Creating New Roles & Inviting Team Members
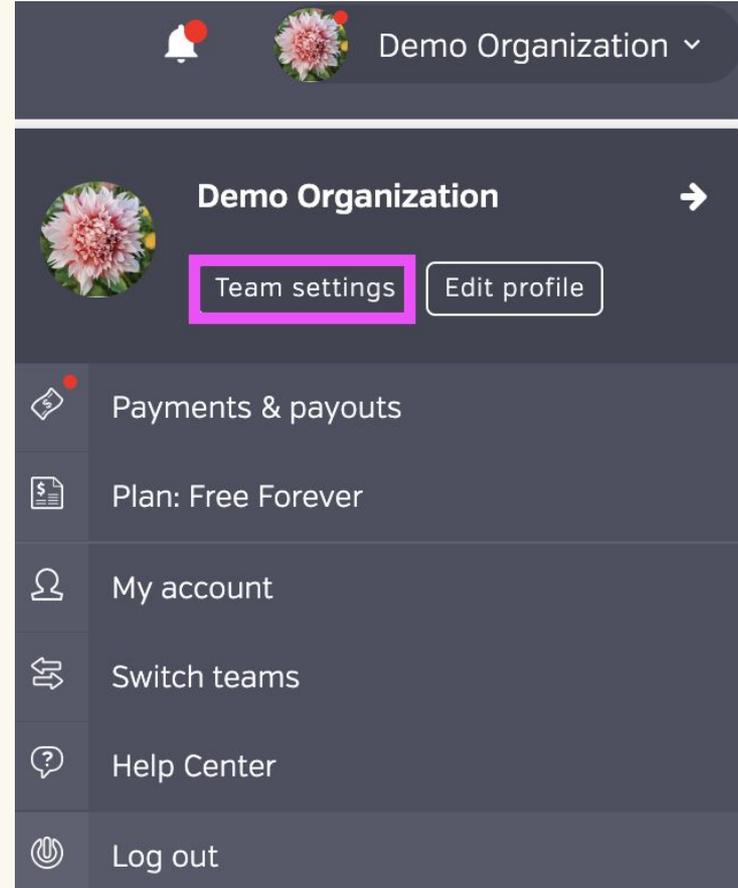
betterworld

You are able to have multiple team members working on your dashboard at once. You can assign custom roles to each team member. To create roles and give a team member permission to access the dashboard using their own log-in, follow these steps.
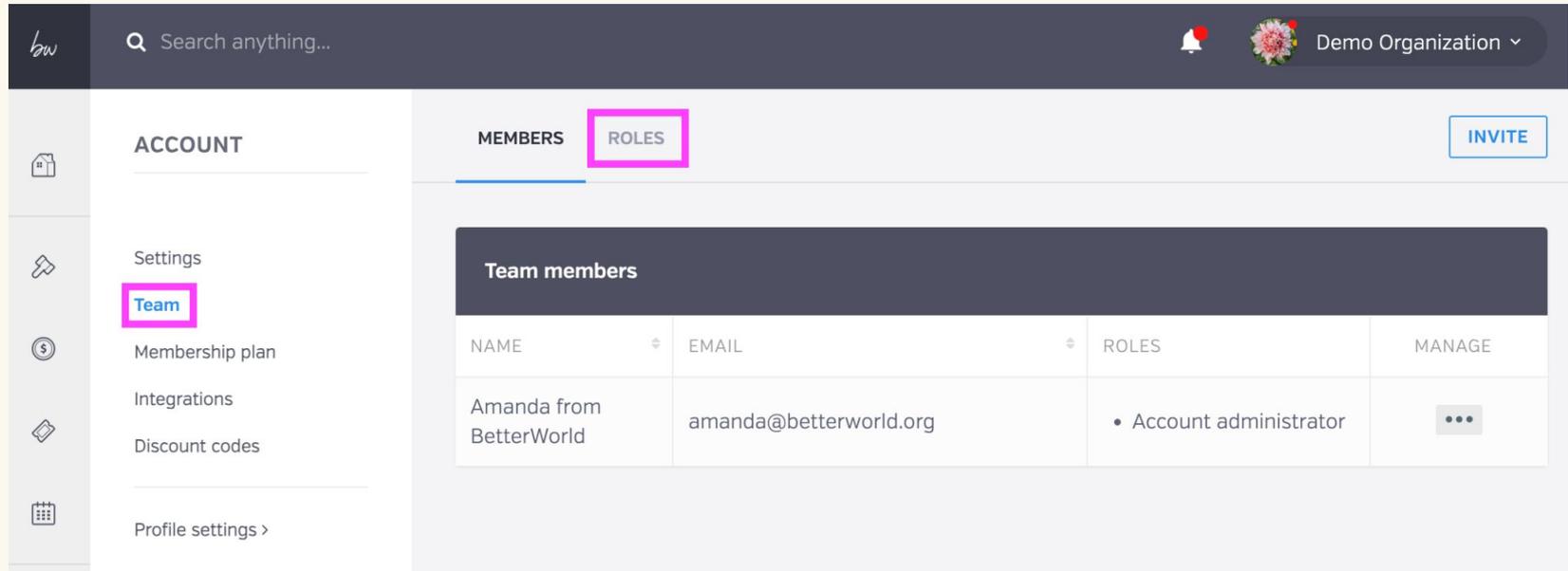
First, from the right-drop down menu of your dashboard, select *Team settings*.

Create Custom Team Roles

You can create custom team roles to choose who has access to what on the dashboard. To do this, select *Team* then *Roles*

There are pre-set roles of **Account administrator** and **Team member,** with pre-set permissions. You also have the option to add a **NEW ROLE** with custom permissions.

NEW ROLE

NAME	PERMISSIONS	MANAGE
Account administrator PRESET	• Account and billing information • Team members and roles • Auctions • Donations • Ticketing and events • Contacts • Giveaways • Profile settings	n/a
Team member PRESET	• Auctions • Donations • Ticketing and events • Giveaways • Profile settings	n/a

Show 10 roles

‹ Previous   1   Next ›

MEMBERS   ROLES

Roles

Create a new role ×

NAME

Event Check-In

USERS BELONGING TO THIS ROLE CAN MANAGE:

Nothing selected ▾

Account and billing information

Team members and roles

Auctions

Donations

Ticketing and events

Contacts

Giveaways

Profile settings

Give your new role a custom name and select the areas of the dashboard this role can manage. When you are finished, select

Create role

and you will receive this confirmation

✓

We have created this role.

bw

The new role will appear here. Select the three dots if you ever need to delete it.

Now you are ready to invite team members.

Roles

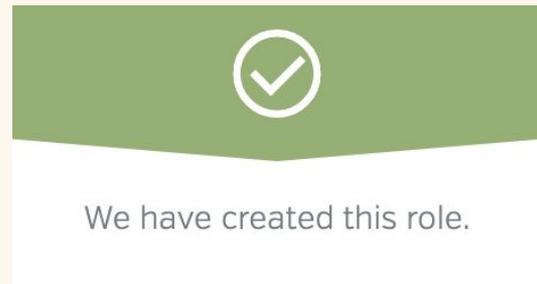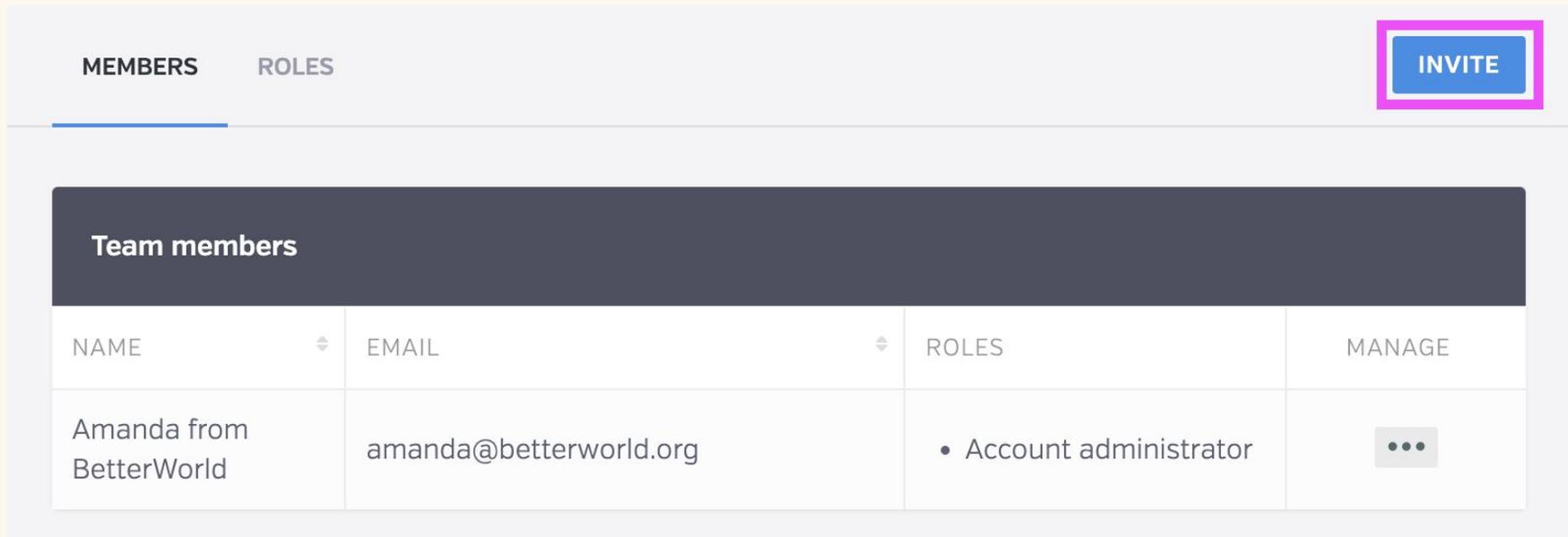| NAME	PERMISSIONS	MANAGE
Account administrator PRESET	• Account and billing information • Team members and roles • Auctions • Donations • Ticketing and events • Contacts • Giveaways • Profile settings	n/a
Team member PRESET	• Auctions • Donations • Ticketing and events • Giveaways • Profile settings	n/a
Event Check-In	• Ticketing and events	•••

Show 10 roles

‹ Previous   1   Next ›

bw

Inviting New Team Members

Click back to the *Members* tab and select the **INVITE** button

MEMBERS	ROLES			INVITE

Team members

NAME	EMAIL	ROLES	MANAGE
Amanda from BetterWorld	amanda@betterworld.org	• Account administrator	•••

bw

Add a team member

Complete this form and your team member will receive an email invitation to create an account.

A note on roles: By assigning roles to team members, you can choose which actions they may perform on the site. You can edit the permissions granted by each role (and create new roles) here.

EMAIL

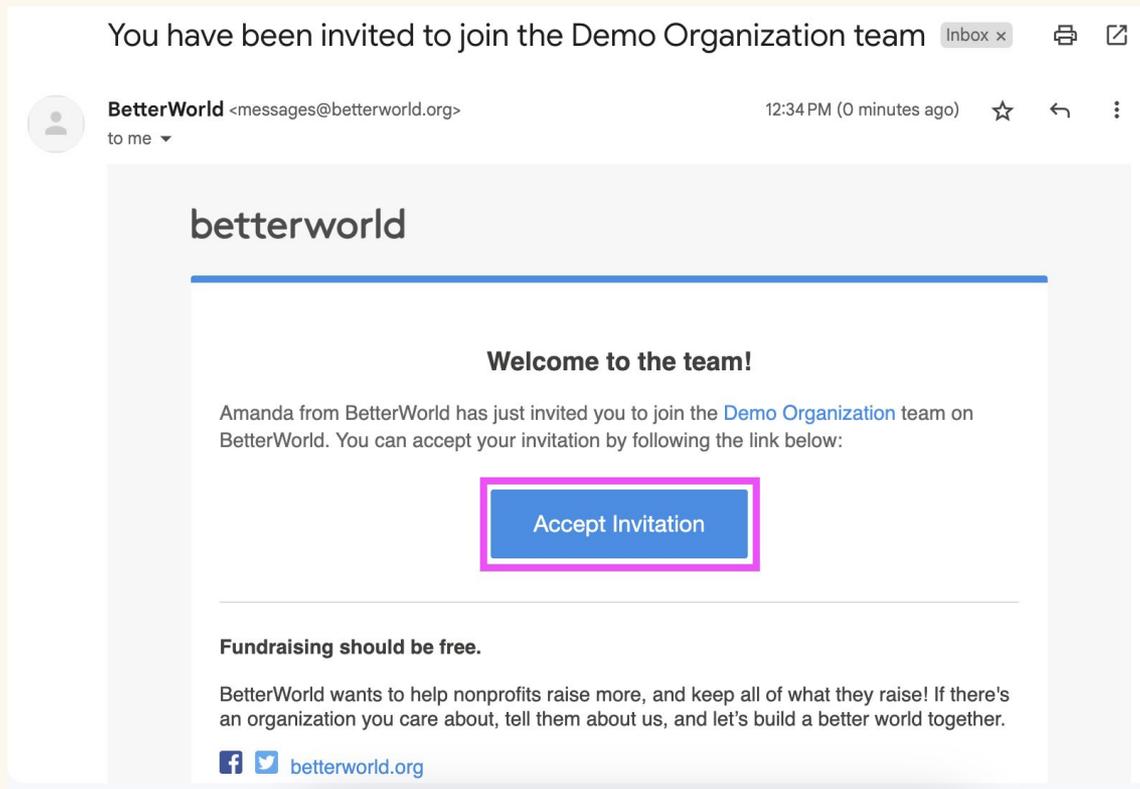**ROLES**

Nothing selected ▼

Close   **Save**

Add your team member's email address and select their role. Click Save, and you will receive this confirmation.

We have sent an invitation to this email address.

bw

Your team member will receive this email.They must click **Accept Invitation.**

You have been invited to join the Demo Organization team Inbox ×

BetterWorld <messages@betterworld.org>   12:34 PM (0 minutes ago)

to me

betterworld

Welcome to the team!

Amanda from BetterWorld has just invited you to join the Demo Organization team on BetterWorld. You can accept your invitation by following the link below:

Accept Invitation

Fundraising should be free.

BetterWorld wants to help nonprofits raise more, and keep all of what they raise! If there's an organization you care about, tell them about us, and let's build a better world together.

betterworld.org

betterworld

Welcome to the Demo Organization team

Please create an account to begin working with Demo Organization.

FIRST NAME

LAST NAME

EMAIL

PASSWORD

☐ I HAVE READ AND AGREE TO THE TERMS AND CONDITIONS.

Create account

They will then be brought to this screen, which will prompt them to create an account.

Once they create an account, they will be directed to the dashboard.
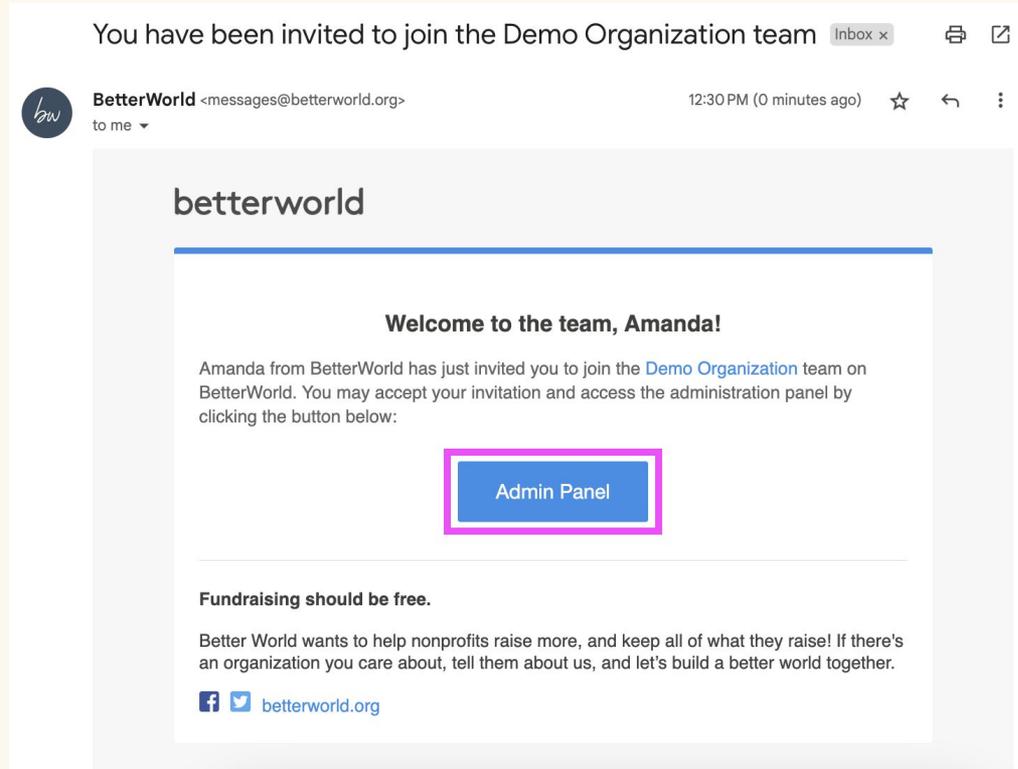
Thanks, Amanda!

We have created your account. Click the button below to get started!

Go to dashboard

bw

If your team member already has a BetterWorld account (such as an account they created to make a donation), then the email will invite them to join the **Admin Panel**.

They will not need to create a new account, they will just need to login to gain access to the dashboard.

You have been invited to join the Demo Organization team Inbox ×

BetterWorld <messages@betterworld.org>
to me

12:30 PM (0 minutes ago)

betterworld

Welcome to the team, Amanda!

Amanda from BetterWorld has just invited you to join the Demo Organization team on BetterWorld. You may accept your invitation and access the administration panel by clicking the button below:

Admin Panel

Fundraising should be free.

Better World wants to help nonprofits raise more, and keep all of what they raise! If there's an organization you care about, tell them about us, and let's build a better world together.

betterworld.org

Once logged into their account at account.betterworld.org they can access the Dashboard by clicking here, or by going directly to dashboard.betterworld.org

Their dashboard will only display the sections you gave them permission to view through the role in which you assigned to them.