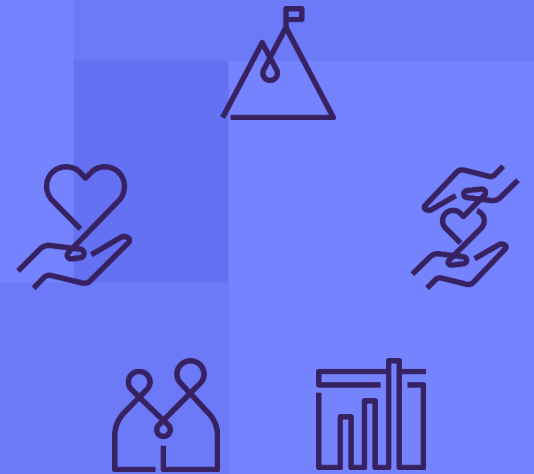


**DONOR ENGAGEMENT**

# Managing Your Users



# Meet your Trainer...

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Training Specialist

Donor Engagement

EveryAction



# Agenda

1. User Accounts and Roles Review
2. Creating a User Account / Managing Roles
3. Troubleshooting, Security, and Deactivating Accounts
4. Q&A



# User Accounts and Roles Overview

# Understanding the ActionID



# Understanding the ActionID

Some organizations are able to create and edit their own **User Profiles (roles)** and will be able to define customized permission sets that will allow staff the right amount of access while limiting the changes they can make.

In this case, you will see the option "**User Profiles**" listed under your **Administrative Menu** or from the **Sidebar**.

For more information on **User Profiles in EveryAction**, please see our help documentation listed in the reference section of this webinar.

## Administrative Menu

Settings and Preferences

State Updates

Mail Merge Templates

➤ Reports • Forms • Labels

➤ MiniVAN

➤ Exports

➤ Letters

➤ Phone Services

▼ Users • Committees

Users

Canvasser and User Look Up

**User Profiles**

User Profile Comparison

# Understanding Users and Roles

In EveryAction, each User is assigned a User Profile, which determines their access to features and types of data. User Profiles represent a certain level of access and are named based on the packages.

- Admin level User Profiles have access to all offered features in the packages their Committee has purchased and can create other Users.
- Manager level User Profiles have access to all offered features in the packages their Committee has purchased but CAN NOT create other Users.
- Staff level User Profiles are intended for low-to-mid level department-specific staff, and typically do not need access to some Committee specific tools.
- Intern level User Profiles perform basic tasks like looking up contact records, viewing Events, and create lists and searches.

# Creating a User Account and Managing Roles



# Creating a User Account

- To create a new User, start by opening the Users list page by searching for Users in the Sidebar or Main Menu > Users \* Committees > Users.
- Select **Add New User** and enter the **Contact Information** and **Committee** for your new user.
- Select an Account Name and then select a User Profile or User Role. If necessary, set an expiration date. The Assign Access option will also appear for state-based databases.

USERS

## Add New User

**Contact Information**

First Name\* Last Name\*

Jane Good

Email Address\*

email@address.com

A welcome email will be sent to your new user to join your selected committee. After confirming their email address, they'll create or login with their own ActionID account. [What's ActionID?](#)

Do not send this user a welcome email

Send a copy of this email to yourself

**User Details**

Committee\*

People for Good

Suggested Account Names

email

PeopleforGoodemail

emailPeopleforGood

Custom Account Name...

User Profile\*

Activate this user account at a later date?

Expire this account after a set amount of time

# Welcome Email

- New users will automatically receive a Welcome email unless you selected
- **Do not send this user a welcome email.**
- The invitation will contain the **Committee** name and the site name, as well as the URL to use for login going forward.
- The invite expires after 48 hours.



## You've been invited to join Baughman for Massachusetts on VoteBuilder Massachusetts

To join, click the link below. This link will expire in 48 hours

Accept Invitation

To easily log in later, save this URL:

<https://votebuilder.com>

# Volunteer Accounts

While we understand that your organization may have many volunteers who assist you, we urge you NOT to create only a few generic volunteer accounts that are reused by multiple people. Individual accounts will give you greater:

- **Transparency:** If someone makes a mistake when entering data, editing a contact record, or while doing anything else in the database, it is easier to identify which person performed that task if your users are not sharing accounts. It will also make it easier to resolve the issue, such as wiping inaccurate data from contact records.
- **Ease:** It is now easier than ever to avoid creating a user for each volunteer if necessary. Volunteers who are doing phone banking and canvassing can simply create their own ActionID and then canvass with MiniVAN and make calls via Open Virtual Phone Bank.
- **Security:** Should any volunteer appear to be doing anything dubious or submitting fake data, it is easier to identify that person and shut down or limit their access if each person has their own user account.

# Troubleshooting, Security, and Deactivating Accounts

# Troubleshooting Common Issues

- Pending User Accounts
- Editing Name and Contact Information
- Database Access
- Impersonating User Accounts

ADMIN SETTINGS

## USERS

Last Name	First Name	Ac
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Created From	Date Created To	Created By
<input type="text"/>	<input type="text"/>	<input type="text"/>
Committee	Security Fun	
<input type="text"/>	<input type="text"/>	
Exclude 500 Users	User Profile	
<input type="text"/>	<input type="text"/>	
Add-On Package	UserID	User Group
<input type="text"/>	<input type="text"/>	<input type="text"/>
Pending User	Login Method	
<input type="text"/>	<input type="text"/>	

More Save

Status

Active  
 Inactive

Deactivate in All States

Date Expires\*

Set the time

Allow Multiple Logins

Impersonate User  
View Log-In Report  
Send ActionID Invitation

More Save

Status

Active  
 Inactive

Deactivate in All States

Date Expires\*

Set the time

Allow Multiple Logins

Impersonate User  
View Log-In Report  
Send ActionID Invitation

# Requiring 2FA for Other Users

If you are creating user accounts for others, you may want to make their user account more secure by requiring that they use 2FA to log in. This becomes more important when:

- A user has access to sensitive data, such as donor profiles or Scores
- A user is able to perform more sensitive tasks, like sending emails or Bulk Uploading (importing data)
- A user has the ability to export
- A user has access to API integrations

The screenshot shows the 'everyaction Demo' interface. The breadcrumb trail is 'Home / User Profiles / Engagement & Development Admin testing'. The page title is 'USER PROFILE Engagement & Development Admin testing'. Under 'User Profile Details', the following information is displayed:

- Profile Name\*: Engagement & Development
- Description: Engagement Administrator (No Dev or Org)
- Database:
- Date Created: 4/28/20 (erik haunold)
- Date Modified: 4/21/22 (erik haunold)
- Owner Committee: People for Good
- Profile Type (500): This User Profile is not based on Product Packages and can be modified directly.

A 'Settings' section is visible at the bottom of the profile details area.

# Deactivating Accounts

**Here are some steps you can take to retain access to assets from past users:**

Rather than deactivate a user account, you can **make a former staffer inactive**, revoking their access while retaining ownership of critical assets. Data associated with the defunct user account remain in the system. Ownership of folders and other data points cannot be made to automatically transfer to current staff.

To do this:

- **Unlink the user's ActionID** so the former staffer cannot log into the account, but the user account remains open
- **Rename the user account** something generic, role-based
- **Reassign the user to a lower User Profile** so that other users can impersonate that account. You may need to have client services do this if the staffer was a top-level administrator. While impersonating the former staffer, share any folders of saved searches in that staffer's My Folder with anyone who needs access to them. Additionally, share any user-specific Reports.

# Q&A



# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto:help@EveryAction.com)
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



# Help Center Resources

- [Manage Your Users with User Roles in EveryAction](#)
- [User Profiles in EveryAction](#)
- [Creating User Accounts](#)
- [Troubleshooting User Accounts](#)



# Additional Training

- Bonterra Academy:

<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>

- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



# Feedback & Training Survey

- Please fill out our 1-minute survey that appears after the webinar.
- Access the survey here: [Training Feedback Survey](#)



Thank You for Attending!

