PUBLIC USER / LEADS

User Access Control List for Public Users / Leads

View Public Pages

Home	About Us
Services	Contact Us

Charitable Organization

About Us	Programs & Activities
Featured Projects	Donation

CHARITY ADMIN ACCESS CONTROL LIST

01 ACCOUNT MANAGEMENT
○ Register, Forget Password, Login and Log-out

02 DASHBOARD
○ View Statistic Data in the Dashboard

03 MANAGE LEADS
○ View Leads, Delete Leads, and Move Leads to Prospects.

04 MANAGE PROSPECTS
○ View Prospects, Move Back to Leads, Add to Opportunity, and Generate Cash Donation Inflow Report (PDF)

05 MANAGE PROJECTS
○ View, Add, Edit, Delete Projects.
○ View, Add, Edit, and Delete Tasks.
○ Add New Featured Projects, and Feature Existing Projects.

CHARITY ADMIN ACCESS CONTROL LIST

MANAGE USERS

06

- View, Unlock Users, and Backup Users list (Excel).

MANAGE BENEFICIARIES

07

- View all, Add Beneficiaries, and Backup Beneficiaries (Excel).
- Generate Selected Beneficiary (PDF), Edit, Delete beneficiaries.

MANAGE BENEFACTORS

08

- View, Add, Edit, Delete and Backup Benefactors (Excel)

MANAGE VOLUNTEERS

09

- View, Add, Edit ,Delete, and Backup Volunteers (Excel).

MANAGE GIFT GIVINGS

10

- Add and View Gift Giving Projects.
- Add and Delete Participants, and Generate Tickets.

CHARITY ADMIN ACCESS CONTROL LIST

11 — MANAGE AUDIT LOGS
- View Audit Logs

12 — MANAGE STAR TOKENS
- Order Star Tokens/Subscription, and View Transactions History.

13 — MANAGE NOTIFICATIONS
- View All, View Details of and Delete Notifications.

14 — MANAGE PERSONAL PROFILE
- Edit Profile and Change Password.

CHARITY ASSOCIATES ACCESS CONTROL LIST

01 ACCOUNT MANAGEMENT

○ Register, Forget Password, Login and Log-out

02 DASHBOARD

○ View Statistic Data in the Dashboard

03 MANAGE LEADS

○ View Leads Delete Leads and Move leads to Prospect

04 MANAGE PROSPECTS

○ View Prospect, Move back to Leads, Add to Opportunity and Generate Cash Donation Inflow Report (PDF)

05 MANAGE PROJECTS

○ View Project
○ View, Add, Edit and Delete Tasks

CHARITY ASSOCIATE ACCESS CONTROL LIST

06 MANAGE USERS

- VIew Users, and Backup User list (Excel)

07 MANAGE BENEFICIARIES

- View all and add Beneficiary , Generate Beneficiary list
- Backup Selected Beneficiary , Edit and delete beneficiary

08 MANAGE BENEFACTORS

- View , Add, Edit ,Delete and Backup Benefactors (Excel)

09 MANAGE VOLUNTEERS

- View , Add, Edit ,Delete and Backup Volunteers (Excel)

10 MANAGE GIFT GIVINGS

- View Gift Giving Project
- Add and Delete Participants of Gift Giving Project, and Generate Tickets.

CHARITY ASSOCIATE ACCESS CONTROL LIST

11 MANAGE NOTIFICATIONS

- View all. View details of and Delete Notifications.

12 MANAGE PERSONAL PROFILE

- Edit Profile and Change Password