### PUBLIC USER / LEADS



User Access Control List for Public Users / Leads

### **View Public Pages**

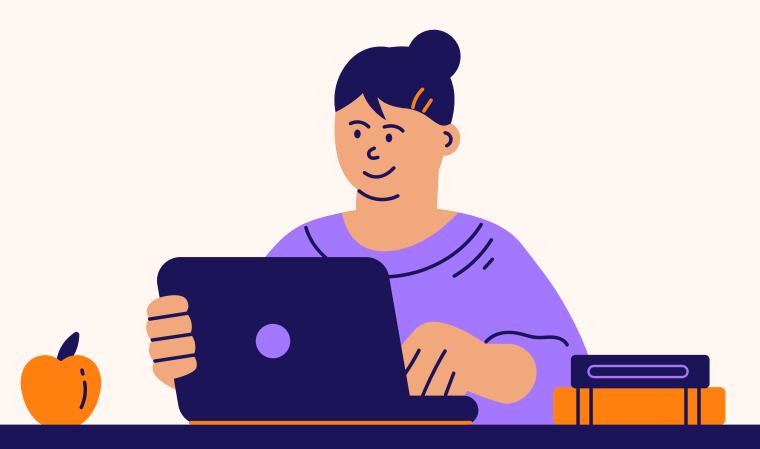
Home About Us

Services Contact Us

### Charitable Organization

About Us Programs & Activities

Featured Projects Donation



# CHARITY ADMINACCESS 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**

- O View, Add, Edit, Delete Projects.
- O View, Add, Edit, and Delete Tasks.
- Add New Featured Projects, and Feature Existing Projects.

# CHARITY ADMINACCESS CONTROL LIST



06

#### **MANAGE USERS**

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

07

#### **MANAGE BENEFICIARIES**

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

80

#### 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

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

# CHARITY ADMINACCESS CONTROL LIST



П

#### **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
- O 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

80

#### **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**

- O 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