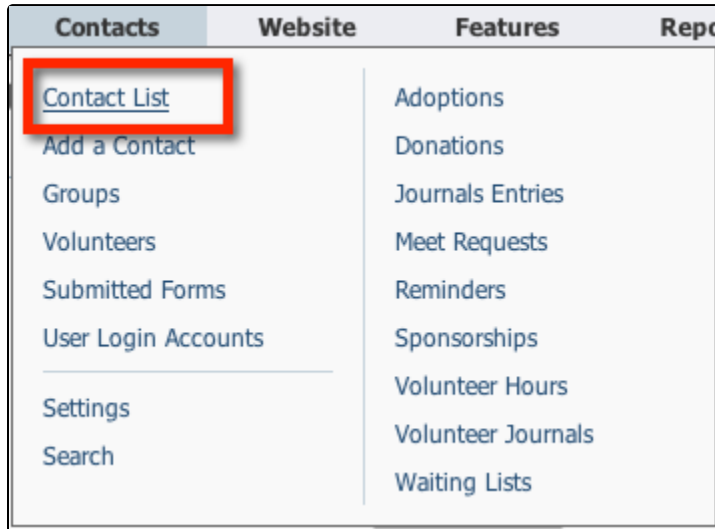


Assigning roles and permissions Content_v1

Checking to see if your volunteer has a user login account

Follow these instructions to see if your volunteer has an account already:

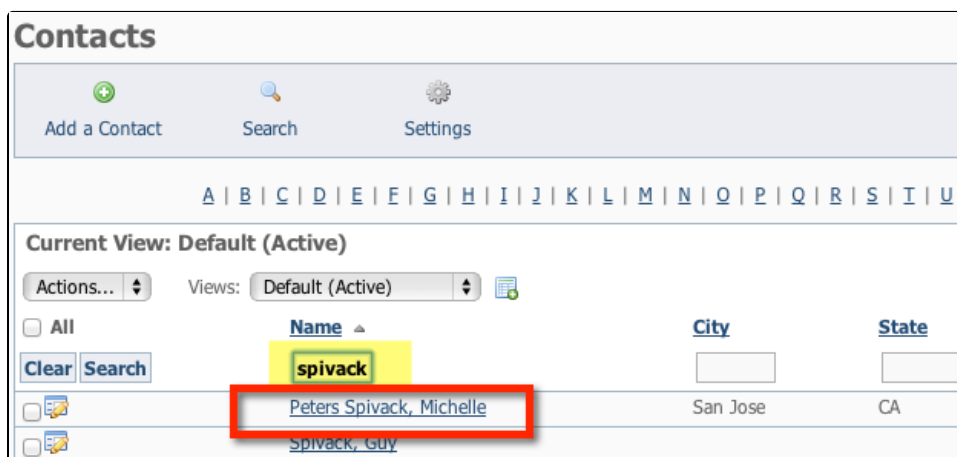
1. Go to the **Contacts > Contacts List**.



2. Using one of the **Search** icons, find the volunteer in your list of contacts.



3. Click the volunteer's name to view the **Contact** page for that volunteer.



4. At the top of that **Contact** page, click **User Login Accounts** to find the **User Login Accounts** for that volunteer.

NOTE:

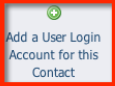
Most people, especially new volunteers, will have a 0 in parenthesis next to the link for User Login Accounts. In this case, Michelle has 5 accounts.

Michelle Peters Spivack
 « [Contacts](#)

[Adoptions \(0\)](#) [Calls \(0\)](#) [Campaigns \(53\)](#) [Submitted Forms \(2\)](#) [Donations \(5\)](#)
[Email History \(741\)](#) [Files \(0\)](#) [Fosters \(40\)](#) [Groups \(5\)](#) [Journal Entries \(0\)](#)
[Inventory Loans \(0\)](#) [Meet Requests \(0\)](#) [Reminders \(0\)](#) [Sponsorships \(3\)](#) [User Login Accounts \(5\)](#)
[Volunteer Calls Assigned \(0\)](#) [Volunteer Calls Queues \(0\)](#) [Volunteer Colony Caretakers \(0\)](#) [Volunteer Journal \(0\)](#) [Volunteer Hours \(0\)](#)
[Waiting Lists \(0\)](#)

5. Click **User Login Accounts** to go to the User Login data table for this one contact. From that data table, you can see if they have a **User Login Account**, and if not, you can create one for them.










User Login Accounts for Michelle Peters Spivack
 « [Contacts](#) » [Michelle Peters Spivack](#)



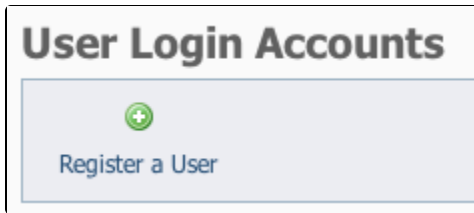
If you do not see a user login in the data table below, click on the Add a User Login icon to the left, to create a user login for them.

Current View: Default
 Views: [Default](#) 

[User Name](#) [Last Login](#) [Security Roles](#)

Total: 5                  

4. Click **Register User**. They will receive an email with the username you designated for them and a temporary password.



NOTE:

Registering a new user also adds them as a **Contact** in your organization.

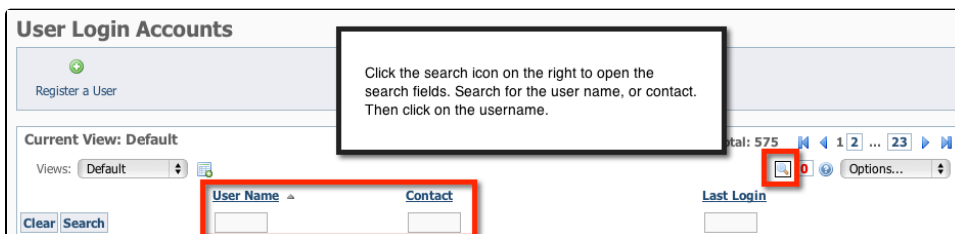
Assigning Roles to a Contact

Whether you have created a **User Login Account** for a volunteer, or your volunteer is already a contact, you are ready to proceed to the next step: assigning roles. To assign roles, follow these instructions:

1. Go to **Contacts > User Login Accounts** in the **Contacts** menu.





2. Find the **User Name** for the user to whom you would like to assign a role or grant access.



3. Click the **User Name**.

Current View: Default

Views:  


User Name ▲

4. Click **Roles** from the user's data table. If the user has no roles assigned as yet, there will be a 0 in parenthesis after the word Roles. The number in parenthesis denotes the number of assigned roles within your organization. You can always come back at any time to verify the roles a user is assigned.

« [User Login Accounts](#)

Roles (0)	Security History (195)
---------------------------	--

5. Click **Grant a Role** to the user to add permissions and roles to this volunteer's account.



Grant a Role to
this User