

How to Add a New User to Donor CRM

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This guide explains how to add new users and manage access within Donor CRM.

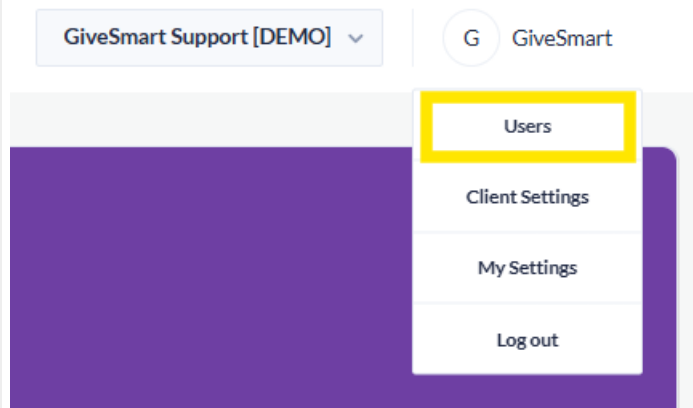
User Roles Overview

There are two types of user roles:

- **Admin User**
 - Can manage users, fields, codes, activities, and client settings
- **Standard User**
 - Has limited access and cannot manage system settings, other users, or activities

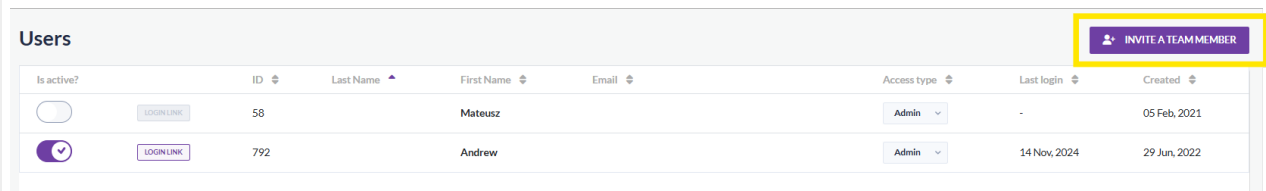
How to Add a New User

First, select your name in the upper right corner. Select **Users**.



Note: Only Admin Users will have access to Users option noted above. If you are a Standard User and are looking to add a new user, contact an Admin in your CRM account for assistance.

From the Users panel, select **Invite a Team Member** on the right-hand side.

A screenshot of the 'Users' panel in the GiveSmart interface. The panel has a header 'Users' and a table of users. A button labeled 'INVITE A TEAM MEMBER' with a plus icon is highlighted with a yellow box in the top right corner of the panel. The table has columns for 'Is active?', 'ID', 'Last Name', 'First Name', 'Email', 'Access type', 'Last login', and 'Created'.

Is active?	ID	Last Name	First Name	Email	Access type	Last login	Created
<input type="checkbox"/>	58		Mateusz		Admin	-	05 Feb, 2021
<input checked="" type="checkbox"/>	792		Andrew		Admin	14 Nov, 2024	29 Jun, 2022

Enter in their First Name, Last Name, and Email Address. Check the box for Admin User to grant them the ability to add and manage new fields, codes, and other admin users.

Invite a Team Member

× CANCEL

First Name

Last Name

Email Address

Admin User

Should this person be authorized to add other team members?

SEND INVITE

CANCEL

Admin Users have access to the **Client Settings**, and the ability to add and manage new fields, codes, activities, and other admin users.

The user will receive an email from notifications_crm@mail.donorcrm.givesmart.com with the subject "You've been invited to join [Org_Name]."

The user will select the Join action in the email.

GiveSmart[®]
Donor CRM

**GiveSmart Support has invited you
to join GiveSmart Donor CRM**

Start raising more money with the help of GiveSmart Donor CRM!

Join GiveSmart Support [DEMO]

Need help? Visit givesmart.com/solutions/donor-management/ for more information

The user will be prompted to agree to GiveSmart's [terms and conditions](#), where upon submitting, will be taken to the Donor CRM Dashboard.

Thanks for signing up, GiveSmart!

We just need a few more details and you can get started.

I agree to the [terms and conditions](#)

SUBMIT

Managing Users

Login Link

Is one of your users not receiving the invite email? Under Users, select **Login Link** to provide an alternative login method for any user created.

Users	
Is active?	
<input checked="" type="checkbox"/>	LOGIN LINK
<input checked="" type="checkbox"/>	LOGIN LINK
<input type="checkbox"/>	LOGIN LINK
<input type="checkbox"/>	LOGIN LINK

Choose Save and Generate Magic (Login) Link to generate a unique login link for this user.

Generate Login Link

× [CANCEL](#)

You are about to generate new login link for **GiveSmart Support**. Are you sure?

SAVE AND GENERATE MAGIC LINK

Select the Copy action and share the link with your user so they can bookmark their URL as needed.

Generate Login Link

× CANCEL

You are about to generate new login link for GiveSmart Support. Are you sure?

SAVE AND GENERATE MAGIC LINK

Login Link

Copy the login link and share it with GiveSmart Support.

GO TO THE LOGIN LINK



NOTE: Be careful to only share this login link with the associated user, as clicking the link will provide direct access to Donor CRM for that user.

Adjust User Privileges

Adjust a user's privileges to Admin or User under Access type. Admin Users will have access to the **Client Settings**, and the ability to add and manage new fields, codes, activities, and other admin users.

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Access type	Last login	Created
Admin	-	05 Feb, 2021
Admin	14 Nov, 2024	29 Jun, 2022
Admin	09 Jan, 2025	09 Jan, 2025
User	09 Jan, 2025	09 Jan, 2025
Admin		

Deactivate a User

Use the toggle to deactivate a user to revoke access to Donor CRM.

Users

Is active?

<input checked="" type="checkbox"/>	LOGIN LINK
<input checked="" type="checkbox"/>	LOGIN LINK
<input type="checkbox"/>	LOGIN LINK
<input type="checkbox"/>	LOGIN LINK

When a deactivated user attempts to log in, they are met with the following dialogue window:

Inactive

You have been deactivated from GiveSmart Support [DEMO]. If you think this is an error, please contact GiveSmart Support [DEMO] administrator.

[GO TO CLIENTS PANEL](#)