Adding Salsa CRM Users

Agenda

Manage Role Permissions

Add a Constituent Record

Assigning Roles

Q&A

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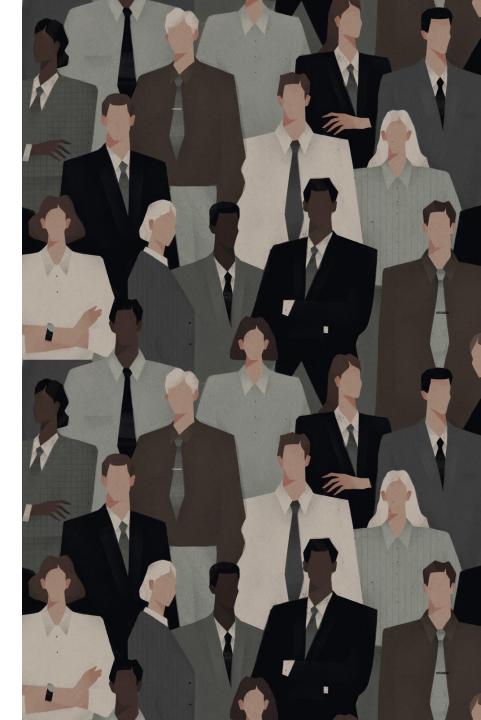# Manage Permissions within Roles

Roles

- Every Salsa CRM user can be assigned different roles dependent upon their functions within your organization

- Permissions for each role can be **Task**-related and/or **Data**-related

- You can **Add**, **Copy**, or **Delete** roles

- The only exception to this is the **Salsa Labs Admin** role, which is assigned to the Admin user so someone can always log in to the software

How many different roles (or sets of permissions) do you really need?

- Think about organization departments, individual staff, volunteers

- Keep it as simple as possible with room to scale

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Additional Resources

Additional Training Opportunities

Other targeted webinars available in Bonterra Academy

(live and recorded)

1. Adding Salsa CRM Users
2. Creating Constituents and Supporters
3. Adding Donations

Visit the question bubble in your software to find Documentation or the Help Center to find a library of help articles.

Build confidence and knowledge in our software.

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Customer Support

Reach out to our Customer Support team with questions or concerns.

Available Monday through Friday, from 8am until 8pm ET.

- Submit a Support Request through the question bubble
- Call 866-935-8281

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Training Survey

Please complete the survey:

We value your feedback!

Q & A

- Ask questions about functionality covered in this training

- Ask trainer to redo a demo

- Ask real-life application questions

- Or sign off and we will see you in the next training!

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Thank you for attending!

We hope to see you
in future trainings.

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