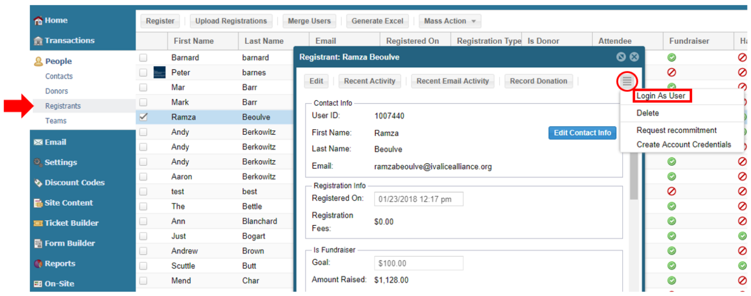
How to Log in as Fundraiser

As a non-profit administrator, there will be scenarios in which it is beneficial, in some instances necessary, to access the personal page of a fundraiser. Below are the steps in how this would be done.

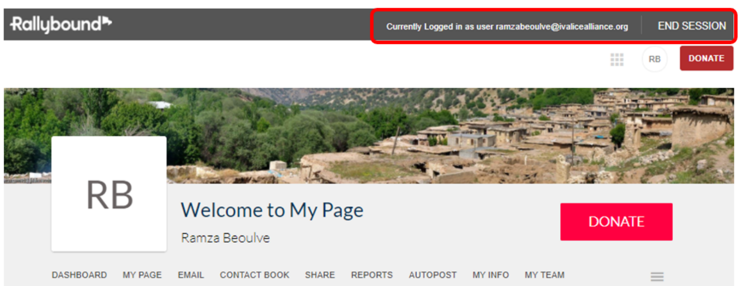
1. Locate the desired registrant record by—

- Using the global search in the org admin
- Navigating to the Campaign Admin to pulling up the registrant record directly

2. Click the “Login as User” button at the top of the registrant’s record (it may be hidden in the hamburger icon.



3. The Administrator will be logged in as the fundraiser until they select “END SESSION” in the upper right-hand corner.



4. While logged in as the fundraiser the Administrator will be able to do many of the activities the fundraiser can do themselves. To protect your fundraisers’ privacy, the following resources remain inaccessible to the logged-in administrator:

- Email
- Contact Book
- Share (Social Connections)
- Account Details/Profile section (administrators can still update these details from the admin panel; see here and here.)

Permissions

To access this feature, the administrator must have permission to "Edit" (or better) for the “Login as User” permission item (located in the “People” category) on whichever campaign the fundraiser's page is located. For more on creating and editing security roles, click here. The default roles that will have access to this feature are “Full Permissions” and “Editor”.