

MANAGING YOUR ORGANIZATION ACCOUNT IN SURVEYMONKEY APPLY (SMA) TIPS FOR THE PRIMARY ADMINISTRATOR

The Primary Administrator is the organization member that initially creates the organization account and has full administrative control over the organization's members and applications/reports. They will be able to transfer ownership of the organization account, as well as edit and remove members from the organization account at any time.

The Primary Administrator of your organization's SMA account can add additional members to the account and then these members can be added to any applications/reports that are part of the account.

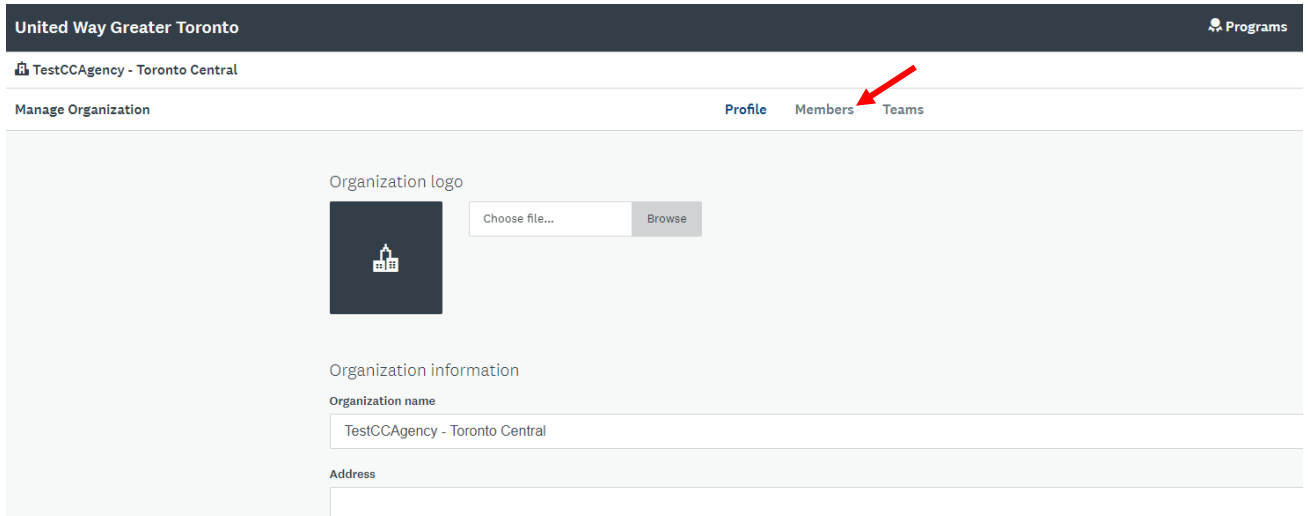
Members must be added first to the account and then they can be added to an application/report that is part of the account.

Adding Members to your Organization's Account

1. Login as an organization administrator.
2. Click on **Manage Organization** in the top right corner.



3. Click on **Members**.



4. Click on Add Member.

United Way Greater Toronto Programs

TestCCAgency - Toronto Central

Manage Organization Profile Members Teams

0 Actions Add member Search...

<input type="checkbox"/>	Name	Email	Role	Teams	Last login	Invited at	Signup date	Active
<input type="checkbox"/>	CC Caralyn Clpin	ccclpin@uwgt.org	Primary administrator		Today	2020-09-29T22:30:12	Jun 3 2020	✓
<input type="checkbox"/>	TC Tereza Coutinho	tcoutinho@uwgt.org	Administrator		No invite sent	2020-12-22T17:33:35	Dec 22 2020	...
<input type="checkbox"/>	JH Julia Harbinson	jharbinson@uwgt.org	Non-administrator		Feb 5 2024	2020-06-04T16:50:57	Sep 12 2021	✓ ...

5. Enter the First Name, Last Name, and Email Address of the member.

Add members Import members...

First name

Last name

Email: (required)

Role:

Non-administrator

Organization administrator

Add to team

Notify member by email that they have been added

6. Select if they will have Administrative or Non-Administrative Access¹.

7. *Optional:* Notify the user that you are adding them to the organization

TIP! This is useful if the user does not already have an account in the system as they will receive the invite and be able to create a password to log in.

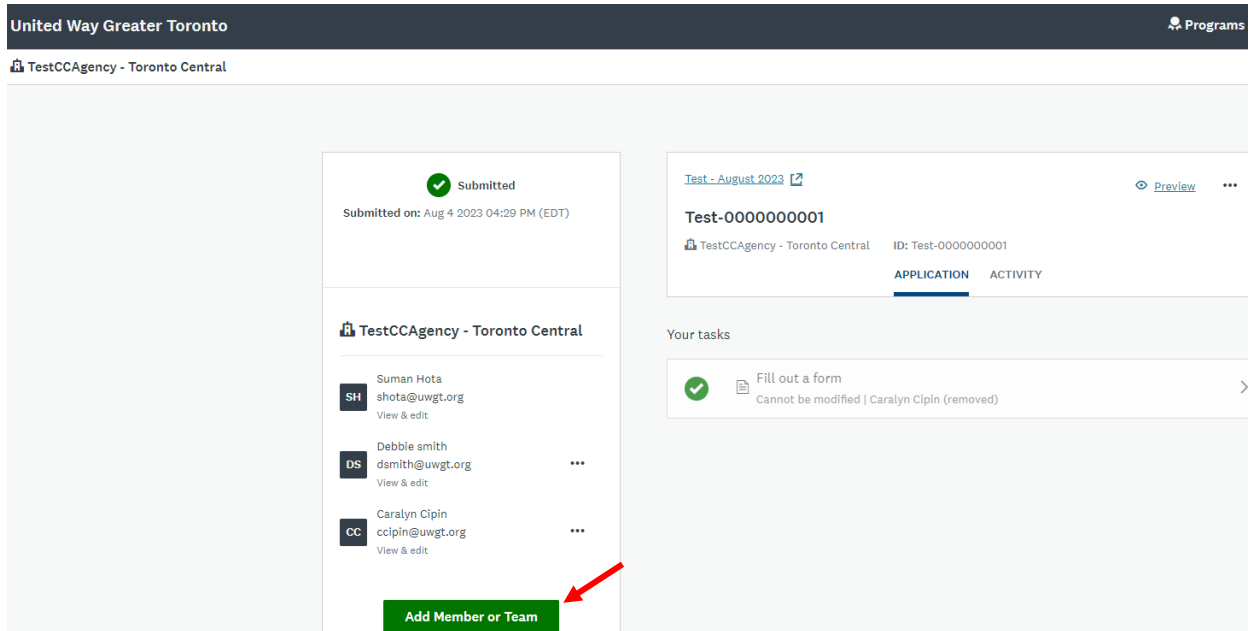
8. Click **Add**.

¹ Administrator: These members have similar control over the organization's members and applications/reports as the Primary Administrator. However, they will only be able to edit and remove non-administrative members, or inactive Administrators.

Non-Administrative Members: These members will be able to edit applications/reports on behalf of the organization but will not have access to manage the organization's profile and members. They will also not be able to create or submit applications/reports for an organization.

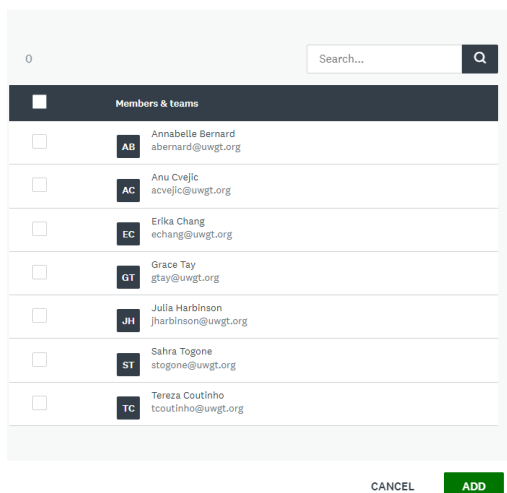
Adding Members to an Application/Report

1. Login as an organization administrator.
2. On the **"My Applications"** page you will see several tiles which show the various grant applications/reports the agency has submitted. There will be a green button at the bottom of the tile that says either **START** or **CONTINUE**. Click on the button.
3. Click on **Add Member or Team**.

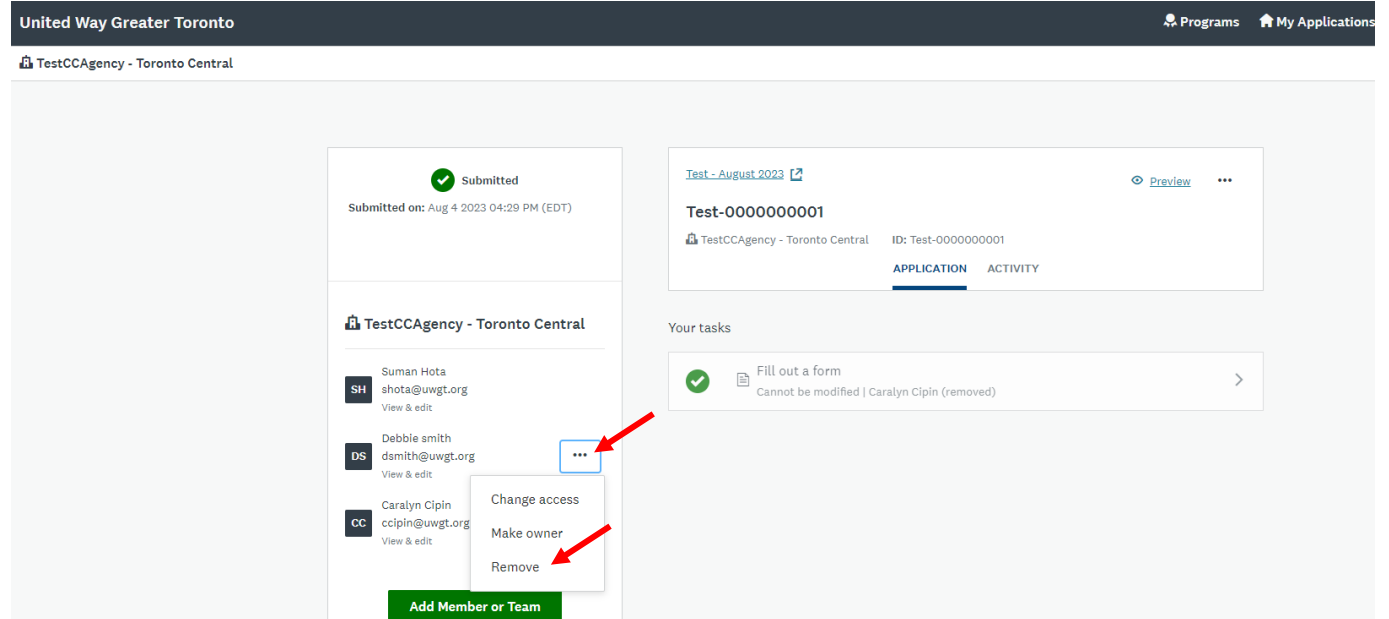


4. Choose the member(s) you would like to add from the **"Add members to application"** list by clicking on the box to the left of each person's name.
5. Scroll to the end of the list and click **Add**.

Add members to application



Note: If you don't want a member to have access any longer to a particular application/report you can remove their access by clicking on the three dots to the right of their name on the application page and then clicking on **Remove**. This only removes their access to this one application/report. If they are members of other applications/reports, they will still have access to them.

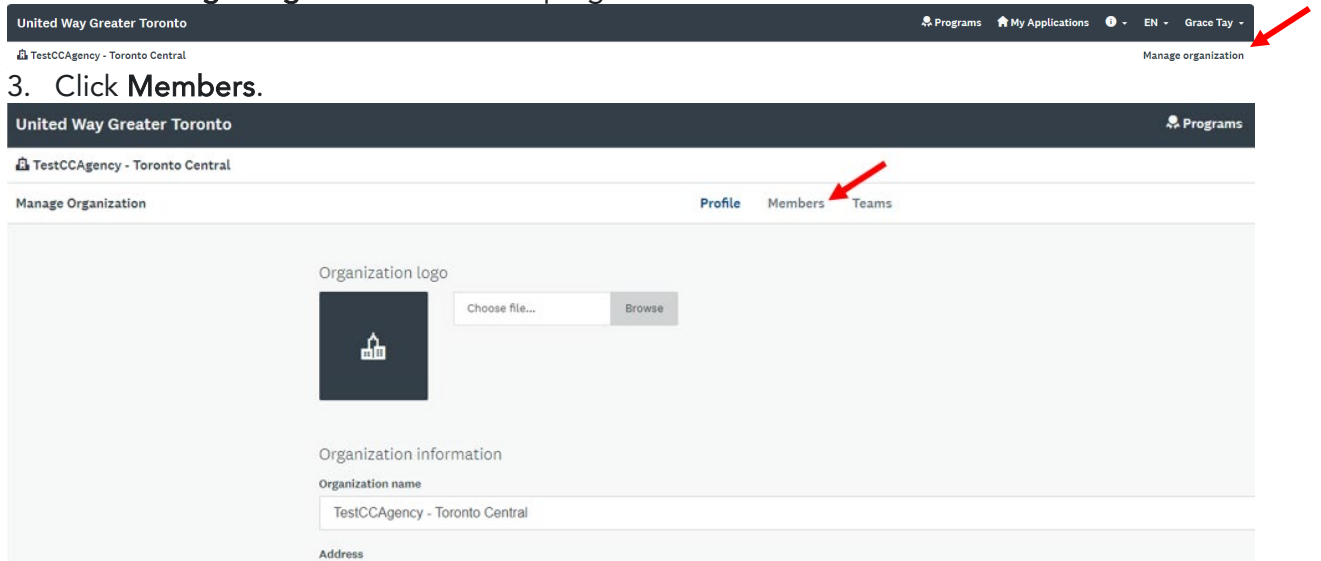


Deleting Members from your Organization's Account

To completely remove a member from the organization's account:

1. Login as an organization administrator.
2. Click **Manage Organization** in the top right corner.

3. Click **Members**.



4. Select the member(s) and click **Actions**.

The screenshot shows the 'Manage Organization' page for 'United Way Greater Toronto'. The page has a dark header with the organization name and a 'Programs' icon. Below the header, there's a breadcrumb trail: 'TestCCAgency - Toronto Central' > 'Manage Organization'. The main content area has tabs for 'Profile', 'Members', and 'Teams'. Below the tabs, there's a search bar and a table of members. A red arrow points to the 'Actions' dropdown menu in the table's header row.

<input type="checkbox"/>	Name	Email	Role	Teams	Last login	Invited at	Signup date	Active
<input type="checkbox"/>	CC Caralyn Cipun	ccipun@uwgt.org	Primary administrator		Today	2020-09-29T22:30:12	Jun 3 2020	✓
<input type="checkbox"/>	TC Tereza Coutinho	tcoutinho@uwgt.org	Administrator		No invite sent	2020-12-22T17:33:35	Dec 22 2020	...
<input type="checkbox"/>	JH Julia Harbinson	jharbinson@uwgt.org	Non-administrator		Feb 5 2024	2020-06-04T16:50:57	Sep 12 2021	✓

5. Click **Delete from Organization**.

The screenshot shows the 'Manage Organization' page with the 'Actions' dropdown menu open. The menu options are: 'Change team membership', 'Resend invite', 'Toggle role', 'Toggle site access', and 'Delete from organization'. A red arrow points to the 'Delete from organization' option.

<input type="checkbox"/>	Name	Email	Role	Teams	Last login	Invited at	Signup date	Active
<input type="checkbox"/>	CC Caralyn Cipun	ccipun@uwgt.org	Primary administrator		Today	2020-09-29T22:30:12	Jun 3 2020	✓
<input type="checkbox"/>	TC Tereza Coutinho	tcoutinho@uwgt.org	Administrator		No invite sent	2020-12-22T17:33:35	Dec 22 2020	...

6. Confirm you wish to remove the member(s) from the organization and click **YES**.

Any applications/reports that the deleted member(s) own will be transferred to the Primary Administrator's account.