How Do I Add Team Members to Manage My Account?

Adding team members is a great way to have an assistant or someone you trust help manage your Brand Avatar. Permissions must be given for each Brand Avatar individually.

NOTE: The ability to add Team Members to your account is reserved for BASIC plan or higher plans to SmartEngage

Step 1: Click on Manage / Integrate for the Brand Avatar you wish to provide access.

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Step 2: Click the left navigation menu for "Members"

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Step 3: Enter the email address of the person you wish to add as a new member of this Brand Avatar. You can them as an "Admin" or "Contributor".

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Admin - Has full access to everything related to this Brand Avatar

Contributor - Has limited access related to this Brand Avatar

Account contributors can create and edit campaigns, broadcasts, and automation rules, but they do not have access to these account settings:
• Members
• Billing
• Integrations

After you click the button for "Send Invitation" that person will receive an email with an invitation to manage your brand avatar.

Once they follow the steps to join they will automatically have permission to manage your Brand Avatar page according to the permission level assigned by you.

You can set further permissions by clicking the gear icon next to their role status and set permissions for:

a. Exporting Subscribers

b. Running Bulk Operations on the Subscribers Page

c. Sending Broadcasts

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