SIGNIVENT

Team, members, roles and permissions

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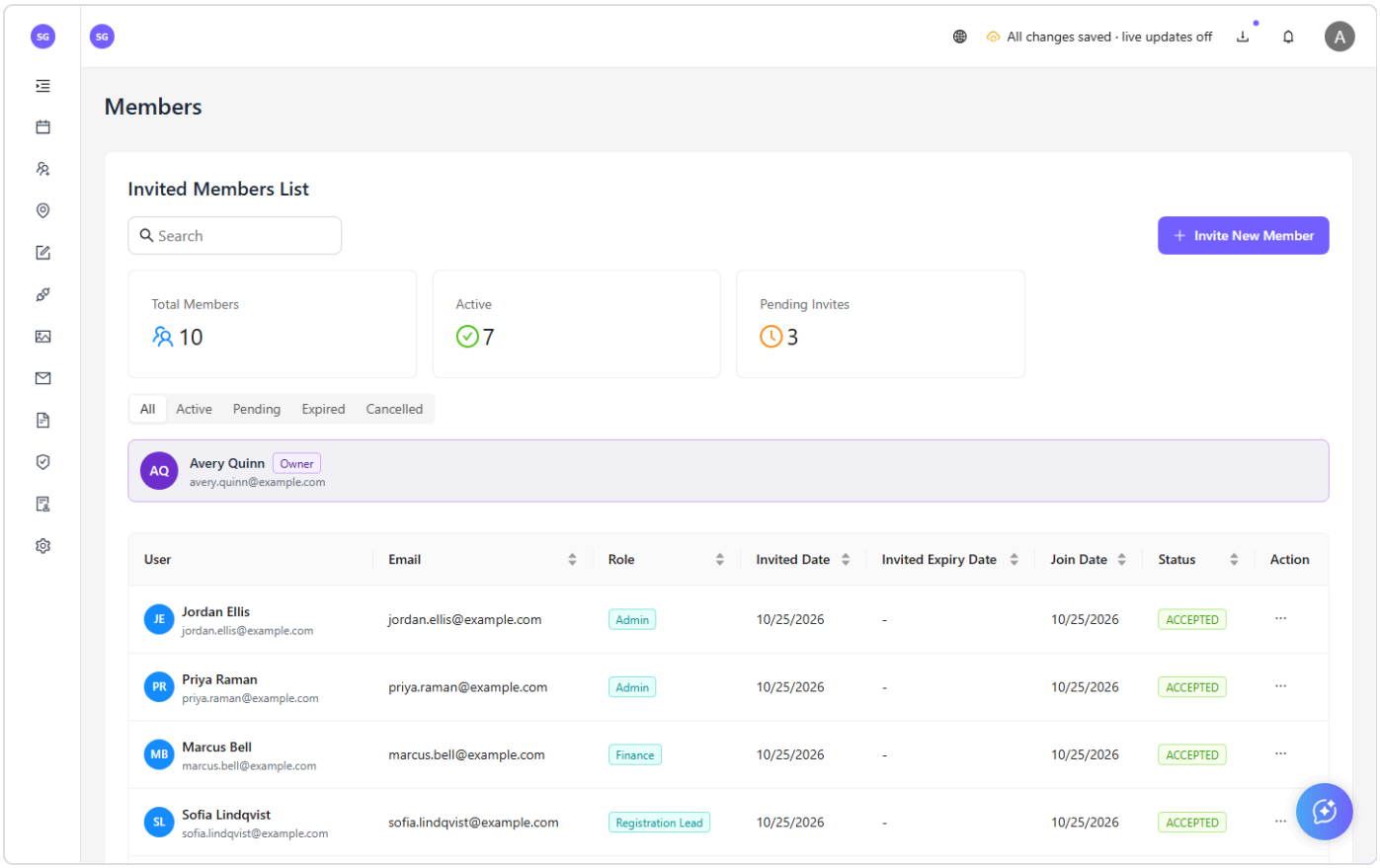
Your team is everyone who signs in to manage your organization. **Team** in the sidebar has two pages: **Members**, where you invite people and see who has joined, and **Roles**, where you decide what each kind of team member may do.

See your team

Open **Team** > **Members**. The cards at the top count **Total Members**, **Active** members and **Pending Invites**. The tabs filter the list: **All**, **Active**, **Pending**, **Expired** and **Cancelled**. Use **Search** to find someone by name or email.

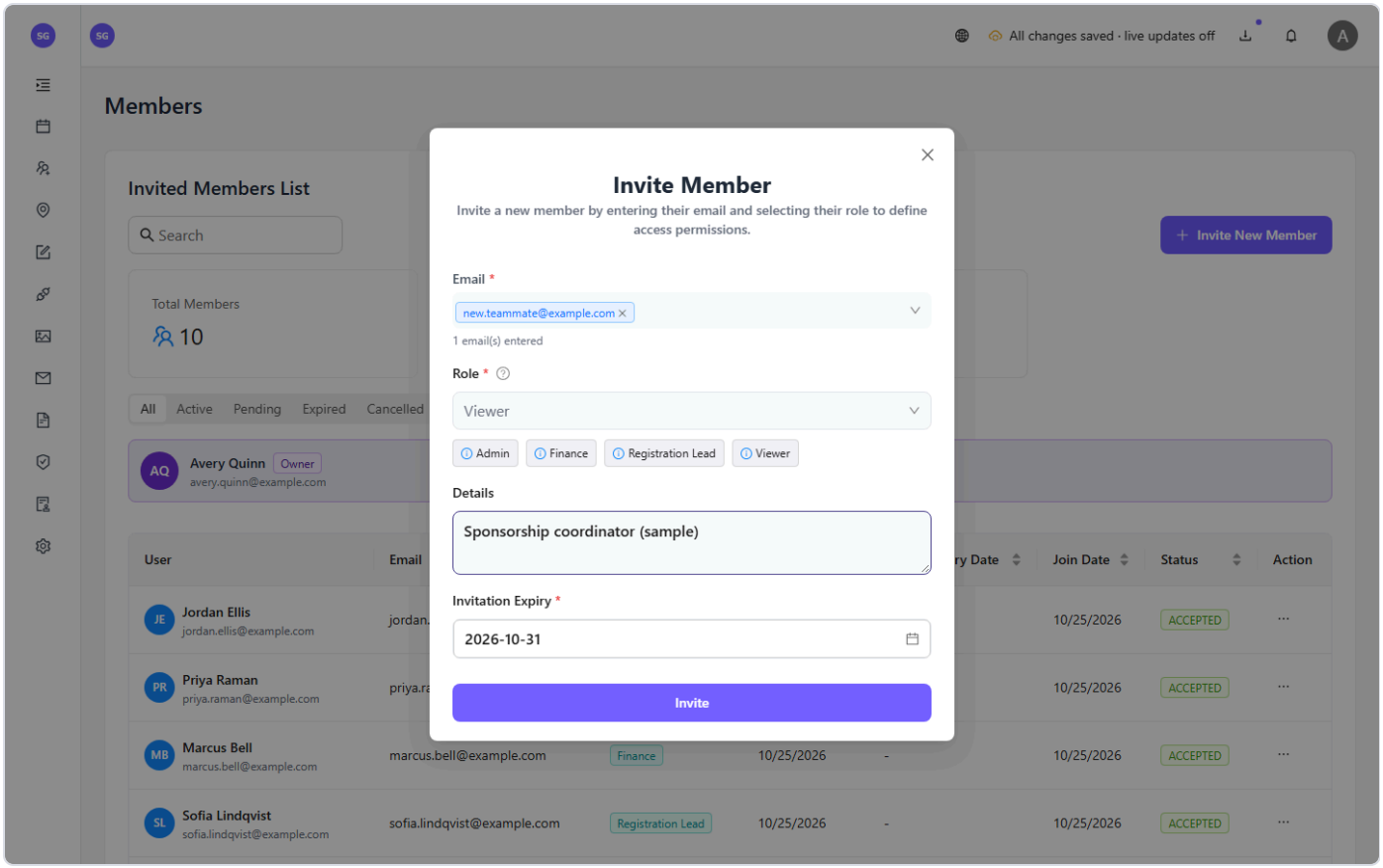


Team > Members: totals for members, active and pending invites, the status tabs, and the member list with role, dates and status

Each row shows the person's role, when they were invited, when the invitation expires, when they joined and their status: **ACCEPTED** once they joined, **INVITED** while the invitation is open.

Invite a member

1. Click **Invite New Member**.
2. Enter one or more **Email** addresses. Press Enter after each one, or paste a list separated by commas. The count below the field confirms how many you entered; an address already on your team is flagged.
3. Pick a **Role**. Point at a role chip below the field to see what that role allows.
4. Optionally add **Details**, such as their job, so the rest of the team knows who they are.
5. Set the **Invitation Expiry**: click the field and pick a day. The invitation stays open until the end of that day.
6. Click **Invite**.



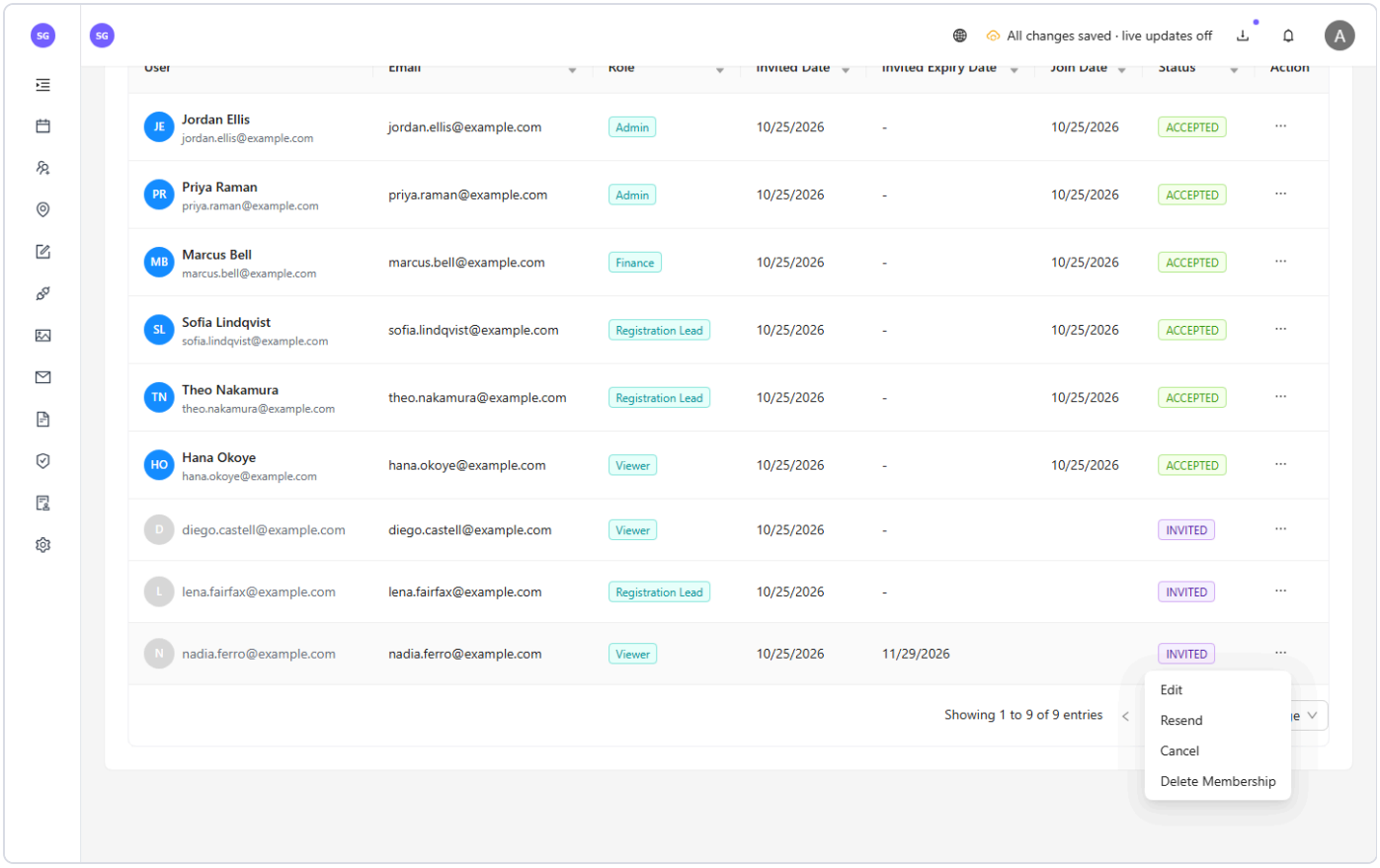
The Invite Member dialog: email, role, details and invitation expiry

Each person gets an email with a link to join. They appear on the list as **INVITED** until they accept.

If your plan includes a set number of team members and these invitations would go past it, you are asked to confirm first. The dialog shows how much your subscription would rise if everyone accepts. Extra seats are billed only once an invitation is accepted.

Resend, change or cancel an invitation

Open the actions menu (the three dots) on the person's row.

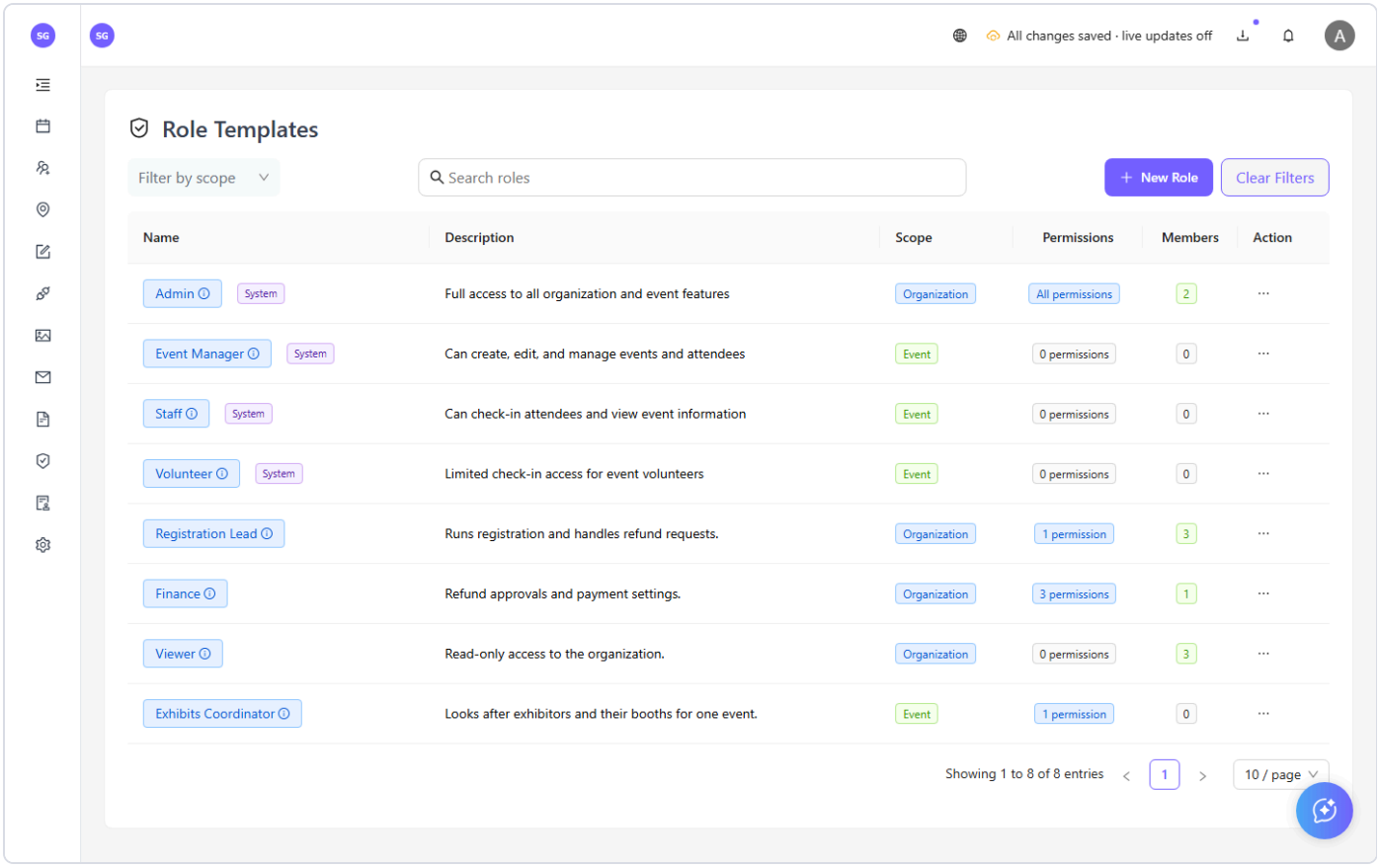


The actions menu on an invited member: Edit, Resend, Cancel and Delete Membership

Action	What it does	Shown for
Edit	Change the role, details or (for an open invitation) the expiry date. A role change asks you to confirm	Everyone
Resend	Sends the invitation email again	Open invitations
Cancel	Withdraws the invitation	Open invitations
Delete Membership	Removes the person from your organization	Everyone

Understand roles

Open **Team** > **Roles** (the page is called **Role Templates**). Every member has one role.



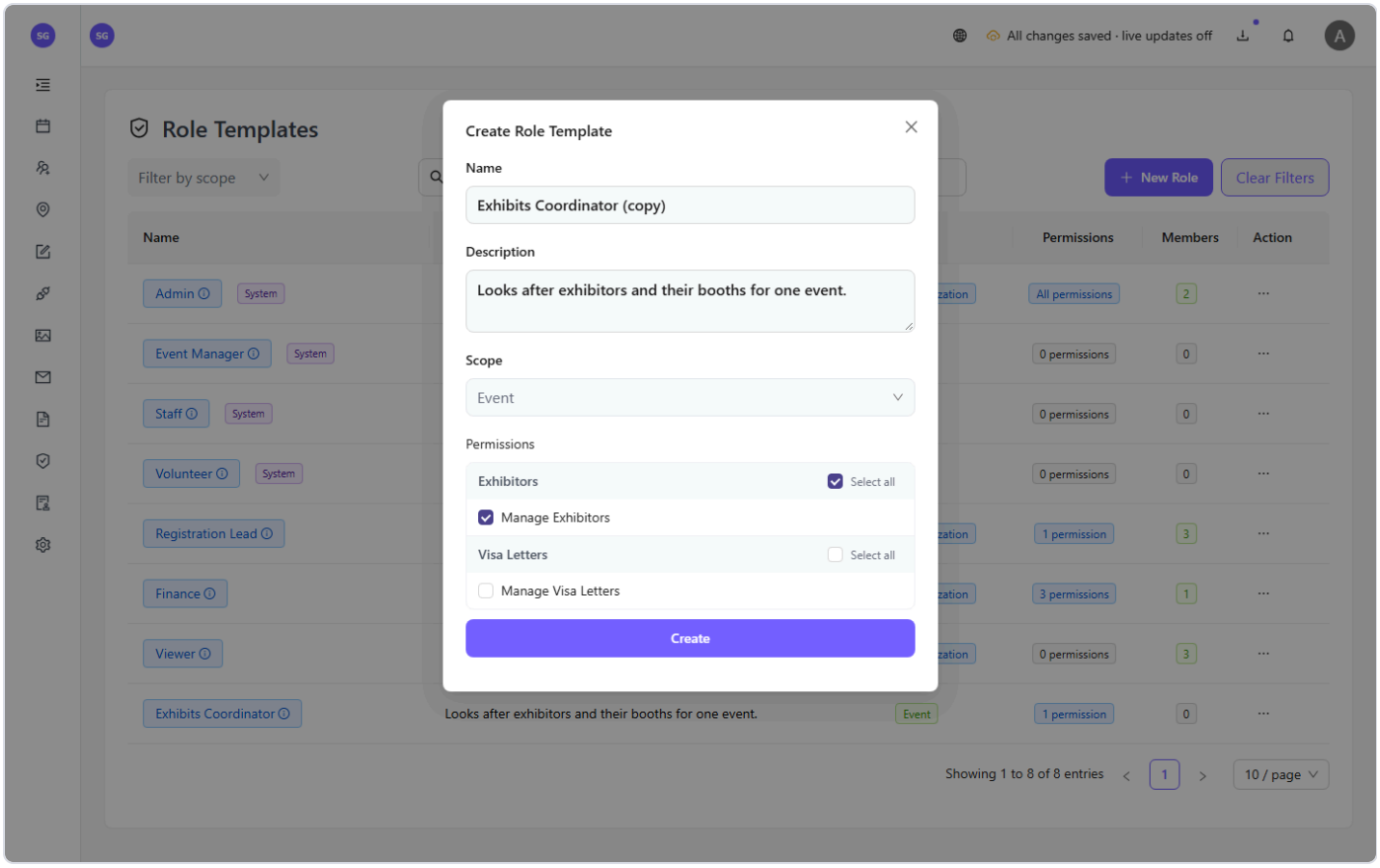
Role Templates: system and custom roles with their scope, permission count and number of members

- **System** roles come with every organization and cannot be deleted. **Admin** has full access to all organization and event features. **Event Manager**, **Staff** and **Volunteer** are event roles for running a single event.
- **Custom** roles are the ones you create, such as Finance or Viewer in the example.
- **Scope** says where a role applies. **Organization** roles are given on Team > Members. **Event** roles are given per event: open the event, go to **Event Setup** > **Team** and click **Add to Team**. Organization admins already have full access to every event.
- **Permissions** lists the extra abilities the role grants. **Members** counts the people who have it.

Use **Filter by scope** and **Search roles** to narrow the list.

Create a role

1. On **Team** > **Roles**, click **New Role**.
2. Enter a **Name** and a **Description** your team will understand.
3. Pick the **Scope**: **Organization** or **Event**. The permissions for that scope appear.
4. Tick the permissions to grant. **Select all** ticks a whole group.
5. Click **Create**.



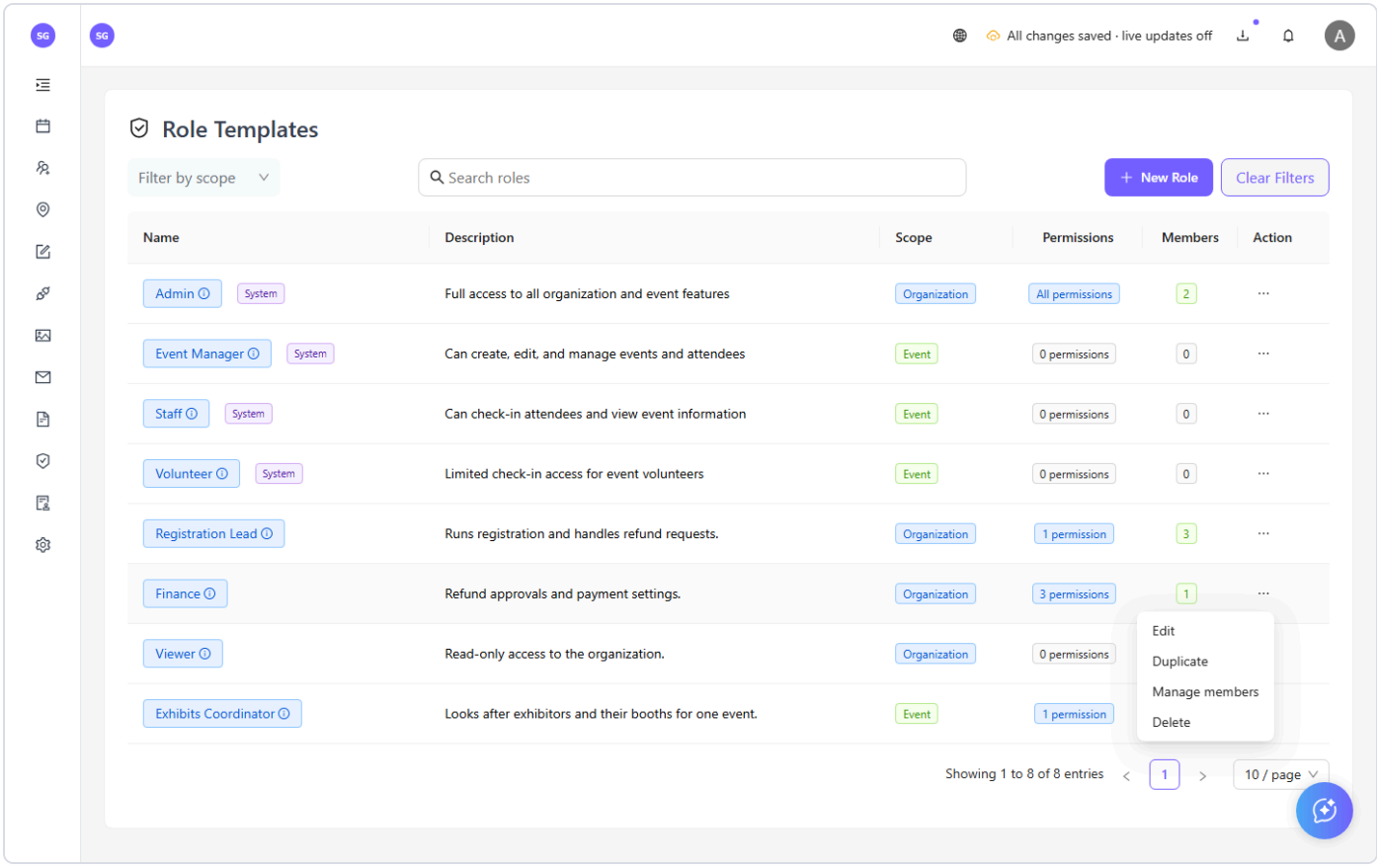
Create Role Template: name, description, Event scope and the Exhibitors and Visa Letters permission groups

The permissions available today:

Scope	Group	Permission
Organization	Payment settings	Change payment settings
Organization	Refunds	Issue refunds (within the approval threshold), Approve refunds
Event	Exhibitors	Manage Exhibitors
Event	Visa Letters	Manage Visa Letters

Change or remove a role

Open the role's actions menu.



The actions menu on a role: Edit, Duplicate, Manage members and Delete

- **Edit** changes its name, description or permissions. Everyone with the role gets the change.
- **Duplicate** starts a new role from this one.
- **Manage members** lists who has the role.
- **Delete** removes a custom role. System roles have no Delete.

Troubleshooting

You see	Why	Fix
"Invitation expiry date is required"	No expiry was picked	Pick a day in the calendar
An email tag turns red	The address is not valid	Remove it and type it again
An email tag turns orange, "Already invited"	That person is already on your team or invited	Use Resend on their row instead
Manage members shows "No members have this role yet" although the Members column has a number	Fixed in this release; older versions failed to load the list	Refresh after the update. The Members column count is correct
Someone did not get the invitation	It went to spam, or the address had a typo	Check the address with Edit, then Resend

You see	Why	Fix
An invitation shows on the Expired tab	The expiry date passed before they accepted	Edit it to set a new expiry and Resend, or invite them again