

WidgetMakr Quick Reference: Users Accounts

WidgetMakr allows widget owners to grant “users” limited access to their widgets. This feature is especially useful in the context of list rental prospecting. When a widget owner rents an email list, the list owner may want insight into the performance of the fundraising initiative. Through a user account, a list owner can view a widget, copy the embed code and access fundraising information. However, unlike organization managers, users cannot modify widgets or view organization account information. This solution provides transparency for the list owner, while protecting the privacy of the widget owner’s WidgetMakr account.

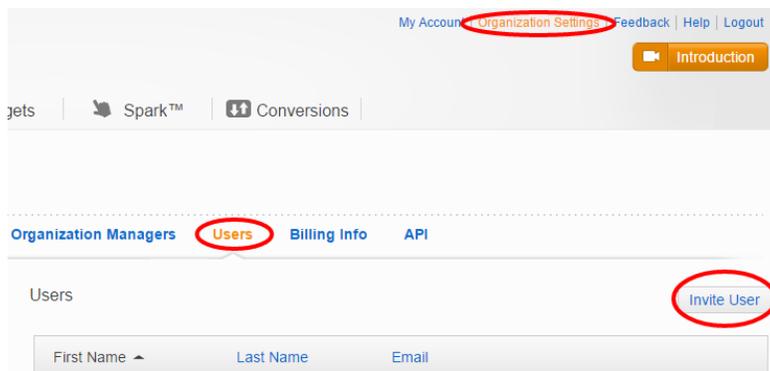
The guide for **widget owners** describes how to set up user accounts and grant users access to specific widgets. The guide for **widget users** explains how an invited user can access a widget.

Widget Owners

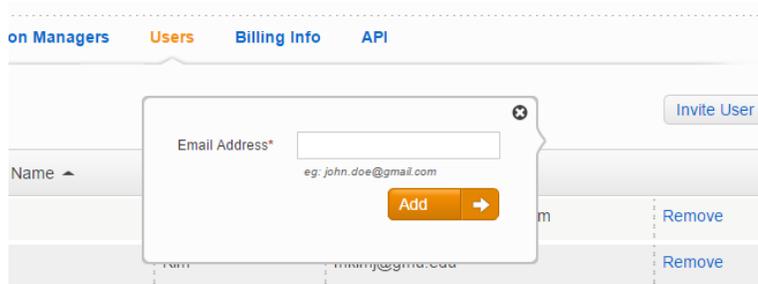
How to Invite a User

Following the steps below, widget owners may invite a third party, such as a prospecting list owner, to create a user account. The user will be able to access any widgets that the list owner has chosen to share with users.

1. Sign in to your WidgetMakr account.
2. Click “**Organization Settings**” in the top right corner.
3. Click “**Users**” on the lower menu bar.
4. Click “**Invite User**” on the right side, above the list of users.



5. Enter the email address of the person you wish to invite and click . He or she will receive an invitation to create a WidgetMakr account.



6. The user should receive an email with the subject line, “You’ve Been Invited to Join WidgetMakr!” He or she should open the email and click on the link to accept the invitation and set up an account. (See **How to Set Up a WidgetMakr User Account** below.)
7. You must share a widget before it will be visible to anyone with a user account. (See **How to Share a Widget with Users.**)

How to Share a Widget with Users

Following the steps below, widget owners may share a widget with users. Once a widget has been shared, anyone with a user account will be able to access it.

1. From your dashboard, click  **Widgets** on the top menu bar.
2. Find and click on the widget that you want to share.
3. On the right side (under “Options”) check the box **Share with Users**



4. Click 
5. Once a widget has been shared, all users will be able to view it.

Widget Users

This guide describes how an invited user, such as a prospecting list owner, can access a widget. A user must set up an account before accessing a widget. The user may then view the widget, copy the embed code and access fundraising information.

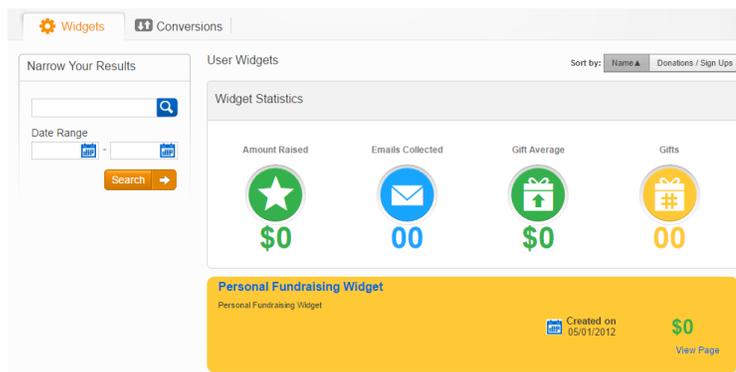
How to Set Up a WidgetMakr User Account

1. Check your email and look for an email with the subject line, **“You’ve Been Invited to Join WidgetMakr!”** This email was generated when the widget owner invited you to be a user.
2. Open the email and click on the link to accept the invitation and set up an account.
3. **Set up** a WidgetMakr account, and accept the terms of service.



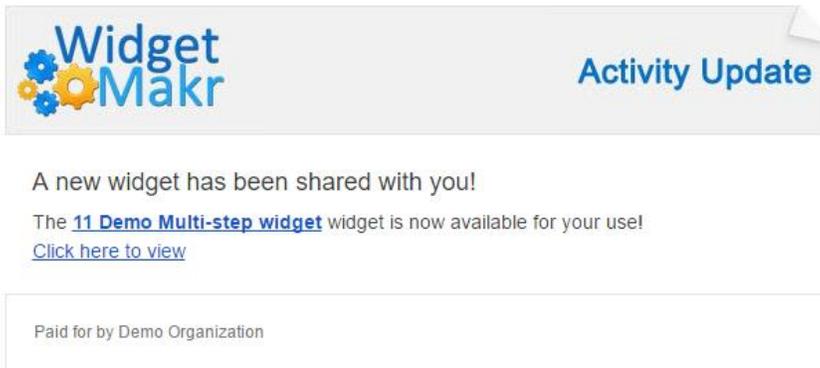
The screenshot shows a registration form on a yellow background. At the top, it says "Start fundraising for Demo Organization today!". Below this are three input fields: "First Name*", "Last Name*", and "Email*". There is a checkbox for "I agree to the Terms of Service*" and a blue button labeled "Start fundraising" with a right-pointing arrow. Below the button is a link that says "Register with Facebook".

4. Return to your email account and look for an email with the subject line, **“Welcome to WidgetMakr.”** Click on this email to confirm the email address and temporary password.
5. Enter this information into the WidgetMakr login page. You will then see a limited WidgetMakr dashboard.

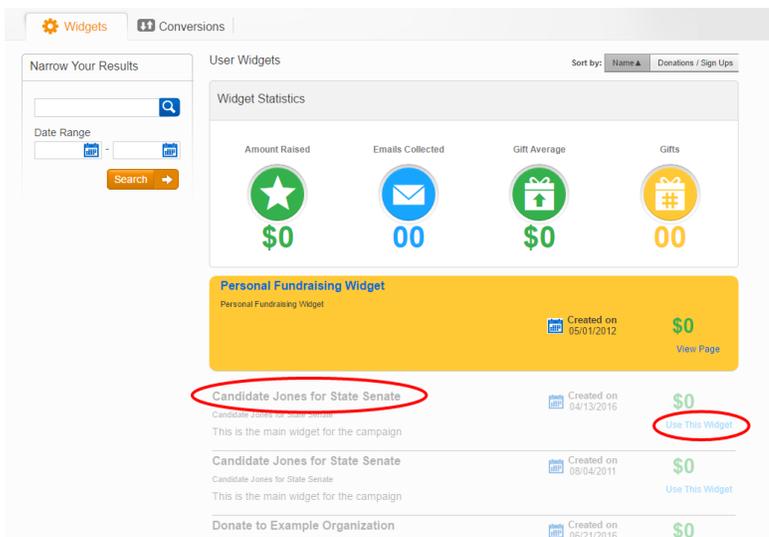


How to Access a Widget

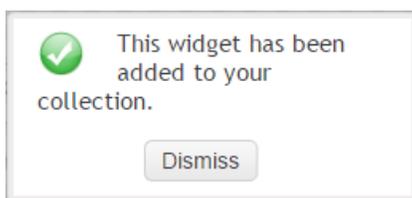
1. Open the WidgetMakr invitation email with the subject line, “A Widget Has Been Shared With You!”



2. Follow the prompts to log in to your account.
3. Click on the  Widgets dashboard, which will display all of the widgets that have been shared with you. The widgets in the dashboard will initially be “greyed out.”



4. Choose a widget and click “Use This Widget” on the right side of the widget dashboard.
5. The widget will be added to your “collection,” and you will now be able to access it. A confirmation message should appear.



6. The widget will now appear in full color in the dashboard. (See **How to Navigate WidgetMakr as a User.**)

How to Navigate WidgetMakr as a User

1. **To view a widget:**

- Click **“View Page”** on the right side of the widget dashboard.
- You can view the widget, but you will not be able to edit it.



Candidate Jones for State Senate
Candidate Jones for State Senate
This is the main widget for the campaign

Created on 04/13/2016

\$0

[Embed Code](#) [View Page](#)

2. **To embed or link to a widget:**

- Click **“Embed Code”** on the right side of the widget dashboard.
- [Follow these instructions.](#)



Candidate Jones for State Senate
Candidate Jones for State Senate
This is the main widget for the campaign

Created on 04/13/2016

\$0

[Embed Code](#) [View Page](#)

3. **To view the widget details:**

- Click on the title of the widget in the widget dashboard.



Candidate Jones for State Senate
Candidate Jones for State Senate
This is the main widget for the campaign

Created on 04/13/2016

\$0

[Embed Code](#) [View Page](#)