



Spotlight on



Team Accounts

Collaborate and control access, funding, and more.

Team Owners

Team owners manage the team with access to full permissions and account balances.

Team owners are able to:

- **Invite** new members
- **Change** roles & permissions
- **Update** usernames
- **Run** reports on all members
- **Transfer** credits to and from User Accounts

Admin

Admins have customizable permissions. The Team Owner can grant Admin's access to:

- **Reporting** (default) – added ability to run reports on one or more team members
- **Invite** new members to the Team Account
- **Transfer credits** to and from User Accounts

User



All Users are able to buy, send & manager offers, and run reports on their own account activity.

Stay organized

Add notes to gift campaigns that are only visible to your team — like customer tracking details to keep your various reward programs organized.

Run Team Report

From	To
01/01/22	06/30/22


<input checked="" type="checkbox"/>	 Delia Evans delia@rocketship.com
<input type="checkbox"/>	 José Pasqual jose@rocketship.com

Transfer

50


Credits

From

 **Delia Evans**
delia@rocketship.com

↓

To

 **Jessie Matthews**
jessie@rocketship.com

Transfer Credits

+

Add Team Member

Account Type

☐ User


☒ Admin

☐ Reporting

☒ Invite Users

☒ Transfer Credits

Gift Template

Logo	
Subject	Here's your gift card!
Message	Thanks for being so awesome, enjoy your gift card!

Region	USA
Value	\$50.00
Brands	Amazon, Starbucks, iTunes
Claim Period	30 Days
Notes	Customer referral campaign

✓

Claimed by jane@happyplace.com
Aug 12 at 4:33 PM

✓

Claimed by steve@thingsgetdone.com
Aug 12 at 4:01 PM

✓

Claimed by hashim@cloverbugs.com
Aug 12 at 3:58 PM

To claim your Team Account or to learn more, reach out to your Customer Success Manager or email hello@giftbit.com