

Managing Admin Settings

Learn how to update your sending email address and manage users and roles within the Muse Software portal. This guide provides a walkthrough for configuring administrative access and adjusting specific permissions for your organization.

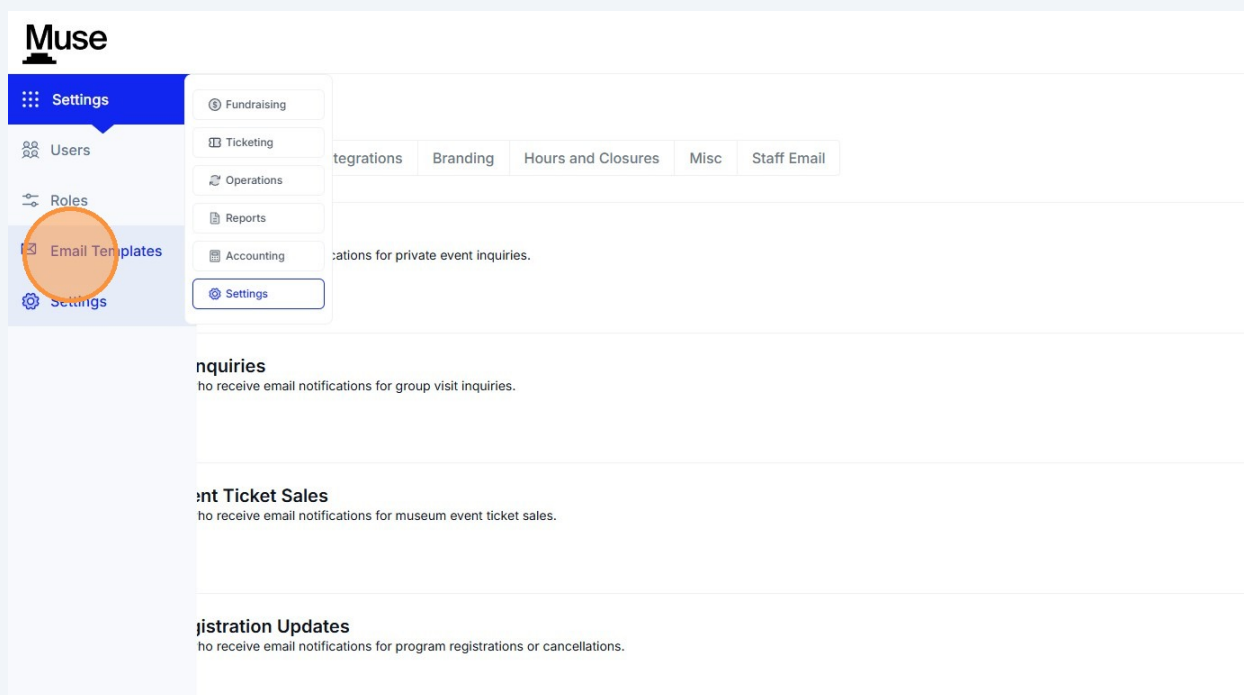
Email Templates

1

For new customers, you will need to set up your Sending Email Address before continuing on to the other admin settings.

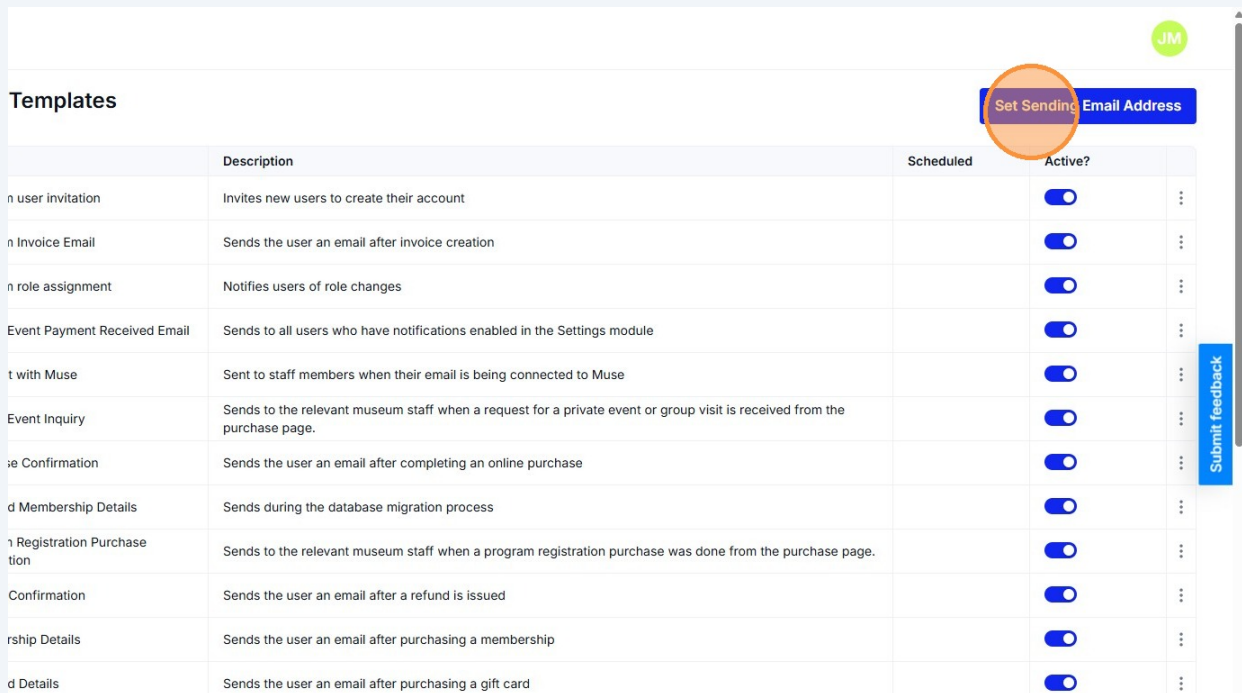
2

Click the blue "Email Templates" menu option from within the admin settings menu.



3

Click "Set Sending Email Address" in the top-right of the window. This is the email address from which all of your outbound emails are sent.

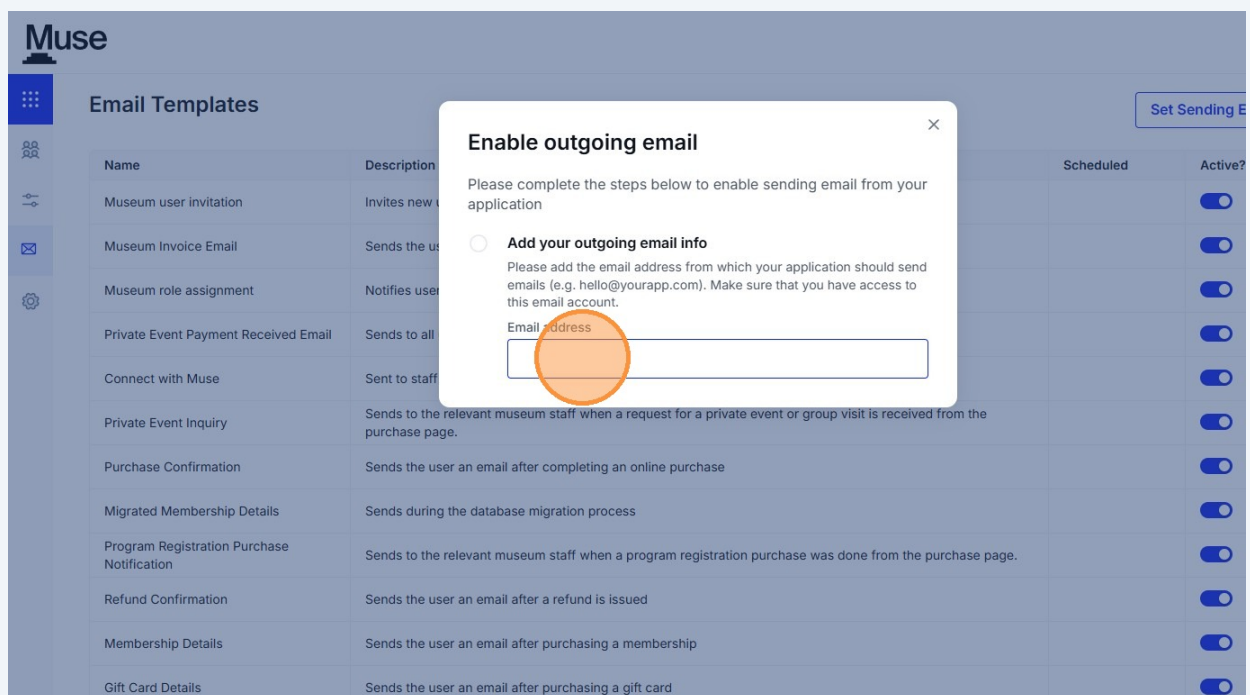


The screenshot shows the 'Email Templates' section of a web application. In the top right corner, there is a blue button labeled 'Set Sending Email Address', which is circled in orange. Below the button is a table of email templates. The table has columns for 'Name', 'Description', 'Scheduled', and 'Active?'. The 'Active?' column contains toggle switches, all of which are currently turned on. A 'Submit feedback' button is visible on the right side of the table.

Name	Description	Scheduled	Active?
new user invitation	Invites new users to create their account		☒
new Invoice Email	Sends the user an email after invoice creation		☒
new role assignment	Notifies users of role changes		☒
Event Payment Received Email	Sends to all users who have notifications enabled in the Settings module		☒
Connect with Muse	Sent to staff members when their email is being connected to Muse		☒
Event Inquiry	Sends to the relevant museum staff when a request for a private event or group visit is received from the purchase page.		☒
Purchase Confirmation	Sends the user an email after completing an online purchase		☒
Migrated Membership Details	Sends during the database migration process		☒
Program Registration Purchase Notification	Sends to the relevant museum staff when a program registration purchase was done from the purchase page.		☒
Refund Confirmation	Sends the user an email after a refund is issued		☒
Membership Details	Sends the user an email after purchasing a membership		☒
Gift Card Details	Sends the user an email after purchasing a gift card		☒

4

Update sending email address to the general inbox of your choosing.



The screenshot shows the 'Email Templates' section of the 'Muse' application. A modal dialog titled 'Enable outgoing email' is open in the center. The dialog contains the text 'Please complete the steps below to enable sending email from your application' and a radio button labeled 'Add your outgoing email info'. Below this, there is a text input field for 'Email address', which is circled in orange. The background shows the same table of email templates as in the previous screenshot, with the 'Set Sending Email Address' button visible in the top right corner.

5 Click "Verify my email".

The screenshot shows a modal window titled "Enable outgoing email" with a close button (X) in the top right corner. The modal contains the following text: "Please complete the steps below to enable sending email from your application". Below this is a section titled "Add your outgoing email info" with a sub-instruction: "Please add the email address from which your application should send emails (e.g. hello@yourapp.com). Make sure that you have access to this email account." There is a text input field labeled "Email address" containing the text "jen.mendoza@musesoftware.ai". Below the input field is a blue button labeled "Verify my email", which is highlighted with an orange circle. The background of the modal shows a table with columns "Description", "Scheduled", and "Active?". The table lists various email templates such as "User invitation", "Invoice Email", "Role assignment", "Event Payment Received Email", "Event Inquiry", "Event Confirmation", "Membership Details", "Registration Purchase Confirmation", "Membership Details", "Gift Details", and "Registration Cancellation". Each row has a toggle switch in the "Active?" column. A "Set Sending Email Address" button is visible in the top right corner of the background interface. A "Submit feedback" button is visible on the right side of the background interface.

6 After inputting the email address you wish to use, you'll need access to the inbox to provide validation that this email address can be used.

The validation step will be completed with a 3rd party called Postmark.

Since all emails in the system will be sent by Muse via the email address provided in this field, the validation will ensure outgoing emails do not get caught in spam folders.

7

After you verify your email from your inbox, you have now set your sending address and can close this modal.

Enable outgoing email

Please complete the steps below to enable sending email from your application

✓ **Add your outgoing email info**
jen.mendoza@musesoftware.ai is verified and ready to go!
[Remove email](#)

[Edit Sending Email Address](#)

[Submit feedback](#)

	Description	Scheduled	Active?
new user invitation	Invites new users to create their account		☒
Invoice Email	Sends the user an email after invoice creation		☒
role assignment	Notifies users of role changes		☒
Event Payment Received Email	Sends to all users who have notifications enabled in the Settings module		☒
Connect with Muse	Sent to staff members when their email is being connected to Muse		☒
Event Inquiry	Sends to the relevant museum staff when a request for a private event or group visit is received from the purchase page.		☒
Purchase Confirmation	Sends the user an email after completing an online purchase		☒
Membership Details	Sends during the database migration process		☒
Registration Purchase Confirmation	Sends to the relevant museum staff when a program registration purchase was done from the purchase page.		☒
Refund Confirmation	Sends the user an email after a refund is issued		☒
Membership Details	Sends the user an email after purchasing a membership		☒
Gift Card Details	Sends the user an email after purchasing a gift card		☒

Users

8

Click the blue "Users" menu option from within the admin settings menu.

Muse

[Settings](#) [Email Templates](#) [Edit Sending Email](#)

[Users](#) [Roles](#) [Email Templates](#) [Settings](#)

	Description	Scheduled	Active?
invitation	Invites new users to create their account		☒
Invoice Email	Sends the user an email after invoice creation		☒
role assignment	Notifies users of role changes		☒
Event Payment Received Email	Sends to all users who have notifications enabled in the Settings module		☒
Connect with Muse	Sent to staff members when their email is being connected to Muse		☒
Event Inquiry	Sends to the relevant museum staff when a request for a private event or group visit is received from the purchase page.		☒
Purchase Confirmation	Sends the user an email after completing an online purchase		☒
Membership Details	Sends during the database migration process		☒
Registration Purchase Confirmation	Sends to the relevant museum staff when a program registration purchase was done from the purchase page.		☒
Refund Confirmation	Sends the user an email after a refund is issued		☒
Membership Details	Sends the user an email after purchasing a membership		☒
Gift Card Details	Sends the user an email after purchasing a gift card		☒

9

Click "New user"

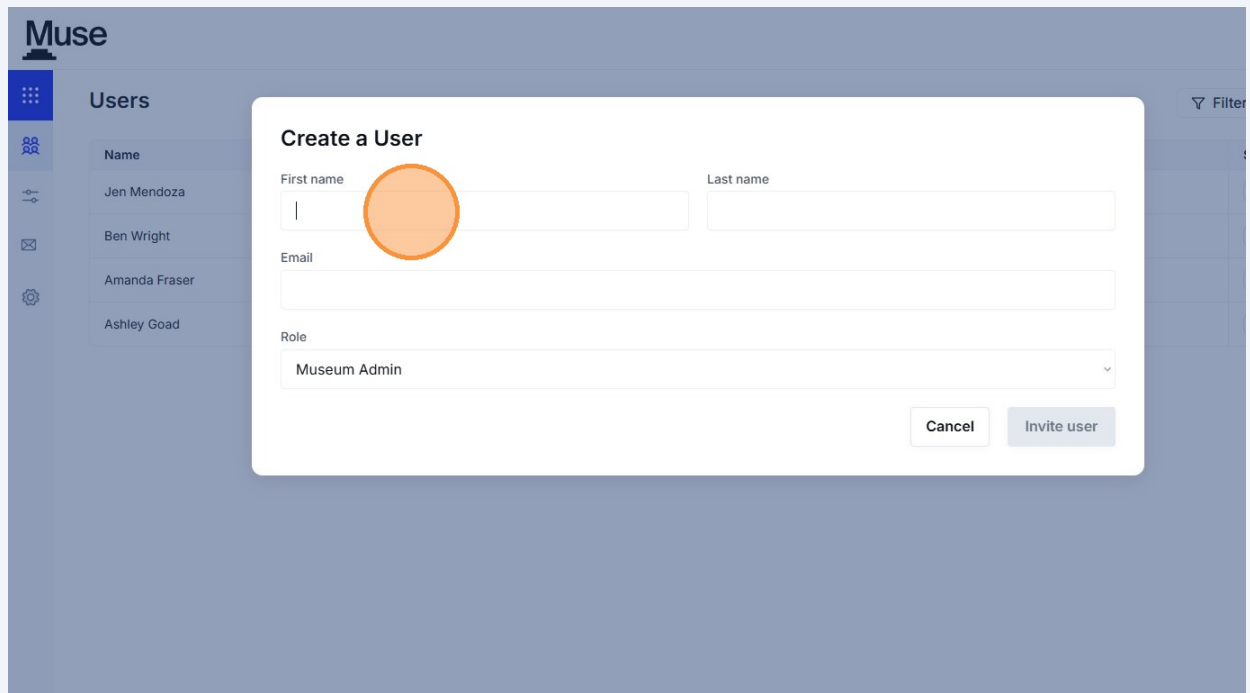
The screenshot shows a user management interface. At the top right, there is a 'Filter' button and a 'New user' button, which is highlighted with an orange circle and a green 'JM' icon. Below this is a table with four columns: 'Email', 'Role(s)', and 'Status'. The table contains four rows of user data. At the bottom right, there is a blue 'Submit feedback' button.

	Email	Role(s)	Status
jendoza	jen.mendoza@musesoftware.ai	Museum Admin	Active
ght	ben+jensandbox@musesoftware.ai	Museum Admin	Active
Fraser	amanda.fraser+jensandbox@musesoftware.ai	Museum Admin	Active
Goad	ashley.goad+jensandbox@musesoftware.ai	Museum Admin	Active

10

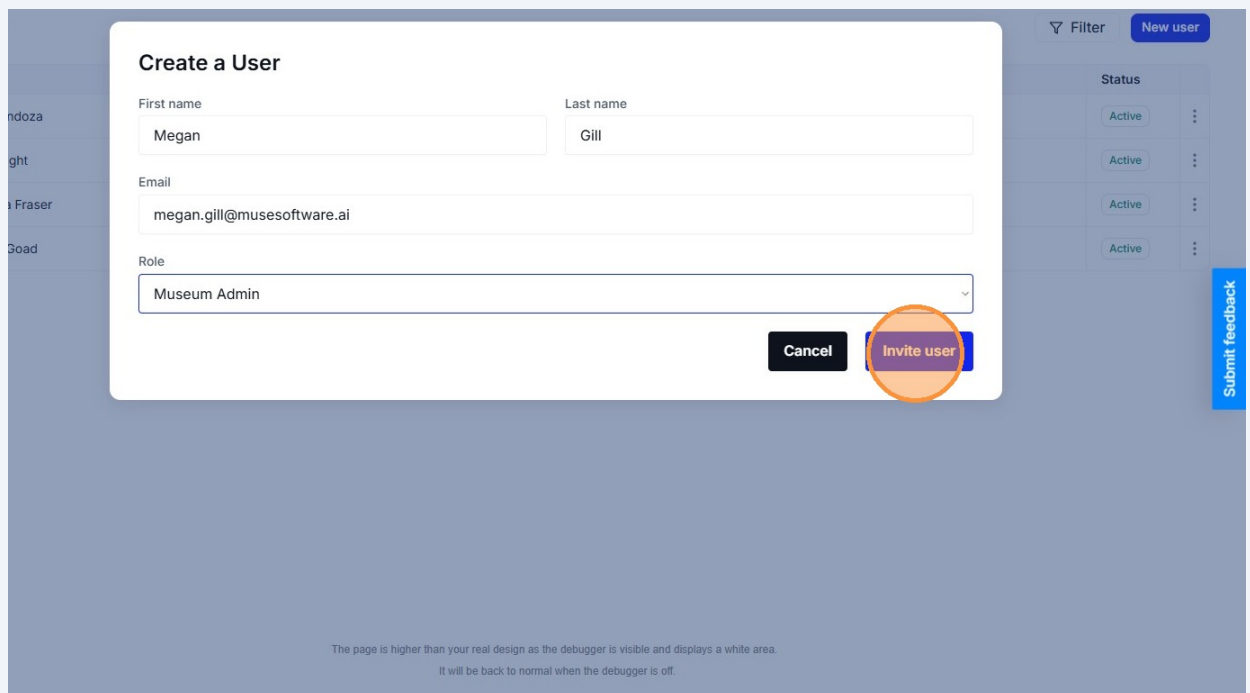
It is recommended that you only invite the team members who will be part of the implementation and configuration of Muse

- 11 Capture first name, last name, email address and role for the new user.



The screenshot shows the 'Muse' application interface. On the left, a sidebar contains icons for users, settings, and other functions. The main area is titled 'Users' and displays a list of existing users: Jen Mendoza, Ben Wright, Amanda Fraser, and Ashley Goad. A 'Create a User' modal is open in the center, featuring input fields for 'First name', 'Last name', and 'Email', and a dropdown menu for 'Role'. The 'Role' dropdown is currently set to 'Museum Admin'. At the bottom right of the modal are 'Cancel' and 'Invite user' buttons. An orange circle highlights the 'First name' input field.

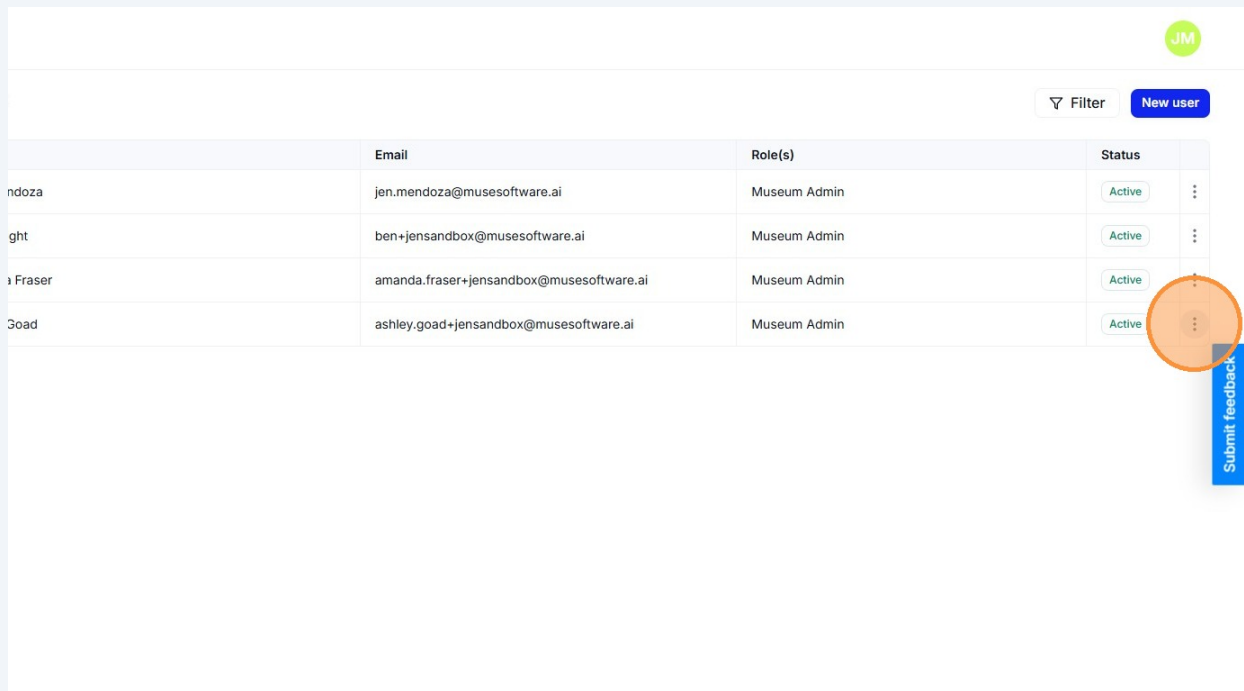
- 12 Click "Invite User" to email profile set-up instructions to this individual.



This screenshot shows the same 'Create a User' modal as in the previous step, but with the 'First name' field filled with 'Megan' and the 'Last name' field filled with 'Gill'. The 'Email' field now contains 'megan.gill@musesoftware.ai'. The 'Role' dropdown remains set to 'Museum Admin'. The 'Invite user' button is now highlighted with an orange circle. In the background, a table of users is visible, showing names and status (Active). A 'Submit feedback' button is located on the right side of the page. At the bottom, a note states: 'The page is higher than your real design as the debugger is visible and displays a white area. It will be back to normal when the debugger is off.'

13

To manage your users, click the vertical ellipses to the right of the user in the list view.

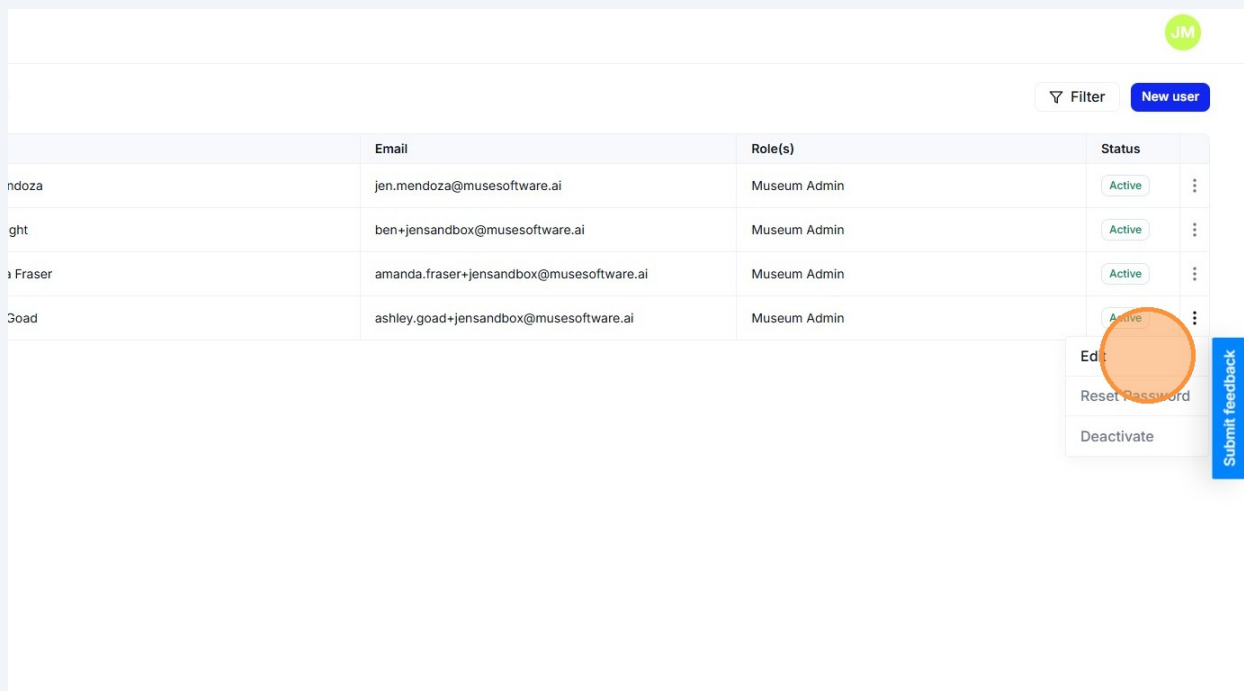


The screenshot shows a user management interface. At the top right, there is a green circular profile icon with the initials 'JM'. Below it, there are two buttons: 'Filter' and 'New user'. The main content is a table with the following columns: 'Email', 'Role(s)', and 'Status'. There are four rows of user data. The last row, for 'ashley.goad+jensandbox@musesoftware.ai', has an orange circle highlighting the vertical ellipsis menu icon to its right.

	Email	Role(s)	Status
ndoza	jen.mendoza@musesoftware.ai	Museum Admin	Active
ght	ben+jensandbox@musesoftware.ai	Museum Admin	Active
Fraser	amanda.fraser+jensandbox@musesoftware.ai	Museum Admin	Active
Goad	ashley.goad+jensandbox@musesoftware.ai	Museum Admin	Active

14

From here you have the option to Edit (first name, last name or role), Reset Password, or Deactivate.

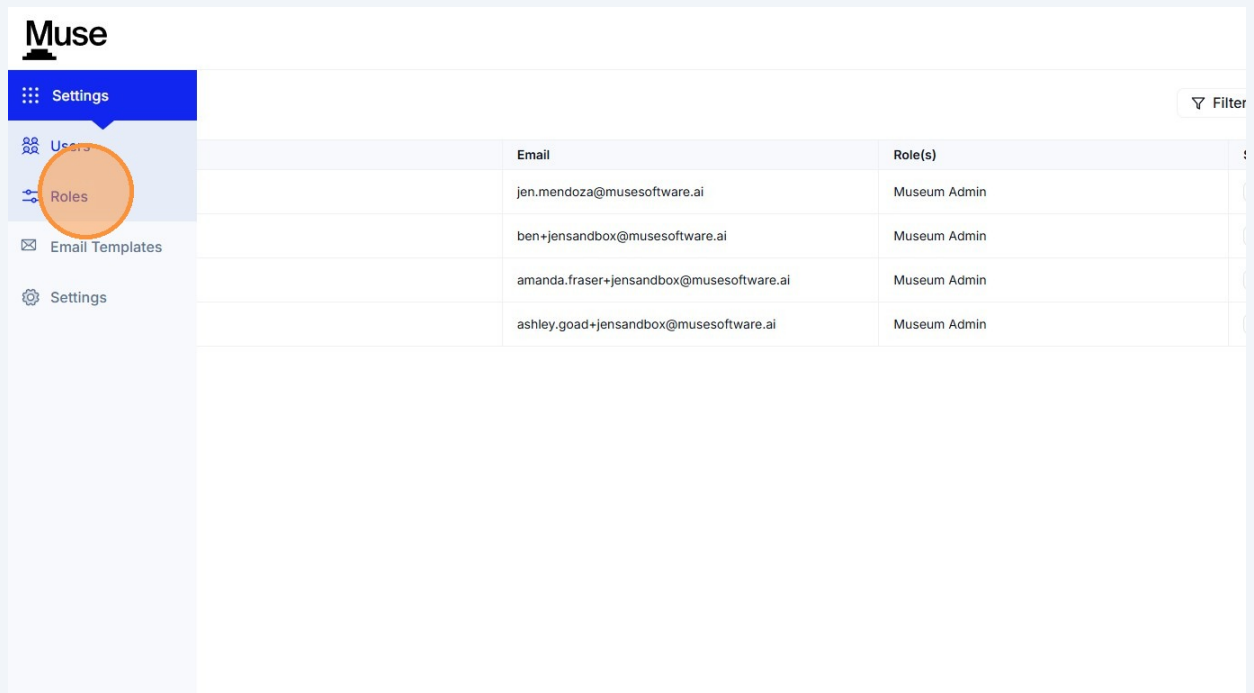


This screenshot shows the same user management interface as the previous one, but with the dropdown menu for the user 'ashley.goad+jensandbox@musesoftware.ai' open. The menu contains three options: 'Edit', 'Reset Password', and 'Deactivate'. An orange circle highlights the menu, and a blue 'Submit feedback' button is visible on the right side of the interface.

	Email	Role(s)	Status
ndoza	jen.mendoza@musesoftware.ai	Museum Admin	Active
ght	ben+jensandbox@musesoftware.ai	Museum Admin	Active
Fraser	amanda.fraser+jensandbox@musesoftware.ai	Museum Admin	Active
Goad	ashley.goad+jensandbox@musesoftware.ai	Museum Admin	Active

Roles

- 15 Click the blue "Roles" menu option from within the admin settings menu.



- 16 There are 7 standard Muse Roles that cannot be edited.

17

The "Museum Floor Manager" role has permissions to view and edit the Floor Admin tab .

Muse

JM

Roles

New role

Name	Description	Team Members	Status	
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active	⋮
Museum Admin	Access to all modules		Active	⋮
Accounting	Configure accounting rules and view reports	No team members	Active	⋮
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active	⋮
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active	⋮
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active	⋮
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active	⋮
Museum Volunteer	Supports functions of Museum Staff	No team members	Active	⋮

Submit feedback

18

The "Accounting" role has permissions to configure accounting rules and view reports.

Muse

JM

Roles

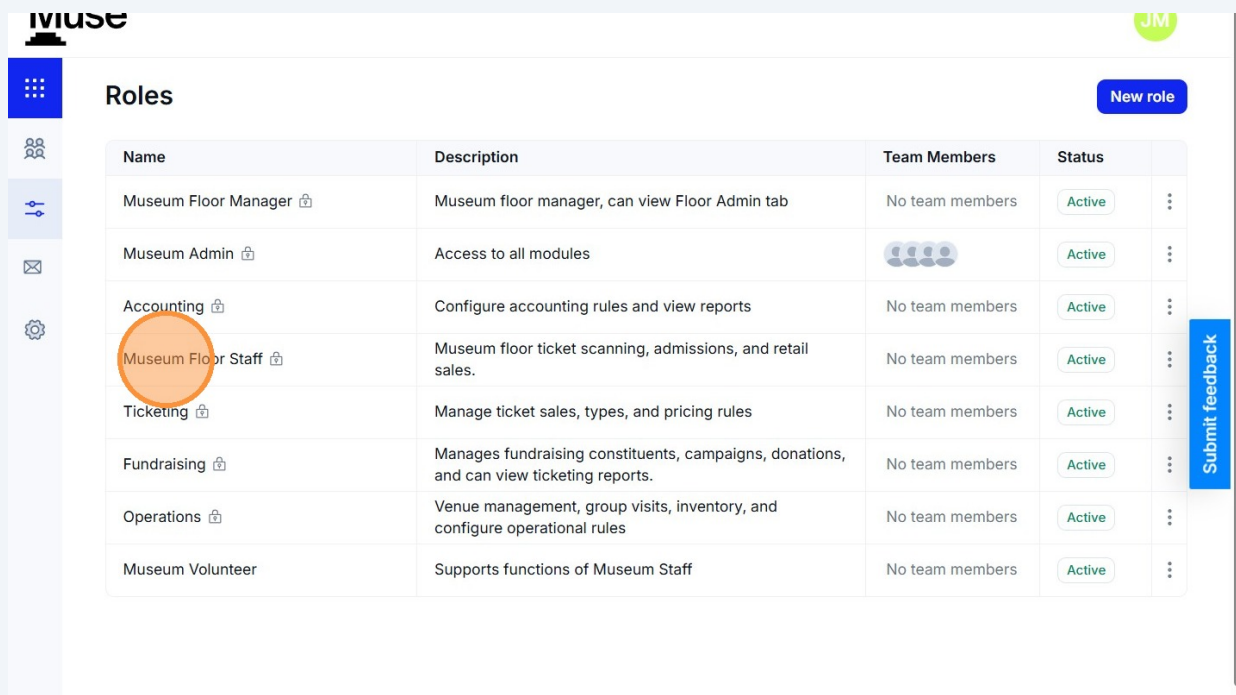
New role

Name	Description	Team Members	Status	
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active	⋮
Museum Admin	Access to all modules		Active	⋮
Accounting	Configure accounting rules and view reports	No team members	Active	⋮
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active	⋮
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active	⋮
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active	⋮
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active	⋮
Museum Volunteer	Supports functions of Museum Staff	No team members	Active	⋮

Submit feedback

19

The "Museum Floor Staff" role has permissions for museum floor ticket scanning, admissions and retail sales.



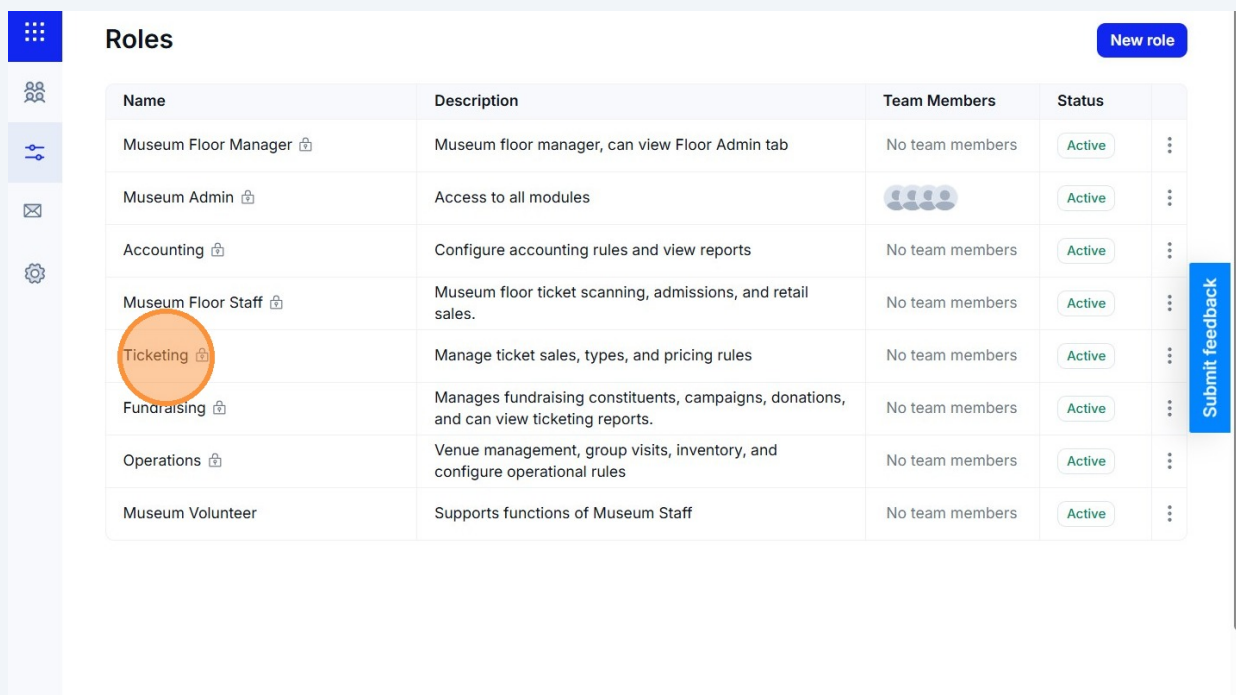
Roles New role

Name	Description	Team Members	Status	
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active	...
Museum Admin	Access to all modules		Active	...
Accounting	Configure accounting rules and view reports	No team members	Active	...
Museum Floor Staff 	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active	...
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active	...
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active	...
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active	...
Museum Volunteer	Supports functions of Museum Staff	No team members	Active	...

Submit feedback

20

The "Ticketing" role has permissions to view and manage ticket sales, types and pricing rules.



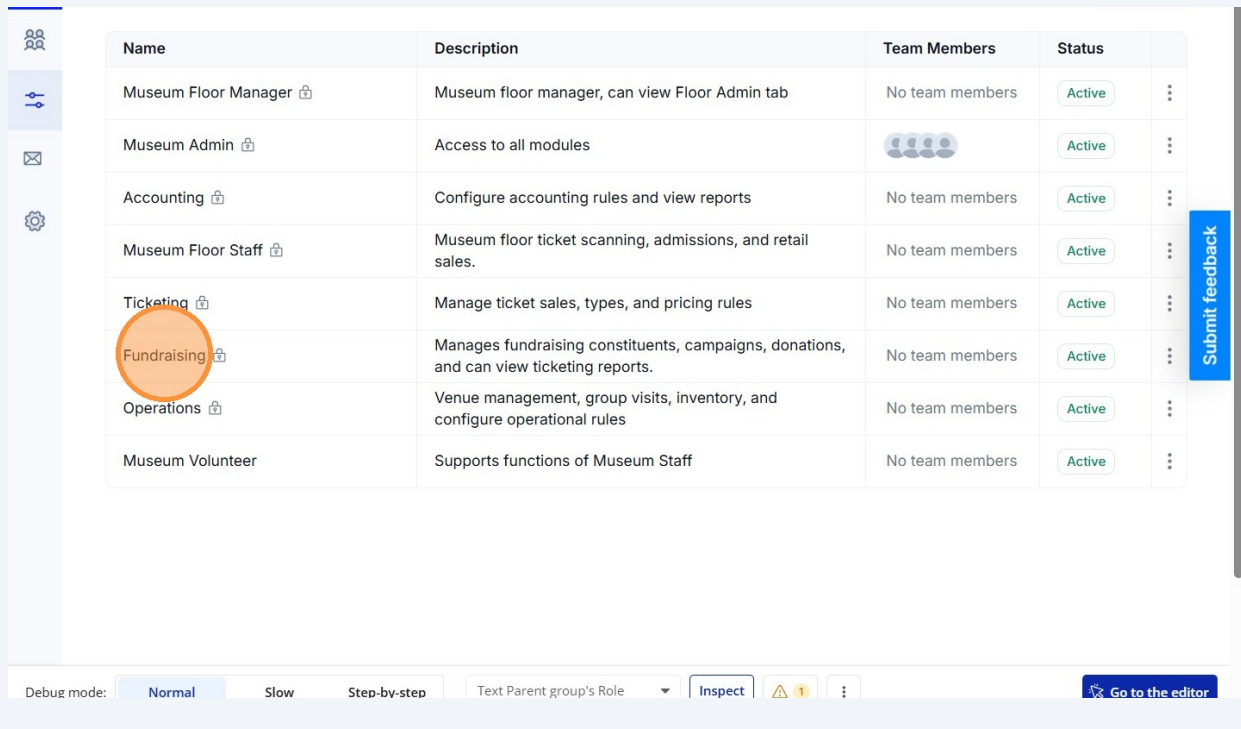
Roles New role

Name	Description	Team Members	Status	
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active	...
Museum Admin	Access to all modules		Active	...
Accounting	Configure accounting rules and view reports	No team members	Active	...
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active	...
Ticketing 	Manage ticket sales, types, and pricing rules	No team members	Active	...
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active	...
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active	...
Museum Volunteer	Supports functions of Museum Staff	No team members	Active	...

Submit feedback

21

The "Fundraising" role has permissions to view and edit fundraising constituents, campaigns, donations and ticketing reports.



The screenshot shows a table of roles in a system. The 'Fundraising' role is highlighted with an orange circle. The table has columns for Name, Description, Team Members, and Status. A 'Submit feedback' button is on the right, and a 'Go to the editor' button is at the bottom right.

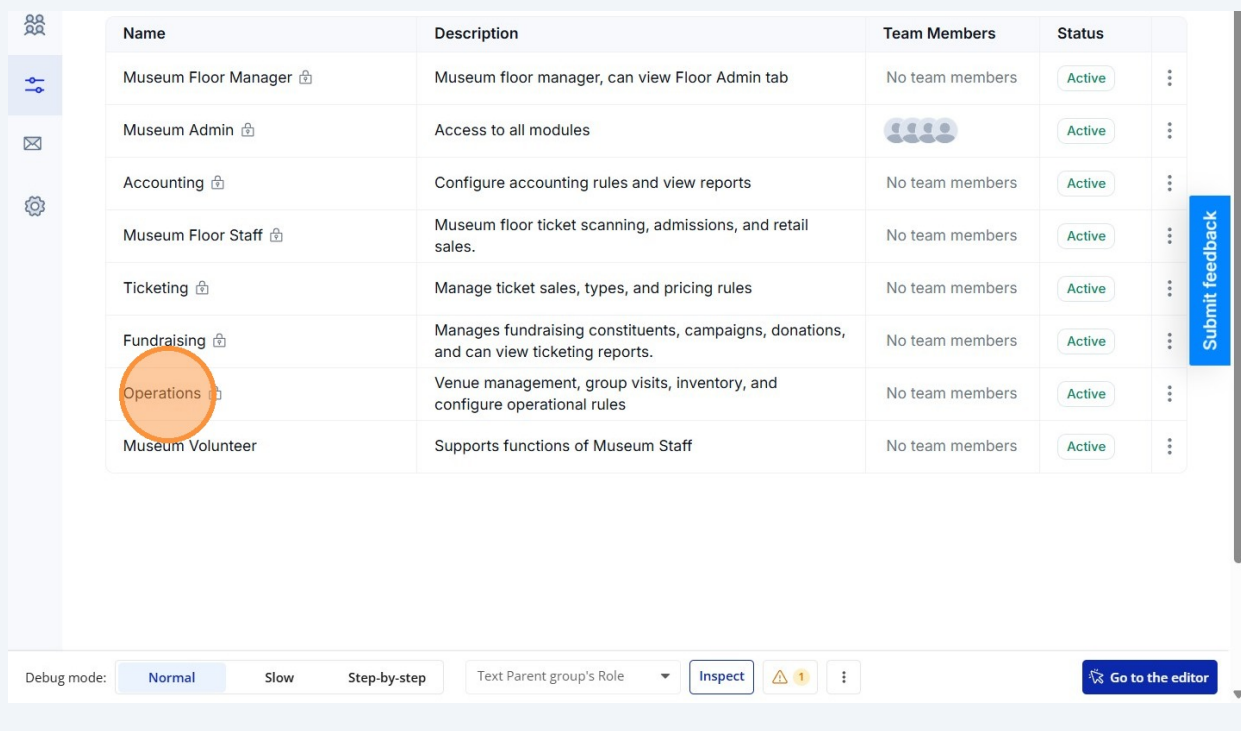
Name	Description	Team Members	Status
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active
Museum Admin	Access to all modules		Active
Accounting	Configure accounting rules and view reports	No team members	Active
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active
Museum Volunteer	Supports functions of Museum Staff	No team members	Active

Debug mode: **Normal** Slow Step-by-step Text Parent group's Role **Inspect**

[Go to the editor](#)

22

The "Operations" role has permissions to view and manage venues, group visits, inventory, and operational rules.



The screenshot shows the same table of roles as above, but the 'Operations' role is highlighted with an orange circle. The 'Fundraising' role is no longer highlighted. The 'Submit feedback' button is on the right, and the 'Go to the editor' button is at the bottom right.

Name	Description	Team Members	Status
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active
Museum Admin	Access to all modules		Active
Accounting	Configure accounting rules and view reports	No team members	Active
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active
Museum Volunteer	Supports functions of Museum Staff	No team members	Active

Debug mode: **Normal** Slow Step-by-step Text Parent group's Role **Inspect**

[Go to the editor](#)

23 The "Museum Admin" role has permissions to view and edit all modules of Muse.

We recommend that all team members involved in implementation have this role.

Muse

Roles New role

Name	Description	Team Members	Status	
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active	...
Museum Admin 	Access to all modules		Active	...
Accounting	Configure accounting rules and view reports	No team members	Active	...
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active	...
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active	...
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active	...
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active	...
Museum Volunteer	Supports functions of Museum Staff	No team members	Active	...

Submit feedback

24 It is recommended that you use the available default roles for any users you invite to the portal.

25

However, if you feel that you need additional Roles, you can click the blue "New role" button on the top-right of the screen to create a custom role.

Muse

Roles

Name	Description	Team Members	Status
Museum Floor Manager	Museum floor manager, can view Floor Admin tab	No team members	Active
Museum Admin	Access to all modules	4 team members	Active
Accounting	Configure accounting rules and view reports	No team members	Active
Museum Floor Staff	Museum floor ticket scanning, admissions, and retail sales.	No team members	Active
Ticketing	Manage ticket sales, types, and pricing rules	No team members	Active
Fundraising	Manages fundraising constituents, campaigns, donations, and can view ticketing reports.	No team members	Active
Operations	Venue management, group visits, inventory, and configure operational rules	No team members	Active
Museum Volunteer	Supports functions of Museum Staff	No team members	Active

New role

Submit feedback

26

Provide a name and description for the new role and click "Create Role".

Muse

Create a Role

Name

Museum Volunteer

Description

Supports functions of the Museum Staff

Cancel **Create Role**

Submit feedback

27

From there, you'll be directed to the Role Settings screen where you can give "Edit access" or "No access" to any feature in Muse.

The screenshot shows the 'Role Settings' screen for a role named 'Museum Volunteer'. The role's description is 'Supports functions of Museum Staff'. Below this is a table of permissions for various features. An orange circle highlights the 'Edit access' option for the 'Constituents' feature.

Fundraising Permissions	Description	Access
Dashboard		☒ Edit access
Constituents	View and manage donor/member information	☒ Edit access
Campaigns	Create and manage fundraising campaigns	☐ No access
Donations	Process and record donations	☐ No access
Events	Manage fundraising events	☐ No access
Tasks		☐ No access
Reports		☐ No access
Settings		☐ No access

28

Next, the "Default module after login" allows you to configure the landing page for any user with this assigned role.

Muse will automatically open to this section/module upon staff login.

Your landing page options will depend on the features that have been granted access for this role.

Click "Save Changes" when finished.

The screenshot displays the 'Museum Admin' role configuration page. It features two tables for managing permissions. The first table, under the 'Reports' section, lists 'Dashboard', 'Reports', and 'Saved Reports' with access levels of 'Edit access', 'No access', and 'No access' respectively. The second table, under the 'Museum Admin' section, lists 'Users', 'Roles', 'Email Templates', and 'Settings' with 'No access' for all. Below these tables is a 'Default module after login' dropdown menu currently set to 'Museum Floor | Museum Entry'. The interface includes a left sidebar with navigation icons, a right sidebar with a 'Submit feedback' button, and a bottom toolbar with 'Debug mode' (Normal, Slow, Step-by-step), 'Dropdown default subtab', 'Inspect', a warning icon, and a 'Go to the editor' button. 'Cancel' and 'Save Changes' buttons are located at the bottom right of the main content area.

Reports	Description	Access
Dashboard		Edit access
Reports		No access
Saved Reports		No access

Museum Admin	Description	Access
Users	Manage user accounts	No access
Roles	Configure roles and permissions	No access
Email Templates	Manage email template content	No access
Settings	Modify system configuration	No access

Default module after login

Museum Floor | Museum Entry

Cancel Save Changes

Debug mode: Normal Slow Step-by-step Dropdown default subtab Inspect 1 Go to the editor