

### The 'Role Type' admin control panel:

is for surveying new members when they create accounts. Unlike 'Roles' they do not affect what members can do on the exchange.

When role types are enabled a new member is asked to choose a role type when creating an account. **You control the options that the user chooses from in this control panel.**

Statistics are compiled in the statistics admin panel under 'Member by Role Type.'

### How Role Types display

Once the user clicks on the radio button next to the role type, a drop down bar appears with examples below it. (You chose if you would like to display examples for each role type.)

#### Create Account

[Home](#) / [Account](#) / [Create Account](#)

Do you already have an account? [Sign in here.](#)

Registration is currently free. After you register, we will send you a password by e-mail. You can then use your e-mail and password to sign in, post listings and receive alerts of new listings by e-mail, as well as manage your listings and account information.

Members of this site are divided into three groups. Please choose what type of account you would like to create.

Fields below that are marked with \* are required.

\* I am a:

**Producer/Farmer**  
You may post food items for sale, barter, or donation.

**Charity**  
You may collect food donations.  
*Please do not choose this option unless you have a 501(c)3 designation or are otherwise registered as a charity.*

**Please note:** Producer & Charity memberships will be held for administrator approval before a password is issued.

**Consumer**  
You may register without the approval of the administrator and post wanted listings or food donation listings.

\*

**Institution**  
Hospital, prison, university

**Retail**  
Caterer, Grocery Store, Restaurant

**The Role Types you enter appear when the user clicks on drop-down list here:**

**Consumer**  
You may register without the approval of the administrator and post wanted listings or food donation listings.

\*

**Institution** prison, university

**Other** all

**Retail** bar, Grocery Store, Restaurant

# How to add a Role Type

## Step 1:

Click on 'Role Type' (Under 'Configure the Exchange')

### Configure the Exchange

- [Categories](#)
- [County](#)
- [Member Referrals](#)
- [Zip Codes](#)
- [Member Contact & Privacy Policies](#)
- [Main Settings](#)
- [Layout Options](#)
- [Exchange Messages](#)
- [Contact Information](#)
- [Role Types](#)

## Step 2:

Click on 'Add New Role Type.'

### Role Types

[Home](#) / [Admin](#) / **Role Types**

When Role Types are enabled a new member is asked to choose a role type when creating an account. You control the options that the user chooses from, here.

Roles Types are used only to survey new members when they create accounts. Unlike 'Roles' they do not affect what members can do on the exchange.

Member selections are compiled and found in the statistics admin panel here: [Members by Role Type](#)

The Role Types feature is currently Enabled. [Disable](#)

[+ Add New Role Type](#)

Role	Role Type	Actions
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There are no Role Types to list.

# How to add a Role Type

## Step 3:

Follow the onscreen instructions and click on [Submit].

### Add New Role Type

[Home](#) / [Admin](#) / [Role Types](#) / [Add New Role Type](#)

Fields below that are marked with \* are required.

Enable this role type on 'Create Account' page.

\*Role:

\*Role Type:

**Examples of Role Types:**  
**Producer:** Pork farmer, Beef farmer, Wheat farmer  
**Charity:** Food Bank, Shelter, Church  
**Consumer:** Individual, Retail, Institution

We suggest that you add an 'Other' for each role type, just in case the user does not fit into any of the options you have provided for them.

Show examples on 'Create Account' page.

Examples:

When you click on the examples checkbox above, the role type name and the examples you enter will show on the 'Create Account' page.

When this checkbox is ticked here...

### Note:

If you click on the 'Enable this role type on Create Account page' checkbox when adding a new role type, the [Enable/Disable] button will display [Disable], which means it is enabled (or displayed) on the 'Create Account' page.

You may enable or disable role types at anytime by either:

- 1) using the [Enable/Disable] button
- or
- 2) by clicking [Edit] next to a role type and checking or unchecking the 'Enable this role type...' checkbox.

## Step 4:

You may enable/disable, edit and delete role types here.

 [Add New Role Type](#)

Role	Role Type	Actions
Consumer	<a href="#">Institution</a>	<input type="button" value="Disable"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Consumer	<a href="#">Other</a>	<input type="button" value="Disable"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Consumer	<a href="#">Retail</a>	<input type="button" value="Disable"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Producer	<a href="#">Beekeeper</a>	<input type="button" value="Disable"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

... [Disable] displays here

# A note on deleting and/or transferring Role Types

If you try to delete a Role Type that already has members listed in it, you will see the following:

## Delete Role Type

[Home](#) / [Admin](#) / [Role Types](#) / **Delete Role Type**

You are about to delete the **Consumer** Role Type: '*Other*'.

There are members listed under this role type. To prevent problems with missing data, you cannot delete this role type until you transfer these members to a different role type.

\*Transfer users to:

**TIP:** You can disable the role type without deleting it. When the role type is disabled, it will no longer be displayed when members create accounts. To disable this role type, click [Cancel] and disable the role type on the previous page.

Cancel

Remove

**Basically you have two options:**

1) Transfer the members to another role type and delete the role type (which is done by choosing from the drop-down list and then clicking [Remove] (shown above).

or

2) Simply press [Cancel] and disable the Role Type which will no longer display on the 'Create Account' page and will keep the data intact.