

Adding a Person to the database

13 Steps [View most recent version](#) 

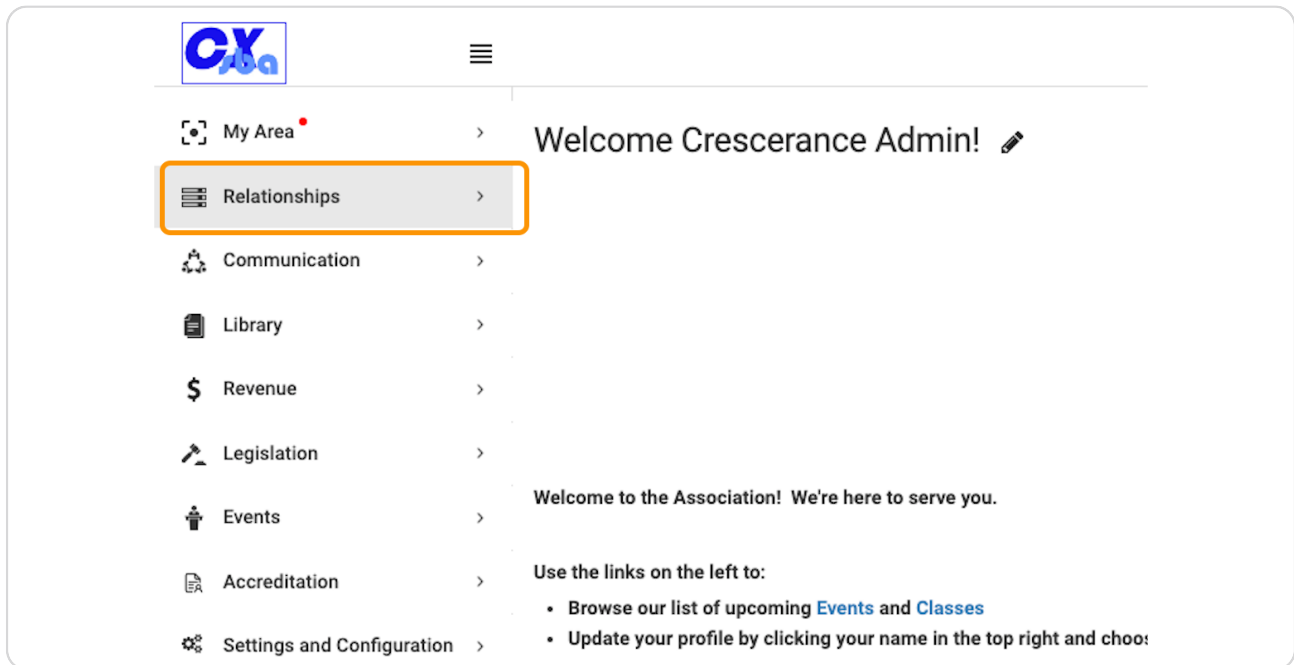
Created by
Engagifii Inc.

Creation Date
August 18, 2023

Last Updated
August 18, 2023

STEP 1

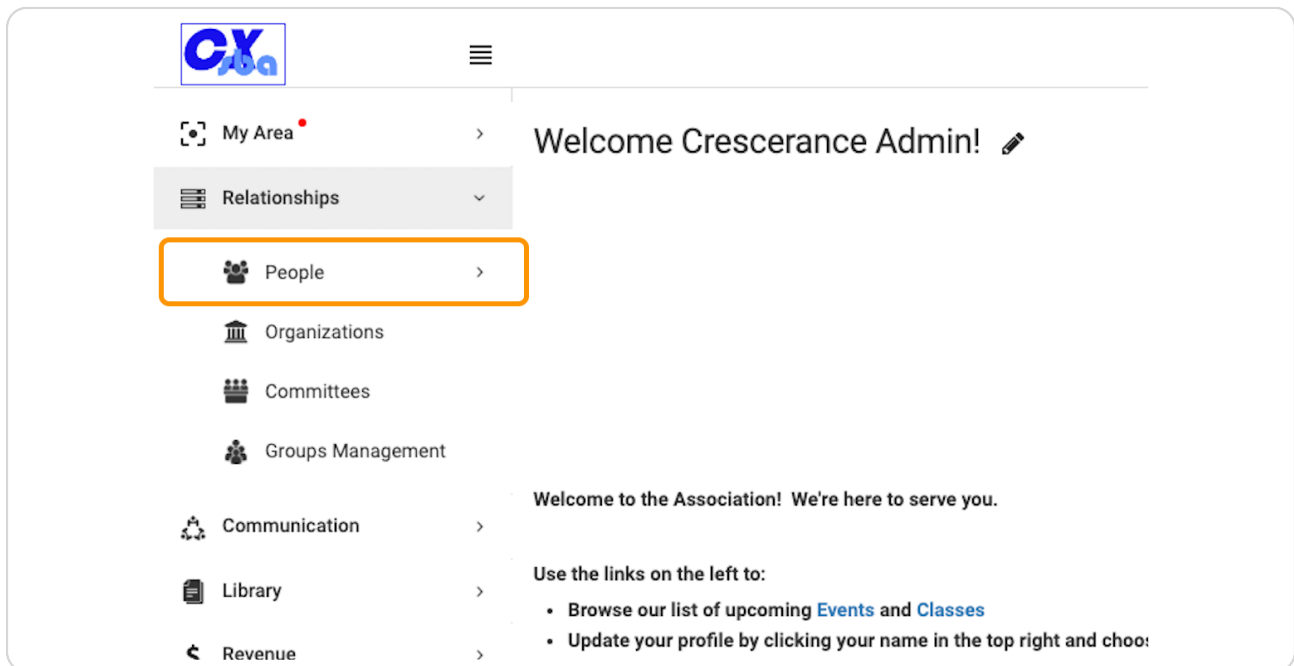
Click on Relationships



The screenshot shows the Crescerance Admin interface. At the top left is the 'CX' logo. To its right is a hamburger menu icon. Below the logo is a navigation sidebar with the following items: 'My Area' (with a red dot), 'Relationships' (highlighted with an orange box), 'Communication', 'Library', 'Revenue', 'Legislation', 'Events', 'Accreditation', and 'Settings and Configuration'. Each item has a right-pointing chevron. To the right of the sidebar, the text 'Welcome Crescerance Admin!' is displayed with a pencil icon. Below this, a welcome message reads: 'Welcome to the Association! We're here to serve you.' Underneath, it says 'Use the links on the left to:' followed by two bullet points: 'Browse our list of upcoming [Events](#) and [Classes](#)' and 'Update your profile by clicking your name in the top right and choos'.

STEP 2

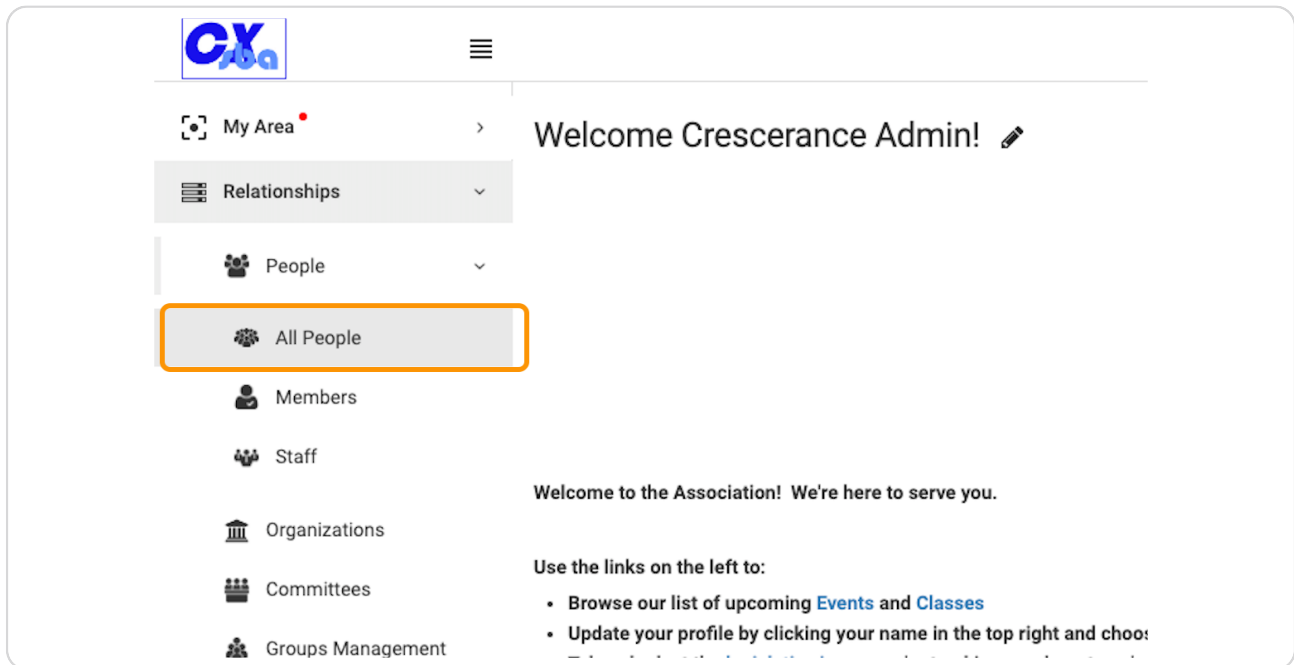
Click on People



The screenshot shows the Crescerance Admin interface with the 'Relationships' menu expanded. The 'Relationships' item in the sidebar is highlighted with a grey background and a downward-pointing chevron. Below it, the sub-menu items are: 'People' (highlighted with an orange box), 'Organizations', 'Committees', and 'Groups Management'. The rest of the sidebar items are 'Communication', 'Library', and 'Revenue'. The right-hand side of the interface remains the same as in Step 1, showing the 'Welcome Crescerance Admin!' message and the welcome text.

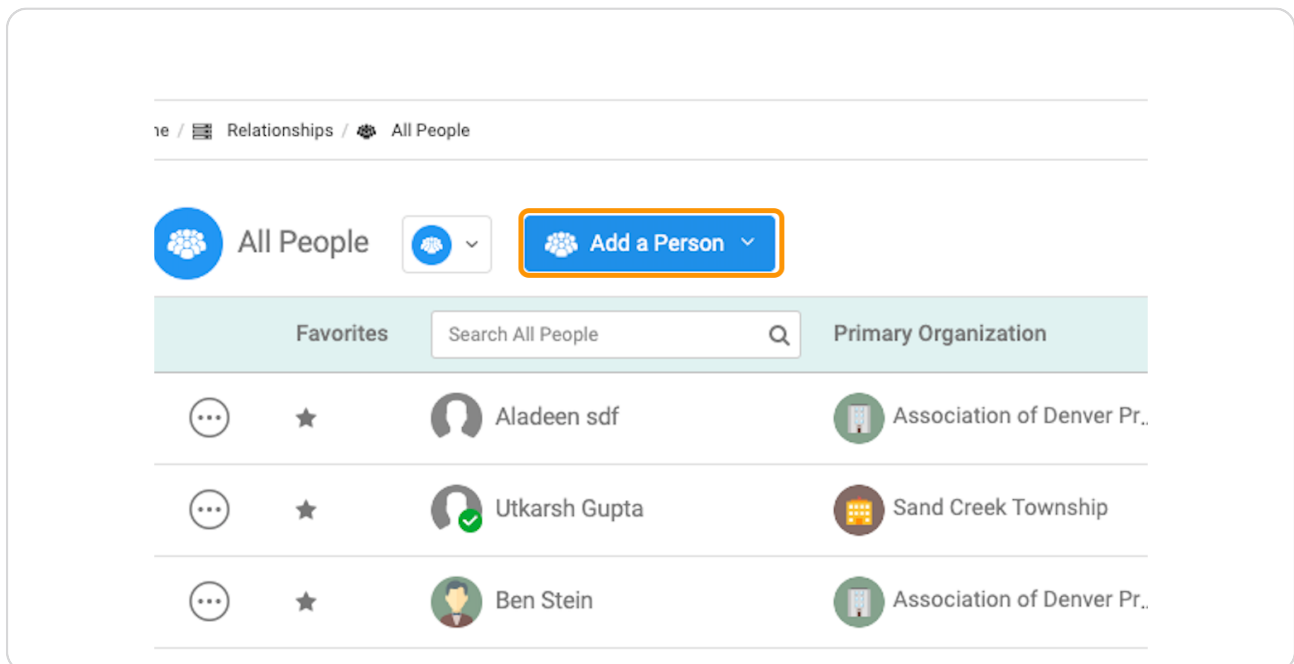
STEP 3

Click on All People



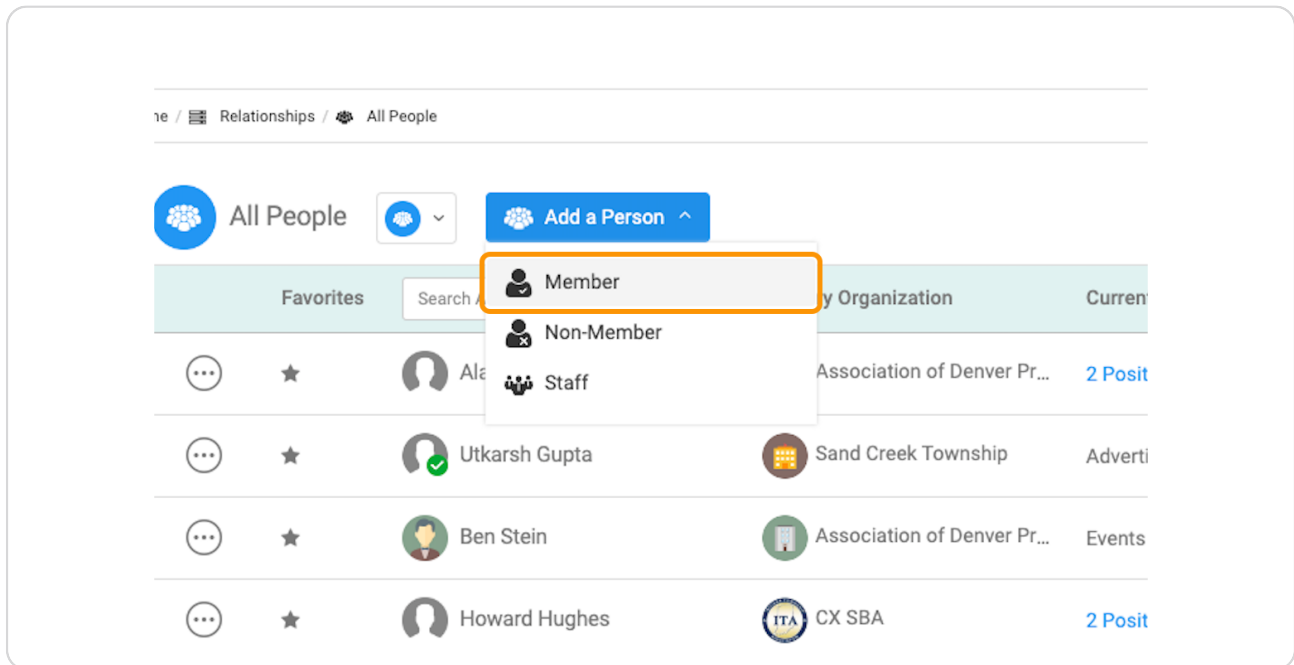
STEP 4

Click on Add a Person



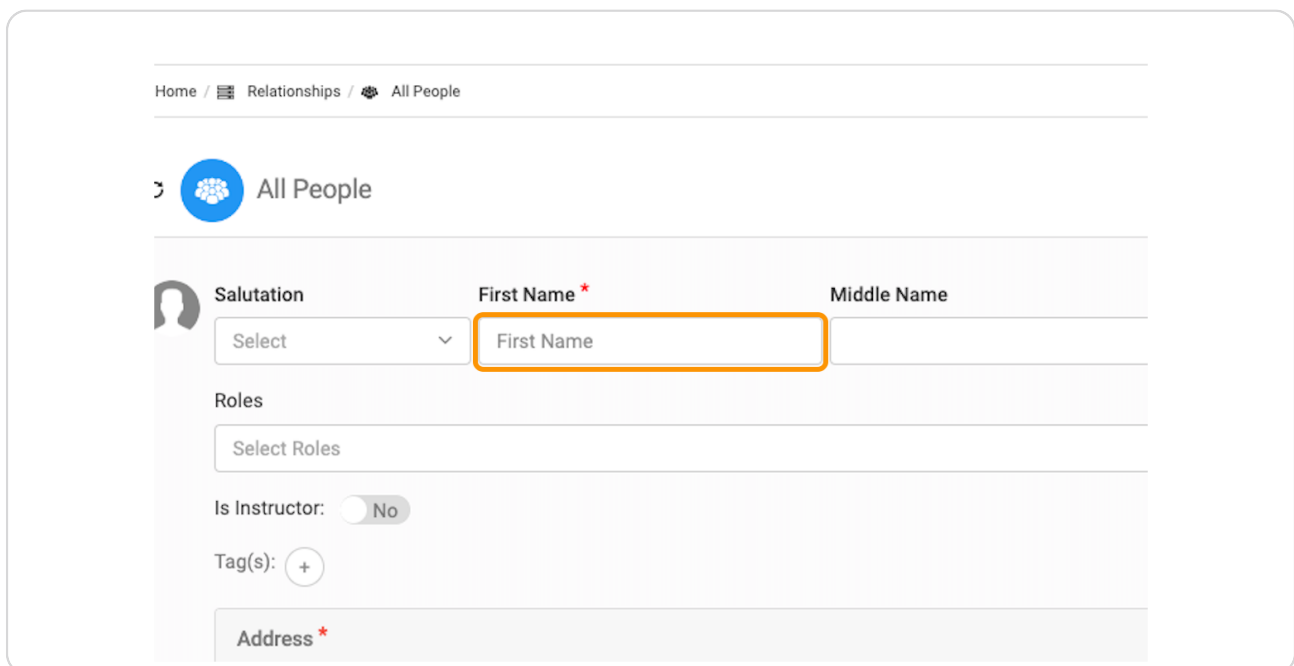
STEP 5

Choose what type of person you are adding, Member, Non-Member or Staff



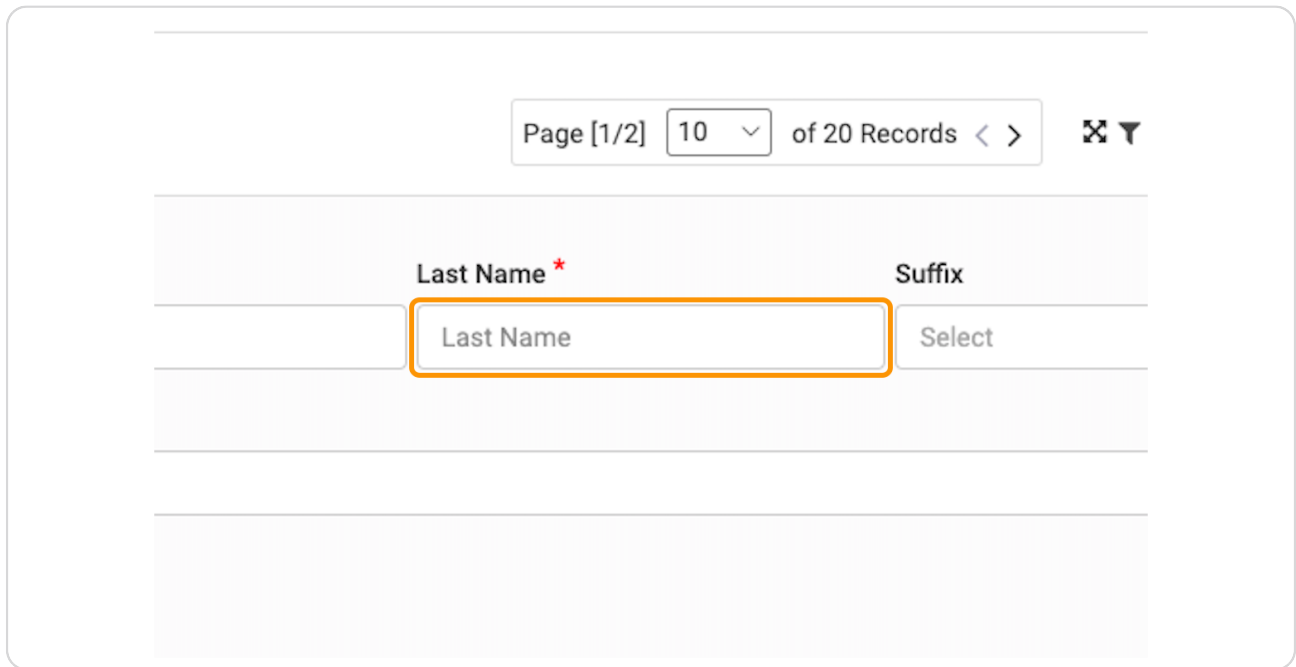
STEP 6

Enter First Name



STEP 7

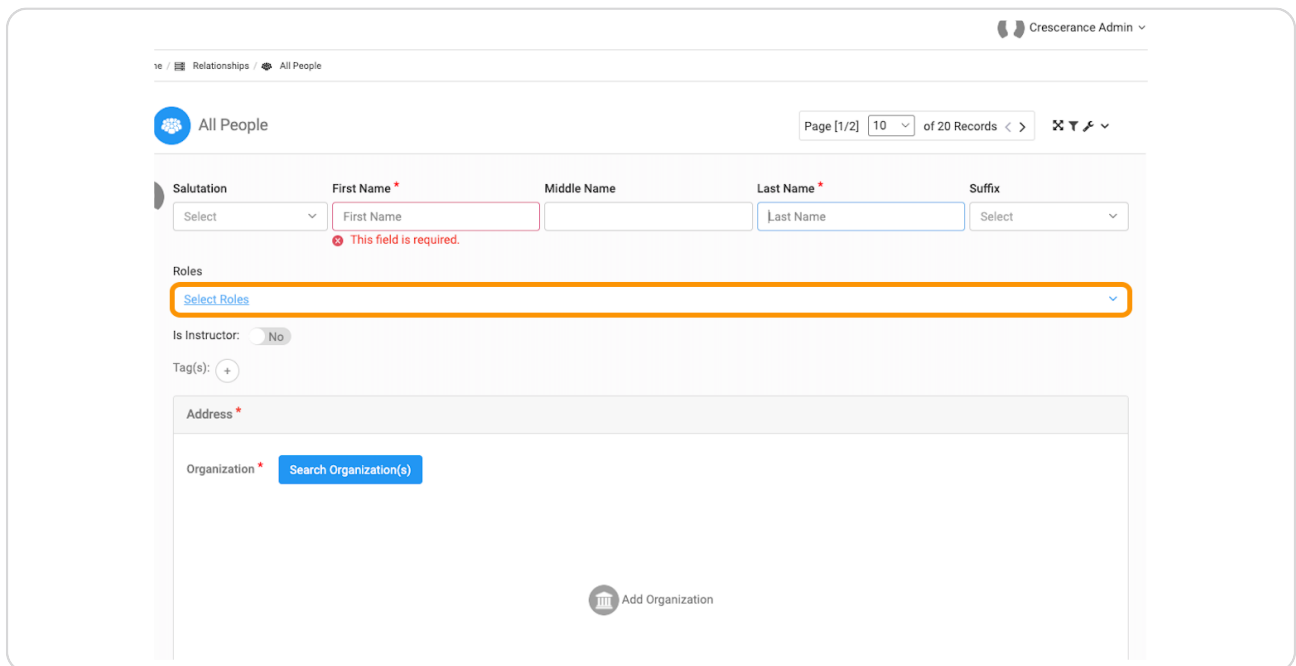
Enter Last Name



A screenshot of a web form. At the top, there is a pagination control showing "Page [1/2] 10 of 20 Records" with navigation arrows and a search icon. Below this is a table with two columns: "Last Name *" and "Suffix". The "Last Name" column has a text input field containing "Last Name", which is highlighted with an orange border. The "Suffix" column has a dropdown menu with "Select" as the current option.

STEP 8

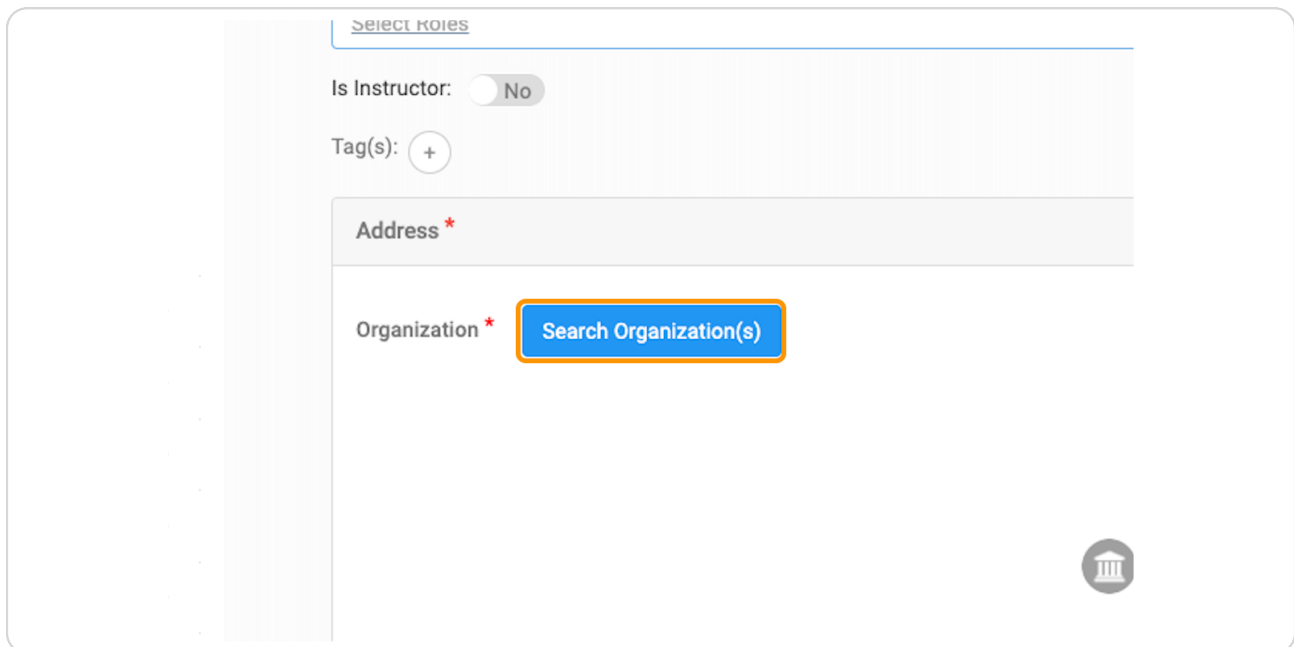
Click on Select Roles and select the role for the person you are adding



A screenshot of a web form for adding a person. The form is titled "All People" and has a pagination control showing "Page [1/2] 10 of 20 Records". The form fields are: "Salutation" (dropdown), "First Name *" (text input with "First Name" and a red error message "This field is required."), "Middle Name" (text input), "Last Name *" (text input with "Last Name"), and "Suffix" (dropdown). Below these is a "Roles" section with a dropdown menu showing "Select Roles" (highlighted with an orange border). There is also a toggle for "Is Instructor" set to "No" and a "Tag(s)" field with a plus icon. At the bottom, there is an "Address *" section with an "Organization *" field and a "Search Organization(s)" button, and an "Add Organization" button.

STEP 9

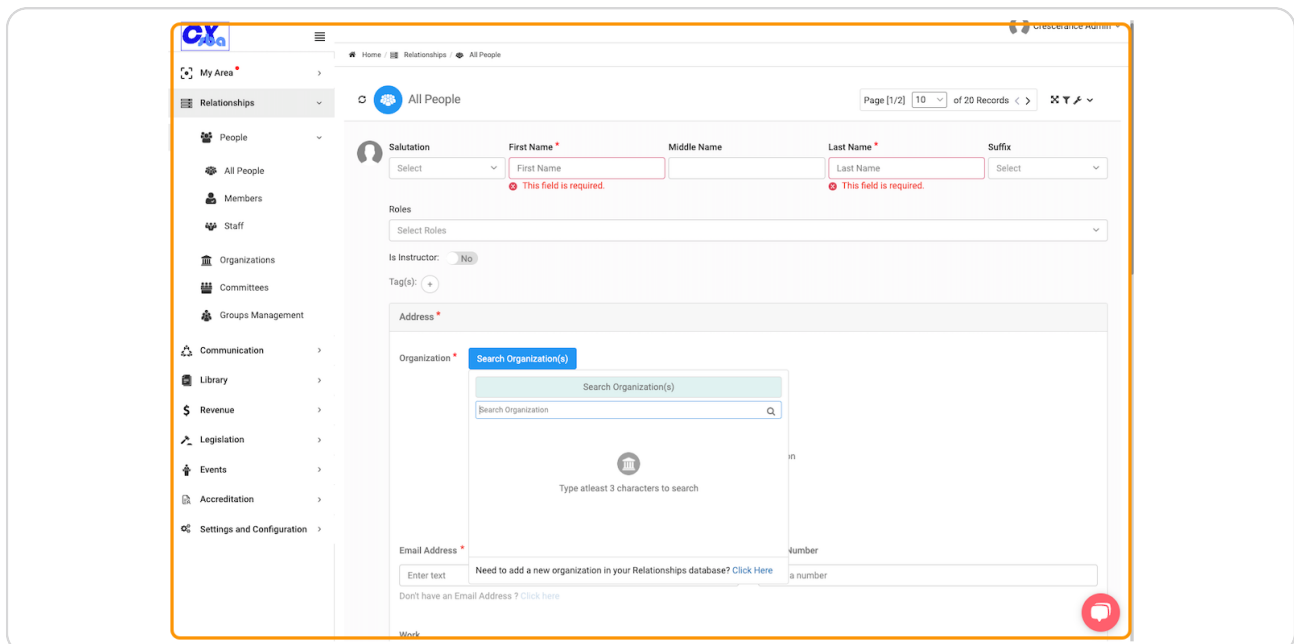
Click on Search Organization(s) to add the person's organization



The screenshot shows a form titled "Select Roles". At the top, there is a section for "Is Instructor:" with a radio button set to "No". Below that is a "Tag(s):" field with a plus sign icon. The main form area has a grey header "Address *". Below the header is the "Organization *" field, which contains a blue button labeled "Search Organization(s)". A small icon of a building is visible in the bottom right corner of the form area.

STEP 10

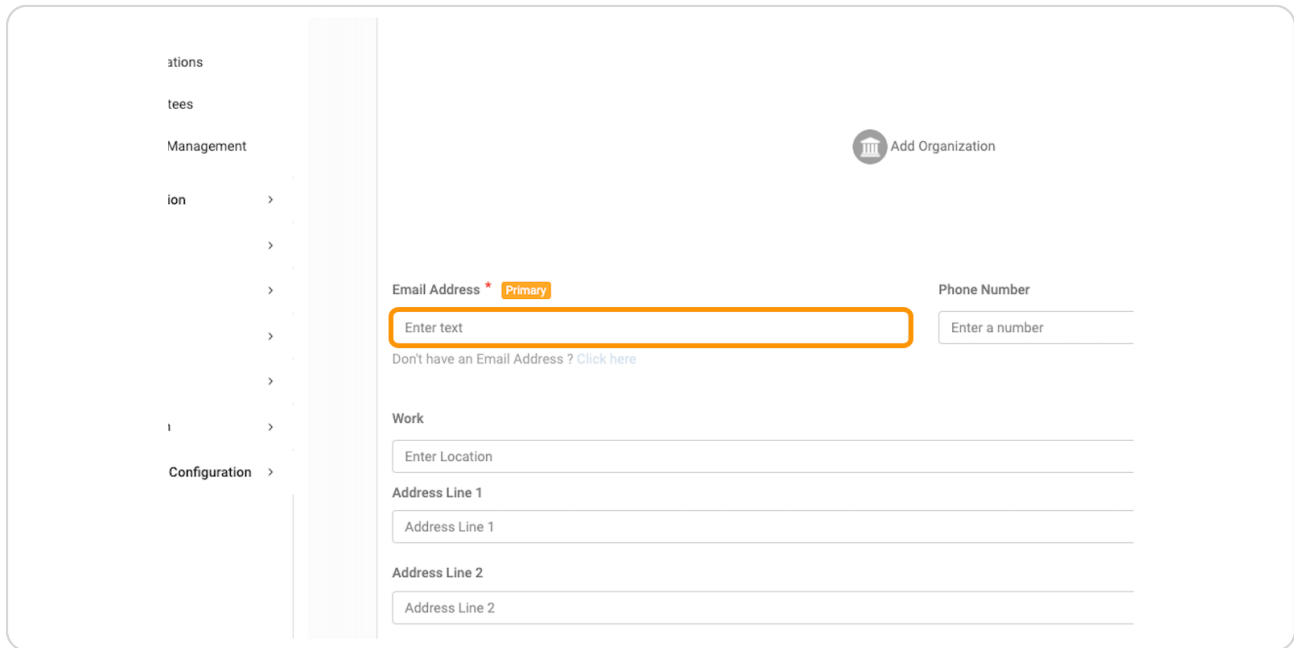
Either search for an existing organization or add a new organization to the database



The screenshot shows the "All People" form in a web application. The form is titled "All People" and has a breadcrumb trail: Home > Relationships > All People. The form includes fields for "Salutation", "First Name *", "Middle Name", "Last Name *", and "Suffix". Below these are "Roles" (a dropdown menu), "Is Instructor:" (radio buttons), and "Tag(s):" (plus sign). The "Address *" field is highlighted in grey. Below it is the "Organization *" field, which contains a blue button labeled "Search Organization(s)". A search modal is open over this field, showing a search bar and a message: "Type atleast 3 characters to search". At the bottom of the form, there is an "Email Address *" field and a link: "Need to add a new organization in your Relationships database? Click Here". A red speech bubble icon is in the bottom right corner.

STEP 11

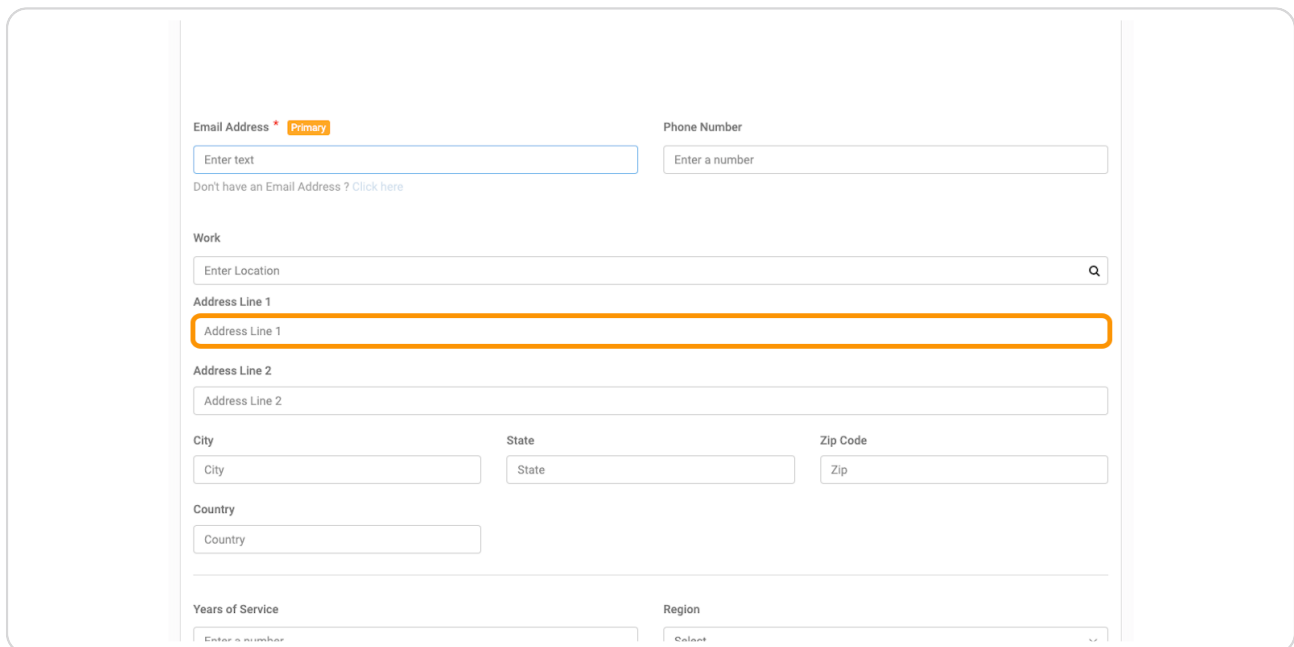
Enter an email address. If the person doesn't have an email address, click on 'Don't have an Email Address' and the system will auto-generate one



The screenshot shows a web interface for adding an organization. On the left is a navigation menu with items like 'ations', 'tees', 'Management', 'ion', and 'Configuration'. The main content area is titled 'Add Organization' and contains several input fields. The 'Email Address' field is highlighted with an orange border and contains the placeholder text 'Enter text'. Below it is a link that says 'Don't have an Email Address ? Click here'. To the right is the 'Phone Number' field with the placeholder 'Enter a number'. Below these are sections for 'Work' (with 'Enter Location' field), 'Address Line 1' (with 'Address Line 1' field), and 'Address Line 2' (with 'Address Line 2' field).

STEP 12

Complete the address section



This screenshot shows the same 'Add Organization' form as in Step 11, but with the 'Address Line 1' field highlighted with an orange border. The 'Email Address' field now contains the placeholder 'Enter text'. The 'Phone Number' field contains 'Enter a number'. The 'Work' section has 'Enter Location' with a search icon. The 'Address Line 1' field contains 'Address Line 1'. The 'Address Line 2' field contains 'Address Line 2'. Below these are fields for 'City', 'State', and 'Zip Code', each with its respective placeholder. There is also a 'Country' field with the placeholder 'Country'. At the bottom, there are fields for 'Years of Service' (placeholder 'Enter a number') and 'Region' (placeholder 'Select').

STEP 13

Click on Save or if you wish to send the person an invitation to complete the setup process and create a password, Click on Save & Invite

