Adding a Person to the database

13 Steps
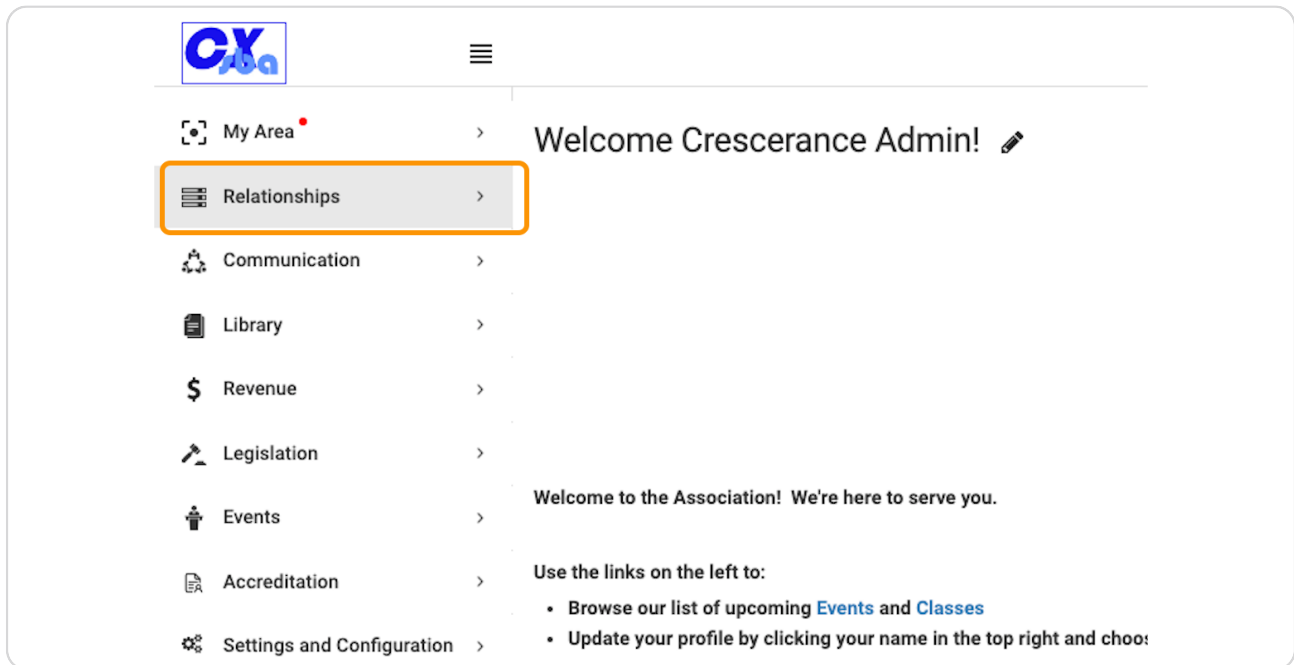
Created by	Creation Date	Last Updated
Engagifii Inc.	August 18, 2023	August 18, 2023

STEP 1

Click on Relationships

STEP 2

Click on People

STEP 3

Click on All People
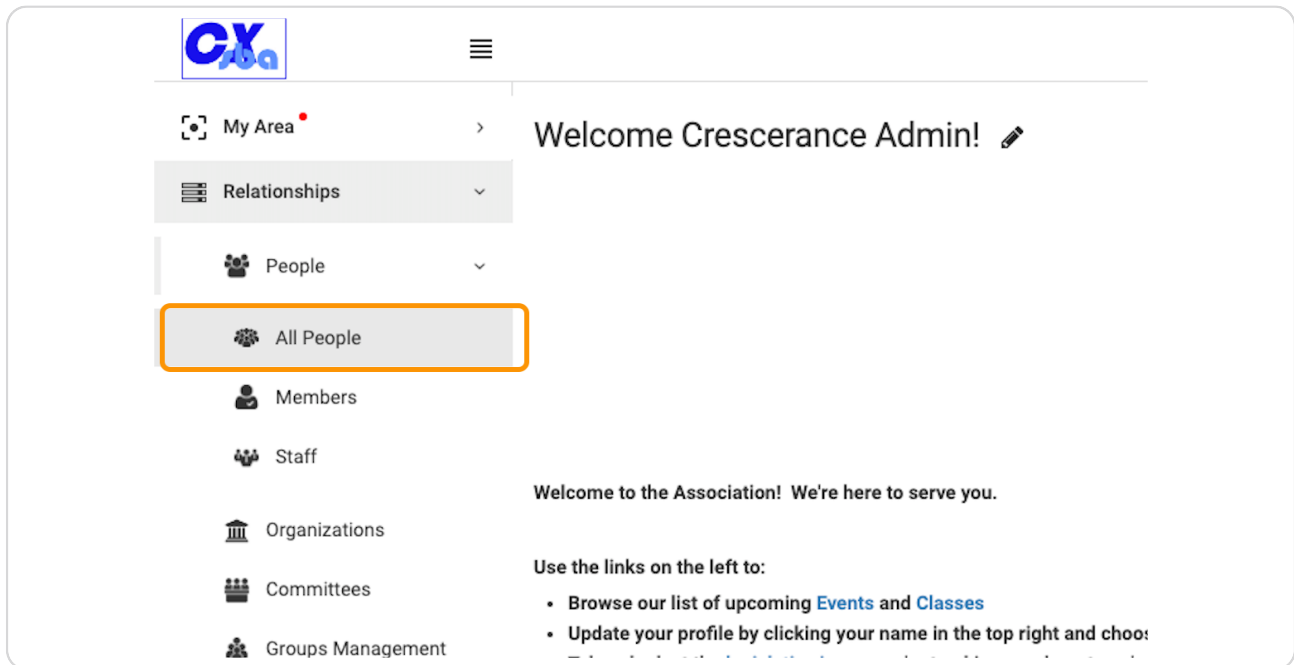
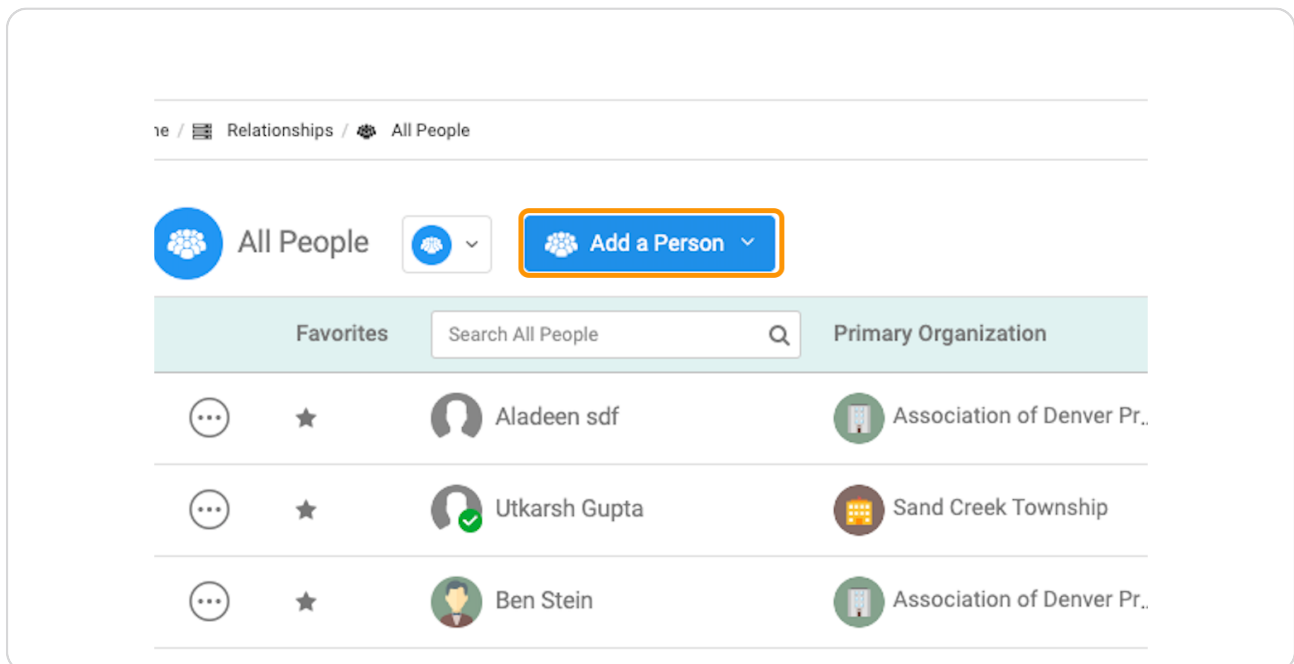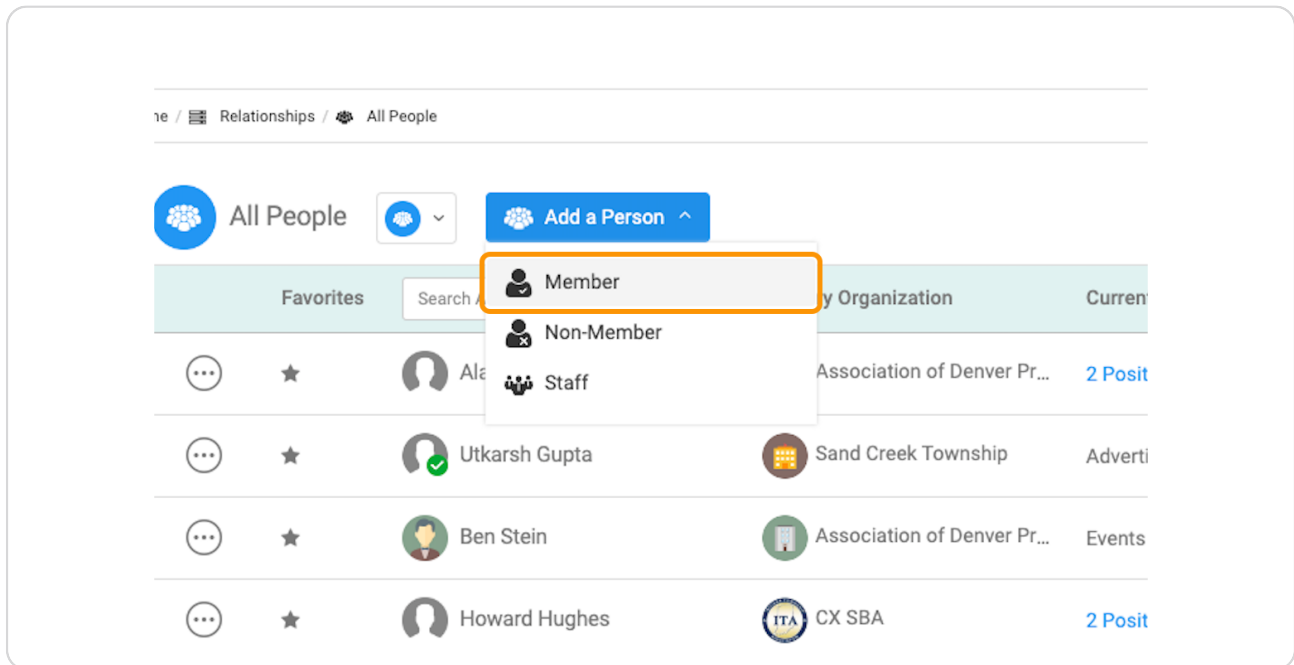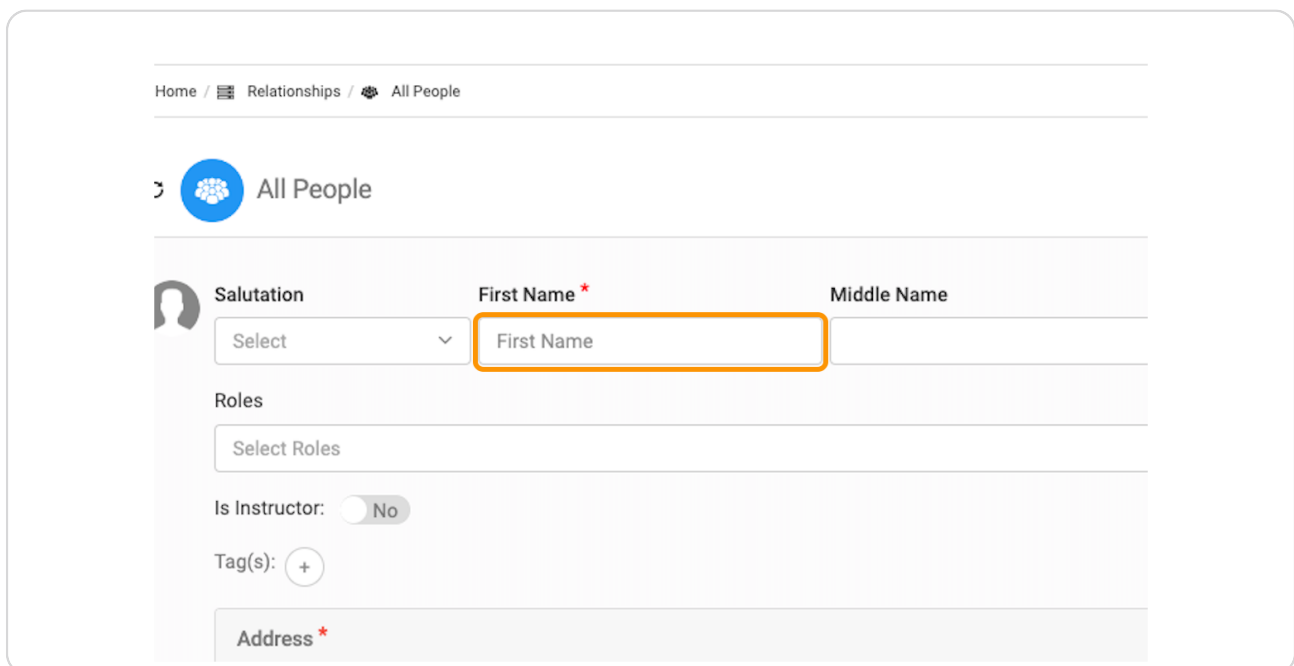**STEP 4**

Click on Add a Person

STEP 5

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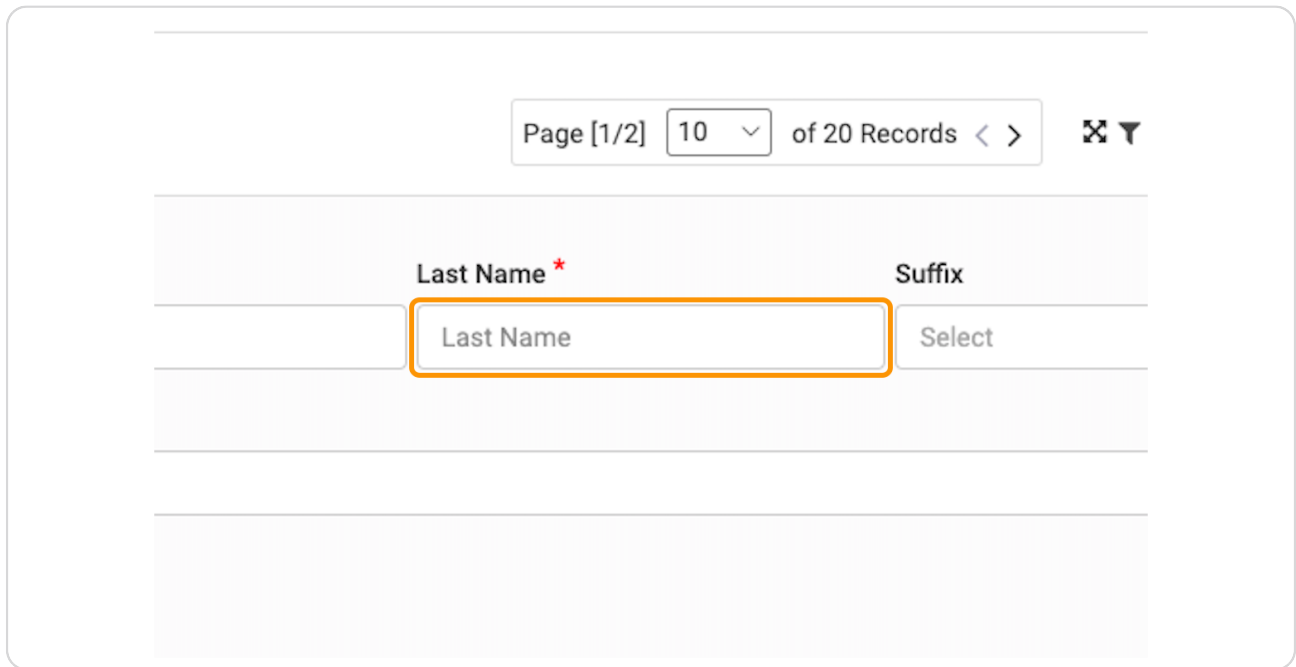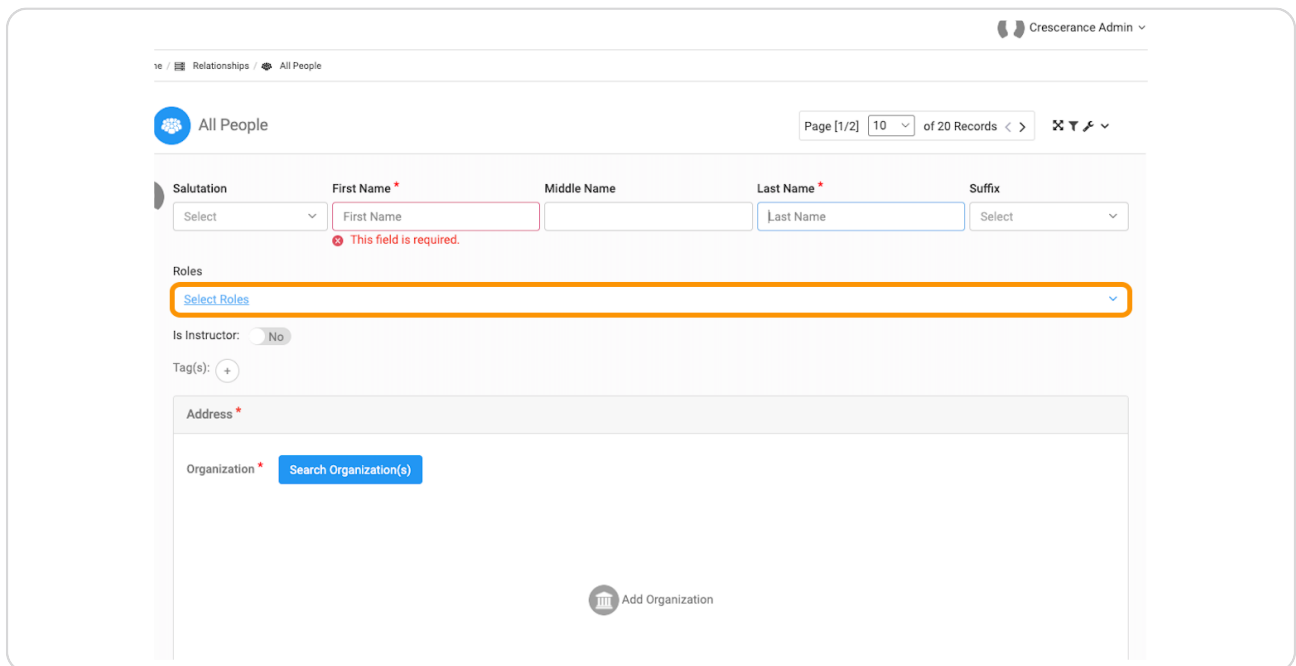

STEP 6

Enter First Name

STEP 7

Enter Last Name

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Last Name *

[Last Name]

Suffix

[Select]

STEP 8
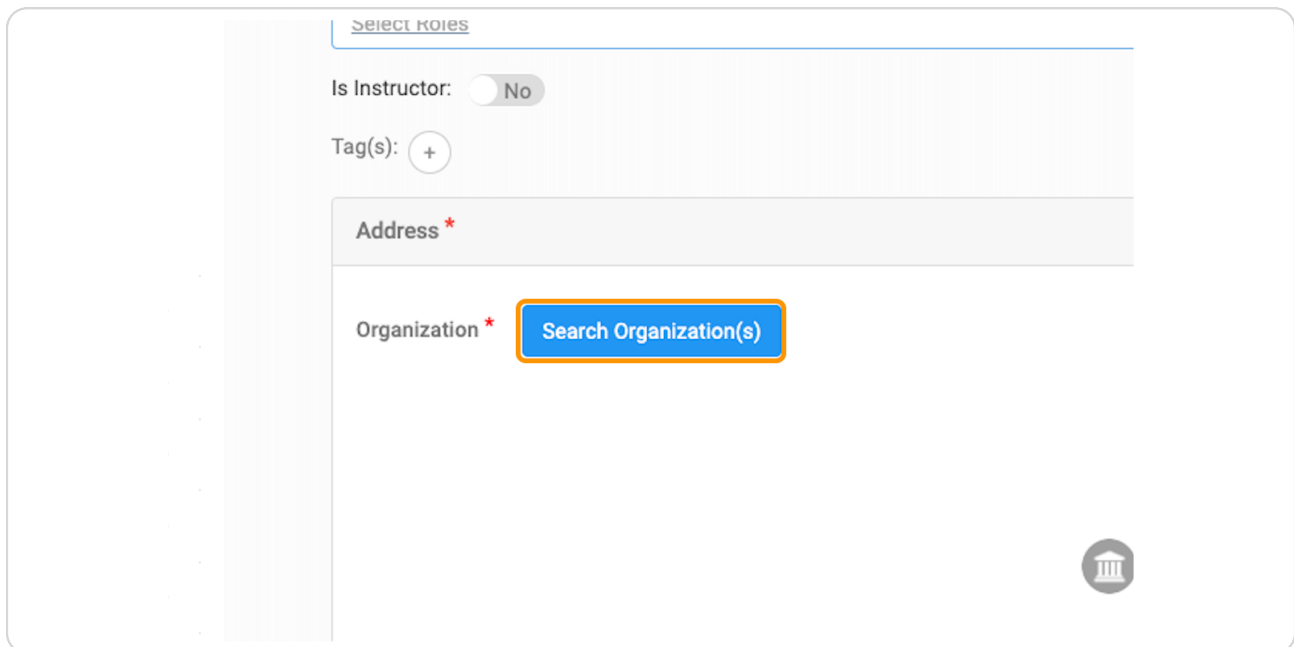
Click on Select Roles and select the role for the person you are adding

Crescerance Admin ∨

me / Relationships / All People

All People   Page [1/2] 10 of 20 Records < >

Salutation	First Name *	Middle Name	Last Name *	Suffix
Select	First Name		Last Name	Select
	⊗ This field is required.			

Roles

Select Roles   ∨

Is Instructor: No

Tag(s): +

Address *

Organization * Search Organization(s)

Add Organization

STEP 9

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

STEP 10
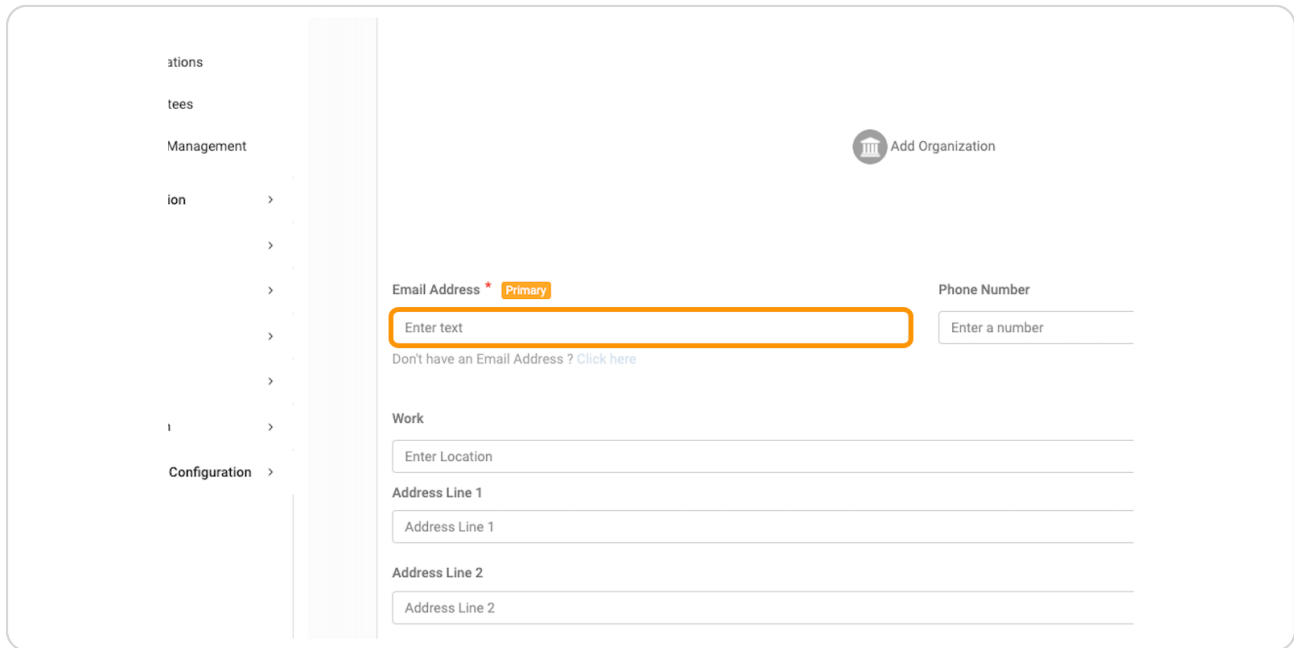
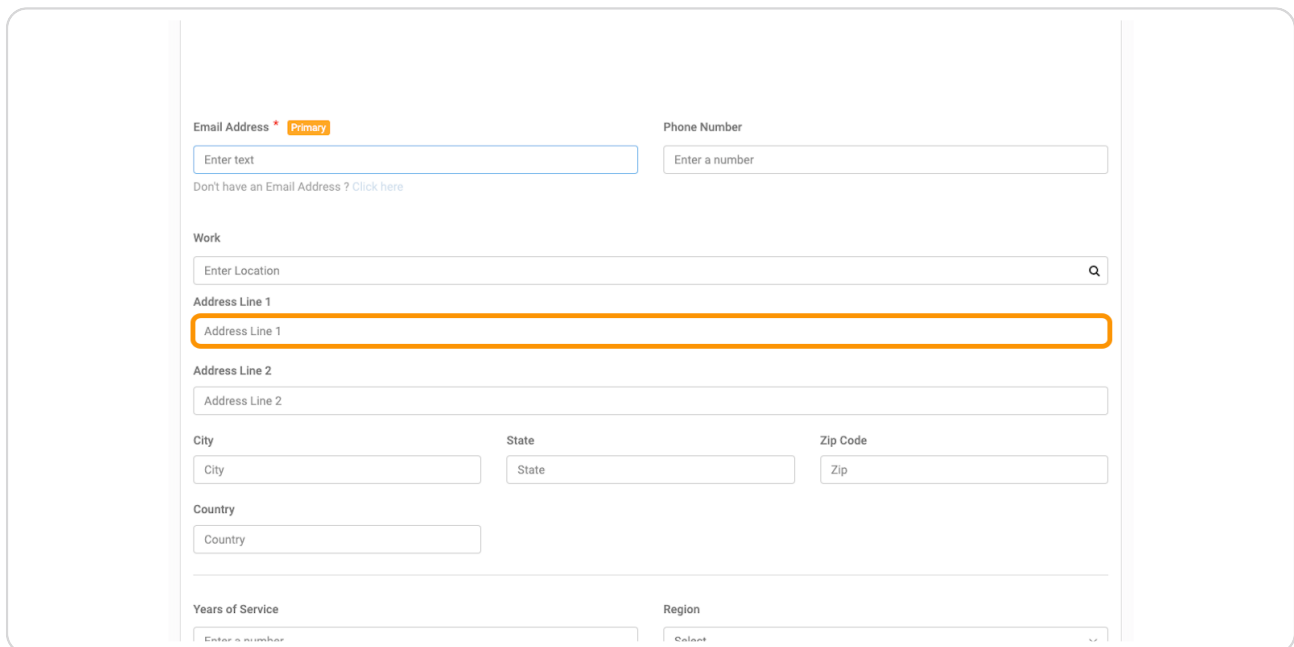# Either search for an existing organization or add a new organization to the database

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

STEP 12

Complete the address section

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