

Adding a new person without an email address

10 Steps

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Created by

Engagifii Inc.

Creation Date

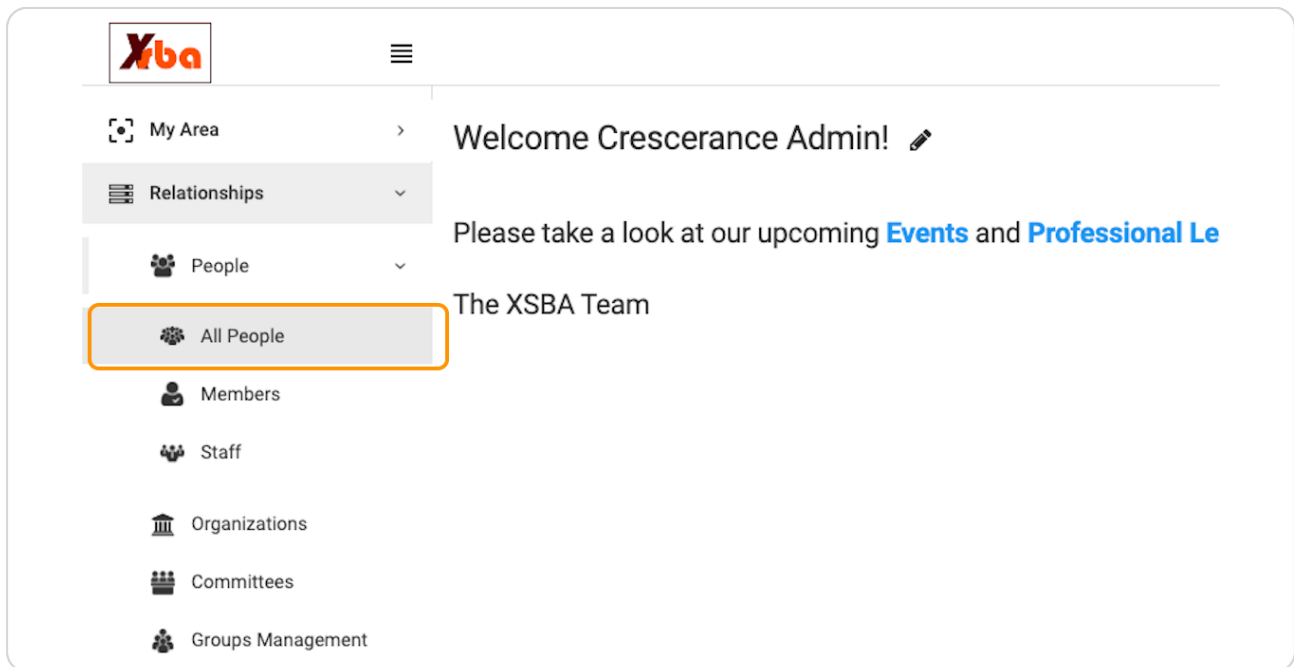
October 16, 2023

Last Updated

October 16, 2023

STEP 1

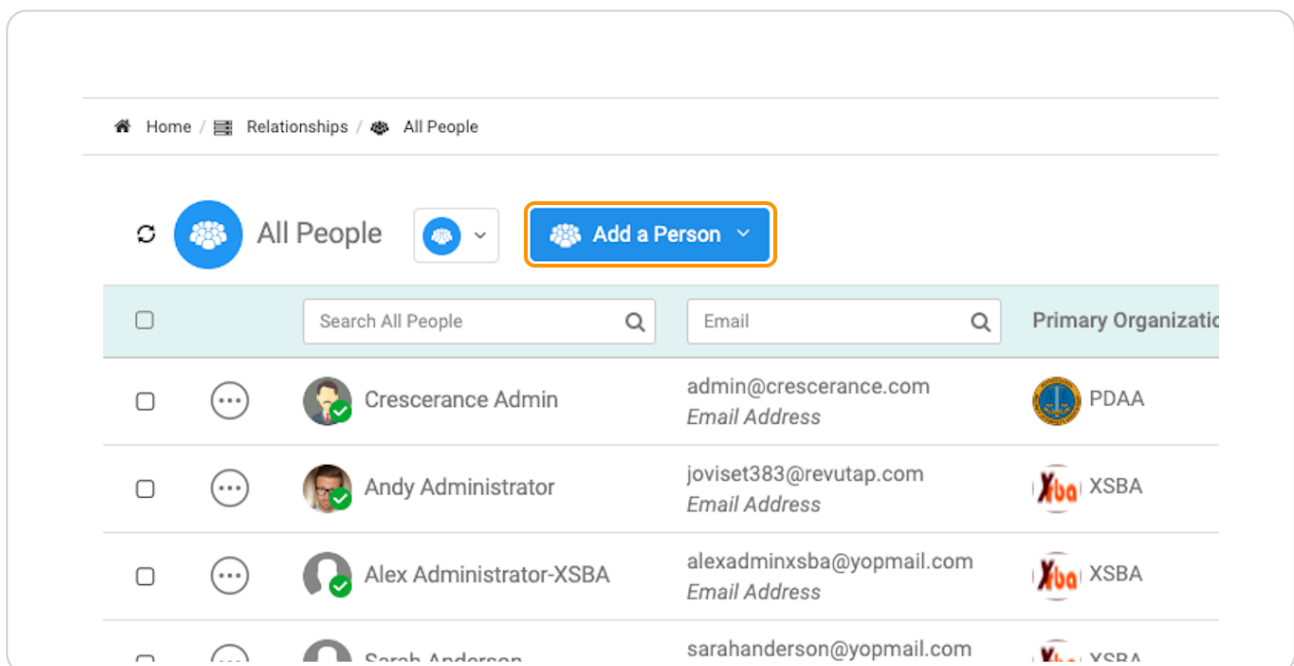
Click on Relationships, People and then All People



The screenshot shows the Xsba admin interface. The top left corner features the Xsba logo and a hamburger menu icon. Below the logo is a navigation menu with the following items: My Area, Relationships, People, All People (highlighted with an orange box), Members, Staff, Organizations, Committees, and Groups Management. The main content area displays a welcome message: "Welcome Crescerance Admin!" followed by a prompt to look at upcoming Events and Professional Le. Below this, it says "The XSBA Team".

STEP 2

Click on Add a Person

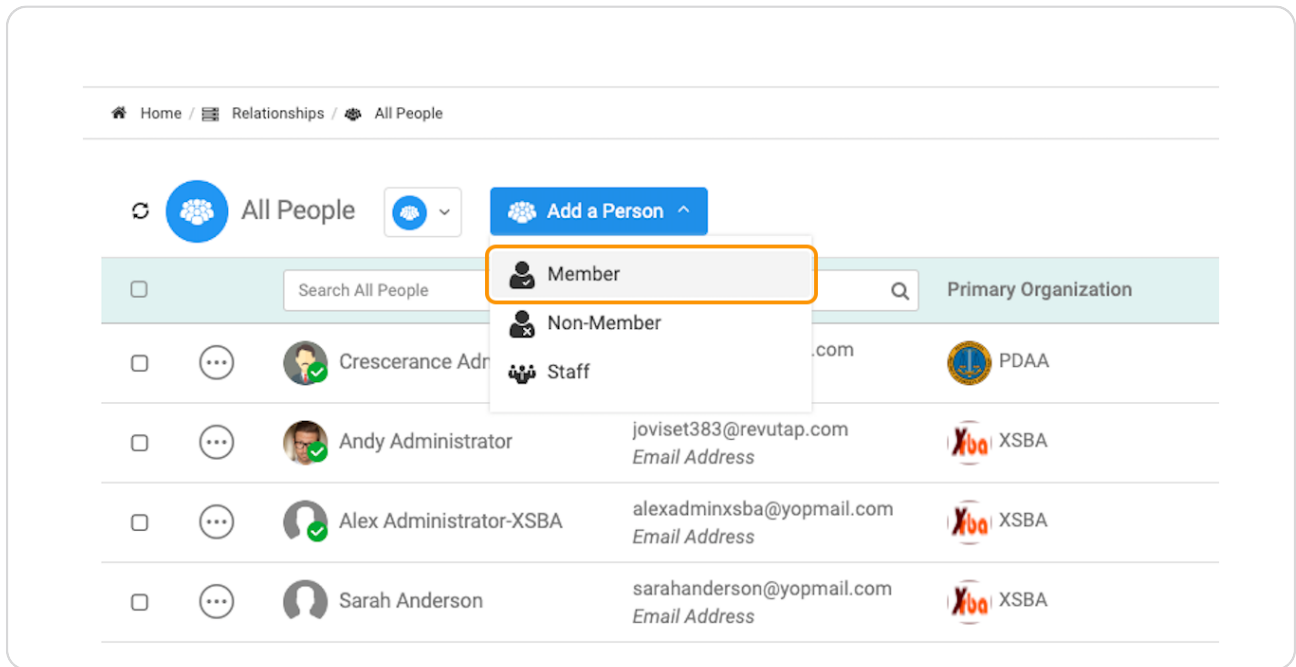


The screenshot shows the 'All People' page in the Xsba admin interface. The breadcrumb trail at the top reads: Home / Relationships / All People. Below the breadcrumb is a navigation bar with a refresh icon, a blue circle containing a person icon, the text 'All People', a dropdown menu with a person icon, and a blue button labeled 'Add a Person' (highlighted with an orange box). Below the navigation bar is a table with the following columns: a checkbox, a search input labeled 'Search All People', another search input labeled 'Email', and a column for 'Primary Organization'. The table contains the following rows:

<input type="checkbox"/>	<input type="text" value="Search All People"/>	<input type="text" value="Email"/>	Primary Organization
<input type="checkbox"/>	Crescerance Admin	admin@crescerance.com <i>Email Address</i>	PDAA
<input type="checkbox"/>	Andy Administrator	joviset383@revutap.com <i>Email Address</i>	XSBA
<input type="checkbox"/>	Alex Administrator-XSBA	alexadminxsba@yopmail.com <i>Email Address</i>	XSBA
<input type="checkbox"/>	Sarah Anderson	sarahanderson@yopmail.com	XSBA

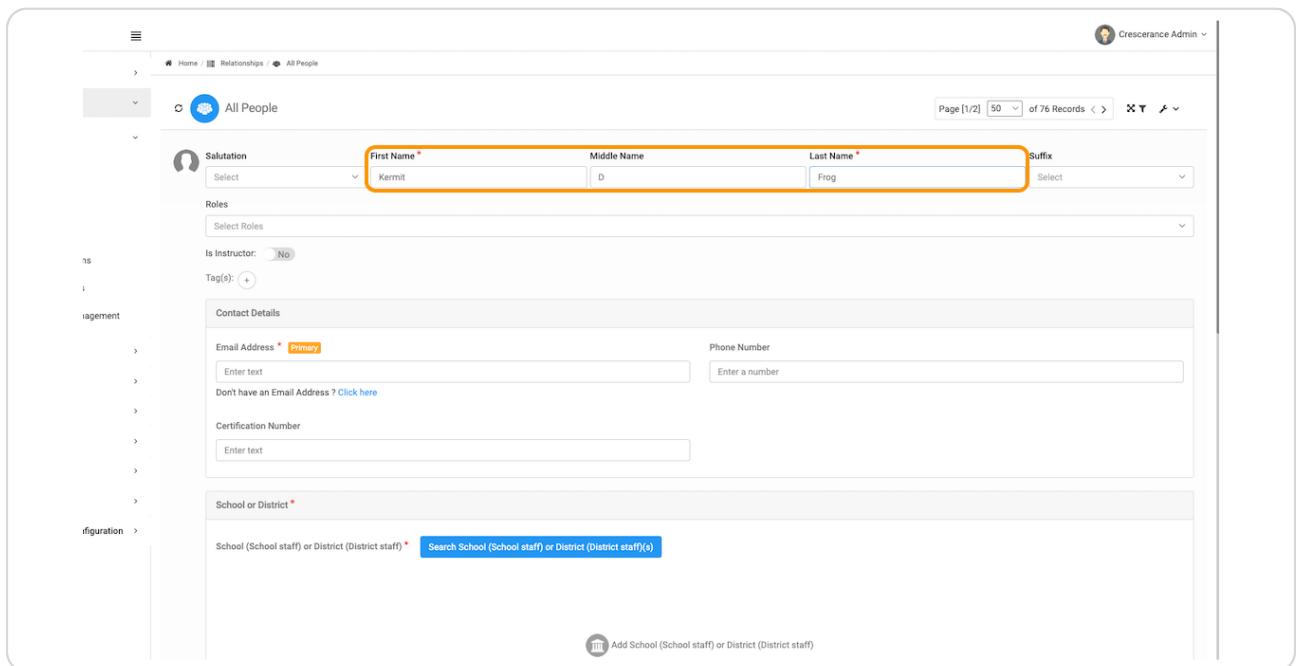
STEP 3

Chose what type of person you are adding



STEP 4

Type persons name



STEP 5

Click on [Click here](#) to have a system generated email created

Tag(s): (+)

Contact Details

Email Address * **Primary**

Enter text

Don't have an Email Address ? [Click here](#) Engagifii will generate a unique internal add

Certification Number

Enter text

School or District *

STEP 6

Once all mandatory fields are entered, click on **Save**

Certification Number

Enter text

School or District *

School (School staff) or District (District staff) * [Search School \(School staff\) or District \(District staff\)\(0\)](#)

Charlotte School District

Department: Administration
Position: Assistant Superintendent **Current** ✓

Oct 16, 2023 - present

[Add Position](#)

Personal demographics

Sex:

Date of Birth:

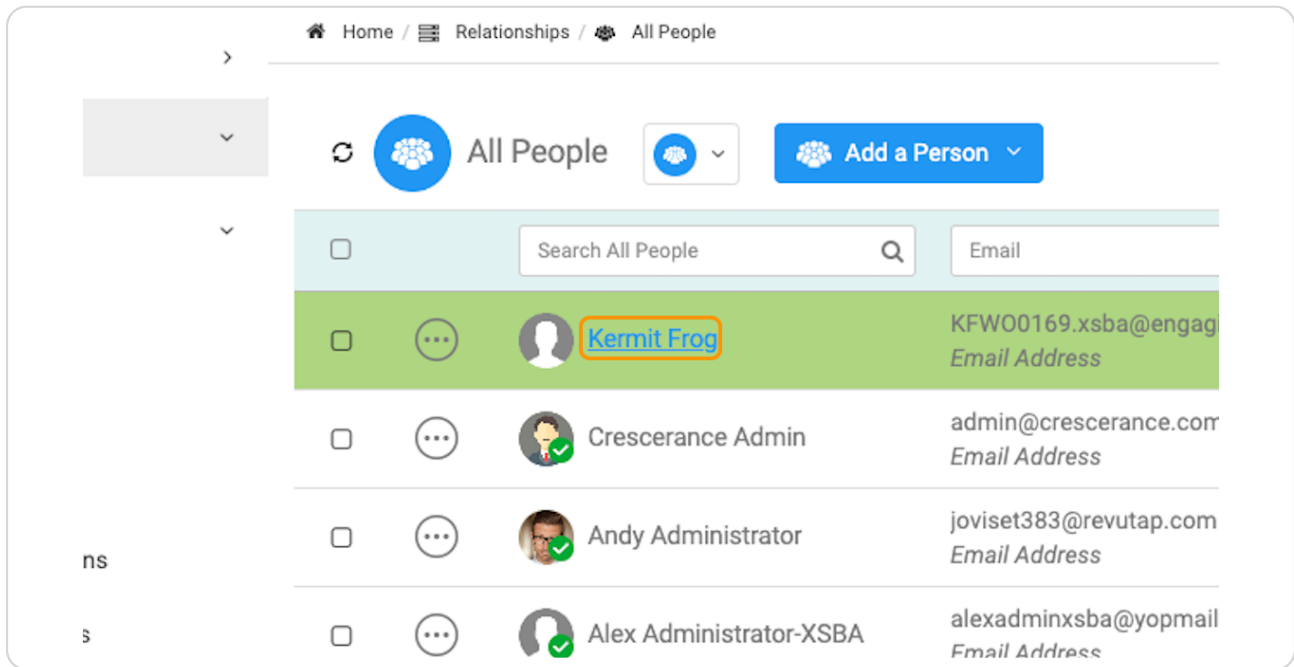
Favorite Breakfast Meal:

Close **Save** **Save & Invite**

<input type="checkbox"/>	<input type="text" value="Search All People"/>	<input type="text" value="Email"/>	<input type="text" value="Primary Organization"/>	<input type="text" value="Status"/>	<input type="text" value="Roles"/>	<input type="text" value="Current Position"/>	<input type="text" value="Tags"/>	<input type="text" value="Total Time W"/>
<input type="checkbox"/>		Crescence Admin admin@crescence.com Email Address		Active	2 Roles	2 Positions		4 mos
<input type="checkbox"/>		Andy Administrator jovise183@revitap.com Email Address		Active	Global Administrator	3 Positions	maintenance	
<input type="checkbox"/>		Alex Administrator-XSBA alexadminxaba@yopmail.com Email Address		Active	Global Administrator	Board Secretary		
<input type="checkbox"/>		carahairferson@sunmail.com						

STEP 7





To update the email address, click on the person's name



Home / Relationships / All People

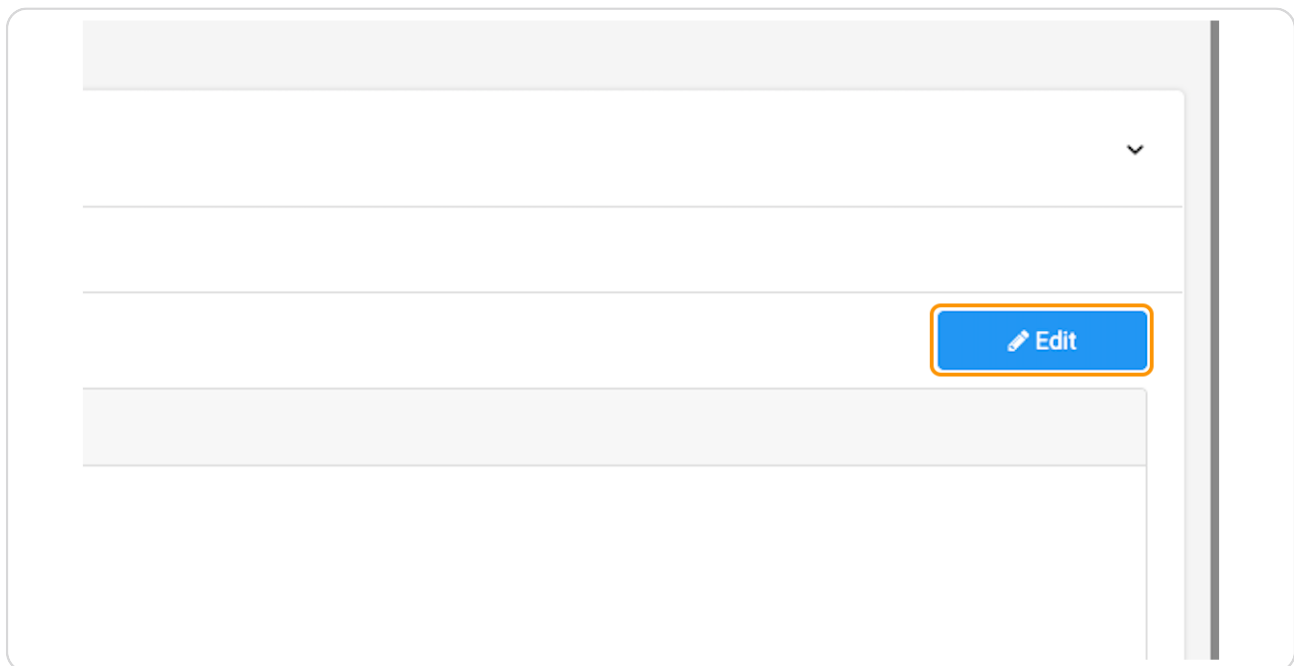
All People

Search All People

<input type="checkbox"/>	...	 Kermit Frog	KFW00169.xsba@engagifii.com <i>Email Address</i>
<input type="checkbox"/>	...	 Crescerance Admin	admin@crescerance.com <i>Email Address</i>
<input type="checkbox"/>	...	 Andy Administrator	joviset383@revutap.com <i>Email Address</i>
<input type="checkbox"/>	...	 Alex Administrator-XSBA	alexadminxsba@yopmail.com <i>Email Address</i>

STEP 8

Click on Edit



STEP 9

Type in new email address

The screenshot shows a user profile page with a sidebar on the left and a main content area. The sidebar contains a list of navigation items: All People, Members, Staff, Organizations, Committees, Groups Management, Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The main content area has a header with four tabs: GENERAL DETAILS (selected), ACCOUNTING DETAILS, EVENTS AND TRAINING, and POLITICAL INFORMATION. Below the tabs is a sub-header 'GENERAL DETAILS' and a sub-tab 'Basic Information'. The 'Contact Details' section is visible, featuring an 'Email Address' field with a 'Primary' label, a 'Phone Number' field, and an 'Address' section with fields for 'Enter Location', 'Address Line 1', 'Address Line 2', 'City', and 'State'. The 'Email Address' field is highlighted with an orange border and contains the text 'kermidfrog@yopmail.com'.

STEP 10

Click on Save

The screenshot shows a close-up of the bottom right corner of a form. It features a 'Cancel' button and a 'Save' button. The 'Save' button is highlighted with an orange border and has a small dropdown arrow to its right. The form also includes a vertical scrollbar on the right side.

