

Adding an Instructor

9 Steps [View most recent version](#) 

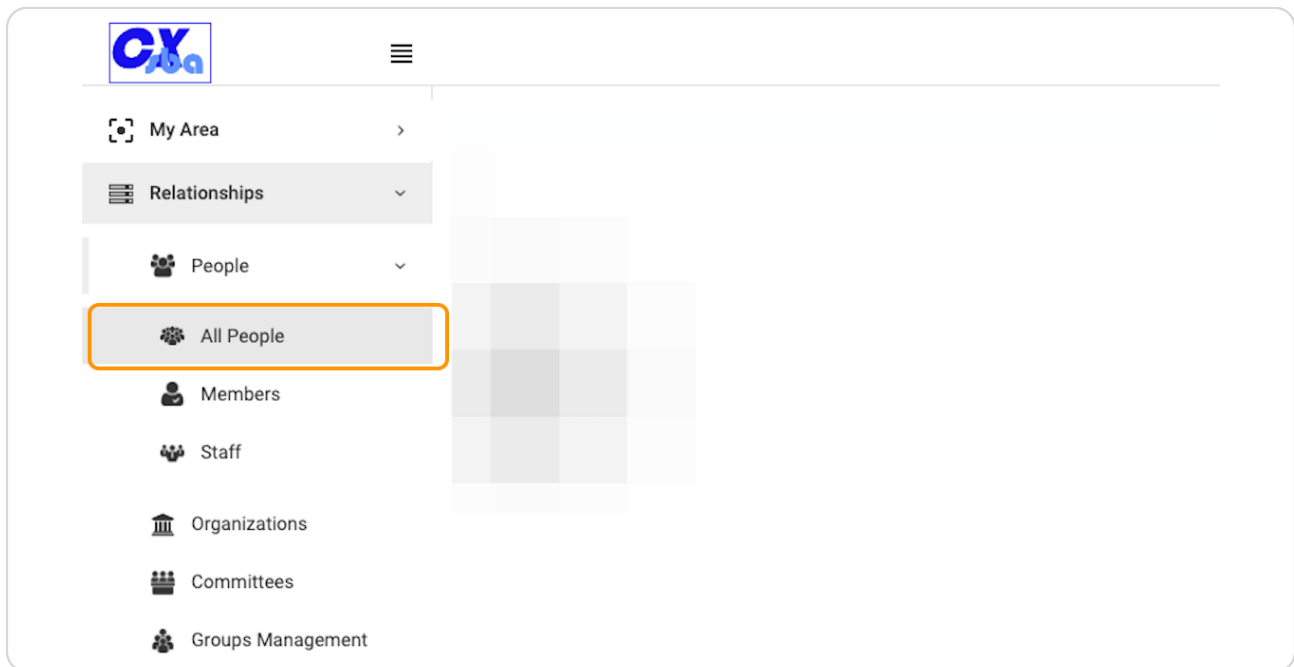
Created by
Engagifii Inc.

Creation Date
October 27, 2023

Last Updated
October 27, 2023

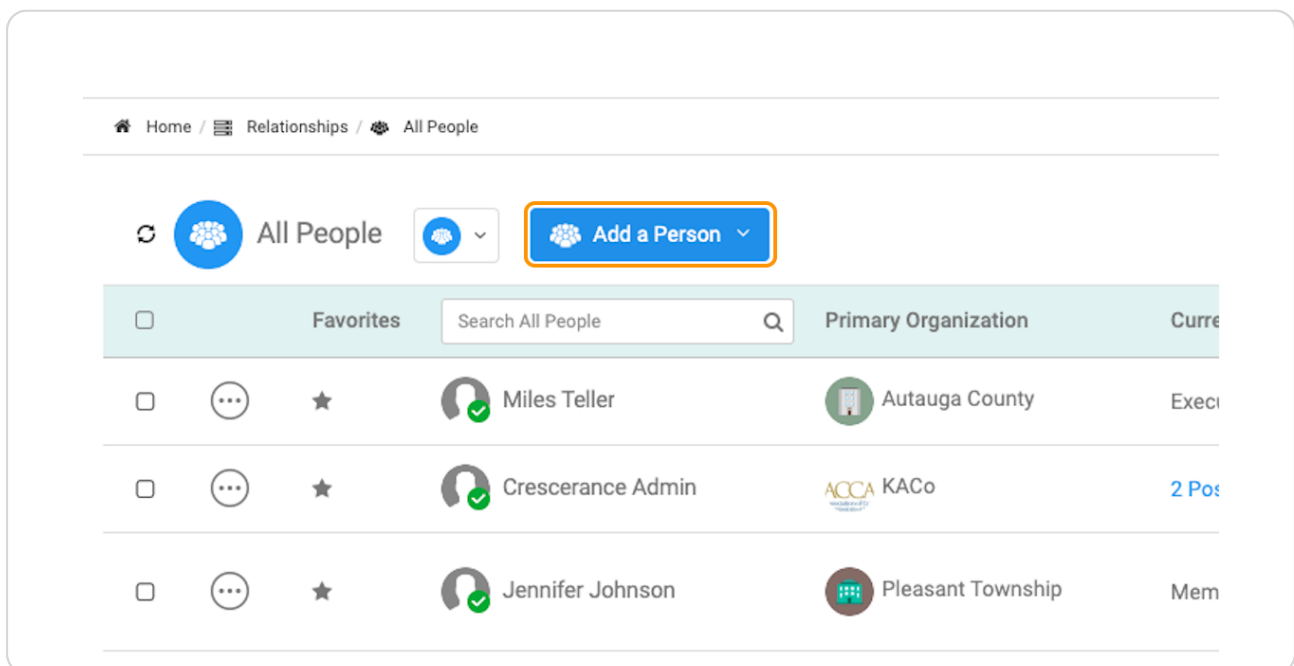
STEP 1

Click on Relationships, People and All People



STEP 2

Click on Add a Person



STEP 3

Click on Person Type

The screenshot shows the 'All People' page with a navigation breadcrumb: Home / Relationships / All People. Below the breadcrumb, there is a refresh icon, a circular icon with a person silhouette, the text 'All People', a dropdown arrow, and a blue button labeled 'Add a Person' with an upward arrow. A dropdown menu is open from the 'Add a Person' button, showing three options: 'Member' (with a person icon), 'Non-Member' (with a person icon), and 'Staff' (with a group of people icon). The menu is highlighted with an orange border. Below the menu, a table lists people with columns for 'Favorites', 'Search', 'Person', 'Organization', and 'Current Position'. The table contains four rows of data, including 'Crescerance Admin' at 'ACCA KACo' and 'Jennifer Johnson' at 'Pleasant Township'.

STEP 4

Enter the name

The screenshot shows the 'Add a Person' form on the 'All People' page. The breadcrumb is Home / Relationships / All People. At the top right, there is a pagination control: Page [1/3] 10 of 26 Records. The form has several sections: 'Salutation' with a dropdown menu; 'First Name', 'Middle Name', and 'Last Name' text input fields, which are highlighted with an orange border; and 'Suffix' with a dropdown menu. Below these are sections for 'Roles' (with a 'Select Roles' button), 'Is Instructor' (with a toggle set to 'No'), and 'Tag(s)' (with a plus icon). The 'Contact Info' section has a note: '(At least one Email Address OR Phone Number is required)'. The 'Organization' section has a 'Search Organization(s)' button and an 'Add Organization' button with a building icon. At the bottom, there is a 'Personal Email' field.

STEP 5

Click on Select Roles

Relationships All People

Crescerance Admin

All People Page [1/31] 10 of 26 Records

Salutation First Name Middle Name Last Name Suffix

Roles

Select Roles

Is Instructor: No

Tag(s):

Contact Info (At least one Email Address OR Phone Number is required)

Organization Search Organization(s)

Add Organization

Personal Email

Enter text

STEP 6

If you have created a separate role for Instructor, select from the list. If not, use one of the created roles

Staff

Organizations

Committees

Groups Management

Communication >

Library >

Revenue >

Instructor

Search Roles

Select All Clear All

Board Sec

Global Administrator

Instructor

Member

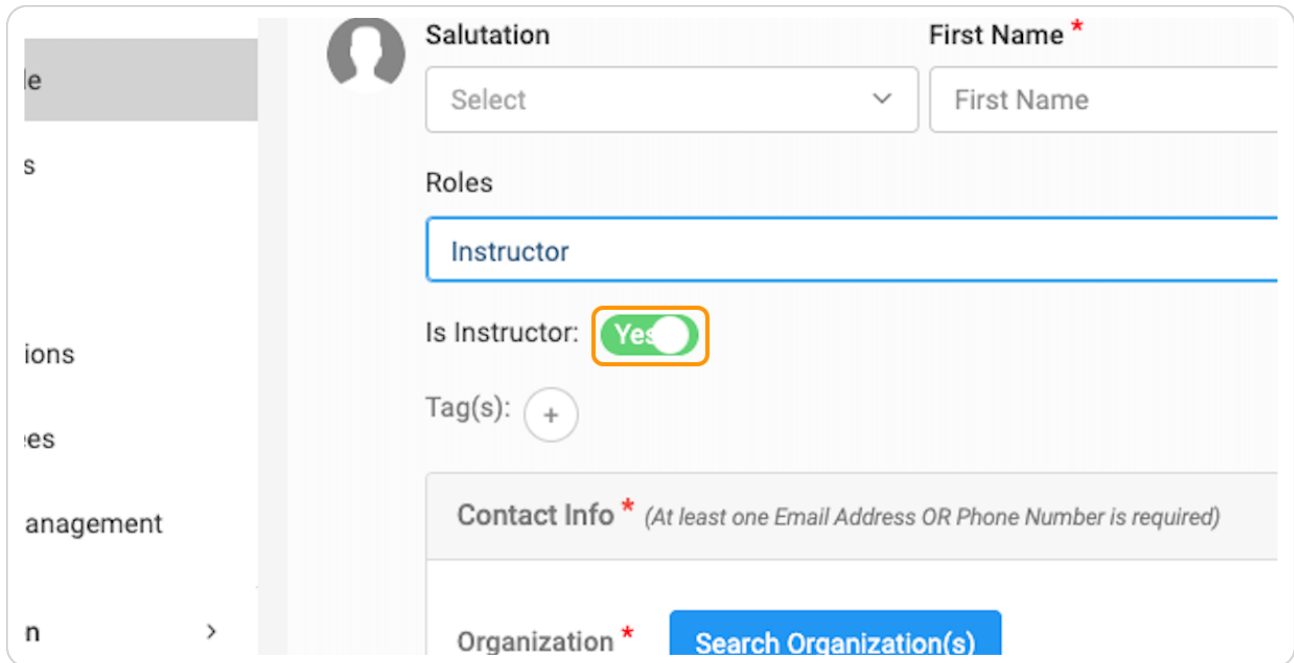
Staff User

View Only

Phone Num

STEP 7

Toggle the button to Yes



Salutation: Select

First Name: First Name

Roles: Instructor

Is Instructor: **Yes**

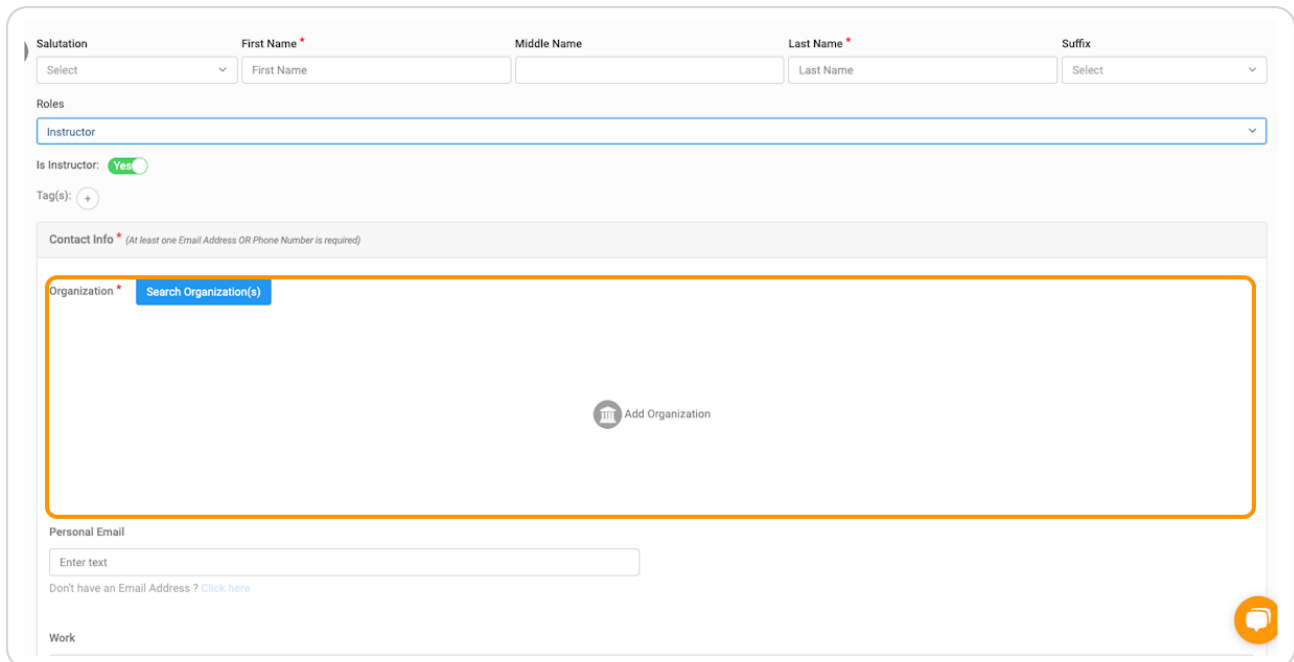
Tag(s): +

Contact Info * (At least one Email Address OR Phone Number is required)

Organization * [Search Organization\(s\)](#)

STEP 8

Finish adding the required information



Salutation: Select

First Name: First Name

Middle Name:

Last Name: Last Name

Suffix: Select

Roles: Instructor

Is Instructor: **Yes**

Tag(s): +

Contact Info * (At least one Email Address OR Phone Number is required)

Organization * [Search Organization\(s\)](#)

Add Organization

Personal Email: Enter text

Don't have an Email Address? [Click here](#)

Work

STEP 9

Click on Save or Save and Invite when finished

The screenshot shows a modal window with a light gray background. At the top, there is a large empty text input field. Below it is a smaller input field with a dropdown arrow on the right. In the center-right area, there are three buttons: a text link 'Close', a blue button with white text 'Save' (highlighted with an orange border), and another blue button with white text 'Save & Invite'. Below the buttons is a table with a light teal header and a light gray body. The table has four columns: 'Department', 'Last Updated', 'Email', and 'Status'. The first row of the table contains the following data: 'ff' in the Department column, 'Oct 10, 2023' in the Last Updated column, 'bulldogsbs@yopmail.com' in the Email column (with 'Personal Email' written below it), and 'Active' in the Status column.

Department	Last Updated	Email	Status
ff	Oct 10, 2023	bulldogsbs@yopmail.com <i>Personal Email</i>	Active

