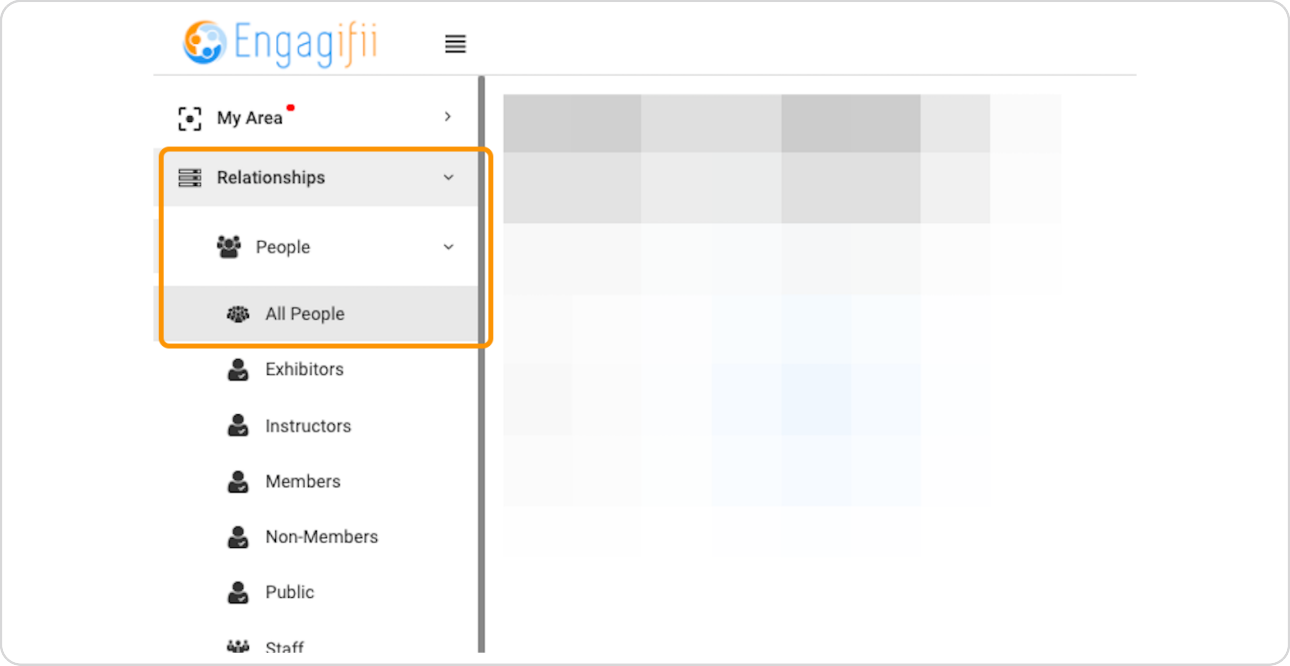
Changing Persona Types

13 Steps View most recent version

Created by	Creation Date	Last Updated
Engagifii Inc.	January 29, 2024	January 29, 2024

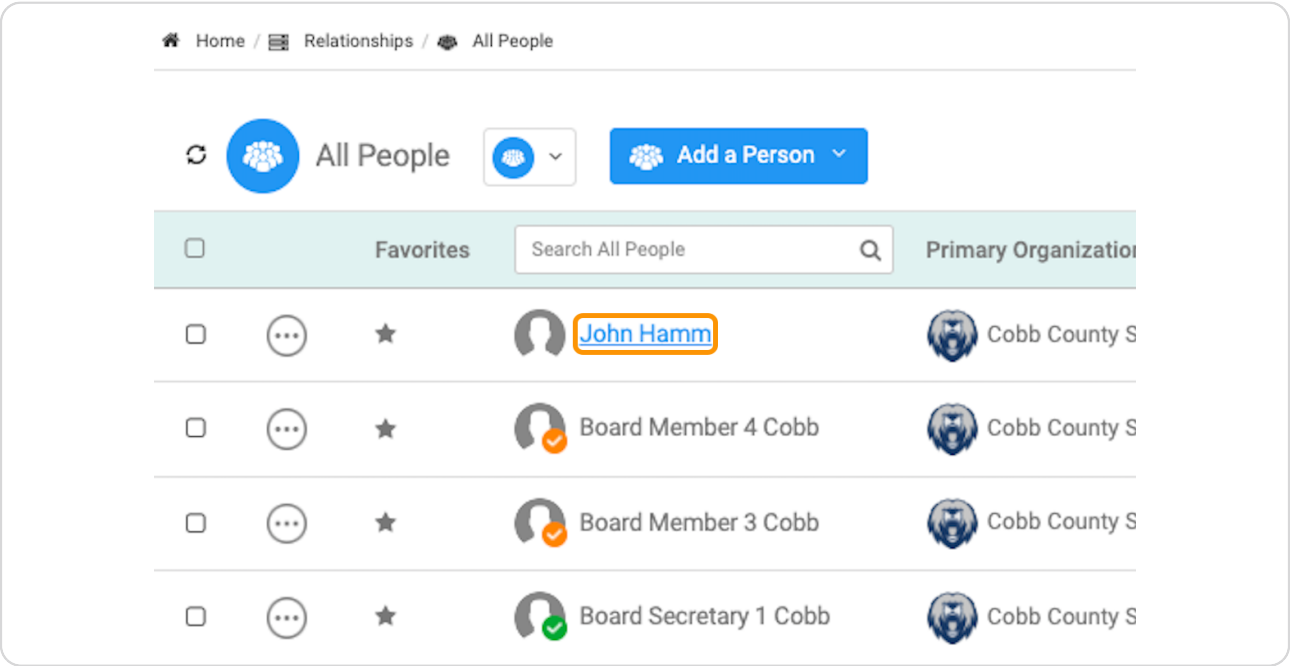
STEP 1

Click on Relationships, People and then All People



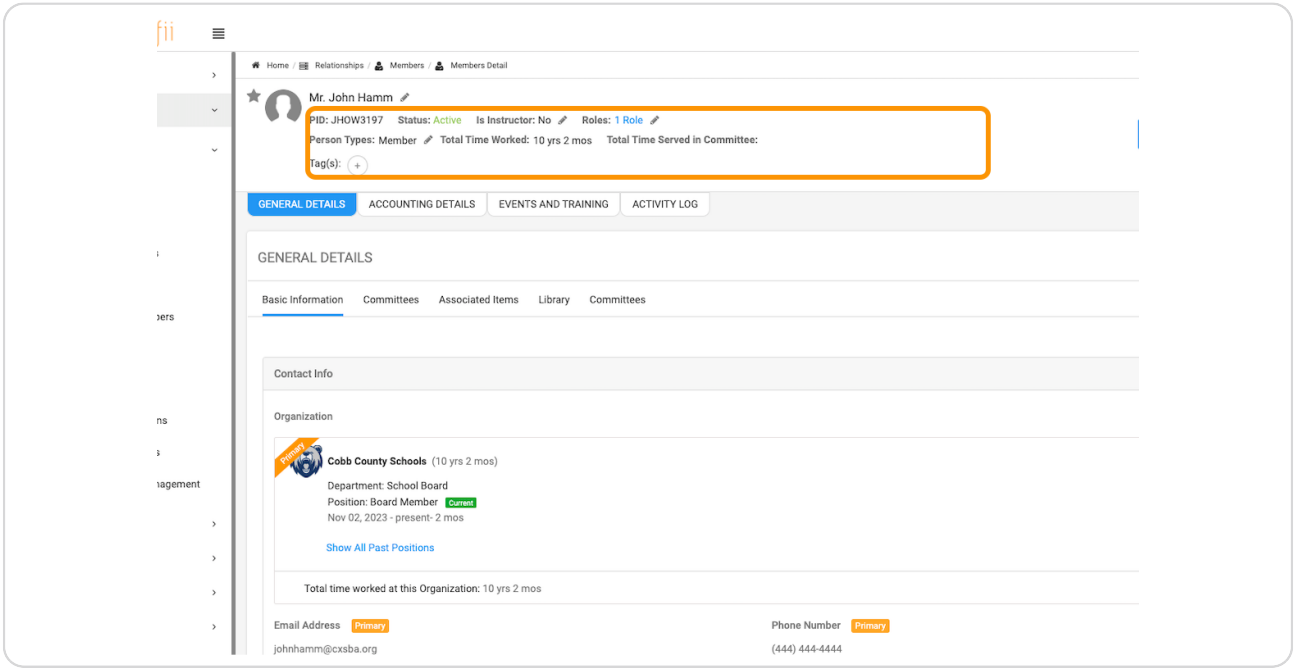
STEP 2

Click on the person you wish to update



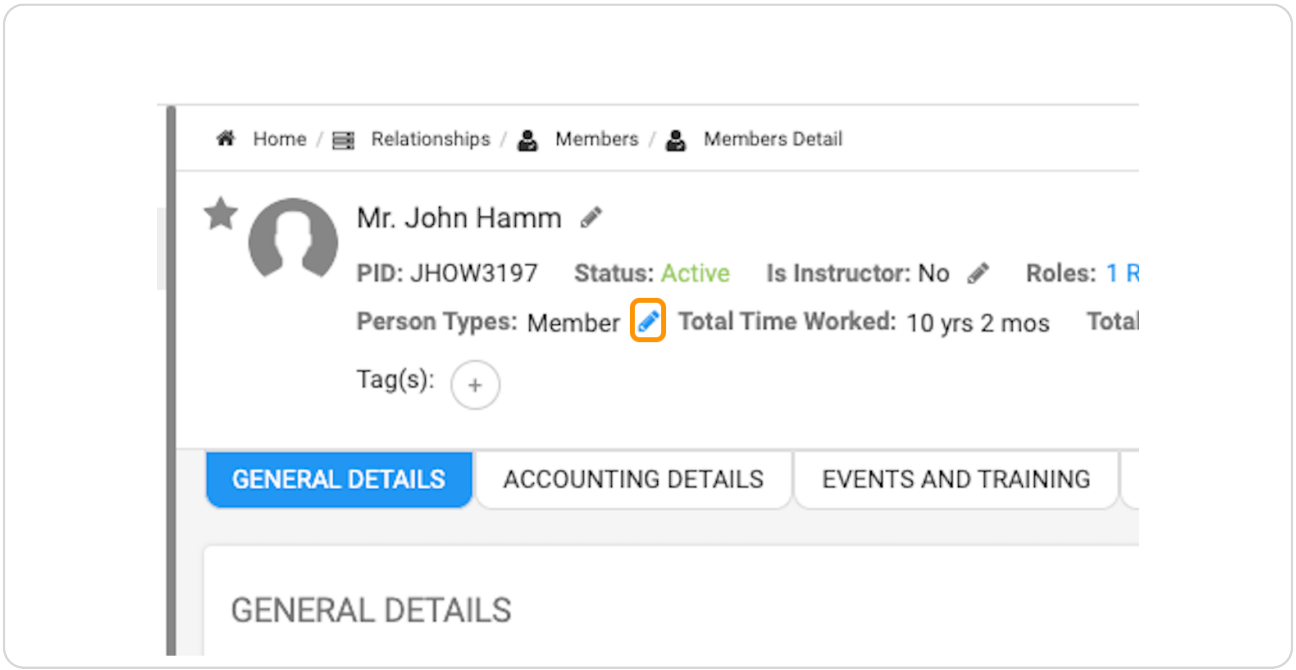
STEP 3

Y



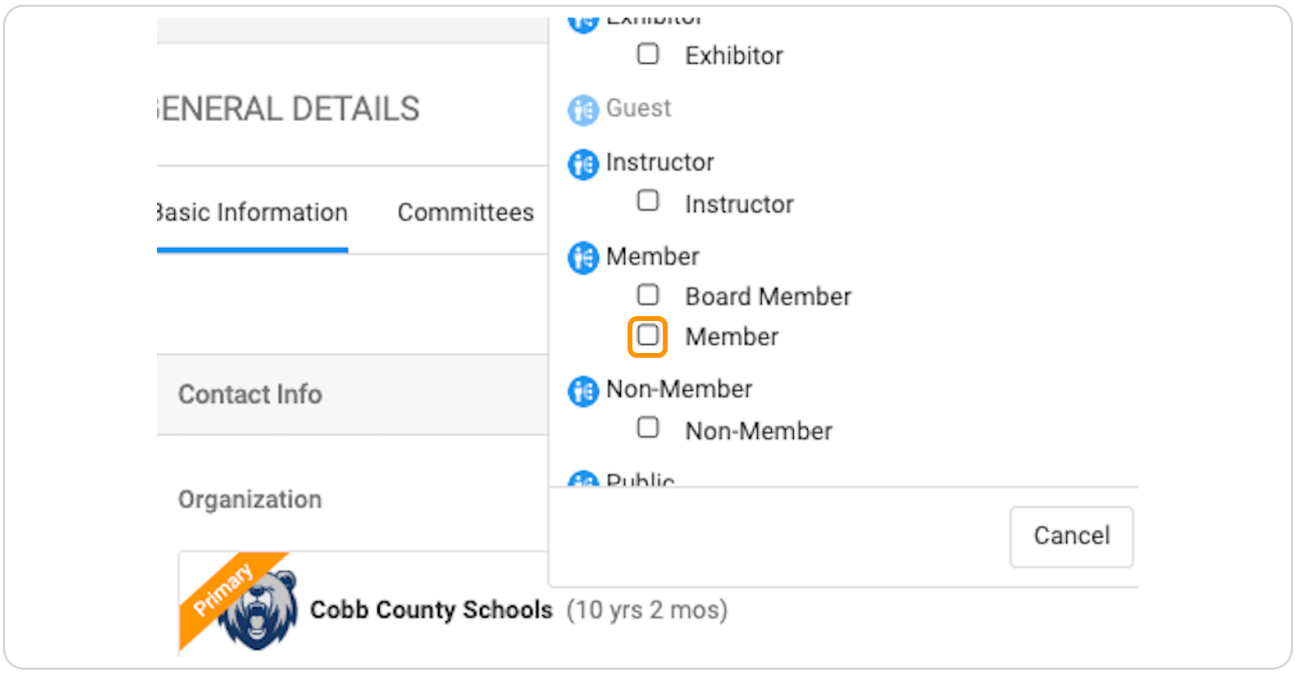
STEP 4

Click on the pencil icon next to Person Types



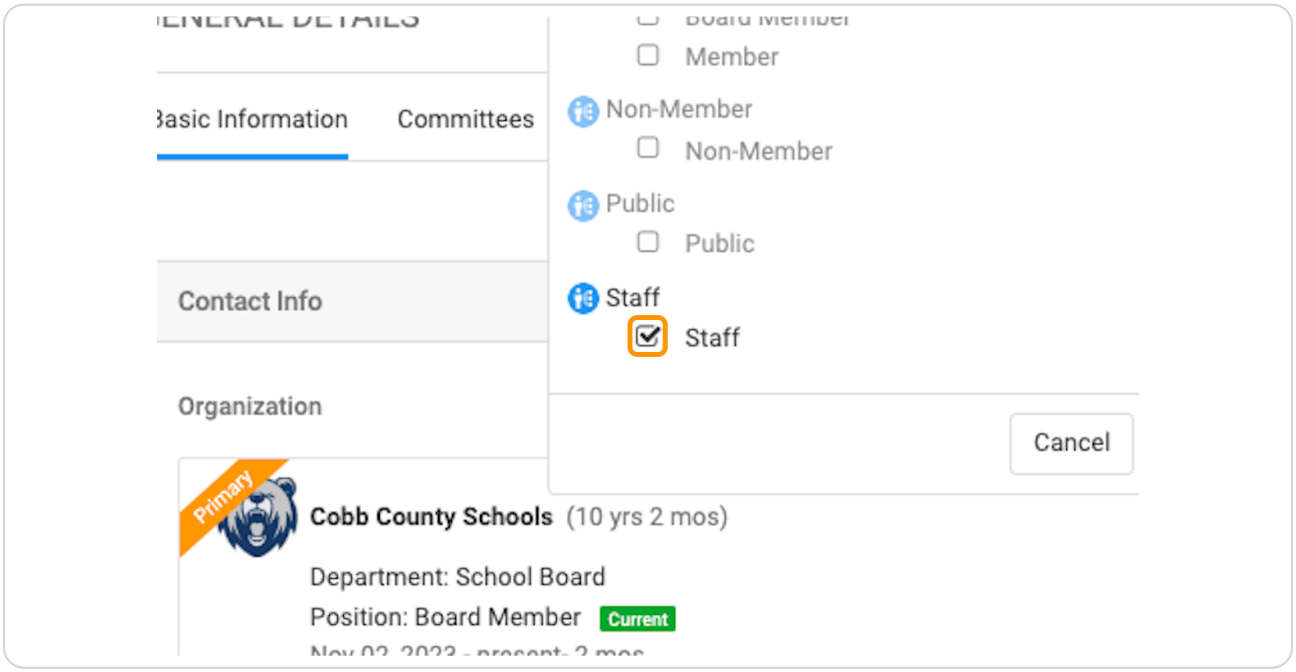
STEP 5

Uncheck the current type



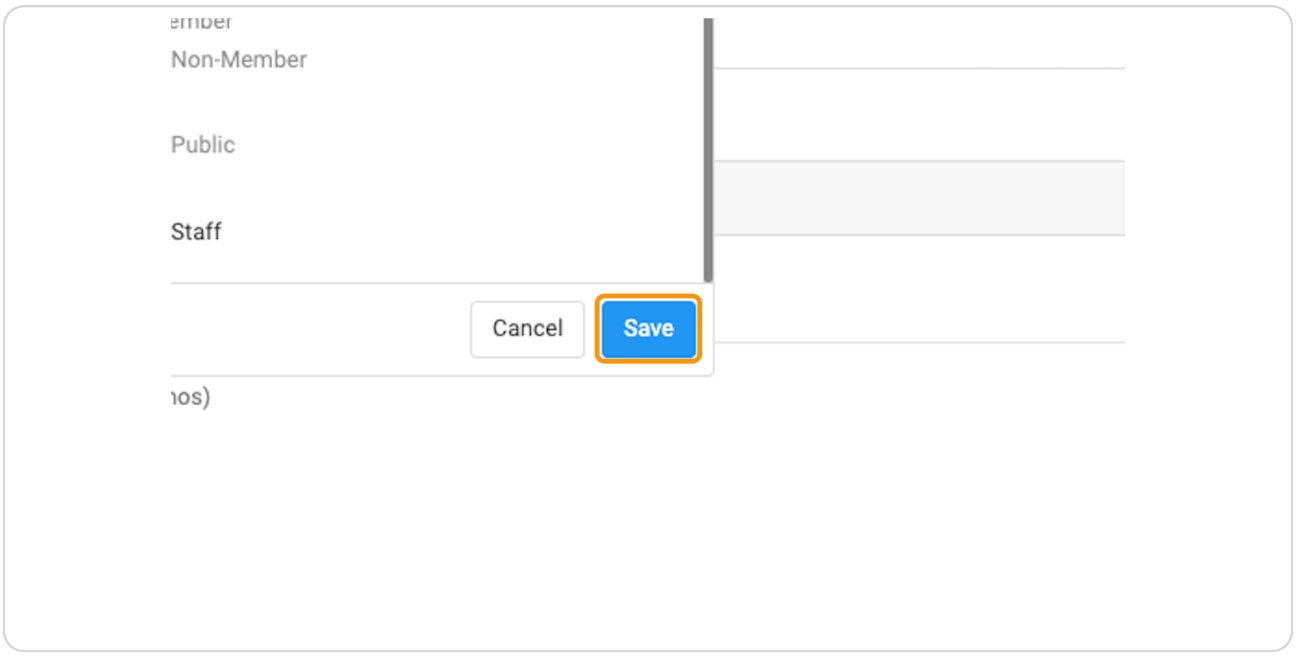
STEP 6

Check on the new Person Type you wish to use



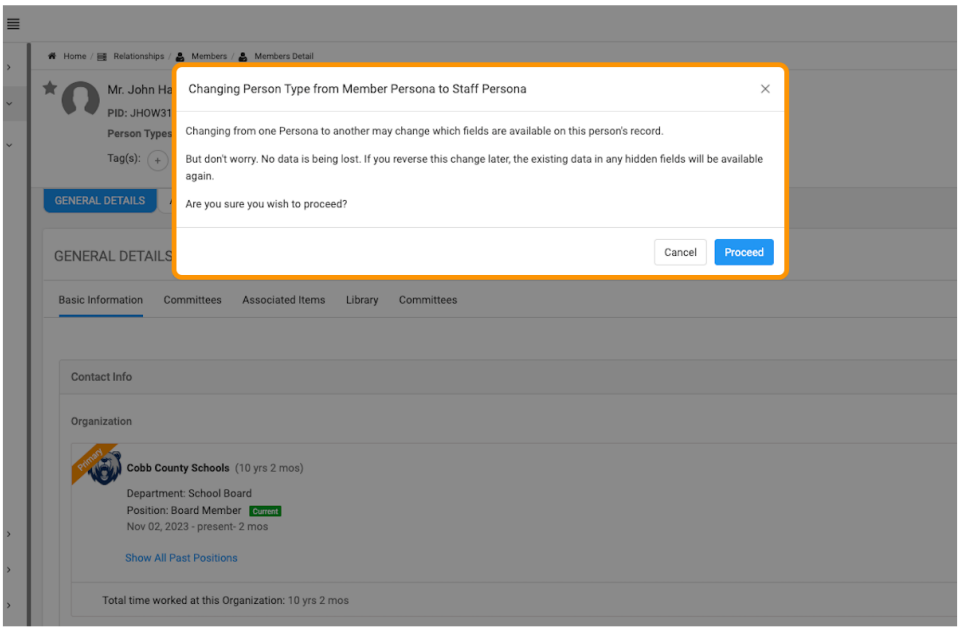
STEP 7

Click on Save



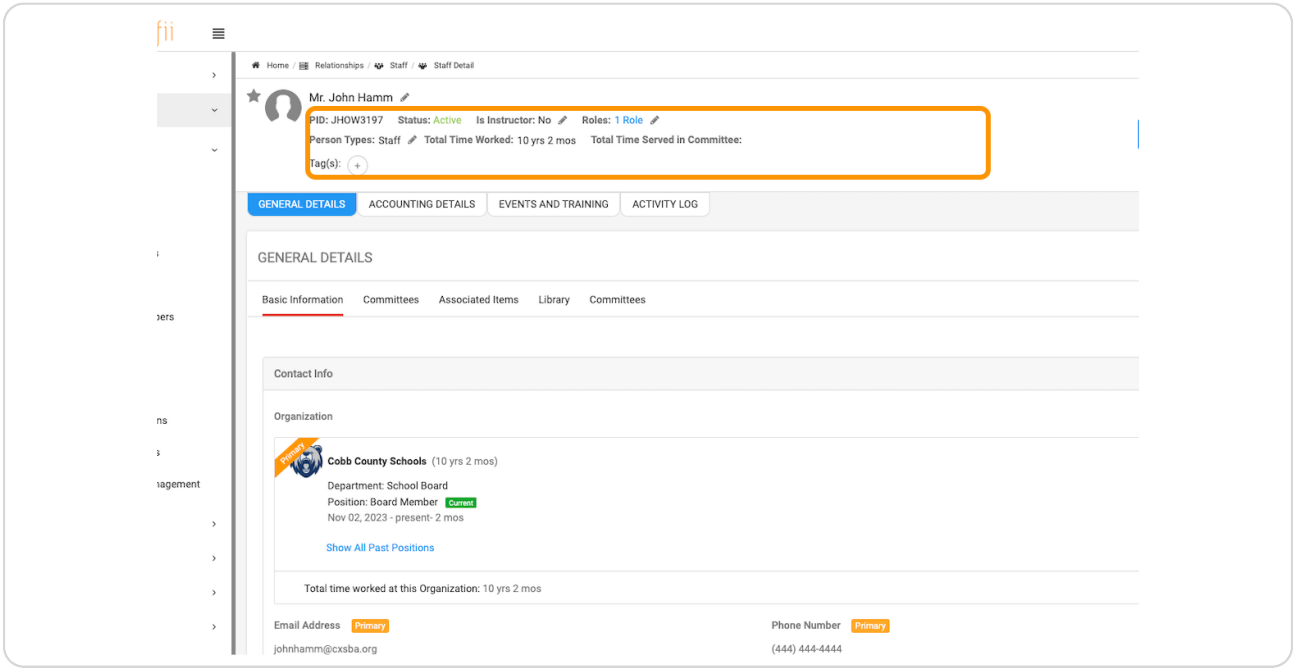
STEP 8

View the pop up box with the implications of chaning, if you are ok, click Proceed.



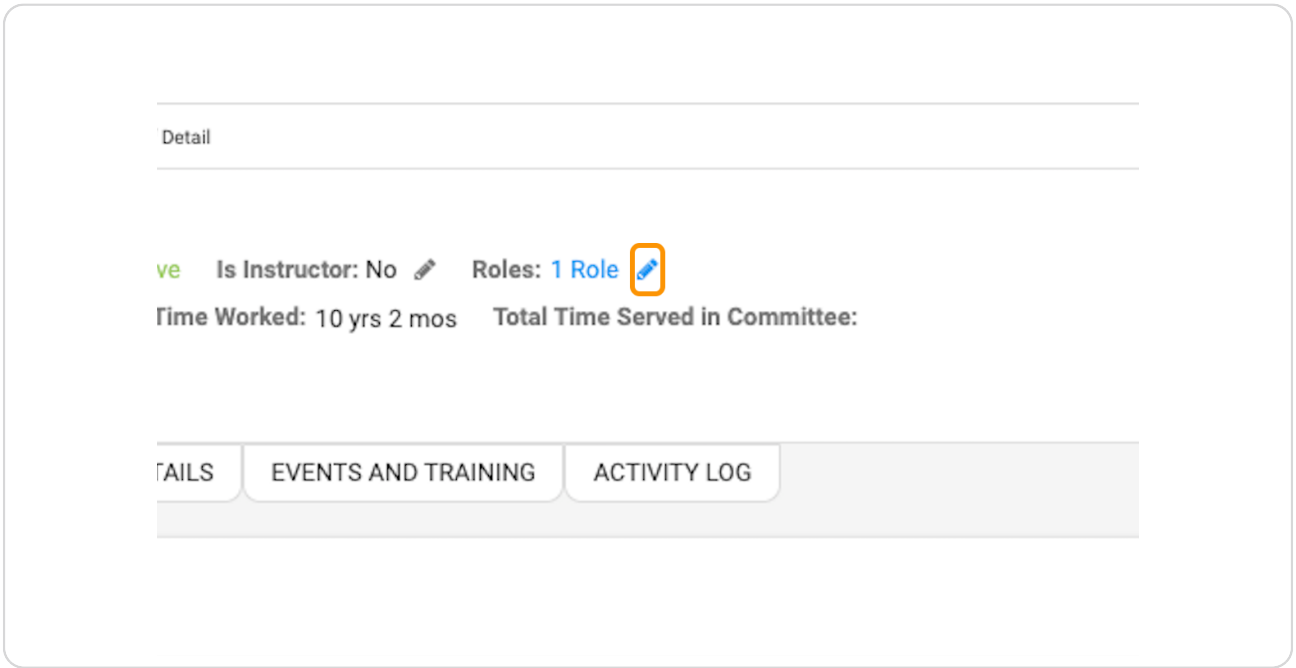
STEP 9

Now you can see the updated Person Type is has been changed.



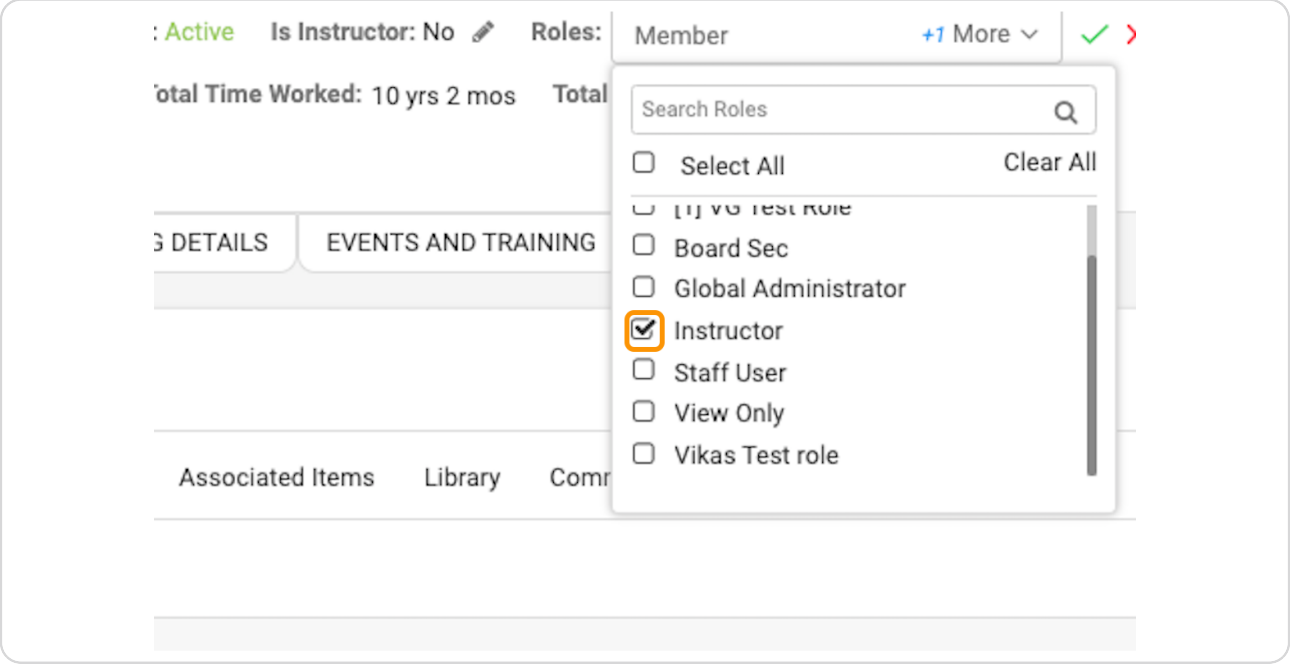
STEP 10

Click on the pencil icon next to the Role to update role (permissions)



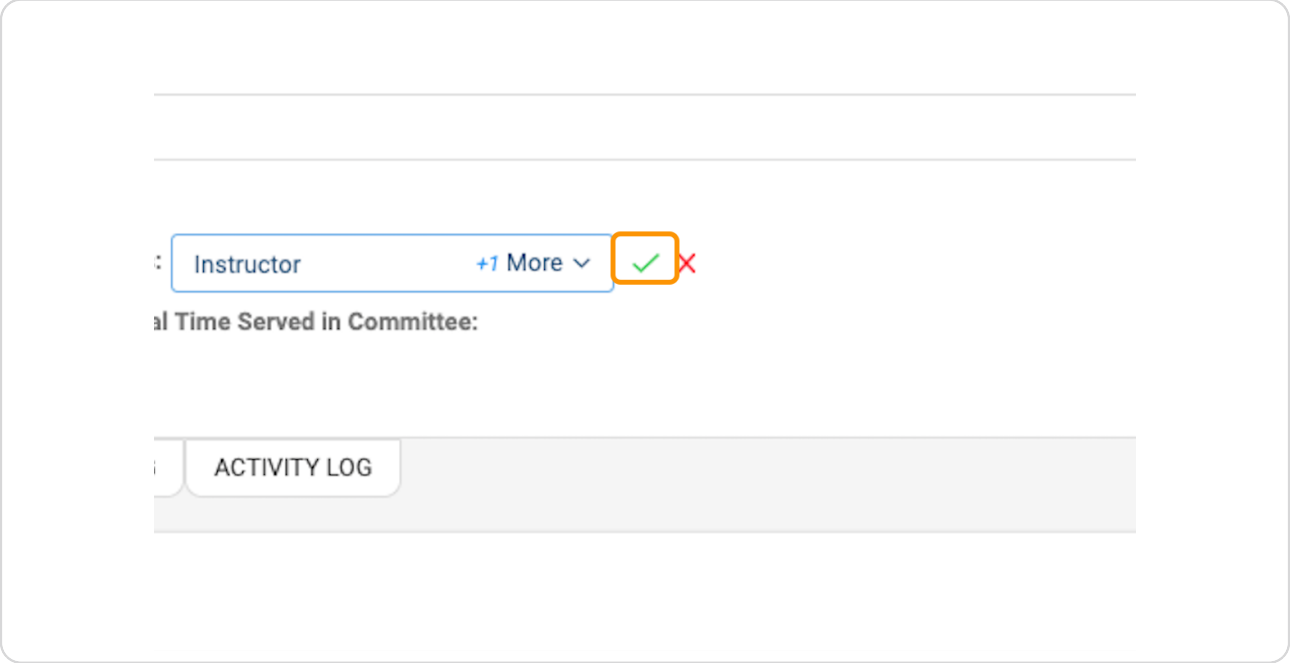
STEP 11

Check new role(s) you wish to add to this user



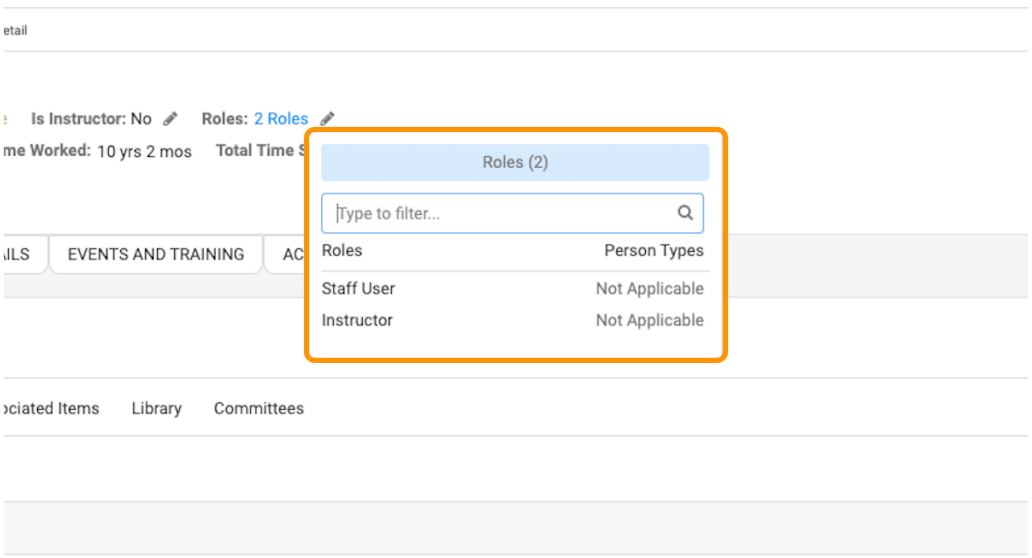
STEP 12

Click on the green check mark when finished with selections.



STEP 13

Click on Roles to view the associated Roles



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