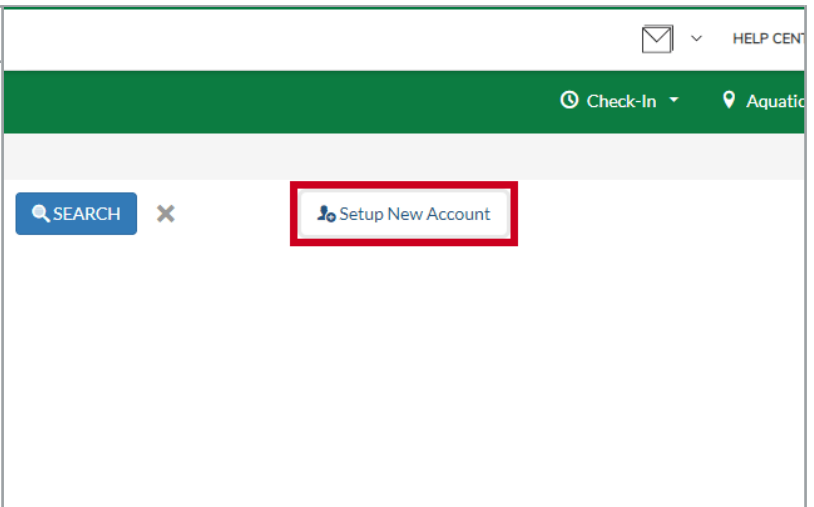


1

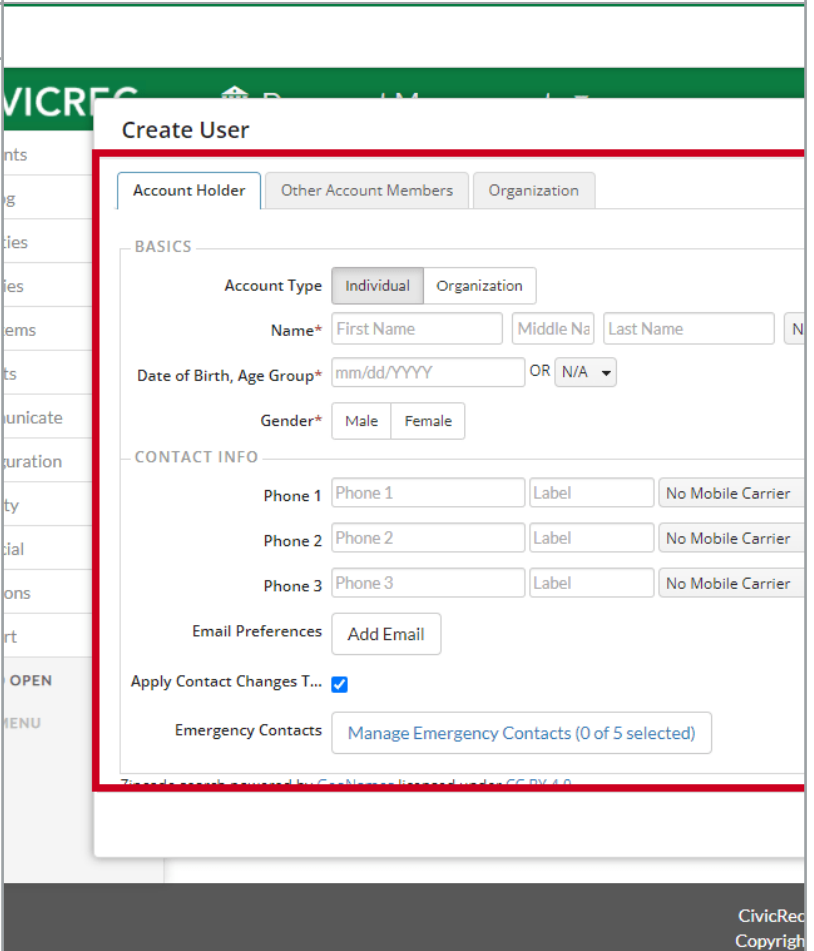
The first step is to click on **Setup New Account**



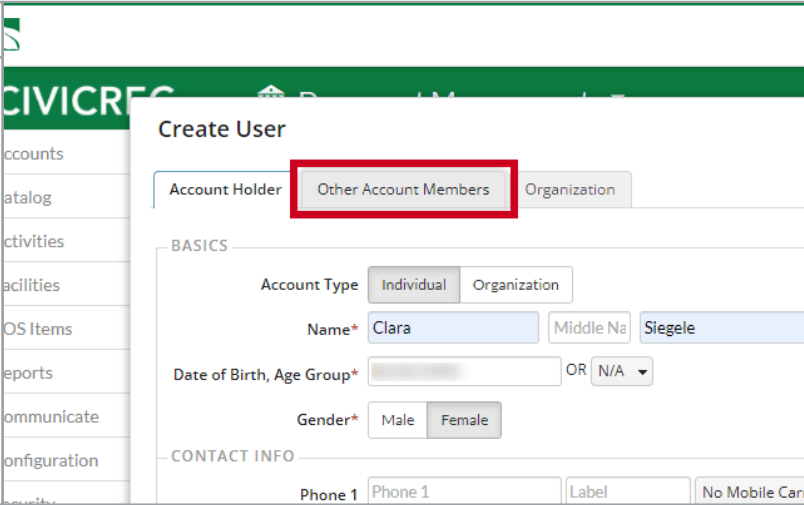
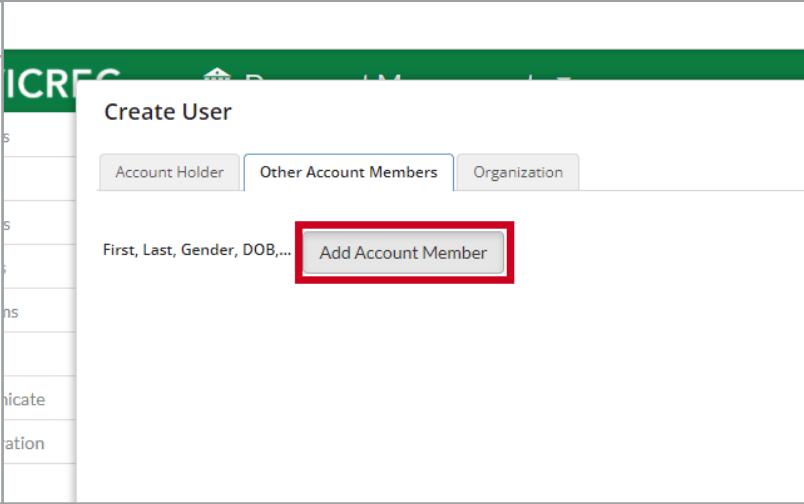
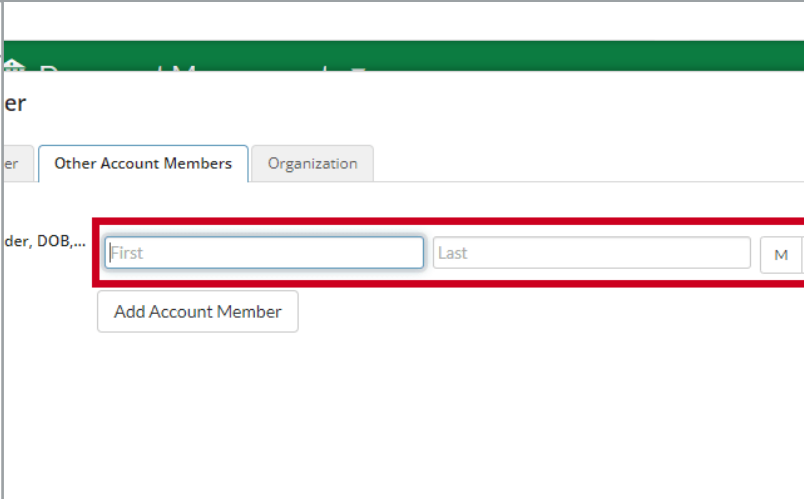
The screenshot shows the CivicRec home page. At the top right, there is a 'HELP CENT' link. Below the header, there is a search bar with a 'SEARCH' button and a 'Setup New Account' button, which is highlighted with a red rectangular box.

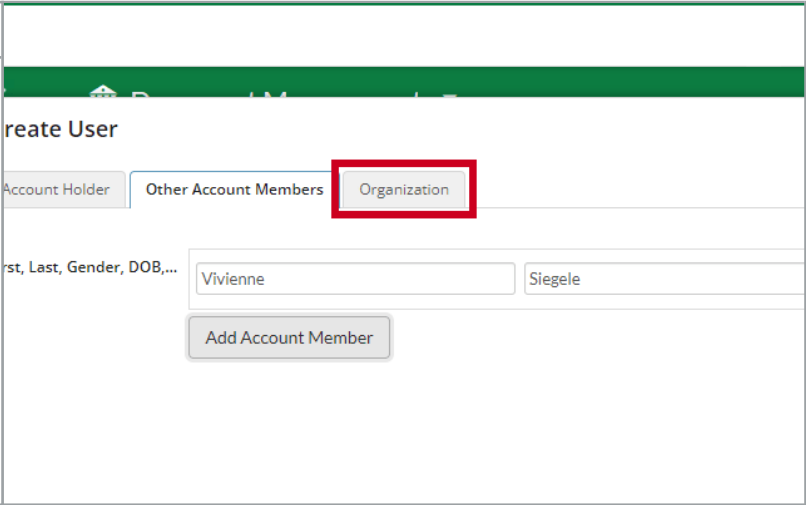
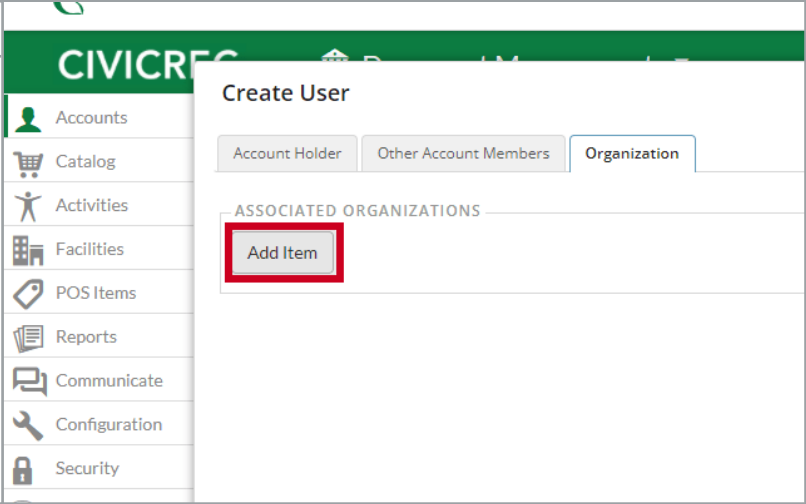
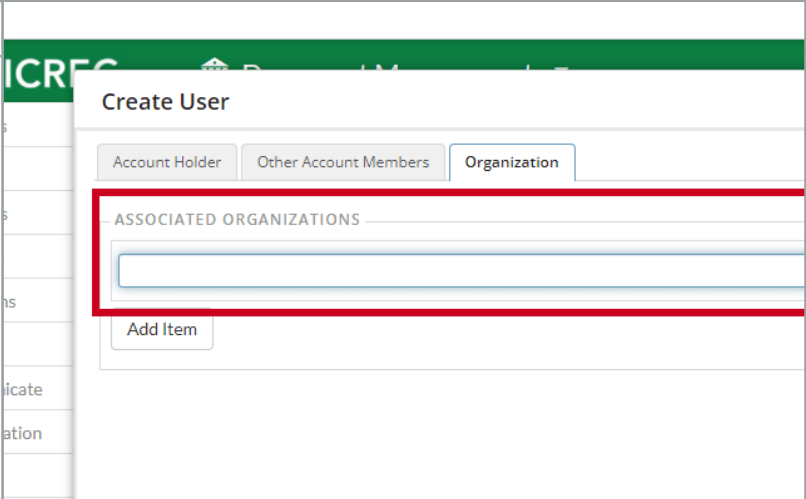
2


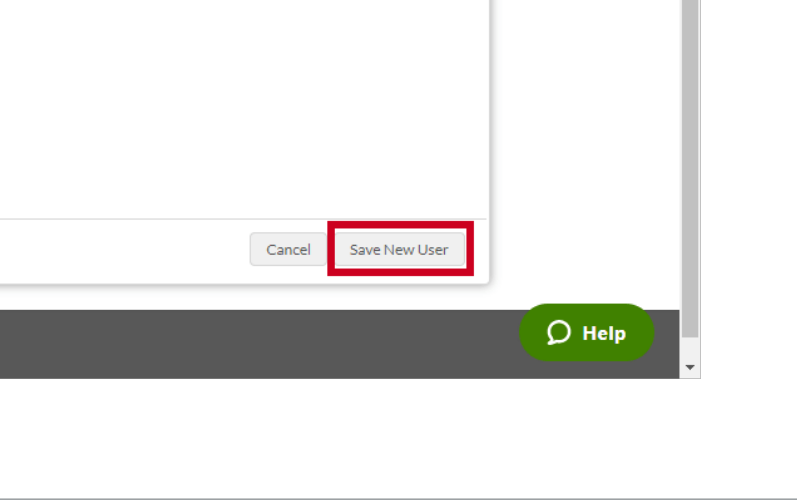

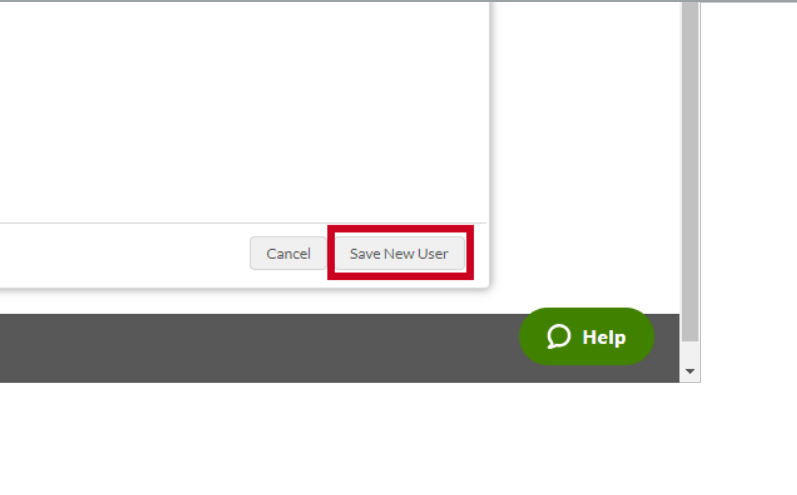
Fill out fields for the **Account Holder**



The screenshot shows the 'Create User' form. The 'Account Holder' tab is selected. The form is divided into 'BASICS' and 'CONTACT INFO' sections. The 'BASICS' section includes fields for 'Account Type' (Individual/Organization), 'Name\*' (First Name, Middle Name, Last Name), 'Date of Birth, Age Group\*' (mm/dd/YYYY or N/A), and 'Gender\*' (Male/Female). The 'CONTACT INFO' section includes fields for 'Phone 1', 'Phone 2', and 'Phone 3', each with a 'Label' and 'No Mobile Carrier' checkbox. There is also an 'Email Preferences' section with an 'Add Email' button, an 'Apply Contact Changes T...' checkbox (checked), and an 'Emergency Contacts' section with a 'Manage Emergency Contacts (0 of 5 selected)' button. The entire form is highlighted with a red border.

<p>3</p> <p>Select the <b>Other Account Members</b> tab</p>	 <p>The screenshot shows the 'Create User' form with the 'Other Account Members' tab selected. The 'Account Type' is set to 'Individual'. The 'Name' field contains 'Clara', 'Middle Na' is empty, and 'Siegele' is in the 'Last Name' field. The 'Date of Birth, Age Group*' field is empty, and the 'Gender*' field is set to 'Male'. The 'CONTACT INFO' section is partially visible.</p>
<p>4</p> <p>Click <b>Add Account Member</b> to add additional users to the account</p>	 <p>The screenshot shows the 'Create User' form with the 'Other Account Members' tab selected. The 'Add Account Member' button is highlighted with a red box. The text 'First, Last, Gender, DOB, ...' is visible above the button.</p>
<p>5</p> <p>Fill in account member information</p>	 <p>The screenshot shows the 'Create User' form with the 'Other Account Members' tab selected. The 'First' and 'Last' name fields are highlighted with a red box. The 'Add Account Member' button is visible below the fields.</p>

<p>6</p> <p>If applicable, navigate to the <b>Organization</b> tab</p>	 <p>The screenshot shows the 'Create User' form with three tabs: 'Account Holder', 'Other Account Members', and 'Organization'. The 'Organization' tab is highlighted with a red box. Below the tabs, there are input fields for 'First, Last, Gender, DOB,...' with 'Vivienne' and 'Siegele' entered. An 'Add Account Member' button is visible at the bottom.</p>
<p>7</p> <p>Click <b>Add Item</b></p>	 <p>The screenshot shows the 'Create User' form with the 'Organization' tab selected. A sidebar menu is visible on the left with options like 'Accounts', 'Catalog', 'Activities', 'Facilities', 'POS Items', 'Reports', 'Communicate', 'Configuration', and 'Security'. In the main form area, under the 'ASSOCIATED ORGANIZATIONS' section, the 'Add Item' button is highlighted with a red box.</p>
<p>8</p> <p>Search for and select an organization</p>	 <p>The screenshot shows the 'Create User' form with the 'Organization' tab selected. The 'ASSOCIATED ORGANIZATIONS' section is highlighted with a red box, showing a search input field and an 'Add Item' button below it.</p>

<p> Click <b>Save New User</b></p>	<p>9</p> 
<p> That's it! You have just completed a practice tutorial, now go try it on your site!</p>	<p>10</p> 



Scan to go to the interactive player