

3.0 Customer Account Creation Quick Start Guide

Instructions

The following page outlines some of the basic functions needed by users who will be creating accounts for walk-ins and enrolling members of those accounts into activities.

Setup a New User

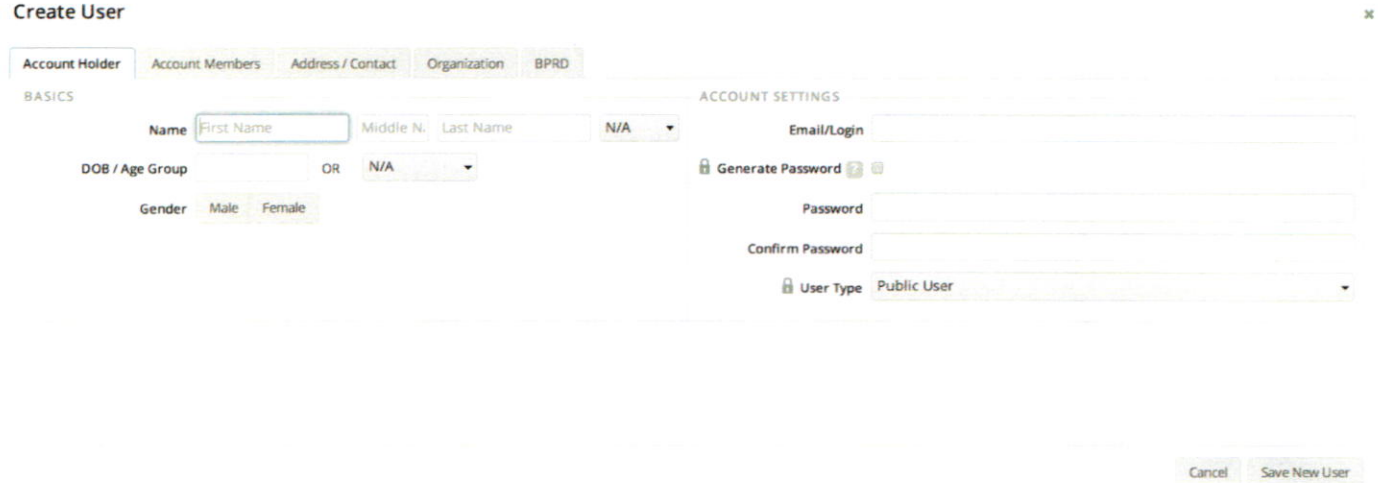
- Search for the person's name to ensure that an account doesn't already exist
- Click "Setup New User"



A search bar with the placeholder text "Name, email, or username" and a blue "SEARCH" button. To the right is a red-bordered button with a person icon and the text "Setup New User".

Note: The Primary Account holder should always be an adult, so enter a "Parent" first before entering a child.

- Enter all available fields under the 'Basics' tab



The "Create User" form is divided into two main sections: "BASICS" and "ACCOUNT SETTINGS".

BASICS: Includes tabs for "Account Holder", "Account Members", "Address / Contact", "Organization", and "BPRD". Fields include "Name" (First Name, Middle N., Last Name, N/A dropdown), "DOB / Age Group" (OR, N/A dropdown), and "Gender" (Male, Female).

ACCOUNT SETTINGS: Includes "Email/Login", "Generate Password" (with a lock icon and help icon), "Password", "Confirm Password", and "User Type" (Public User dropdown).

Buttons for "Cancel" and "Save New User" are at the bottom right.

- The Account Settings information is OPTIONAL, but would allow you to create a login for the user to use during subsequent registrations through the web.
- Enter information in remaining tab as needed.
- Click "Save New User"

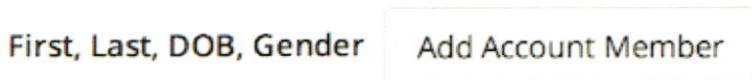
Add a Spouse or Child to an Account

- Click "Add Account Member" under the Account Members tab


Create User



Two tabs: "Account Holder" and "Account Members".



Text input fields for "First, Last, DOB, Gender" and a button labeled "Add Account Member".

- Enter all fields
- Select  to add additional family members
- Select 'Save New User' once all family members have been added.