

How to Onboard a New User in Euna Grants

1. Navigate to Administration > System Security > Users. This will show a list of existing users.



2. On the Users Grid, click the + icon (Create) button in the top right corner, fill out the information on the Create User page. Required information will be indicated by an asterisk.

3. Once completed, click Create at the bottom right corner.

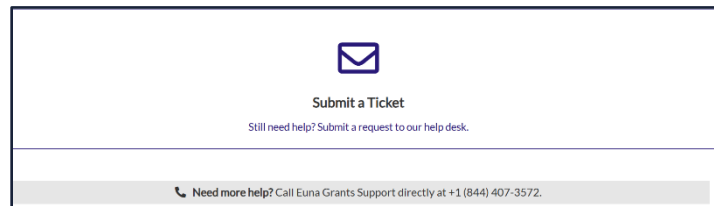
4. On the User's Details page, click the Envelope icon (Send Invitation) in the top right corner to send an invite to the new user. The user will follow the instructions they receive via email to log-in.



5. Assign your New User a "Task" to navigate the Support Portal <https://amplifund.zendesk.com/hc/en-us>

You may want to suggest that they check out some on-demand training videos, register for upcoming live training sessions, read articles and step-by-step instructions, or anything else you think would be helpful to someone in their role.

If they need further assistance, they can submit a ticket on the Support Portal homepage to connect with a member of the Euna Grants team.



6. Users can also navigate to the Resource Center in Euna Grants to review other resources, including step-by-step guides and recent announcements.

