



**eAdventist**

technology for churches

**In-Class Exercises: Set 1**  
*For the eAdventist Demo Site*

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## EXERCISE 1: ACCESSING eADVENTIST'S DEMO WEBSITE

Instructions for the following found in *Connecting to the Site* in the User Guide

To practice using eAdventist's demo website, you must first have a user account that has been successfully activated (*see Appendix A*). If you are not sure if you have a user account, contact your conference membership clerk for assistance.

The demo website has been established to allow clerks to experiment, practice, and learn the eAdventist program in a safe environment. Keep in mind that you cannot hurt anything while practicing in the demo website.

1. Open your Internet browser (for example, Firefox or Internet Explorer).
2. Enter **http://demo.eadventist.net** in the URL Address field and press the **Enter** key.
3. Click the **Membership login** link at the left side of the screen (dark purple menu item).
4. Enter your email address and password for the demo site on the **Account login** screen and click the "Login" button (*your password is the one you selected yourself when you activated your account; remember that passwords are case-sensitive*).
5. You have now connected to the program and the **Home** tab should be displayed.

## EXERCISE 2: ADDING A NEW FAMILY (In this case, a single man)

Instructions for the following found in *Beginning a New Family by Adding the Primary Contact* in the User Guide

Steve Manning is a single adult male that has been taking Bible studies and attending your church. You would like him in your system to receive mailings and in the event he becomes baptized. Add him to your church records using the following information:

**Last Name:** Manning  
**First name:** Steve  
**Suffix:** Jr  
**Church:** Your church  
**Address:** 132 Sherwood Forest Road, Annapolis, MD 21401  
**Email address:** [stevemanning@pretend.net](mailto:stevemanning@pretend.net)  
**Birth date:** February 27, 1985  
**Ethnic class:** Your choice  
**Home phone:** 301-555-1111  
**Work phone:** 301-555-2222  
**Mobile phone:** 301-555-3333

1. Click the **People** menu item on the left side of the screen.
2. Click on **new family** from the **People** menu section. A blank **Person** screen will be displayed.

3. On the top half of the screen, enter Steve’s name, email address, church, gender, marital status, birth date, mobile phone, work phone in the fields provided. On the lower half of the screen enter Steve’s home phone, and street address in the fields provided.
4. Click on the **Personal** in the gray menu located across the middle of the screen. Enter Steve’s ethnic class. (Note that the ethnic classes have been selected by the North American Division eAdventist Committee and are limited to the selections displayed.) Click the “**Save**” button.
5. Steve has been added. Note that his address has been certified by the built-in postal software as a deliverable address. In addition, the address has automatically been formatted according to US Postal Service preferences: "Road" has been changed to "Rd", and the "Plus-4" portion of the postal code has been added and a carrier route filled in. When entering your actual church members' addresses, you may see an orange "warning" message. The warning indicates that you should double-check the address to verify that it was entered correctly. If so, the warning can be ignored. A red error message indicates that the address is not deliverable as entered and needs to be double-checked.
6. The **Allow promo mail**, **Union paper**, and **Adventist World** boxes on the lower left side of the screen will automatically be set according to your conference's preferences. These preferences can be overridden, however, at the member's request. Note that the 'Adventist World' checkbox is referring to the free, once-a-month North American Division edition of this publication, and is not used for paid subscriptions; those are handled directly by *Adventist World*. Your conference membership clerk can assist if you have any questions regarding these fields.

### EXERCISE 3: SEARCH FOR STEVE MANNING

*Instructions for the following found in **Searching by Name and Status** in the User Guide*

Steve has finished his Bible studies and has been baptized. We need to search for his record so that we can change his status from “Nonmember” to “Member” by baptism (if you have just completed the previous exercises, Steve’s record is probably already on your screen; however, this exercise is presented here because in real-time there may be a delay between entering his nonmember record and coming back and making the membership changes).

1. If you are not already on the **People** tab, click the **People** tab (if you are currently looking at Steve’s record, you can click the **search** link in the sub menu below the **People** tab. (Note that it is sometimes helpful to click the advanced search link because there are additional search options available.)
2. Enter a few letters of Steve’s last name and a few letters of his first name, and click the “**Search**” button. (We recommend entering just a few letters in case either name is spelled differently than expected, i.e., “Stephen” rather than “Steve”.) When searching for people, or churches, you do not need to use upper case.
3. Members and nonmembers that start with the same letters in their names will be displayed (to search for other statuses, including “Deceased”, change the **Status** field appropriately). Click on the name of the person you need to modify, in this case, Steve Manning. This will display Steve’s **Person** page for viewing or modifying.

## EXERCISE 4: BAPTIZE STEVE MANNING

Instructions for the following found in *Changing a Person's Membership Status in the User Guide*

Steve finished his Bible studies and was baptized by Pastor Jones on August 7, 2010. Update his record to indicate that he has been baptized.

1. Click on the “**Change Status**” button in the middle of the page.
2. Steve’s **Current status** will display as “Nonmember” on the left side of the screen. Items that can be updated will be on the right.
3. Enter Steve’s baptism date as the **Effective date**, and select 'Baptism' in the **Member by** field. Click the “**Save**” button.
4. The **Baptism Information** screen will automatically display and you can enter the **Baptized by**, **Event**, and **Original baptism place**. Enter whatever information you have, and even if you do not have any of this info, go ahead and click the “**Save**” button.
5. Steve’s **Person** screen is automatically displayed and notice that his **Member status** is now “Member”.
6. If you need to modify any baptism information entered, click the “**Edit Person**” button on the upper right side of the screen. Then click on “**Membership**” in the gray menu located across the middle of the screen. Make any needed changes and then click the “**Save**” button.

## EXERCISE 5: PRINT FAMILY UNIT RECORD (FUR)

1. To print Steve’s Family Unit Record (FUR), click the “**Print Family**” button located in the lower right side of the screen.
2. The report with the family information will be displayed (*if the report does not display, check your browser's pop-up blocker settings; [www.eadventist.net](http://www.eadventist.net) needs to have pop-ups allowed*). Print for the family to review, the pastor, or yourself, by clicking on the printer icon

To exit the report, click the “X” on the top right of your screen.

## EXERCISE 6: ADDING A NEW FAMILY (In this case, beginning a family of five)

Instructions for the following found in *Beginning a New Family by Adding the Primary Contact in the User Guide*

You have a family of five that needs to be added to your records. The wife, Wendy, is a baptized member that transferred into your church a few years ago but didn't get added into eAdventist until now. Her husband, Harold is not a member, and neither are her three children. Wendy will therefore be the primary contact and should be added first. Instructions for adding her family members will be in the next exercise.

1. Click on the **People** tab on the left side of the page. Then click on **new family** in the sub menu below the People tab. A blank **Person** screen will be displayed.

2. Use your own last name for this family of five and enter that in the **Last name** field.
3. Enter Wendy's information as follows:

**First name:** Wendy  
**Church:** Your church  
**Gender:** Female  
**Marital status:** Married  
**Birth date:** May 7, 1970  
**Work phone:** 301-555-9999  
**Mobile phone:** 301-555-8888  
**Address:** 1 Dock Street, Annapolis, MD 21401 *Tip: If you have the correct street address, city, and state, and you have clicked the radio button beside USA, you do not need to enter the postal code; the Auto-certify feature will fill in the complete 9-digit postal code after you click "Save". Try it!*

4. Click the **"Save"** button to store all of Wendy's basic information.
5. Because Wendy was transferred in a few years ago, we need to change her status from a nonmember to a member. Click on the **Change Status** button on the upper right side of the page.
6. Wendy transferred in as a member of your church on November 5, 2005. To record this enter the following:

**Effective Date:** 11/05/2005  
**Member by:** Prior Transfer  
**Prior Church:** First SDA Church

7. Click the **"Save"** button.
8. Wendy's **Person** screen now indicates that she is a member of your church. *Using 'Prior transfer' is not the correct way to transfer a NEW member to your church; that should be done using the **transfers** sub menu link under the **People** tab on the left side of the page. This will be explained in Exercise Set 2. 'Prior transfer' is only to be used in the case of past omissions and with guidance from your conference membership clerk.*

## **EXERCISE 7: ADDING REMAINING FAMILY MEMBERS**

*Instructions for the following found in **Adding Additional Family Members to Existing Family** in the User Guide*

One member of a family needs to be displayed on the screen in order to add *additional* family members.

1. Be sure Wendy is displayed on your screen and click the **"New Person"** button on the lower, right side of the screen. Notice that many of the fields are already filled in to save you keystrokes.

2. Add Wendy's husband with the following information:

**First Name:** Harold  
**Church:** Your church  
**Gender:** Male  
**Marital status:** Married  
**Birth date:** October 8, 1968  
**Work phone:** 301-555-7777  
**Mobile phone:** 301-555-6666

4. Click the "**Save**" button. Harold has now been added as a nonmember into your church with Wendy as the primary contact
5. Wendy would like the union paper to be addressed to "Mr. and Mrs. Harold \_\_\_\_\_", instead of just to her, the primary contact. Change the mailing name to accommodate Wendy's request by clicking the **Edit Person** button. Then enter the **Mailing name** as "Mr. and Mrs. Harold \_\_\_\_\_". Click the "**Save**" button. (Only place the name in the **Mailing name** field – do not place any address information in this field)
6. Click the "**New Person**" button to add a child to this family
7. Add Allen: a male, single, in your church, born on September 3, 1991 (don't click the "**Save**" button just yet).
8. Click the **Student** tab in the gray menu bar across the middle of the page.
9. Allen is a sophomore at the University of Maryland, so select the appropriate grade from the drop down menu, select Non-SDA beside **School Type** and enter "University of Maryland" beside **School (Non-SDA)**. Click the "**Save**" button.
10. Click the "**New Person**" button to add another child to this family.
11. Add Barbara: a female, single, in your church, born November 15, 1992 (don't click the "**Save**" button just yet).
12. Click the **Student** tab in the gray menu bar across the middle of the page.
13. Barbara is a freshman at Washington Adventist University, so select the appropriate grade from the drop down menu, and then select **SDA** from the drop down menu beside **School type**.
14. Click on the "Select" button beside **School(SDA)**.
15. A **Select School** box will pop up. Enter a portion of the school name and click the "Search" button.
16. Select the correct school from the list displayed by clicking on the radio button to the left of the school name. Then click the "**Ok**" button.

17. The school name will be entered in the **School (SDA)** field. Click the "**Save**" button.
18. Click the "**New Person**" button to add one more child to this family
19. Add Charlie: a male, single, in your church, born January 10, 2000, and click the **Student** tab to enter his school information.
20. Charlie is in the fourth grade being home schooled by Wendy, so enter the appropriate information on the "**Student**" tab and click the "**Save**" button.
21. Click the **Family Unit** tab in the gray menu bar across the middle of the page. Scroll to the bottom of the page to see that you have successfully entered a family of five into your eAdventist membership records.

### **EXERCISE 8: BAPTIZE TWO MEMBERS OF THE FAMILY**

*Instructions for the following found in **Changing a Person's Membership Status** in the User Guide*

Allen and Barbara were both baptized on July 3, 2010, and their records need to be updated to reflect that change.

1. Allen must be displayed on the screen before you can baptize him. If one of his family members is already on the screen, just simply click Allen's name on the bottom of the page to display his info (if you are somewhere else in the program, click the **People** tab and then the search link to find Allen).
4. When Allen's info is displayed, click the **Change Status** button.
5. Enter Allen's baptism date as the **Effective date**, and select 'Baptism' in the **Member by** field. Click the "**Save**" button.
6. In Allen's case, we do not have any further information, so just click the "**Save**" button on the **Baptism Information** screen. When Allen's **Person** screen is displayed you will notice that he is now a member of your church.
7. Click Barbara's name at the bottom of the screen.
8. When Barbara's info is displayed, click the **Change Status** button.
9. Enter Barbara's baptism date as the **Effective date**, and select 'Baptism' in the **Member by** field. Click the "**Save**" button.
10. Pastor Dewayne Richards baptized Barbara, so enter his name (Please only enter the first and last name of the pastor, and do not put the word Pastor in front of his name -- EXAMPLE: "Dewayne Richards" not "Pastor Dewayne Richards") Click the "**Save**" button.
11. When Barbara's information is displayed, you can see that she is now a member of your church.



## EXERCISE 9: ADD VACATION ADDRESS TO A FAMILY'S INFORMATION

Instructions for the following found in *Beginning a New Family by Adding the Primary Contact in the User Guide*

Wendy and Harold often spend 8 weeks during the summer in New England and do not want to miss any information that might be mailed out while they are gone. You can add an alternate address for the family and indicate that mail should be sent to this alternate address for the time being. Note that when you update an address for ONE family member, it is AUTOMATICALLY updated for ALL family members, even if they are members in a different church. *Yes, you will be able to see the names of all people combined as a family unit, even if they are members in a different church, at the bottom of the screen (you may need to scroll down to see everyone). Be certain that the address needs to be updated for EVERYONE in the given family.* If only some people in a multi-person family need their address information changed, those people need to be moved to a separate family unit (instructions for splitting family units are included later in these exercises).

1. Be sure one of Wendy and Harold's family members is displayed on the screen and notice that their street address of 1 Dock St is currently being used as the default address type (see left column in the **Family Unit** tab).
2. Click the **Edit Person** button on the upper right side of the screen.
3. On the **Addresses** line on the right side of the page, click on the **Alternate** tab to indicate that you are going to add an alternate address for the family.
4. Enter their Maine address in the blank address fields: 75 South Street, Gorham, ME, and click the **"Save"** button to save this new address (*do not enter the postal code, but make sure the radio button beside "USA" is highlighted*).
5. After clicking the **"Save"** button, the default address type will be displayed, so you will see the street address again.
6. To send mail to the alternate address, click on the **Edit Person** button. Select "Alternate" from the drop down menu beside **Default address type** on the lower left side of the page. Click the **"Save"** button.
7. Any mailings will now be sent to the Maine address. (Notice that the Auto-certify feature automatically added the zip+4 postal code.)
8. When Wendy and Harold return from their vacation, click on the **Edit Person** button. Select "Street" from the drop down menu beside **Default address type** on the lower left side of the page. Click the **"Save"** button.
9. This family's mailings will now be sent to the street address. Note that even though we have had Barbara's personal information displayed at the top of the screen, these address changes are automatically applied to everyone listed at the bottom of the screen as part of this family unit.

## EXERCISE 10: ENTERING A CHANGE OF ADDRESS FOR A FAMILY

Instructions for the following found in *Beginning a New Family by Adding the Primary Contact in the User Guide*

Wendy and Harold have just moved to 1410 West Street and their address needs to be updated. Once again, note that when you update the address for ONE family member, it is AUTOMATICALLY updated for ALL family members. If an individual family member moves to a new address, they need to be their own separate family unit (*instructions for splitting family units are included later in these exercises*).

1. Be sure one of Wendy and Harold's family members is displayed on the screen. Click on the **Edit Person** button.
2. Enter the new street address of 1410 West Street and click the "**Save**" button.
3. You can verify that the address was changed for other family members by clicking on their names at the bottom of the screen.

**TRY:** Click the "**History**" link in the middle of the page (beside the **Change Status** button). Then, click each of the tabs—**History**, **Family**, **Address**, **Phone**—to see the changes that have been recorded. When you are through, click the "**Back to Person**" link on the top, left side of the page. Click another family member's name and look at their history as well.

## EXERCISE 11: SPLITTING A FAMILY WHEN A CHILD GOES TO COLLEGE

Instructions for the following found in *Splitting One Existing Family into Two Separate Families in the User Guide*

Allen is going to go to Andrews University as a college junior to finish college. He is not going to transfer his membership, but wants to receive his own mailings. You need to split him out of his existing family and start a new family unit that will consist of just Allen.

1. Allen must be displayed on the screen before you can split him out of the family. Pretend you had been working with some other family and now needed to search for Allen's record. Click the **search** link under the **People** tab. (If you are in another part of the program, you may need to click the **People** tab first). A blank **Person Search** screen will display.
2. Enter your last name in the **Last name** field (remember, your last name was used for Allen). Click the "**Search**" button.
3. All members and nonmembers whose last name matched what you entered will be displayed.

**TRY:** Most lists in eAdventist, like the one displayed above, have columns that can be sorted. In the image above, the list is currently sorted by Name (notice the triangle indicator). Click on the column heading "Birthdate" and the list will be re-sorted and displayed, but this time by the birthdate. Try sorting on Status as well. When ready, click the Name heading again to re-sort by Name.

4. Click on Allen's name.
5. After Allen's information is displayed, click the **Change Family** button.

6. Because we are starting a new family unit for Allen, click the circle beside “**Create a new Family**”. Harold will remain the C for the original family. Click the “**Save**” button.
7. A **Person** screen for Allen will automatically display, and note that he is now shown as the primary contact and is the only person in this family.
8. Enter new home phone and address info for Allen: 269-555-7212, Andrews University, Meier Hall Room 212, 100 US Highway 21, Berrien Springs, MI, 49104. Click the “**Save**” button.
9. Now update his school information. Click the **Edit Person** button.
10. Click on the **Student** tab in the gray menu bar in the middle of the screen.
11. Enter his updated grade and school information and click the “**Save**” button.
12. Allen is now his own family unit.
13. Go back to look at Allen’s original family to see that he is no longer considered a member of that family unit. Click the search link at the top of your screen, enter your last name in the **Last name** field, and click the “**Search**” button.
14. Click on Wendy’s name. Allen is no longer a member of this particular family unit.

**TRY:** Click the search link at the top of the screen and search for Allen's record. Click on his name to bring up his information and Click the drop down box beside the ‘**Go**’ button and select “**History**” and then ‘**Go**’ button. Then, click each of the tabs—**History, Family, Address and Phone**—to see how the changes you have entered have been recorded.

## **EXERCISE 12: JOINING FAMILIES WHEN SOMEONE GETS MARRIED**

*Instructions for the following found in **Moving a Person from One Existing Family into Another Existing Family** in the User Guide*

Wendy and Harold’s daughter, Barbara, has just married Steve Manning, another member in your church, and you need to move her out of her parents' family unit and into Steve’s.

1. Barbara must be displayed on the screen before you can split her out of her original family. Pretend you had been working with some other family and now needed to search for Barbara’s record. Click the search link at the top of the page (if you were in another part of the program, you would click the **People** tab first).
1. Enter your last name in the **Last name** field and click the “**Search**” button.
2. Members and nonmembers matching the last name you entered will be displayed. Click on Barbara’s name.
3. After her information has displayed, click on the **Change Family** button.

4. Because you want to move Barbara into the home of another one of your members (Steve), click in the circle to the left of the option that says “**Join an existing family**”.
5. Indicate which family Barbara is joining by clicking the “**Select**” button.
6. Enter Steve’s last name in the **Last name** field of the **Select Family** screen and click the “**Search**” button.
7. Primary contacts with last names that match the name you entered will be displayed. Click in the circle to the left of the correct primary contact Barbara is going to join.
8. Click the “**Select**” button.
9. Notice that Steve Manning’s name is automatically filled in as the family for Barbara to join.
10. Click the “**Save**” button.
11. eAdventist will automatically take you back to Barbara’s **Person** screen, and notice who her family members are now by looking at the bottom of the screen.
12. Update Barbara’s last name to her new married name, enter maiden name and marital status by clicking on the **Edit Person** button. Remember to click the “**Save**” button when you are done.
13. You also need to update Steve’s marital status, so now click on his name at the bottom of the page. Change Steve’s marital status and click the “**Save**” button.

**TRY:** Click the **Edit Person** button and then the **Personal** tab in the gray menu bar in the middle of the screen. Enter a marriage date for Steve. Click the “**Save**” button. Repeat these steps to enter a marriage date for Barbara.

14. Take a quick look at Harold and Wendy’s family to make sure that Barbara has been taken out. Click the **search** link at the top of the screen.
15. Enter your last name in the **Last name** field and click the “**Search**” button.
16. Click on Wendy’s name. Note that Barbara is no longer listed as part of this family.

### **EXERCISE 13: REMOVING SOMEONE FROM MEMBERSHIP**

*Instructions for the following found in **Changing a Person’s Membership Status** in the User Guide*

To practice removing someone from membership, we are going to use Wendy’s husband, Harold. However, he is not currently a member, so we are going to baptize him first, and then remove him from membership.

Click on the **People** menu section on the left side of the page, then click on “**Search**” in the menu items below it.

1. Enter the first letter of your last name in the **Last name** field and select “Nonmember” in the **Status** drop-down menu. *Note the other status types that can be searched as well.*
2. Click the “**Search**” button.
3. All nonmembers whose last names begin with the letter you entered will be displayed. Click on Harold’s name.
4. When his information has displayed, click the **Change Status** button.
5. Enter a baptism date of June 5, 2010 beside “**Effective date**”, and click the “**Save**” button.
6. We don’t have any further information at this time, so on the next screen click the “**Save**” button.
7. Harold is now a member of your church.
8. To remove an existing member, have the member displayed on your screen and click the **Change Status** button.
9. eAdventist knows which status options are available for an individual at a given time. To see those options, click in the “**Change to**” field and, for this case, select “**Removed (Apostasy)**”.
10. Enter July 19, 2010, as the **Effective date** and click the “**Save**” button.
11. Harold has now been removed from membership and no longer displays in the family list at the bottom of the page (*only members and nonmembers are displayed here; to see entire family unit click the **Change Family** at the bottom of the page.*)

**NOTE:** The "Removed" option is NOT to be used when someone transfers out of your church, was mistakenly added to your membership list, or is incorrectly listed twice in your membership records. **It is only to be used after a church vote to remove someone from membership (disfellowship), including those times when the member has initiated the request.** If you encounter a situation where you have someone in your records that should not be there, contact your conference membership clerk for assistance if you are not sure which procedure to follow.

#### **EXERCISE 14: UNDOING STATUS CHANGE WHEN MADE BY MISTAKE**

*Instructions for the following found in **Undoing a Person’s Membership Status** in the User Guide*

What if you accidentally removed the wrong person from membership? You just found out that someone else should have been removed, but wasn’t. You also can’t remember who you might have removed instead, but you need to correct their membership information so that they are a member once again. How are you going to find this individual and correct the mistake?

1. Click the **search** link at the top of the page (if you are somewhere else in the program click the **People** tab first)

2. Select “**Removed**” in the “**Status**” field to search for anybody that is currently marked as “Removed” in your church.
3. Click the “**Search**” button.
4. Any person that is currently marked as “Removed” will display on your screen. Hopefully, your memory is jogged, and you see the person you inadvertently removed. Click on their name, in this case, Harold.

**TRY:** Click the advanced search link and experiment with finding Harold, or other individuals. Enter portions of names, member statuses, street numbers, or birthdate ranges, etc. Click "Search" to see the results, and then try combining items such as last name and postal code and search again. You can ignore the checkboxes and fields referring to committees; those are discussed in the *User Guide*. The "advanced search" feature gives you more options than the "search" feature and notice that the default member status is set to "- Any status -" rather than "Member & Nonmember". As you become more comfortable with eAdventist, you will know when it would be most helpful to use "search" or "advanced search".

5. After you have Harold's record displayed, click the **Change Status** button.
6. eAdventist automatically knows the only options available for this person, and at this point gives you the option to undo the removal. Click “**Undo Removed**”.
7. Harold's record has been corrected and he is again listed at the bottom of the screen.

## **EXERCISE 15: ADDING A BABY TO A FAMILY**

*Instructions for the following found in **Adding Additional Family Members to Existing Family** in the User Guide*

You have already practiced adding family members, so adding a baby to the Manning family will be quite familiar.

1. To find the Manning family, if you are not on the **Person Search** screen, click the search link on the **People** tab. Enter the first two letters of the last name and click the "**Search**" button.
2. Any member or nonmember whose last name begins with the same letters that you entered will be displayed. Click on either Barbara or Steve.

To add a child to this family click the “**New Person**” button on the lower, right side of the screen.

3. The default information for a new person in the Manning family will be displayed.
4. Add the baby, Julia—female, single, and a birth date of your choice. Click the “**Save**” button.

## EXERCISE 16: SPLITTING A FAMILY DUE TO DIVORCE

Instructions for the following found in *Splitting One Existing Family into Two Separate Families* in the User Guide

Unfortunately, part of your record keeping as a membership clerk will involve splitting families as the result of a divorce. In our example, we will have Steve and Barbara divorce, with Steve moving out into an apartment.

1. Display the **Person** information for the individual moving out of the home. In this case, Steve is moving out, so click on his name (if you were in another part of the program, you might have to click the **People** tab first, then click the search link to find Steve's name).
2. Click on the "**Edit Person**" button. Change Steve's "**Marital status**" to "Divorced" and then click the "**Save**" button.
3. Now remove him from the family unit. Click on the **Change Family** button. You should see a warning telling you to "Choose a new Primary Contact first." Since Steve is the primary contact for this family, you will need to select which remaining individual should replace him as primary contact before moving him out of the family.
4. Click the "**Change**" button next to the Primary Contact field to open the **Change Primary Contact** window. Click the circle beside Barbara's name (in the "Select" column) to designate her as the primary contact for her family of two. Click the "**Save**" button.
5. Now click on the "**Change Family**" button again. This time you will go to the **Change Family** screen. Since Steve is moving out, we want to create a new family unit for him. Click in the circle to the left of the option which says, "**Create a new Family**" then click the "**Save**" button.
6. This will take you to the **Person** page for Steve. The address is blank, waiting for you to enter the new information.
7. Enter 324 Main Street, Laurel, MD 20707 and click the "**Save**" button.
8. Steve is now his own family unit.

**TRY:** Search for Barbara Manning and update her marital status. Note that Steve is no longer listed as a member of Barbara's family unit, and that she is the primary contact.

Congratulations, you have finished Exercise Set 1. When you are ready, proceed to Exercise Set 2.

## APPENDIX A: OBTAINING/ACTIVATING YOUR USER ACCOUNT

Your conference membership clerk oversees the eAdventist accounts within your conference. She will guide you through the process of obtaining and activating your user account and is available for questions if you have any difficulty. However, a brief overview is presented here for your reference.

1. Your conference membership clerk will provide you a copy of the eAdventist User Authorization Form which both you, and your pastor, need to sign and return to the conference.
2. The conference clerk will then create a user account for you in the eAdventist Demo site, which is available for training and practice.
3. After your account has been created, a message will automatically be sent to the email address you entered on the User Authorization Form. This email message will contain a link and the instructions necessary to activate your account. *Note that the email message will be from [no-reply@eadventist.net](mailto:no-reply@eadventist.net), so please be sure your email system will accept messages from this address so they aren't blocked and don't end up in your "junk mail" folder. However, if you don't receive your email message, let your conference clerk know and she will be able to help.*

Your email message will look similar to the following:

```
Dear [your first name here],

Your account on the eAdventist Demo site has been created/reset. Your new
account information is:

Email: [your email address here]
Activation code: RShcVmAzWkKA [your code will look similar to this]

Click the link below to activate your account and select a password. If the
line has wrapped you may need to copy and paste the link into your browser.
This activation code will expire after three days.

https://demo.eAdventist.net/user/activate?email=youremailaddr&temp\_password=RShcVmAzWkKA

For further assistance contact your user administrator at [your membership
clerk's email address here], do not reply to this email.

God bless,

-----
eAdventist Team
-----
```

4. Click on the link included in the message and the page below will display. Note that your email address and the activation code included in the email message will already be filled in.
5. Select a password for yourself, following the guidelines on the page, and enter it a second time in the **Confirm password** field, remembering that passwords are case-sensitive. ***Note that this is the password you will subsequently use to log in to eAdventist.***



6. Click the "Activate Account" button.
7. You have successfully activated your account and you will be logged in to eAdventist for the first time.
8. Activating your account only happens occasionally: when your account is first established, and if you have requested a new password from your membership clerk. Typically, you log in following the instructions on page 3 of this document. Click the "Logout" link in the upper right corner of the screen.
9. You are now logged out.

**TRY:** When you are ready, begin the demo exercises on page 3 of this document.