

Registering for EfM for the 2023–2024 Year

General Guidelines for Creating an Amilia Account

The following steps are modeled on an earlier registration guide originally outlined by Ed McDonough in Toronto. The present document is focused on the steps involved in creating an Amilia account and has been edited and updated for the current year. Many thanks to Ed for his significant contributions as we first moved to an online registration process.

Introductory Notes and Reminders

All registrants in EfM programs and events must have an account with the online Amilia SmartRec eCommerce platform. If you have not done so already you will need to create an Amilia account.

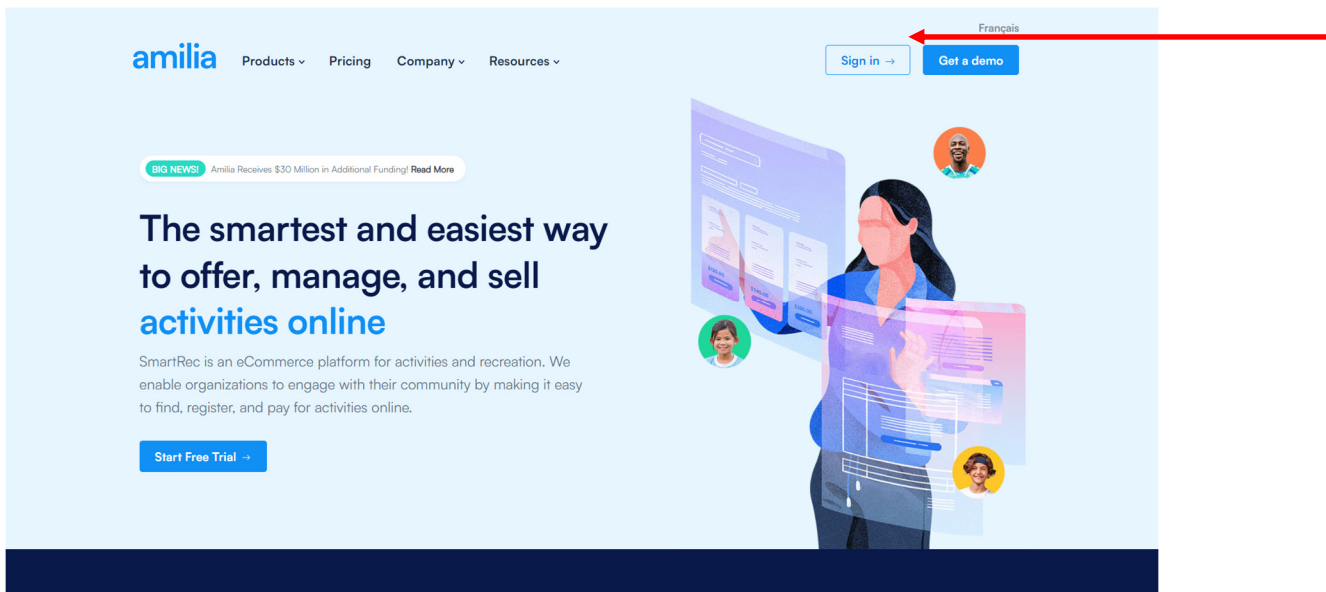
This set of guidelines is intended to help with that process and may be downloaded from the EfM Canada website. The document is in PDF format and should be readily opened in a variety of PDF reader applications: Adobe Acrobat Reader, Foxit PDF Reader, Nitro PDF Reader, etc. The downloaded file will then be available for reference as you go through the steps of creating an online account and the links that are embedded in the file should be active.

As noted above, the current guidelines have undergone significant editing since first introduced. As a result, a number of the screenshots that follow will be out of date (literally) and will not accurately represent what actually appears on your computer screen. We've done our best to ensure that such anomalies are insignificant and that they will not effect the clarity of the directions offered or the registration process itself. That said, if there are steps that are unclear or lead to unexpected results please let us know—our goal is to facilitate as straightforward and seamless a registration process as possible. Many thanks.



Accessing the Website

- Click on the following link to access the Amilia website: <https://www.amilia.com/>
- The Amilia homepage should load in a new browser window, appearing much like the one below



- Click on the **'Sign in'** button found on the top right hand side of the screen, highlighted by the red arrow above
- This will take you to the **'Log in'** screen found on the following page

Log in / Create an account

AMILIA SmartRec Login Sign up Français

Log in

Email
example@domain.com

Password

Log in

Log in with Facebook
Log in with Google
Log in with Microsoft 365

[Create an account or reset your password](#)

[Exploring Amilia? Check us out here.](#)

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- Click where it says **‘Create an account’** near the bottom of the **‘Log in’** window; the screen illustrated at the bottom of this page will then open

AMILIA SmartRec Login Sign up Français

Create an account

First name
Robin

Last name
Graves

Email
rgravesca@yahoo.ca

Password

Create an account

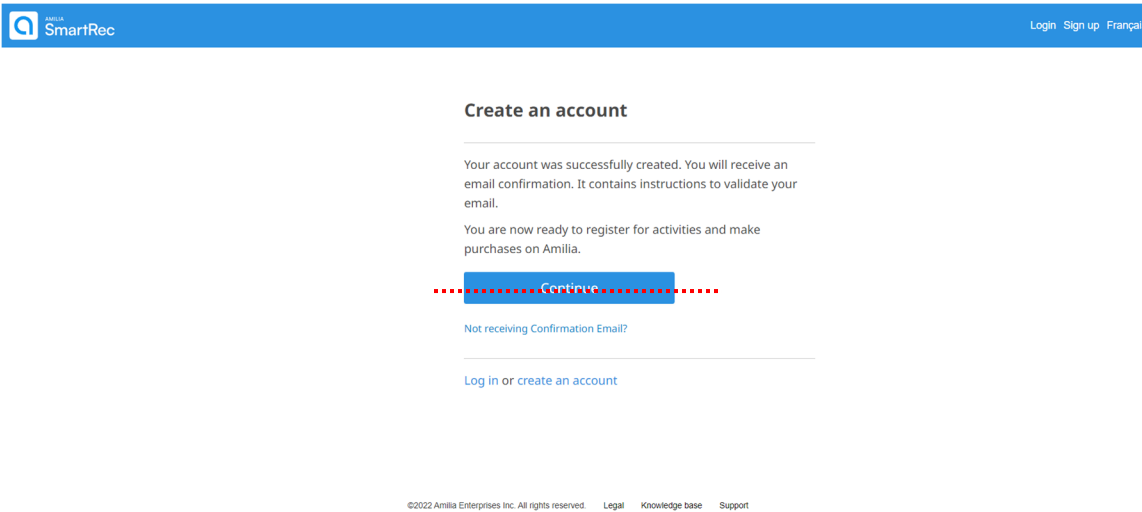
By clicking on "Create an account", you agree to the User Service Agreement and Privacy Policy.

[Log in or reset your password](#)

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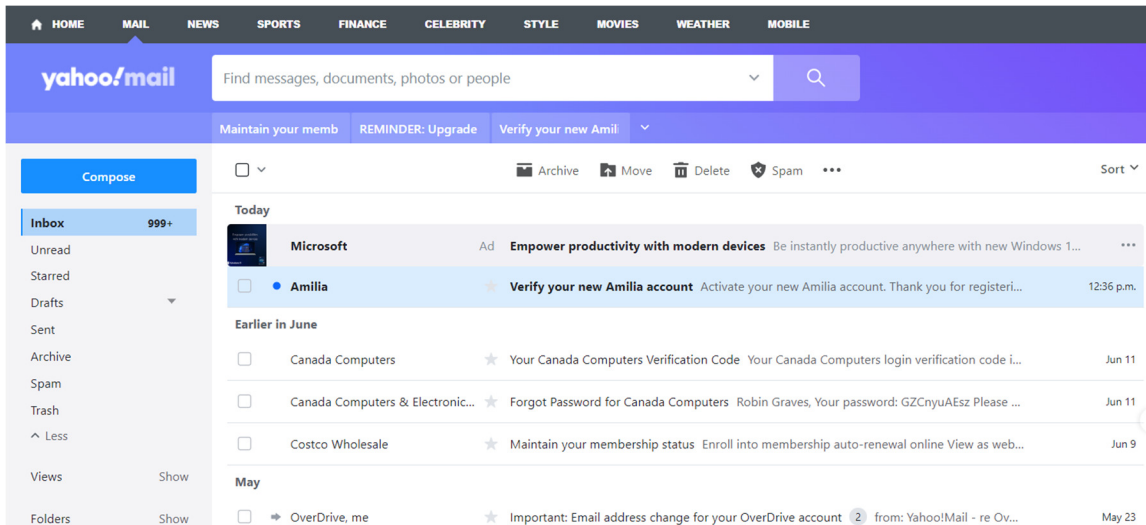
- Fill in your First name, Last name, and your Email address. Create a good password for your account. If you want to see the password you are entering, then click on the ‘eyeball’ to the right of the password box
- Make sure to record the email address and password that you use to ensure that you can readily log into your account at a later time
- Click on the **‘Create an account’** button
- You will then see a **‘Create an account’** confirmation window similar to that illustrated on the next page

Log in / Create an account



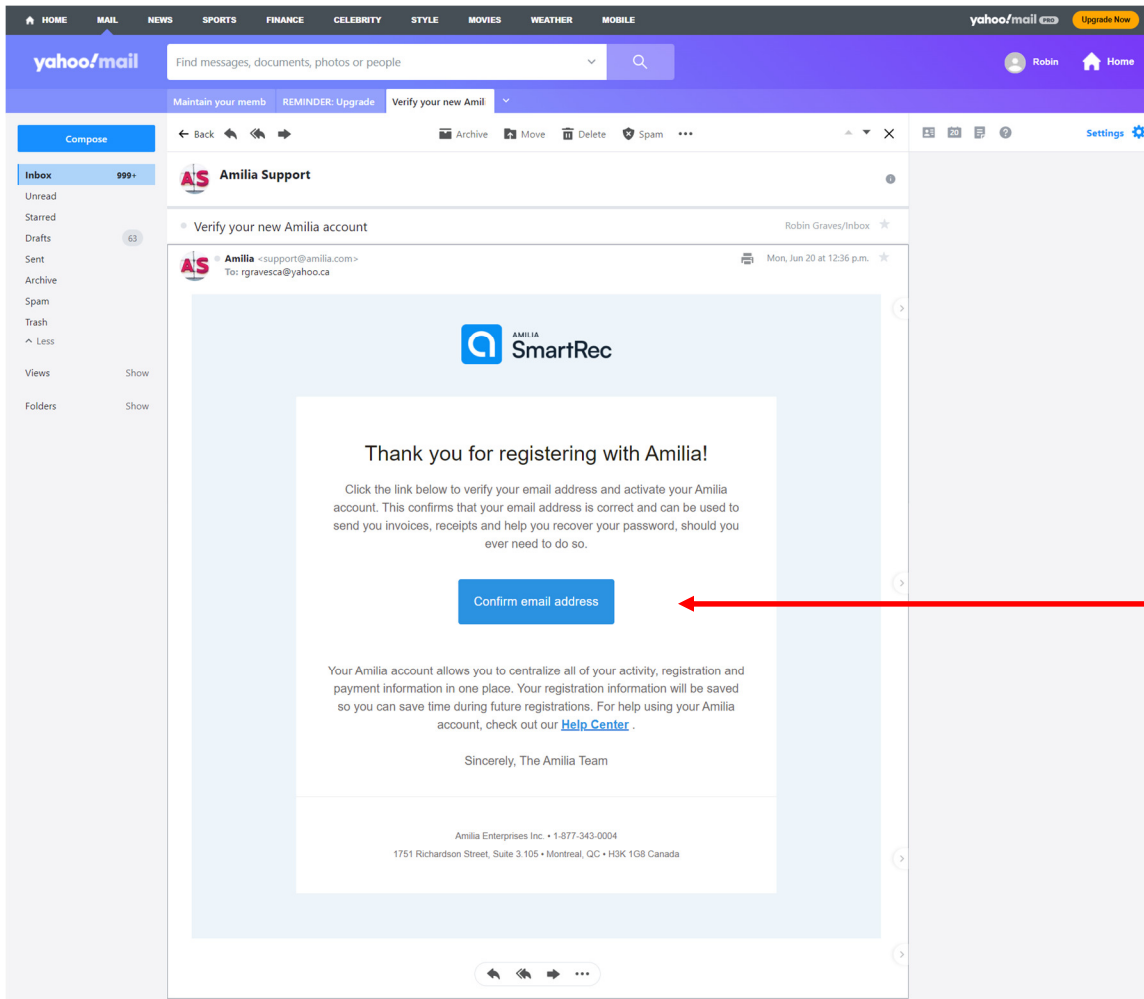
- This will indicate that your account was successfully created and that an email confirmation will be sent to the email address used when creating the account
- Additional instructions needed to validate your email and account for future use will be included in the email
- DO NOT CLICK ON **'Continue'** at this point

Verify your new Amilia account



- Go to your email client and you should see a new email from 'Amilia' with the Subject Line - **'Verify your new Amilia account'**
- If the email does not arrive in your Inbox it may have been filtered by your email program - please check your Junk Mail and Spam folders to see if it is there
- Open the email message and you should see an email that appears like the screenshot on the next page

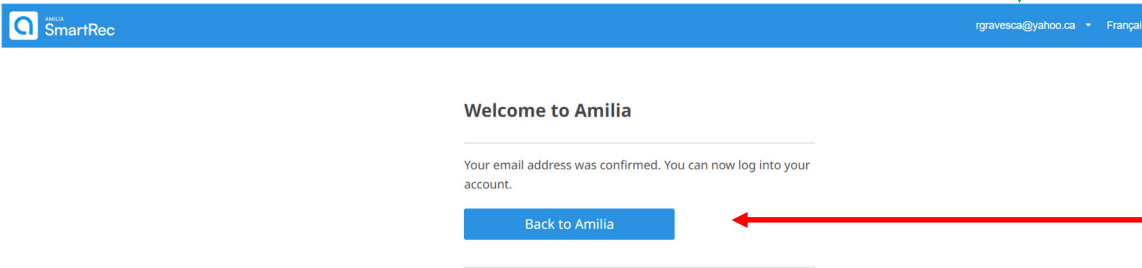
Confirm email address



- Click on the **'Confirm email address'** button, as shown to the left

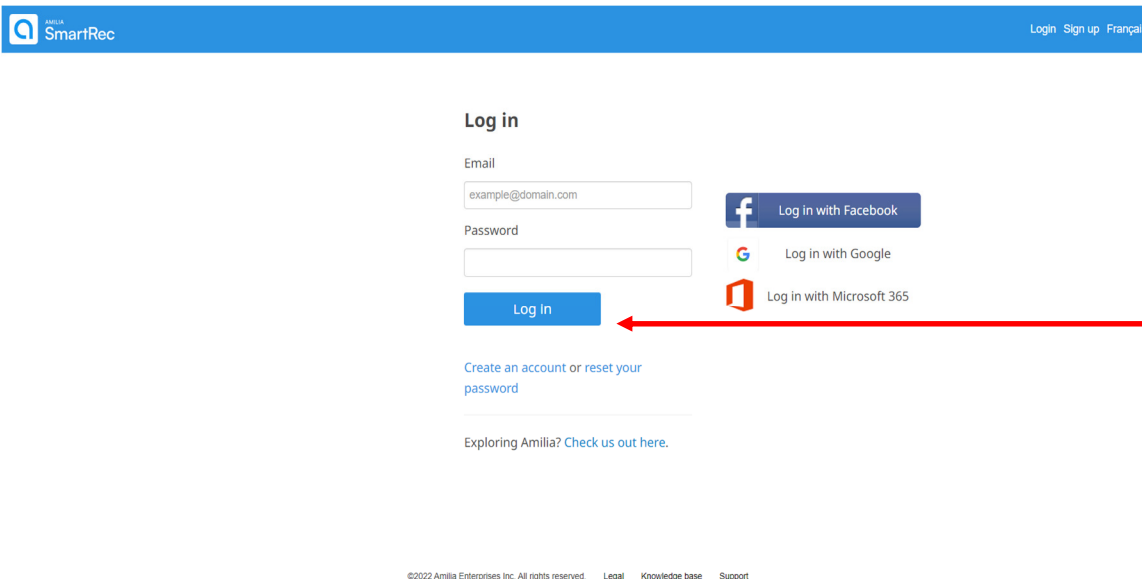
- A new Amilia SmartRec browser tab - **'Welcome to Amilia'** - should open indicating that your email address has been confirmed - see next page

Welcome to Amilia



- The new tab will include your email address in the top right hand corner of the screen (see green arrow) and will also indicate that you can now log into your account
- Click on the **'Back to Amilia'** button—one of two things should happen next:

Log in

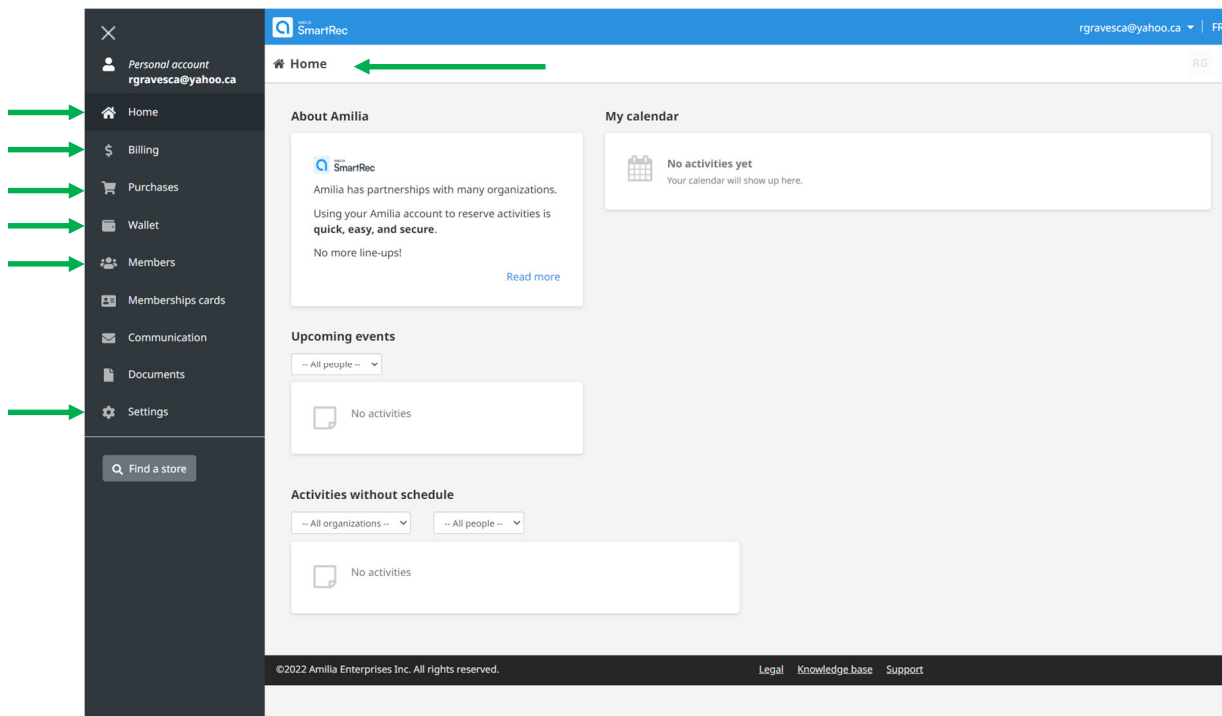


⇒ a **'Log in'** screen will open—in which case you will need to enter the email address and password associated with your new account and then click on the **'Log in'** button

or

⇒ the homepage of your Amilia account will open, as illustrated on the following page

Personal account - Home



- The homepage of your newly created Amilia SmartRec account will be similar to the one illustrated
- The vertical menu bar on the left hand side of the webpage provides access to information and functions associated with your account

- **Billing:** a snapshot of your current account balance, with a history of the billing transactions in the account
- **Purchases:** a cumulative list of the registrations or purchases made in the account, including cancelled items
- **Wallet:** credit card and / or bank account information you have stored in Amilia for ready access when making future registrations or purchases
- **Members:** a list of those added to your account and authorized to use your account for registrations made through Amilia*; it includes contact information for each member—see the next page for more information
 - * *Note:* as account owner you are responsible for all financial transactions made on your account
- **Membership cards / Communication / Documents:** it is unlikely that you will need to access these menus
- **Settings:** allows you to change your account information—can be used, for example, to change your account password if needed

Personal account - editing basic account member information

The screenshot shows the 'Members' page in the Amilia SmartRec interface. A red arrow points to the 'Members' option in the left-hand navigation menu. The main content area displays the profile for 'Robin Graves'. At the top, there is a 'Person' dropdown menu set to 'Robin Graves' and an 'Add a person' button. Below this is a profile picture placeholder with an 'Upload profile picture' button. The profile details include the name 'Robin Graves', email 'rgravesca@yahoo.ca', and a 'Delete' button. The 'Personal information' section has an 'Edit' button and contains fields for 'Gender' (set to 'Not specified'), 'First name *' (filled with 'Robin'), and 'Last name *' (filled with 'Graves'). The 'Address' section also has an 'Edit' button and is currently empty. The 'Contact information' section has an 'Edit' button and an 'Email' field filled with 'rgravesca@yahoo.ca'. At the bottom, there is a 'Log' section with a table header: 'Date', 'Changes', and 'Done by'. The footer contains copyright information: '©2022 Amilia Enterprises Inc. All rights reserved.' and links for 'Legal', 'Knowledge base', and 'Support'.

- You will need to add information to your Amilia SmartRec account to complete this phase of the account setup

- On the homepage of your account, click on **'Members'** in the menu bar on the left side of the page - the screen should change and be similar in appearance to the one illustrated above
- From here you will be able to edit your **'Personal information'**, **'Address'** and **'Contact information'** - missing information may need to be added—see the related illustrations on the following pages

Personal account - editing Personal information

The screenshot displays the 'Members' management interface in SmartRec. At the top, the user is identified as 'Robin Graves' with the email 'rgravesca@yahoo.ca'. The main section is titled 'Personal information' and contains the following fields:

- Gender:** A dropdown menu currently set to 'Not specified'. A green arrow points to this field.
- First name *:** A text input field containing 'Robin'. A green arrow points to this field.
- Middle name:** An empty text input field. A green arrow points to this field.
- Last name *:** A text input field containing 'Graves'.
- Date of birth:** Three dropdown menus for selecting the day, month, and year. A green arrow points to the first dropdown.

Below the personal information form are sections for 'Address' (with an 'Edit' button) and 'Contact information' (with an 'Edit' button and an email field containing 'rgravesca@yahoo.ca'). At the bottom, there is a 'Forms by organization' section with a 'Log' table that is currently empty.

- Click the blue **'Edit'** button next to **'Personal information'** to begin
- **'Gender'** - we do not collect gender information as part of our registration process
- **'Middle name'** - a middle name is not required to finalize your Amilia account creation*

* *Note:* EfM students may include additional names when asked for the certificate name that should appear on the graduation certificate issued by EfM Sewanee upon completion of the full four year program

- **'Date of birth'** - again, this not required to finalize your Amilia account creation*

* *Note:* however, it is optional when registering for a specific EfM program or event and is helpful as we plan for the future

- Click on the green **'Save'** button before continuing to the next page

Personal account - editing Address

SmartRec rgravesca@yahoo.ca | FR

Members RG

Person Robin Graves Add a person

Upload profile picture

Robin Graves
rgravesca@yahoo.ca
Delete

Personal information Edit

Gender Not specified

First name * Robin

Last name * Graves

Address Cancel Save

Address Search for your address

Address 1 * Street and number, P.O. box, c/o.

Address 2 Apartment, suite, unit, building, floor, etc.

City *

Country * Select a country

Postal Code *

I confirm this is my address. *

Contact information Edit

Email rgravesca@yahoo.ca

Forms by organization

Log

Date	Changes	Done by
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- Click on the blue **'Edit'** button to begin
- **'Address 1'** is a required field
- **'Address 2'** information requested here may also be included in the **'Address 1'** field in accordance with Canada Post guidelines
- **'City', 'Country'** and **'Postal Code'** are all required fields
- When you select 'Canada' from the drop down country list an additional **'State/Province'** field appears - this is also a required field
- When all of the required fields are completed please click on the confirmation check box **'I confirm this is my address'**
- Click on the green **'Save'** button before continuing to the next page

Personal account - editing Contact information

SmartRec rgravesca@yahoo.ca | FR

Members RG

Person Robin Graves Add a person

Robin Graves
rgravesca@yahoo.ca
Delete

Upload profile picture

Personal information Edit

Gender Not specified

First name * Robin

Last name * Graves

Address Edit

Contact information Cancel Save

Email rgravesca@yahoo.ca

Phone number

Work Phone

Work Phone Ext.

Cellular

Forms by organization

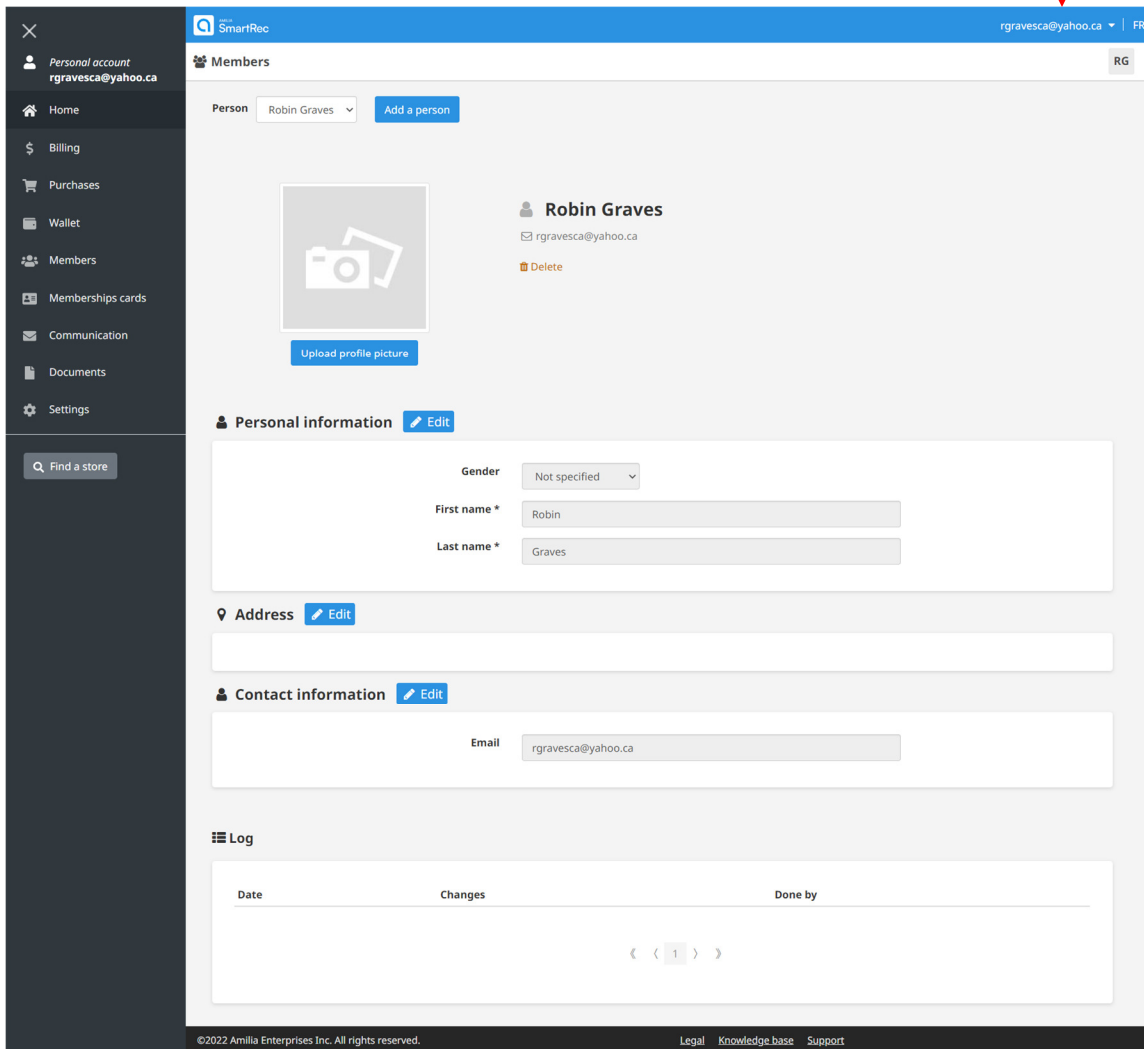
Log

Date	Changes	Done by
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- Click on the blue **'Edit'** button to begin
- **'Email'** was filled in at the time your Amilia account was created and should not be changed
- **'Phone number'** is a required field - please enter a home or landline number here
* if you do not have a landline please enter a cell phone number here and in the **'Cellular'** field below
- **'Work Phone'** and **'Work Phone Ext.'** are optional fields
- **'Cellular'** is an optional field unless it is the only phone number you have
* if that is the case, then it must be included in both the **'Phone number'** and **'Cellular'** fields
- Click on the green **'Save'** button before continuing to the next page

Logging out and next steps ...



The screenshot shows the Amilia SmartRec user interface. At the top right, the user's name and email address 'rgravesca@yahoo.ca' are displayed. A red arrow points to this area. Below the header, the user's profile information is shown, including a profile picture placeholder, name 'Robin Graves', and email 'rgravesca@yahoo.ca'. There is a 'Delete' button next to the email. Below this, there are sections for 'Personal information', 'Address', and 'Contact information', each with an 'Edit' button. The 'Personal information' section includes fields for Gender (Not specified), First name (Robin), and Last name (Graves). The 'Contact information' section includes an Email field (rgravesca@yahoo.ca). At the bottom, there is a 'Log' section with a table showing changes. The footer contains copyright information and links for Legal, Knowledge base, and Support.

- When the edits to your basic account information have been entered and saved you will have completed all the steps necessary to set up an Amilia SmartRec account
- To logout of your Amilia account you will need to click on your name / email address at the top right of your screen
- A blue **'Logout'** button will appear beneath your name / email address
- Click on the **'Logout'** button and then close your Amilia browser windows to completely exit the Amilia website
- You may now use your Amilia SmartRec account to register for all EfM Canada programs and events

- Go to the EFM website <http://www.efmcanada.ca/>
- Click on the blue link where it says **'REGISTRATION PORTAL FOR EfM 2023 – 2024'**
- Look for the program in which you wish to register - guidelines and links are available for each of the four programs offered—you are encouraged to download the guidelines to have at hand as you move through the registration process