



# Account Setup

Tafonic Quick Start Guide

# Introduction

- This document describes the steps for creating and setting up an individual user account on the Tafonic platform.

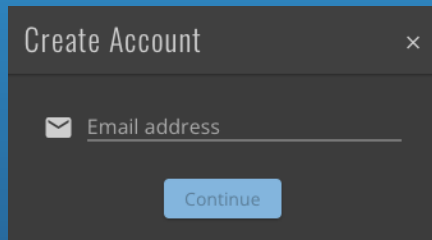
Note: Individual users are (always) affiliated with the public tenant.

If your organization has a private tenant on the Tafonic platform and you would like a user account in that tenant, please contact your tenant administrator.

# Creating an Account

To create an individual user account on the Tafonic platform:

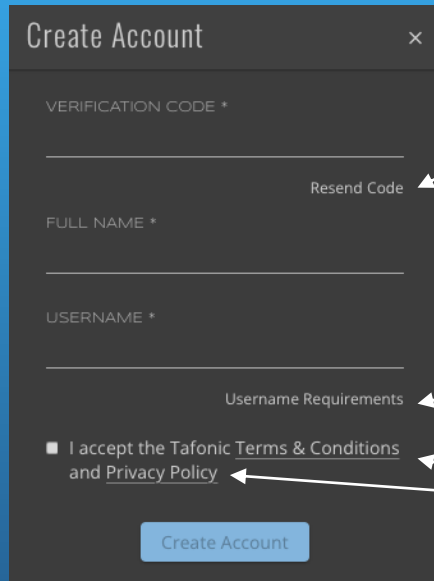
1. Open the Tafonic Platform Console in a web browser.
2. Click the **Create Account** button on the home page to open the form for creating an account.



The screenshot shows a dark-themed dialog box titled "Create Account" with a close button (X) in the top right corner. Below the title bar, there is an email input field with a mail icon on the left and the placeholder text "Email address". Below the input field is a light blue button labeled "Continue".

3. Enter your email address and click **Continue** to initiate email verification.
4. A message should be displayed indicating that a verification code has been sent to the email address provided in step 3. Check your email to obtain this code and click **Continue** to proceed to the next step.

# Creating an Account



The screenshot shows a 'Create Account' form with the following fields and links:

- VERIFICATION CODE \* (input field)
- Resend Code (link)
- FULL NAME \* (input field)
- USERNAME \* (input field)
- Username Requirements (link)
- I accept the Tafonic [Terms & Conditions](#) and [Privacy Policy](#)
- Create Account (button)

Arrows point from the explanatory text on the right to the 'Resend Code' link, 'Username Requirements' link, and the 'Terms & Conditions' and 'Privacy Policy' links.

If you would like to have another verification code sent to your email address, click the **Resend Code** link.

Your username will serve as the unique identifier for your account. Once created, it cannot be modified. Make sure to select something that will be easy for you to remember.

Click the **Username Requirements** link to learn how to create a valid username.

Click the **Terms & Conditions** and **Privacy Policy** links to view those respective documents.

5. Enter the verification code, your full name and a username.
6. Accept the Tafonic Terms and Conditions and Privacy Policy.
7. Click **Create Account**.

# Creating an Account

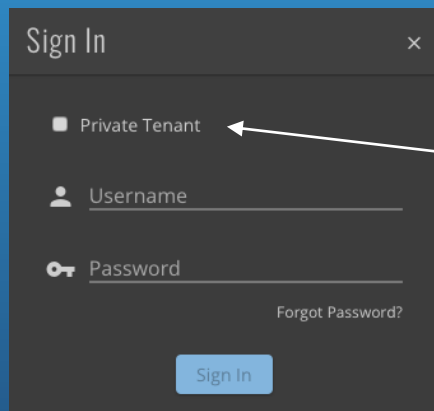
If your account was successfully created, you will see a message informing you of this.

A confirmation email will also be sent to you containing important account information, along with instructions on how to sign in and update your user profile.

# Signing In

To sign in to the Tafonic platform:

1. Open the Tafonic Platform Console in a web browser.
2. Click the **Sign In** button on the home page to open the form for signing in.



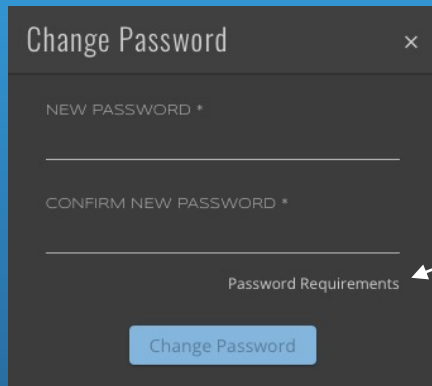
The screenshot shows a dark-themed 'Sign In' dialog box. At the top left is the title 'Sign In' and a close button 'x'. Below the title is a checkbox labeled 'Private Tenant' which is currently unchecked. An arrow points from the text 'Leave the Private Tenant checkbox unselected.' to this checkbox. Below the checkbox are two input fields: 'Username' with a person icon and 'Password' with a key icon. A 'Forgot Password?' link is located below the password field. At the bottom center is a blue 'Sign In' button.

Leave the **Private Tenant** checkbox unselected.

3. Enter your username and password.
4. Click **Sign In**.

# Signing In

If you are signing in for the first time, you will be prompted to change your password.



Change Password

NEW PASSWORD \*

CONFIRM NEW PASSWORD \*

[Password Requirements](#)

Change Password

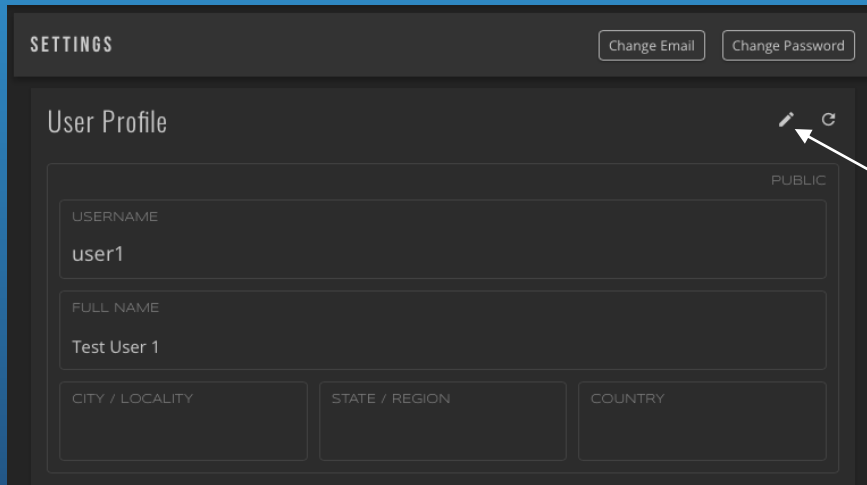
Click the **Password Requirements** link to learn how to create an acceptable password.

5. Enter your new password.
6. Click **Change Password**.

# Updating Public User Profile

After you have signed in, kindly take a moment to complete your public user profile by following these steps:

1. Click the **Settings** link in the main menu to go to the Settings page.



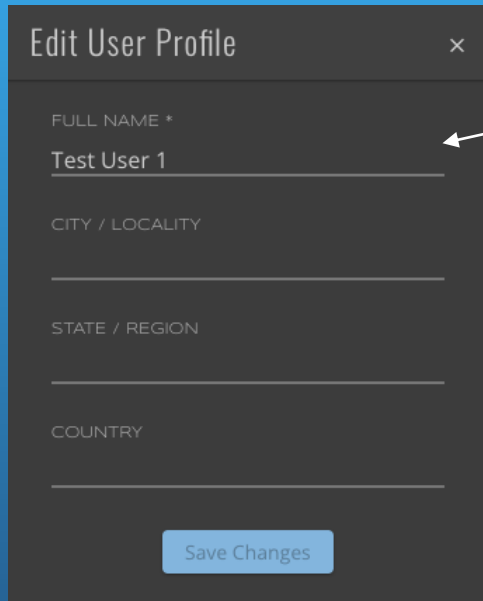
The screenshot shows a dark-themed 'SETTINGS' page. At the top right, there are two buttons: 'Change Email' and 'Change Password'. Below this is a 'User Profile' card. The card has a title 'User Profile' and a 'PUBLIC' label in the top right corner. The card contains three input fields: 'USERNAME' with the value 'user1', 'FULL NAME' with the value 'Test User 1', and three separate fields for 'CITY / LOCALITY', 'STATE / REGION', and 'COUNTRY'. In the top right corner of the card, there is an edit icon (a pencil) and a refresh icon (a circular arrow). A white arrow points from the text 'Edit icon' to the pencil icon.

Edit icon

2. Click the **edit** icon on the User Profile card to open the form for editing the public user profile.



# Updating Public User Profile



EDIT USER PROFILE

FULL NAME \*  
Test User 1

CITY / LOCALITY

STATE / REGION

COUNTRY

Save Changes

The full name field cannot be left empty.

3. Add/update your public user profile data.
4. Click **Save Changes**.

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