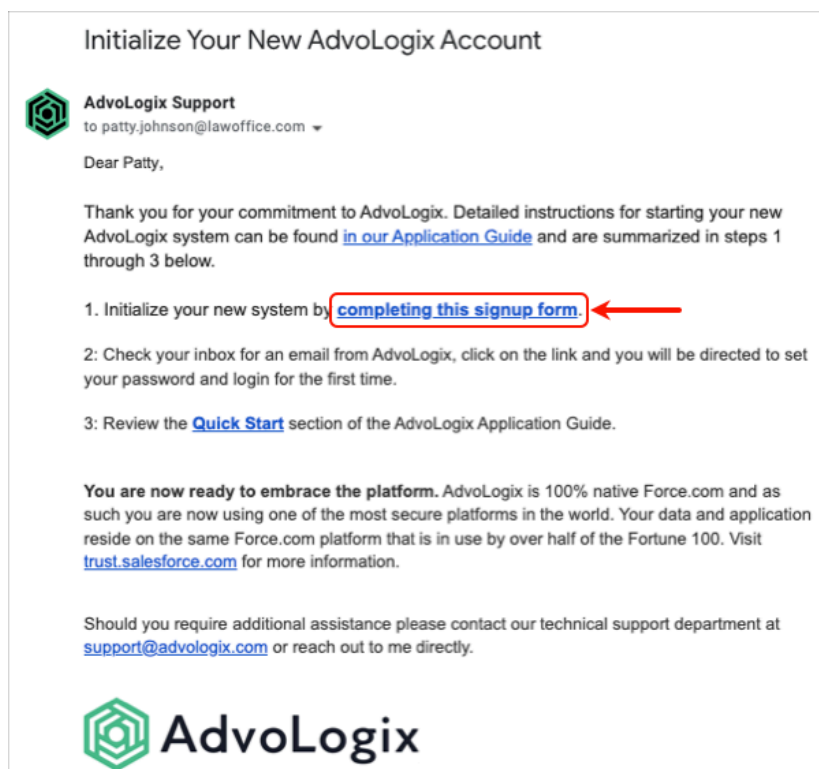


New Account Signup

Most of our customers **do not** have an existing Salesforce implementation and will use the AdvoLogix signup process described here. If your firm has a Salesforce implementation and would like to implement AdvoLogix, then you will need to follow the instructions found here: [Installing AdvoLogix into an Existing Salesforce Organization](#).

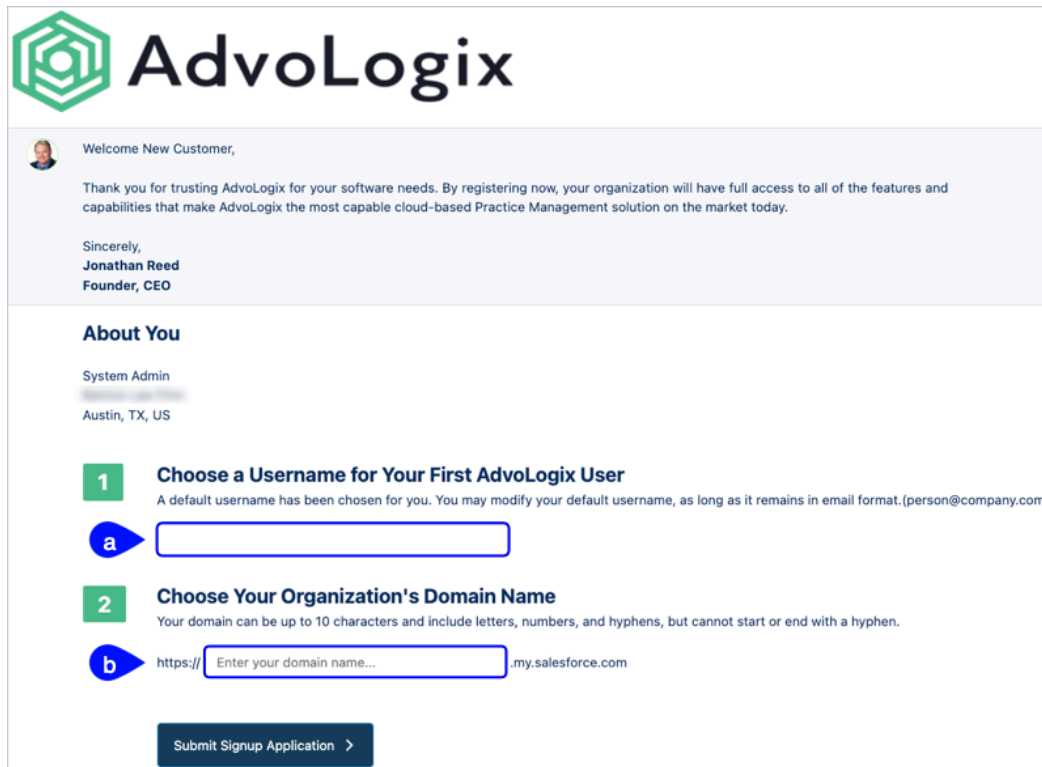
Directions for Creating a New Organization

You will receive an email with instructions on completing the next step. This email is to set your expectations and take the guess work out of the process. Next, you will receive a second email with the subject '*Initial Your New AdvoLogix Account*'. The email will look similar to the image below. Per the instructions sent in the first email, select the '*completing this signup form*' link.



Complete the Signup Application

- a. This will be your username for this org.
- b. This will be your [My Domain](#) name.



The image shows a screenshot of the AdvoLogix signup application form. At the top is the AdvoLogix logo. Below it is a welcome message from Jonathan Reed, Founder, CEO. The form is titled 'About You' and contains two main sections. The first section, '1 Choose a Username for Your First AdvoLogix User', has a text input field with a blue arrow pointing to it labeled 'a'. The second section, '2 Choose Your Organization's Domain Name', has a text input field with a blue arrow pointing to it labeled 'b'. The input field shows 'https:// Enter your domain name... my.salesforce.com'. At the bottom is a 'Submit Signup Application >' button.

AdvoLogix

Welcome New Customer,

Thank you for trusting AdvoLogix for your software needs. By registering now, your organization will have full access to all of the features and capabilities that make AdvoLogix the most capable cloud-based Practice Management solution on the market today.

Sincerely,
Jonathan Reed
Founder, CEO

About You

System Admin
Austin, TX, US

1 Choose a Username for Your First AdvoLogix User
A default username has been chosen for you. You may modify your default username, as long as it remains in email format.(person@company.com)

a

2 Choose Your Organization's Domain Name
Your domain can be up to 10 characters and include letters, numbers, and hyphens, but cannot start or end with a hyphen.

b https:// Enter your domain name... my.salesforce.com

Submit Signup Application >

Once you select *Submit Signup Application*, you will receive an email from Salesforce to sign in with your new username. Please sign out of any other orgs you may be logged into in the browser you are using **before** you select the link to sign in.



If you are unable to create your password, do **NOT** try to reset it. Please contact support@advologix.com for assistance.