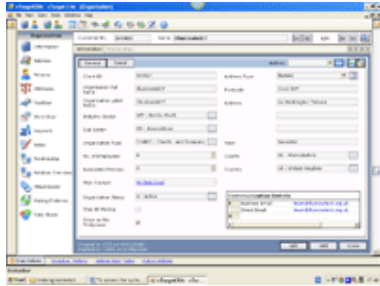




## Change data on an organisation: People



When you are working with the data you will sometimes find errors in the data, or information in the wrong fields. The information visible on the organisation form is of different types.

The organisation information on the left can be edited directly, the address and contact information is edited through the Address button on the left hand Organisation Information Bar.



### Change people

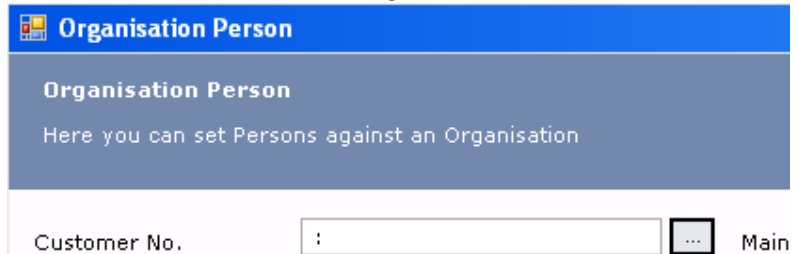
When you click on the people tab the people associated with the organisation will be listed on the screen. At the bottom of the screen you will see a number of buttons.



**The Person(s) Attribute(s)** button shows the attributes assigned against the individual, these attributes are based upon the needs of organisation and funders. For example you may need to record ethnicity of trustees, or people with specific skills

**The Open Button** opens the persons record and allows full editing of that record

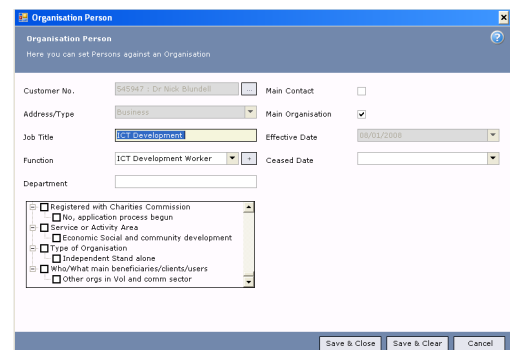
**The add button** allows you assign a new person to the organisation. When you click on the add button you are presented with the Organisation Person box. The Customer No. Box has the smaller box to the right with ellipse(three dots) click here will bring up the search for a person box. NOTE a person must be on the system before they can be assigned to an organisation. So use the add a person wizard to create a completely new person and then return here to assign them to an organisation



**The edit button** edits the links between the person and the organisations. For example their position in the organisation if the organisation has an attribute of a Narrow Boat, then a helmsman may have a personal attribute relating to the Narrow boat.

You can also assign people to a department or section of an organisation

**The delete button** will delete the relationship between the person and the organisation.



**Illuminating Comments**  
NB: if the button is grey it is because you haven't got an organisation record active