



How to add a Person

Contact management systems require people's information to be held securely and assigned against an organisation or organisations. Within the voluntary sector it is not uncommon to find people who work for two or more organisations, or are seconded to specialist projects.

Enter the last name and the post code of the person you plan on entering; please be careful with the spelling of the last name because the machine will not find variants i.e. Reed will not find Reid, or Read.

Select Next and a list of matches will be displayed, if the person is not on the list then select next.

Complete as much information as you have available for the person and then choose next again, this screen will then allow you to link the person to an organisation.

Note the box with the ellipse next to the organisation customer no box. Click on this will present the following box.

This box will allow you to search for the organisation the person belongs to.

Click on find will identify the organisations, select the correct one and double click the record.

You should now complete the last box with personal contact information, job title etc and click on Finish.

You have now entered a person and assigned them to an organisation.

Illuminating Comments

Use the wild card (%) lets you find information without being too precise – e.g. search for %rural will find all organisations that contain the word rural and gets around data entries where someone has entered The rural org etc.

This is useful for answering quick queries over the phone

See other quick reference guides for advanced search options