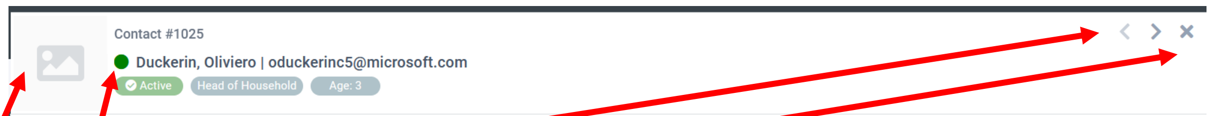
The Contacts screen

Opening a record: Double click on any individual.

Sorting the list: When in grid view, click on any column header to the list according to that column. An upwards pointing arrow will appear in that column name.



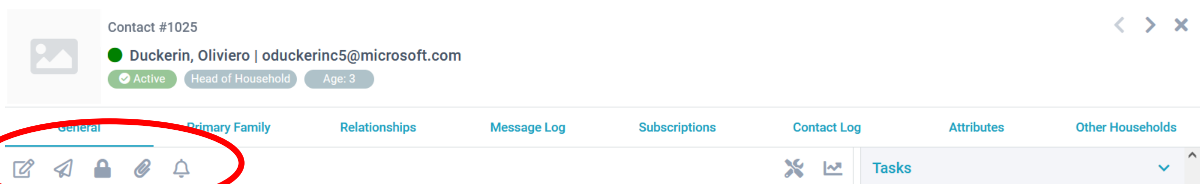
Moving between records: Us the **<** or **>** button to see the next record.

Closing a record: Click the **X** button on the far right to close the record.

Contact Picture: If a picture of this parishioner has been uploaded, it will appear at the top of the screen.

Tasks: When an open task is associated with a record, the green dot will change to yellow.

<u>**Acting on a record:** </u>Options shown in the red circle are described below from left to right.



Edit a record

Send a **message** to this record

Secure: Admin task only.

Attach files to a record

Set up a **notification** for this record to receive notifications when it changes.

Understanding what is stored in a contact record

Contact Number: An internal record number that identifies this person in the databas. You cannot change the contact number.

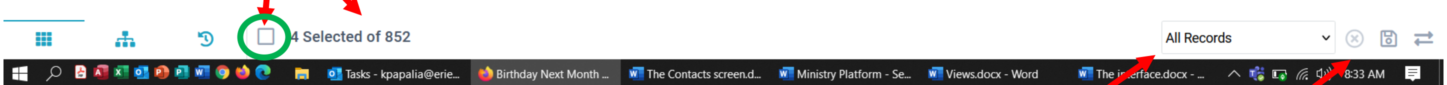
General tab: This screen includes general contact information for the contact. Home phone is not stored in an individual contact's record. It is located on the Household record.

Household: This information common to the whole household: Address, home phone. Click the blue chain link button on anyone's General contact information to jump to information for their household. The members tab includes a list of every member of the household. Each individual has a blue link that will allow you to jump to that user's contact record.

Participant: Information pertaining to how engaged the individual is – groups, sacraments, events, are they volunteering, milestones. How are they participating at your parish?

Selections: (Checkmark boxes in the grid view)

- Check boxes allow you to **take action** on selected records. For example, check boxes for people to whom you wish to send a message or records you wish to export.
- Selections are a temporary group of people you clear after you have acted on them. If you need a permanent means acting on these people, you would instead create a group.
- Selections are sticky. They will remain selected FOREVER until you remove them.
- A count will appear indicating how many records you have checked
- The square check box to the right of the count is the **Select All** button



Making Selections

1. Check the boxes next to individuals upon which you'd like to take action.
2. Click the downward pointing arrow in the **All Records** drop down.
3. Choose **Current/Unsaved Selection**. This will hide non-selected records.
4. Take whatever action you need upon these records.
5. Deselect your records when done taking action on those records.

Important: When you are done with the selected records you MUST clear those checkboxes. Forgetting to de-select records can affect searches in the future. Boxes stay selected for YEARS

   a. Click the downward pointing arrow in the **Record View** drop.
   b. Choose **Current/Unsaved Selection**
   c. Click the round **Clear Selection** button to the right of the Record View drop.