

Tweet? append #DC10

Follow DC10: search.twitter.com (search on #DC10)

WORKING WITH PEOPLE RECORDS BASICS

Barbara Perser

Fellowship Technologies



WORKING WITH PEOPLE RECORDS

BASICS

- **Household/Individual**
 - Add a new individual record
 - Differences between household and individual records
 - Switch between household and individual records
 - Using the actions gear



WORKING WITH PEOPLE RECORDS

BASICS

- **Household/Individual cont'd.**
 - Widgets for individual records
 - Navigation conventions in individual and household records
 - Set and save page settings



WORKING WITH PEOPLE RECORDS

BASICS

- **Search Tips**

- Shortcut key Alt+Shift+s will take you to the Search Box in most web browsers
- Curly Braces { } will search for what the braces contain – {17} will return an address that contains 17 in it.
- Address searches return the “Primary Address”



WORKING WITH PEOPLE RECORDS BASICS

- **Search tips cont'd.**
 - If your search comes back and you don't understand the results, check the household – the information is hidden “under the covers”!



DEMO



THANK YOU

For more information:
education@fellowshiptech.com

Thank you so much!!!

