

Finding Families

Finding all contacts assigned to your agency

1 When on the <Contact> tab, simply click <Find>.

Note: You will see a list of families you have most recently used within the system by default before you click <Find>.

The screenshot shows the 'Contact Search' form with various input fields and a 'Find' button. Below the form, a table displays 'Found 2 Contacts' with columns for Code, Send, Name, Company, Address, Email, Phones, Role, Group, Status, User, and Updated. The contacts listed are Jane Doe and Johnny Doe, both associated with '1) Baby TALK'.

Code	Send	Name	Company	Address	Email	Phones	Role	Group	Status	User	Updated
JX		Jane Doe		123 Main St, Anytown, IL 11111, US	janedoe@gmail.com	Hm: 111-111-1111 Cell: 222-222-2222	Mother	1) Baby TALK	Active	EMW	3/16/2017
JX		Johnny Doe		123 Main St, Anytown, IL 11111, US			Child	1) Baby TALK	Active	EMW	3/16/2017

Note for Decatur users, always choose <Group> = "Baby TALK" to see only family member contacts. Other contacts are being tracked within the system for donor management.

This close-up shows the 'Group' dropdown menu in the 'Contact Search' form. The menu is open, showing options: 'Agency', '1) Baby TALK', '2) Donor', and '3) Donor Prospect Agency'. The '1) Baby TALK' option is highlighted by the mouse cursor.

Finding Families

Finding active families assigned to you/using search fields

- 1 Select "Status" = Active and check the box "Only my contacts" to see only families assigned to your user id.

- 2 The most common additional search field you will use is <Name/Company/Email>. Enter either partial or full name here.

Note: You may not initially see all of the family members if their last names differ. However, when you select any of the family members you will see the primary contact and all of the sub-contacts/family members associated with that primary contact.

In this example, the search only finds the child in the family.

Code	Send	Name	Company	Address	Email	Phones	Role	Group	Status
JX	<input type="checkbox"/>	John Jay Smith		, , ,			Child	1) Baby TALK	Active

When the child record is selected, the system takes you to the primary caregiver and all associated contacts:

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Contact Code: JX Contact #92880 Active ▼ Save

Contact Info:
Jane Doe

Work Phone:
Home Phone:
Cell Phone:
Fax:

Role: Mother Source: Another agency
Email: Assigned To: Ellen Walsh
Type: Individual

 [Add an additional address](#)

More Contacts	Events	Donations/Payments	Sub Cont										
More Contacts													
<table border="1"> <thead> <tr> <th>Name</th> <th>Map</th> <th>Address</th> <th>Phone</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td>Johnny Smith</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Name	Map	Address	Phone	Email	Johnny Smith				
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