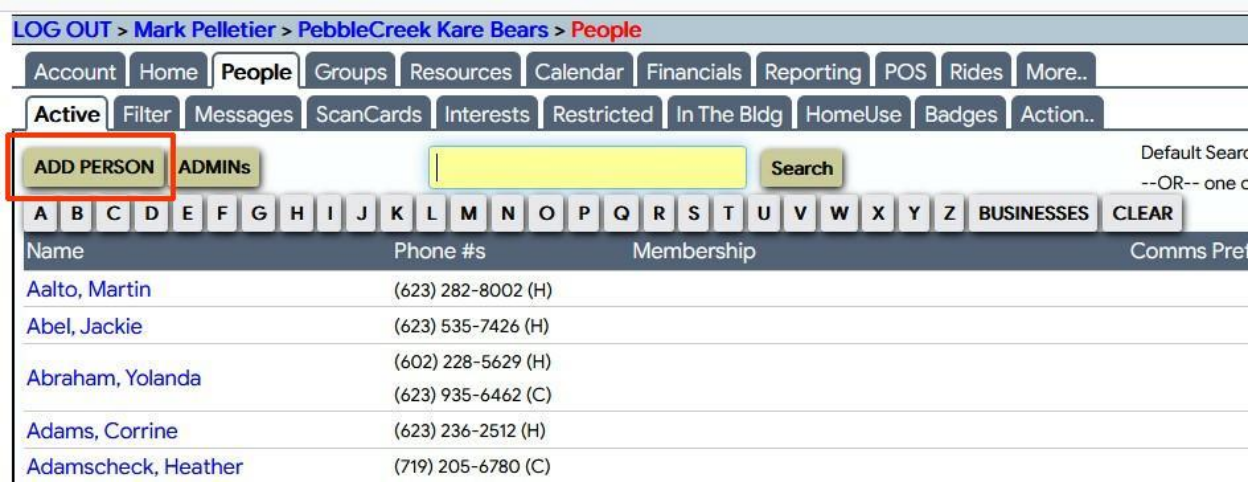
ADDING A NEW ENTRY (PERSON) TO THE "PEOPLE" FILE

The "Add a Person" button appears for all ADMINs, on the PEOPLE tab, however if the ADMIN is not authorized to add, a warning will be issued.

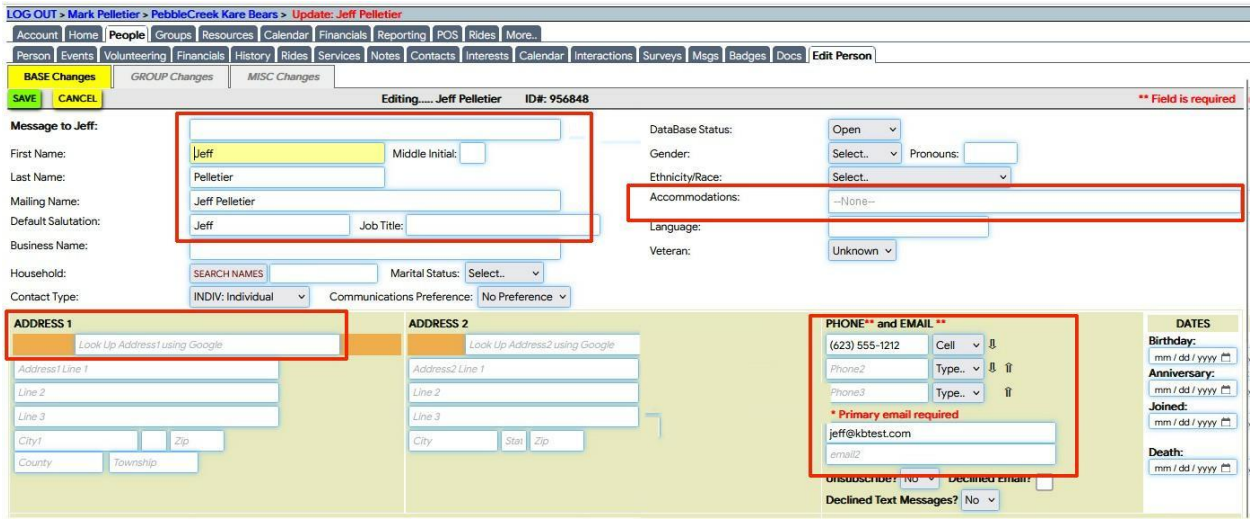


INITIAL ENTRY SCREEN

The initial screen for adding a person requires only a first name, last name, a phone number and an email address. It is important to identify the phone number as "Cell" or "Home". Wherever the system makes use of texting, messages will only be sent to phone numbers marked "Cell" .

Enter the information and click "Save" to proceed to the full data entry panel

MAIN DATA ENTRY SCREEN (UPPER PORTION)



Verity that the system populated the name fields are OK, separating first and last names. Change the default salutation if they actually go by a "nickname".

Ignore Job Title. Leave Contact Type as "Individual". Ignore all items not shown in red.

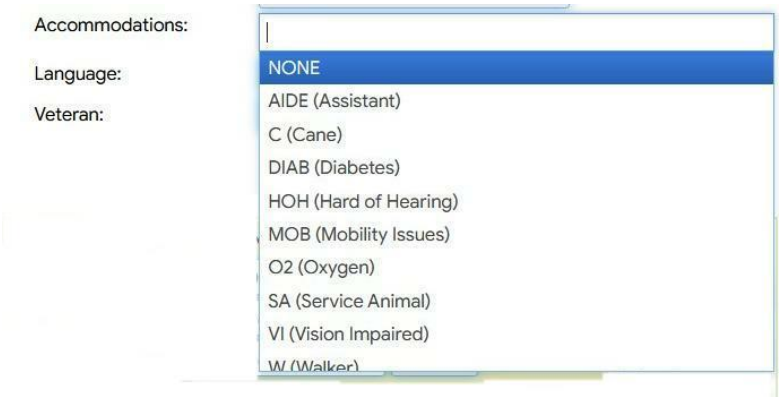
ADDITIONAL ENTRY FOR TRANSPORTION RIDERS

Make these "Accommodation" settings if the person is a frequent transportation RIDER, to have their special needs (such as use of a wheelchair) automatically entered into their Rides.

Under "Accommodations" select all factors relevant to the person.

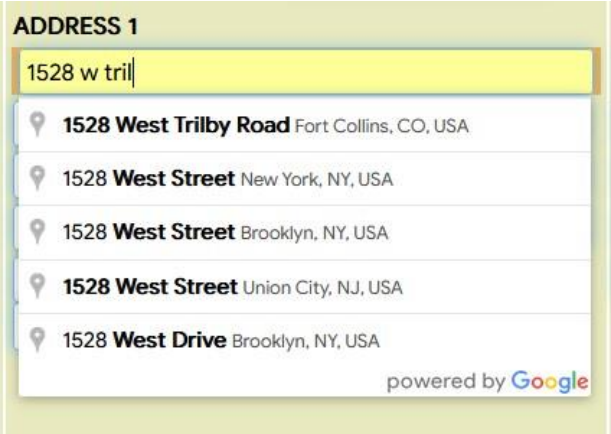
These will be shown on any RIDE created for the person. Hold the SHIFT key to select multiple conditions.

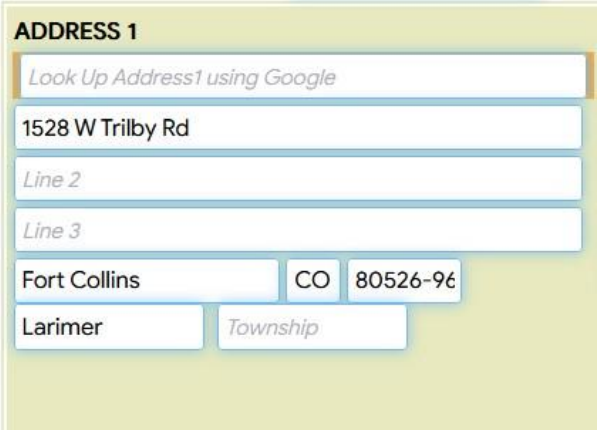
Additional options can be added if needed.



ENTERING ADDRESSES

Begin to enter their street address in the "*Look up Address1 using Google*" box. As you type Google will begin to suggest Street/City/State addresses in a uniform format. If one of the suggestions is appropriate, click it to populate the details. Otherwise type in the separate fields, including Line 2 and Line 3 if needed.





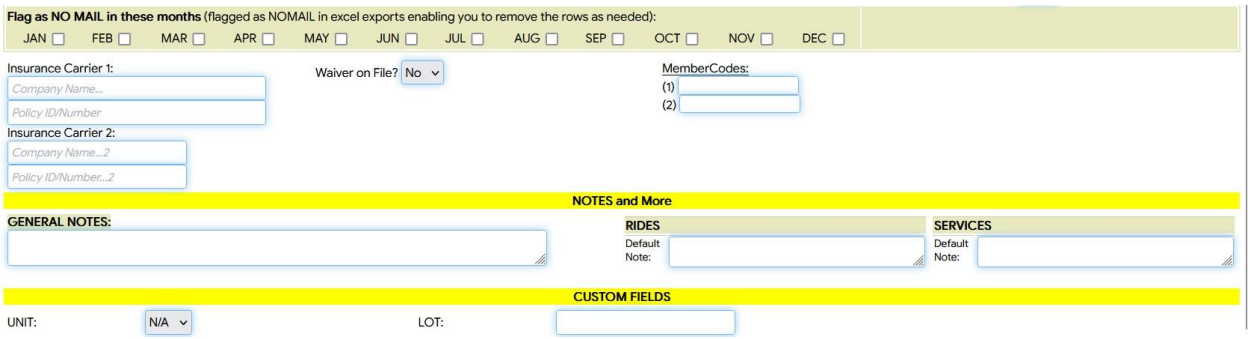
There can be up to three phone numbers.

Please identify any/all which are cell phone number as "Cell" – otherwise "Home" or "Work". Text message will only be sent to "Cell" numbers

There can be up to two email addresses.

System generated messages will be sent to <u>both</u> if two are entered.

LOWER PORTION OF THE MAIN ENTRY SCREEN



Ignore the Unit and Lot entry areas on the lower part of the main entry panel. We will NOT be capturing that information for new additions.

NOTES

These Notes entries are free-form, but we learned during training that if you (optionally) place a hashtag identifier at the start of a note, that "#SOMETHING" can be searched.

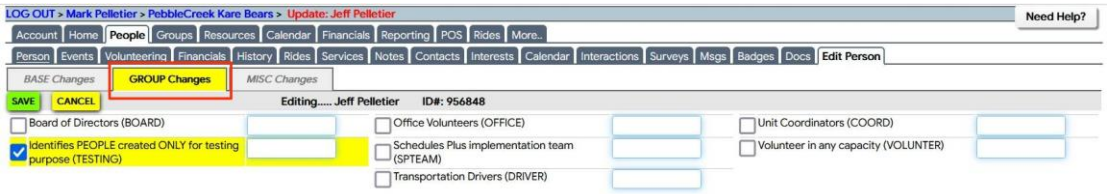
GENERAL NOTES can be added here associated with the person; or notes that will specifically appear on any RIDE created for them.

We need to determine what our specific policy about using these notes options will be.

Ignore SERVICES

APPEARANCE IN GROUPS

A person can belong to one more or GROUPS, which provide a method to manage people performing a specific role with Kare Bears. Group Leaders will manage which persons are assigned to the various GROUPS. **Do not make any entries or changes here.**



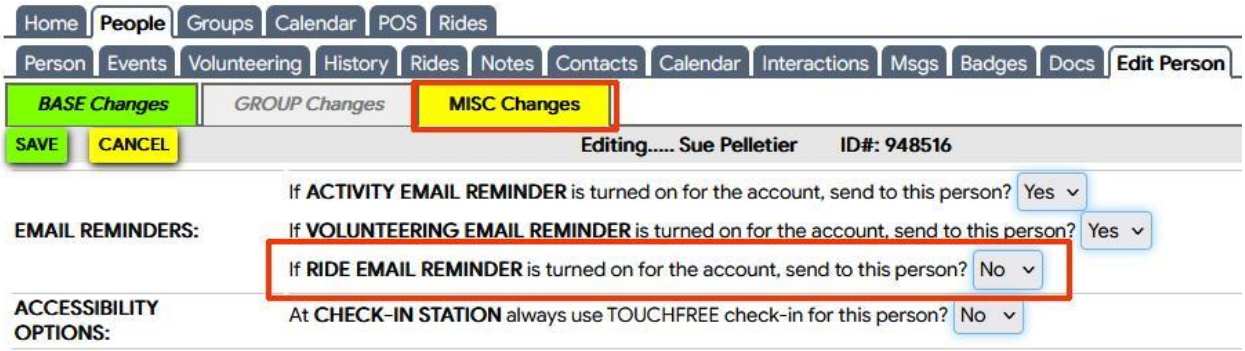
ADDITIONAL ENTRY FOR TRANSPORTION RIDERS

The system can automatically send an email on Saturday evening to persons with Rides scheduled in the upcoming week (Sunday through next Saturday). However their PEOPLE record must be set to enable that message capability for them.

When in EDIT mode, click their MISC CHANGES tab to see this screen.

Change the email reminder setting from NO to YES.

(*The capability IS TURNED ON at the account level)*

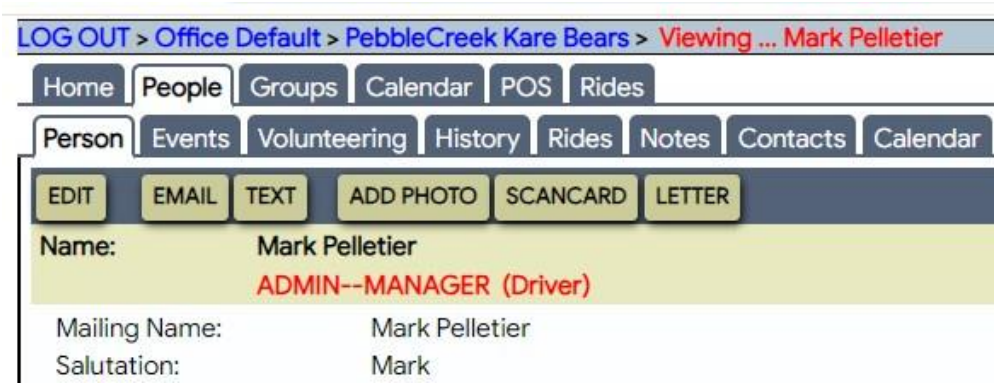


EDITING A RECORD

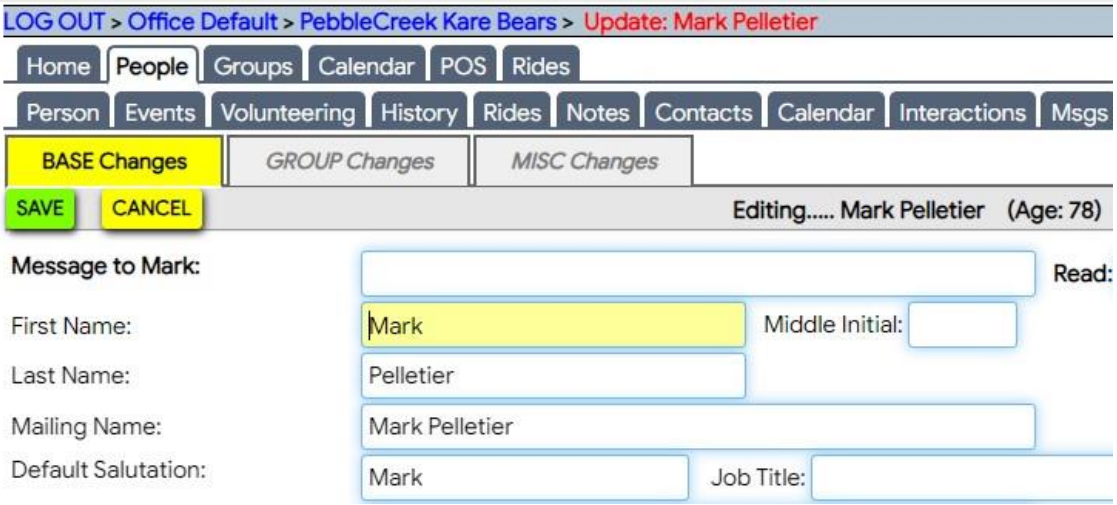
When it is necessary to update information in the person's record, first access the PEOPLE tab. There will be a yellow SEARCH box, and tabs for each letter of the alphabet. Although you can drill through the alphabetical list, it is easier to search for the person.

As you type there, the system will begin to show matching persons. Click on the appropriate person, perhaps one of many matching names.

Once on the person's record, click the EDIT button



The full entry screen – identical to the one used for the initially adding a perosn – will appear.



Make any necessary updates on this screen, or on the "GROUP changes" or MISC changes" screen per the discussion above.

AN IMPORTANT REMINDER FOR ALL INPUT/EDIT

After entering or updating any data elements, you

MUST click the SAVE button to record your changes.

If you simply exit that screen by selecting another tab –

your changes are NOT recorded!