

### 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.

LOG OUT > Mark Pelletier > PebbleCreek Kare Bears > People

Account Home **People** Groups Resources Calendar Financials Reporting POS Rides More..

Active Filter Messages ScanCards Interests Restricted In The Bldg HomeUse Badges Action..

**ADD PERSON** ADMINS  Search Default Search --OR-- one c

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z BUSINESSSES CLEAR

| Name                | Phone #s                                 | Membership | Comms Pre |
|---------------------|--|------------|-----------|
| Aalto, Martin       | (623) 282-8002 (H)                       |            |           |
| Abel, Jackie        | (623) 535-7426 (H)                       |            |           |
| Abraham, Yolanda    | (602) 228-5629 (H)<br>(623) 935-6462 (C) |            |           |
| Adams, Corrine      | (623) 236-2512 (H)                       |            |           |
| Adamscheck, Heather | (719) 205-6780 (C)                       |            |           |

### 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" .

LOG OUT > Mark Pelletier > PebbleCreek Kare Bears > Add New Person

Account Home **People** Groups Resources Calendar Financials Reporting POS Rides More..

Add Person **\*\* Required Field**

First Name:

Last Name:

\*\* Telephone:

\*\* eMail:

Business: (optional)

**SAVE**

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

### MAIN DATA ENTRY SCREEN (UPPER PORTION)

Verify 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.*

Accommodations:

Language:

Veteran:

## 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.

**ADDRESS 1**

1528 w tril|

- 📍 1528 **West Trilby Road** Fort Collins, CO, USA
- 📍 1528 **West Street** New York, NY, USA
- 📍 1528 **West Street** Brooklyn, NY, USA
- 📍 1528 **West Street** Union City, NJ, USA
- 📍 1528 **West Drive** Brooklyn, NY, USA

powered by Google

**ADDRESS 1**

Look Up Address1 using Google

1528 W Trilby Rd

Line 2

Line 3

Fort Collins CO 80526-96

Larimer Township

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 both if two are entered.

**PHONE\*\* and EMAIL \*\***

(623) 555-1212 Cell ▾ ⬇

Phone2 Type.. ▾ ⬇ ⬆

Phone3 Type.. ▾ ⬆

**\*\* Primary email required**

jeff@kbttest.com

email2

Unsubscribe? No ▾ Declined Email?

Declined Text Messages? No ▾

### LOWER PORTION OF THE MAIN ENTRY SCREEN

Flag as NO MAIL in these months (flagged as NOMAIL in excel exports enabling you to remove the rows as needed):  
 JAN  FEB  MAR  APR  MAY  JUN  JUL  AUG  SEP  OCT  NOV  DEC

Insurance Carrier 1:  Waiver on File?  MemberCodes: (1)   
 Company Name...  Policy ID/Number  (2)   
 Insurance Carrier 2:   
 Company Name...2  Policy ID/Number...2

**NOTES and More**

**GENERAL NOTES:**

**RIDES** Default Note:

**SERVICES** Default Note:

**CUSTOM FIELDS**

UNIT:  LOT:

**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.

**NOTES and More**

**GENERAL NOTES:**

**RIDES** Default Note:

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.**

LOG OUT > Mark Pelletier > PebbleCreek Kare Bears > Update: Jeff Pelletier Need Help?

Account Home People Groups Resources Calendar Financials Reporting POS Rides More

Person Events Volunteering Financials History Rides Services Notes Contacts Interests Calendar Interactions Surveys Msgs Badges Docs Edit Person

BASE Changes **GROUP Changes** MISC Changes

SAVE CANCEL Editing..... Jeff Pelletier ID#: 956848

Board of Directors (BOARD)   Office Volunteers (OFFICE)   Unit Coordinators (COORD)

Identifies PEOPLE created ONLY for testing purpose (TESTING)   Schedules Plus implementation team (SPTeam)   Volunteer in any capacity (VOLUNTER)

Transportation Drivers (DRIVER)

### 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)*

The screenshot shows the 'Edit Person' interface for Sue Pelletier (ID#: 948516). The 'MISC Changes' tab is selected and highlighted with a red box. Below the tab, there are three dropdown menus for email reminders. The 'RIDE EMAIL REMINDER' dropdown is highlighted with a red box and set to 'No'. The other two dropdowns are set to 'Yes'. The 'ACCESSIBILITY OPTIONS' section is also visible.

| EMAIL REMINDERS:  | Setting |
|---|---------|
| If ACTIVITY EMAIL REMINDER is turned on for the account, send to this person?     | Yes     |
| If VOLUNTEERING EMAIL REMINDER is turned on for the account, send to this person? | Yes     |
| If RIDE EMAIL REMINDER is turned on for the account, send to this person?         | No      |

ACCESSIBILITY OPTIONS:

|  |    |
|--|----|
| At CHECK-IN STATION always use TOUCHFREE check-in for this person? | No |
|--|----|

### 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.

LOG OUT > Office Default > PebbleCreek Kare Bears > People

Home People Groups Calendar POS Rides

Active Filter Interests Action..

ADD PERSON ADMINS  Search

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

| Name                             | Phone #s                                 | Membership |
|----------------------------------|--|------------|
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| <a href="#">Abel, Jackie</a>     | (623) 535-7426 (H)                       |            |
| <a href="#">Abraham, Yolanda</a> | (602) 228-5629 (H)<br>(623) 935-6462 (C) |            |

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

LOG OUT > Office Default > PebbleCreek Kare Bears > Viewing ... Mark Pelletier

Home People Groups Calendar POS Rides

Person Events Volunteering History Rides Notes Contacts Calendar

EDIT EMAIL TEXT ADD PHOTO SCANCARD LETTER

Name: Mark Pelletier  
**ADMIN--MANAGER (Driver)**

Mailing Name: Mark Pelletier  
Salutation: Mark

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

LOG OUT > Office Default > PebbleCreek Kare Bears > Update: Mark Pelletier

Home | People | Groups | Calendar | POS | Rides

Person | Events | Volunteering | History | Rides | Notes | Contacts | Calendar | Interactions | Msgs

**BASE Changes** | GROUP Changes | MISC Changes

SAVE | CANCEL | Editing..... Mark Pelletier (Age: 78)

Message to Mark:  Read:

First Name:  Middle Initial:

Last Name:

Mailing Name:

Default Salutation:  Job Title:

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!**