

Date created: 9/1/12
 Updated: 8/1/13

CONTACT RECORDS

Data entry for Contacts (like Youth and Adult Volunteers) begins with the family record - this is where the primary mailing address and other basic contact data is stored and comes from. Yes, even single person Contacts will require the creation of a “Family”.


Contacts are:

- **Adult family members**
- **Community partners/stakeholders and other interested persons.**

The [Personal Information] screen for Contacts is much shorter and includes just the most basic of contact and communications data.

Steps to enter in Contacts.

1. Log in to 4-H Online.
2. Click on “Families” tab and click on the “Add Family” Button
3. Create “Family” record. If this family has to have an affiliation to a particular group you will need to create the “Group” as well.
4. When you login to the “Family” record you will have the option to “Add a New Family Member”
5. From the drop-down list select “Contact”. Remember Adult is for 4-H Adult Volunteers (not parents) and youth is for 4-H Members.
6. Click “Add Members”.
7. Enter in details such as first name, last name, telephone etc. That contact information will default to what was established in the “Family”.
8. Click “Continue”.
9. Add “Group” select the appropriate group (if necessary) from the drop down menu. Click “Continue”.



Contact Personal Information

Profile Information

Email: franc237@umn.edu joe@

First Name: Commissioner

Last Name: Anderson

Mailing Address: 18 N. Vine St.

City: Mora

State: Minnesota

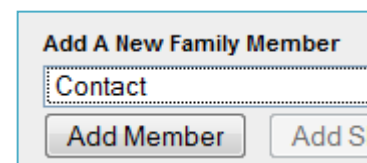
Zip Code: 55051 12345

Gender: Female

Primary Phone: 320-679-6340 555-5

Cell Phone: 555-5

4-H County: Zarlog



Add A New Family Member

Contact

Add Member Add S

This Contact will now appear in the member/volunteer list (and role will state Contact”)

Email – if the person has a different email address than the “family” email address, it can be entered here, and will be an option for emailing. If an email is sent to an individual and no email is listed here, then the email will be sent to the family email address. Do not repeat/ re-enter the family email address here.

Address information – the address information on the [Profile Information] screen will be used if (individual) [Member Correspondence] mailing labels or data are generated. The address information from the Family data will be used if [Family Correspondence] mailing labels or data are generated. It is ok to repeat/copy the family profile data to this screen.

Distinguishing Contacts – You may want to assign a 4-H Online [Group] designation to the main types of Contacts.