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Step-by-step instructions for entering an ENTIRE FAMILY into Membership, Prospects or Misc. Name.

1. From the Shelby Master menu select: Membership or Prospects or Misc. Name.

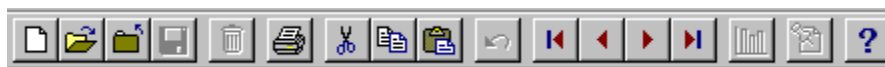


Membership Information

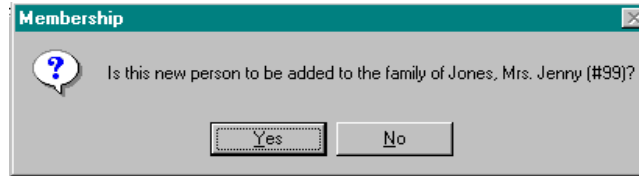
2. From the Membership Home Base screen select: Membership Information.

Module	Name	Preference	Current Record Detail
Member	Aaron, Mrs Abby (P534)	Name	Aaron, Mrs Abby (P534)
Member	Adams, Mr. Allen (B110)	Envelope #	
Member	Adams, Mrs. Ellen (B111)	Family Position	Head of House
Member	Adams, Mr. Gomez (B206)	Spouse	
Member	Adams, Mrs. Monica Carama (B207)	Address 1	123 south Wales St
Member	Adams, Mr. Pugley (B208)	City	Hudson
Member	Adams, Wednesday (B209)	State	FL
Member	Allen, Barry (B432)	Postal Code	34667
Member	Allen, Mrs. Grace (B168)	Phone - Home	444-6565
Member	Allen, Michael, MA (B431)	Phone - Business	
Member	Allen, Mr. Steve (B429)	Birthdate	5/15/1900
Member	Alvarez, Mrs. Carlos (B411)	Age	22
Member	Alvarez, Mr. Carlos (B410)		
Member	Alvarez, Jr., Carlos (B412)		
Member	Alvarez, Carmel (B413)		
Member	Anderson, Betty - Princess (B228)		
Member	Anderson, Mrs. Brenda (B422)		
Member	Anderson, Edward - Eddie (B423)		
Member	Anderson, Howard - Howie (B424)		
Member	Anderson, James - Bud (B238)		
Member	Anderson, Mr. Jim (B236)		

3. From the Individual information screen (Name Filter) type the new family name. (you are checking to see if they are in Membership/Prospects/Misc. Name)
4. Choose the **NEW Icon**.



(NEW ICON top left corner of screen)

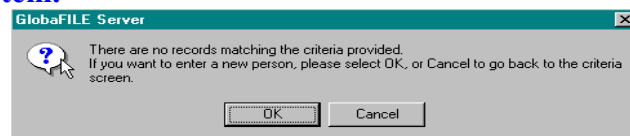


5. If the person is to be added to an existing family select **Yes**, **OR** if it is a **NEW** family select **NO**. (in this scenario I am choosing **NO**)

 A form titled "GlobaFILE Information Criteria". It has fields for "Last Name" (containing "jones"), "First Name", and "Profile". There is a checkbox labeled "Check for 'dba' in address line 1?". Below this is a section titled "Address Information:" with fields for "Address", "City", "State", "Postal Code", and "Phone #". At the bottom are buttons for "Clear Filters", "OK", and "Cancel".

6. From the Globafile search screen, type the name **AGAIN**, then choose **OK**. (We are checking now to see if this person or family is located in another module. Example: Accounts Receivable, Payroll or Accounts Payable)

NOTE: Within the Globafile screen, make sure you do not fill out address information and phone information because we are only searching to see if the family is in the system.



7. IF you get a message: There are no records that match this criteria you **MUST SELECT CANCEL** IF you want to enter an **ENTIRE FAMILY**. (The OK button will allow you to only enter one person within a family at a time)

 A screen titled "GlobaFILE Information - [Pick a name]". It has a menu on the left with options: "File", "Update Record", "New Record", "Update Family", and "New Family". An arrow points to "New Family". The "Selection Criteria:" field contains "Last Name: joneshouser". Below this is a table titled "Pick from available options" with columns "Name" and "City, State". To the right of the table are buttons for "Query", "Select All", and "Clear Selected". At the bottom are buttons for "Add", "Modify/View", "OK", and "Close".

8. Now you can click on **FILE, NEW FAMILY**.

GlobaFILE Family Entry

Pos.	Title	First/Middle	Last Name	Suffix	Salutation	Gender	M.S.
HH	Mr.					Male	Married
Spous	Mrs.					Female	Married
Child						Unknov	
Child						Unknov	
Child						Unknov	
Child						Unknov	
Child						Unknov	
Child						Unknov	
*							

NO ADDRESS FOUND

Main/Home Phone

9. At this point you can enter in each person within the family.

GlobaFILE Information [Update an address.]

Address Line 1

Address Line 2

Postal Code

City State

Country

Carrier Route Location

10. Now we can assign an address by clicking on the **ASSIGN ADDRESS** button.

Main/Home Phone

11. Now you can add the MAIN/HOME phone number. (**Note:** If you do not put slashes or dashes in, the system will do it for you. You can assign more phone numbers later)

12. Now we are finished with this screen so we can choose the **OK** button

GlobaFILE Information - [Pick a name]

File

Selection Criteria: Last Name: joneshouser

Name Filter: joneshouser

Pick from available options

Name	City, State
Jones, Mr. James Jimmy (#536)	Hudson, FL
Jones, Mrs. Carlie (#537)	Hudson, FL
Jones, Miss Jan (#538)	Hudson, FL
Jones, Mr. Robert Bobby (#539)	Hudson, FL

☒ View All (4) ☐ View Selected (0)

Name ID #: 536
2322 South Johnson St.
Hudson, FL 34657
(727) 845-9595

13. You now have two choices: You can select the **MODIFY/VIEW** button and add more information to the Head of House or just choose **OK** which will take you to the **14. Individual Information** Screen. (I am choosing **OK**, I will be able to add more information later.)

15. At this point you will choose each Tab across the screen and put the appropriate information in on this individual.

16. At this point you are ready to **SAVE ALL INFORMATION** on this PERSON and FAMILY by clicking the **OK** button.

▶	Member	Jones, Mr. James -Jimmy(#536)	New
	Member	Jones, Mrs. Carlita (#537)	Open
	Member	Jones, Miss Jan (#538)	Delete...
	Member	Jones, Mr. Robert -Bobby(#539)	Memo...

17. You will see all the family members at this point and you can **RIGHT click** with the mouse and choose **OPEN** to **MODIFY** a person's information.

****Our plan is to bring you different tips and tricks throughout the month. Check back every couple of weeks to see what's new.**

Remember: www.shelbyhelp.com