

## BASIC TRAINING

*infoodle*  
oodles of info



*ADDING AND  
DELETING PEOPLE*  
TRAINERS MANUAL

2  
LEVEL

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STORE

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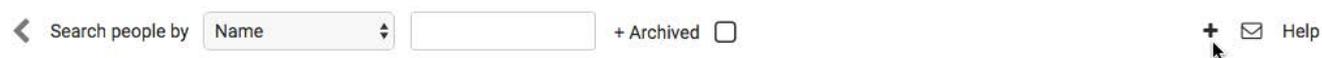
# INFOODLE BASIC TRAINING

## How to add a new person or household

### How to start?

#### Step 1

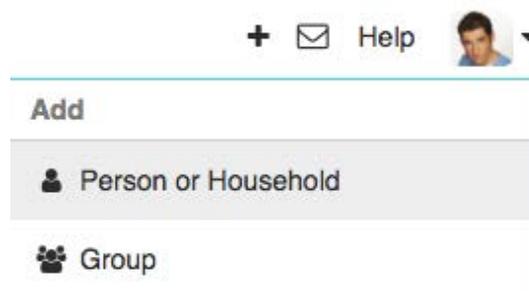
Click the **+** button on the right of the header bar.



#### Step 2

If you have permission to add people you will be able to select **Person or Household** in the dropdown **Add** menu. If you don't see that, contact your administrator and ask for 'add people' permission to be added to your role.

Clicking on **Person or Household** brings up the form for filling in a new persons details.



#### Step 3

Enter the data into each field.

The minimum that you are required to enter is:

Firstname, Surname - even if you don't know one or either of these then you need to complete them with something. The choice of fields available and how they work can be controlled by your infoodle administrator in the custom fields area.

 A screenshot of a form titled 'Persons name' with a '+ Address' button. At the top, there is a label 'Set visibility on the Directory for all data items' with 'Visible' and 'Private' buttons. The form has several input fields: 'Title', 'Firstname\*' (with an asterisk), 'Middlename', and 'Surname\*' (with an asterisk). To the right of the 'Surname\*' field is a 'Visible Private to directory' toggle. Below these fields is a 'Gender' dropdown menu.

## Privacy

Throughout the persons profile pages and when adding a new person there are 'visible/private' switches. This relates to what data can appear on the printed and online directories. If by default you want to publish peoples details on the directory (both printed and online) then you can set the default in the administration/system screen (ask your administrator).

A rectangular button with a grey background and a red background. The word "Visible" is written in white on the grey part, and "Private" is written in white on the red part.

When entering a new person you can switch all buttons over by clicking the 'visible/private' switch at the top of the add person screen. You can change a specific data item by clicking the relevant visible/private button.

By selecting Male or Female, you will be able to create a report based on male or female. The icons below will show if no photos are added. Male, Female and unspecified gender.



## Email

It is helpful to enter the type, if more than one email address is added. You can add and take away email addresses by clicking on the + or - buttons.

<b>Email address</b>	Work	work@gmail.co.nz	Active?	<input checked="" type="checkbox"/>	+ -
	Home	home@gmail.co.nz	Active?	<input checked="" type="checkbox"/>	+ -

In order to send emails through infoodle the active box needs to be ticked. When this is not ticked infoodle will not send an email to this address.

## Phone numbers

Enter the phone numbers here i.e. mobile phone or work number. These numbers are unique for the individual. The number for the whole household or organisation will be entered later.

<b>Phone numbers</b>	Mobile	021 123 4567	Cell?	<input checked="" type="checkbox"/>	+ -
	Home	01 2345678	Cell?	<input type="checkbox"/>	+ -

If you plan to send Text messages through infoodle you need to tick the cell box, otherwise it will not use the number to send any texts to.

## Add more people to same household

**ADD ANOTHER PERSON AT SAME ADDRESS**

By clicking on this button you can add more people at the same time. Notice when you click on it a new tab appears at the top left of the screen. You can click between the tabs to edit or view the details of each individual you are adding.

## Address

Click on address either at the top of the screen in the tabs, or at the bottom of the screen. There is one address for all the people you are adding at this point.

**ADDRESS**

Click Address to complete the address and save these details

If the address is not known, click in this box in order to save the contact.

Address unknown?

## New Zealand Address Search

This is only available to New Zealand infoodle clients. It is a New Zealand only postal search. Start typing the address to show a list of matching addresses, then click the one you want to auto complete. If the address you have is not a valid postal address it won't be shown.

**Search NZ Postal addresses**  
NZ address

## Infoodle Address Search

If you are not using the above; start to enter the household or organisation name, and/or the first line of the address.

**Search infoodle**  
Household name

Infoodle will then automatically check if there is already the same contact in the system and may show some possible matches on the right.

**CREATE NEW ADDRESS**

**MR ARTHUR SMITH, MRS SARAH SMITH, GEORGE SMITH  
72 HAWKRIDGE HEIGHTS BETHLEHEM TAURANGA 3110 NEW ZEALAND**

If this is the address you are looking for you can click on the address shown and the new person will be added into this address/household.

If this is not a match click on 'create new address'. Continue to complete the address.

## Save

Once all the detail is entered click on save. The screen will now go back to the first person you entered into this address.

After save  

**SAVE**

## Mandatory Field

Anywhere where this symbol \* is displayed it indicates a mandatory field.

To edit a persons details go to 'Basic Training Manual Level 1 - Getting Started' for more information

## Archiving and deleting a person

Infoodle encourages you to archive people rather than delete them. This means they are hidden from all screens and reports unless you specifically ask for it (and you have permission to see archived people). This means people are still available to generate reports e.g. how many people left this year. Deleting people removes them from the database and you cannot get them back!

To encourage this – infoodle requires a 2 step process to deleting people. To delete a person from infoodle you first need to archive them.

Note: You first need to have permission in your role in order to be able to archive and delete people in infoodle. These are 2 separate permissions. See your infoodle administrator if you do not have this permission.

### Archiving a person

#### Step 1

Go to the persons profile page you wish to archive.

The archive field is normally found in the General Info section but may have been moved by your administrator.



If you do not see 'archived', you will need to click through each of the tabs you can see, or ask your administrator to check the administration/custom fields area to find which section it is in.

Archived	No
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#### Step 2

Click on the edit button on the top left of the page.



#### Step 3

Click in the dropdown box and change No to Yes. If you are archiving the whole household tick the box below it.

Archived	Yes
	Apply to the whole household? <input type="checkbox"/>

#### Step 4

Click **Save**.

## Unarchiving a person

### Step 1

Type in the name of the person you want to un-archive in the search box at the top of the Dashboard and make sure you have Archived ticked.

Search people by Name Mary J + Archived

Recently used People

Jones Mary (Archived)  
21-31 Dublin Street

### Step 2

Select the person from the dropdown list to go to their profile page.

### Step 3

Follow instructions as for archiving a person; select the General Info tab. Then click on **edit**. Then change the archived Yes to No. Then Save.

Archived No

Apply to the whole household?

## Deleting a person from the database

Remember this is permanent. You cannot undo this action. Go to the archived person you wish to delete as above. Click on remove from database.

**REMOVE FROM DATABASE**

You may be asked if you are sure, if yes, click OK.

Are you sure you wish to remove this person from the database?

Cancel OK

The person is now removed from the database.

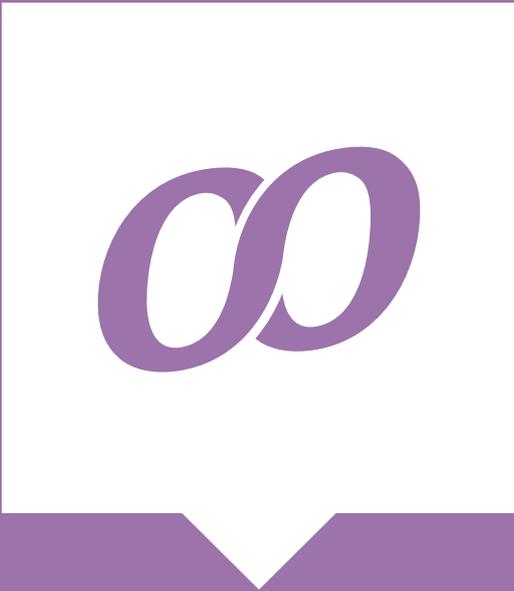
Note – if you are deleting someone immediately after archiving them, you don't need to search for them again – simply click 'edit' again and the 'delete' button is visible.

**Congratulations you have now completed**

*infoodle basic training*

**Level 2 - adding and deleting people**

For more roster training see Basic Training level 1 - Getting Started



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