2015 Training Module 03

Contacts

Version: May 15

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Introduction

Data on individual people is recorded on Milo using the Contacts object. The type of contact will depend on how the record is associated with other objects on the system. Contacts on Milo can refer to:

- A contact person affiliated with an organisation
- A volunteer
- An individual person not affiliated with an organisation or a volunteer registration (e.g. a member of parliament)

These types of records for individuals are all managed using the **Contacts** object in Milo.

Once a contact record has been set up, it can then be associated with other objects on the system, e.g.:

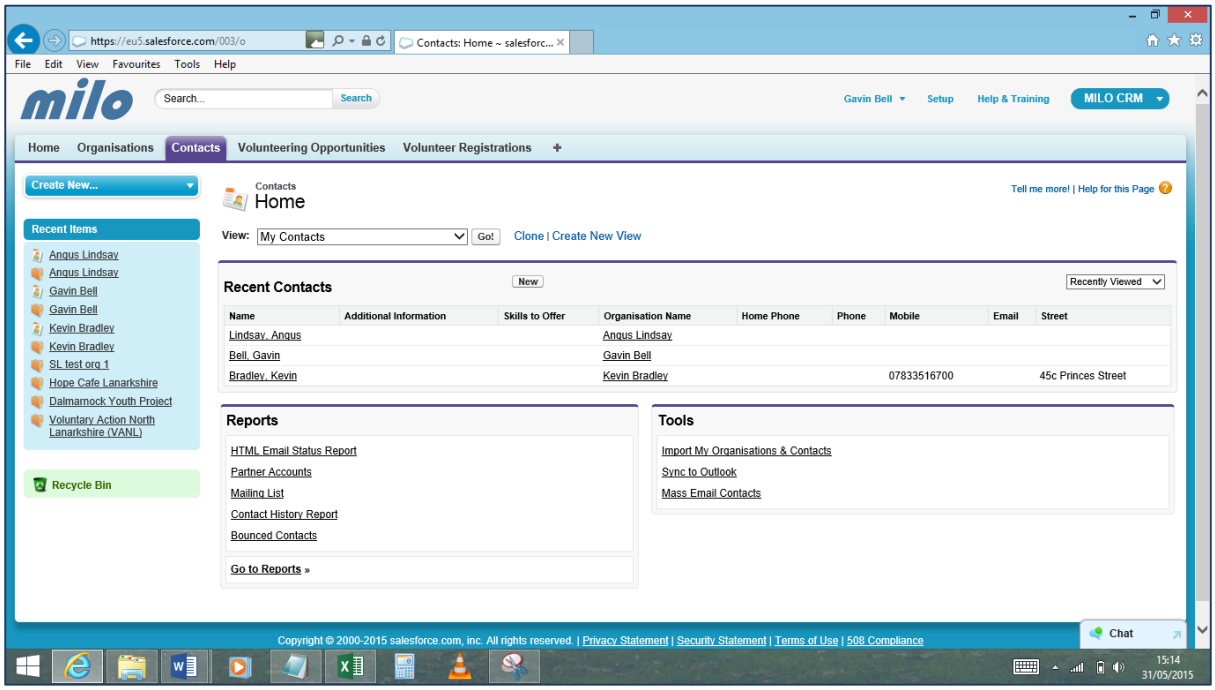
- By affiliating a contact with an organisation record
- By attaching a volunteer registration
- By attaching a membership record

Managing Contacts in Milo

Navigate to Contacts - Home

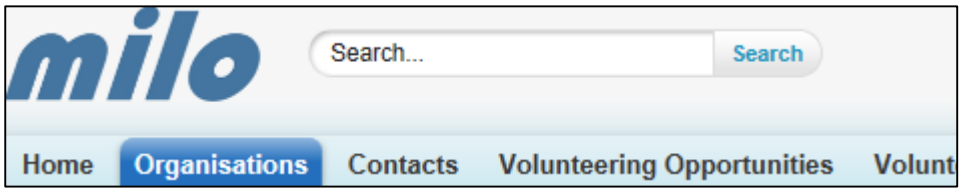
Click on the Contacts tab at the top of the screen to go to the Contacts home page. By default, you will see a list of recent contacts you have accessed. By clicking on the View dropdown above the list of recent contacts, you can select 'All Contacts, which will provide an alphabetised list of every contact on the system you have permission to view.

When you create your own views, these will be available from this dropdown.



Search for a contact

You can search for any record on the database using the Global Search box at the top of every screen.



To search for a contact, simply type the name or part of the name into the search box. You can use * as a wildcard. Try typing 'Kevin Bradley'.

You will now see any contacts, interactions, organisations or volunteer registrations associated with the search phrase.

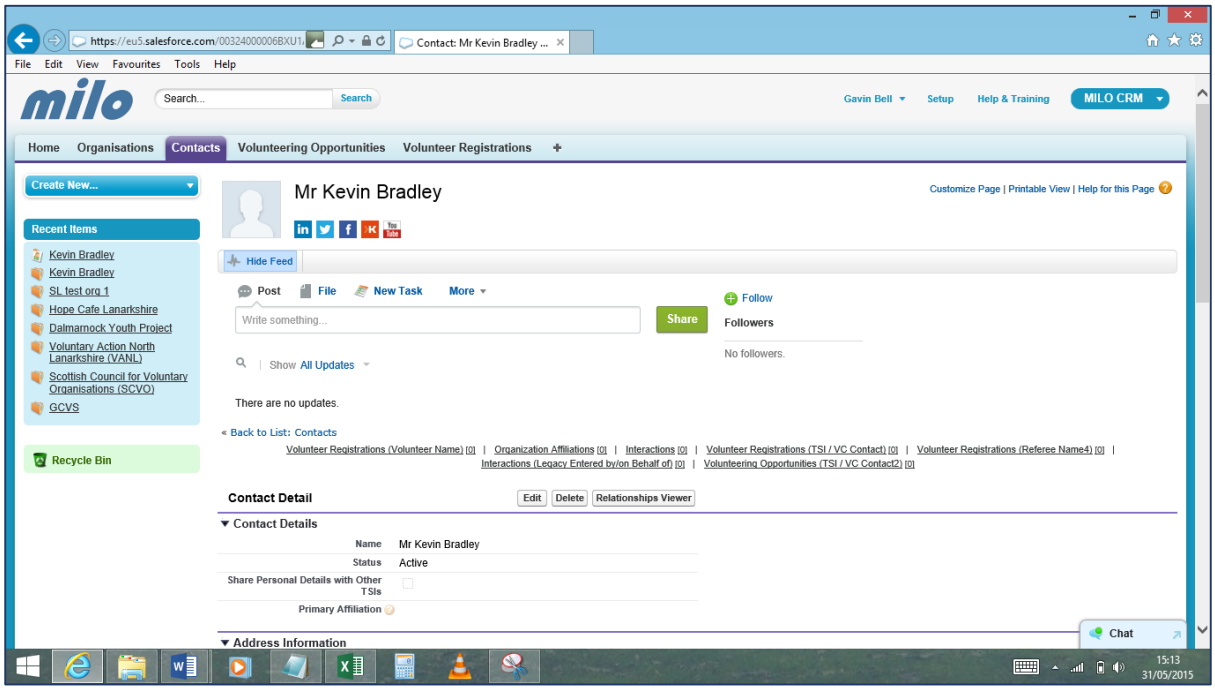
Alternatively, you can use views (see module 01) to set up a specific filter for contacts, e.g. all contacts in your TSI area, all contacts affiliated with organisations based in a certain postcode. The standard My Contacts view will return all contacts you have accessed recently.

Whichever method you use will return a list of contacts. Click on any of the contact names to access the record.

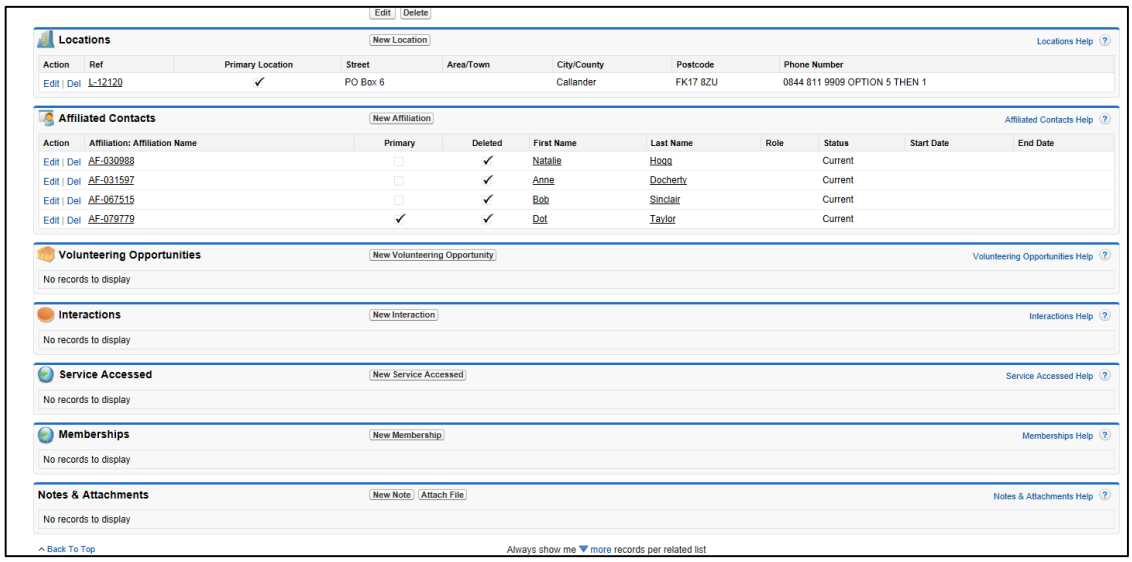
View and edit a contact

When you click into a contact record, you will see the contact view screen. As in the old system, data in each record is organised into a number of sections. Scroll down to see the data held on a contact, broken down into:

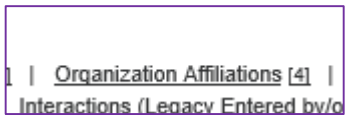
- Main details of contact
- (Non-volunteer) Address information
- (Non-volunteer) Contact details

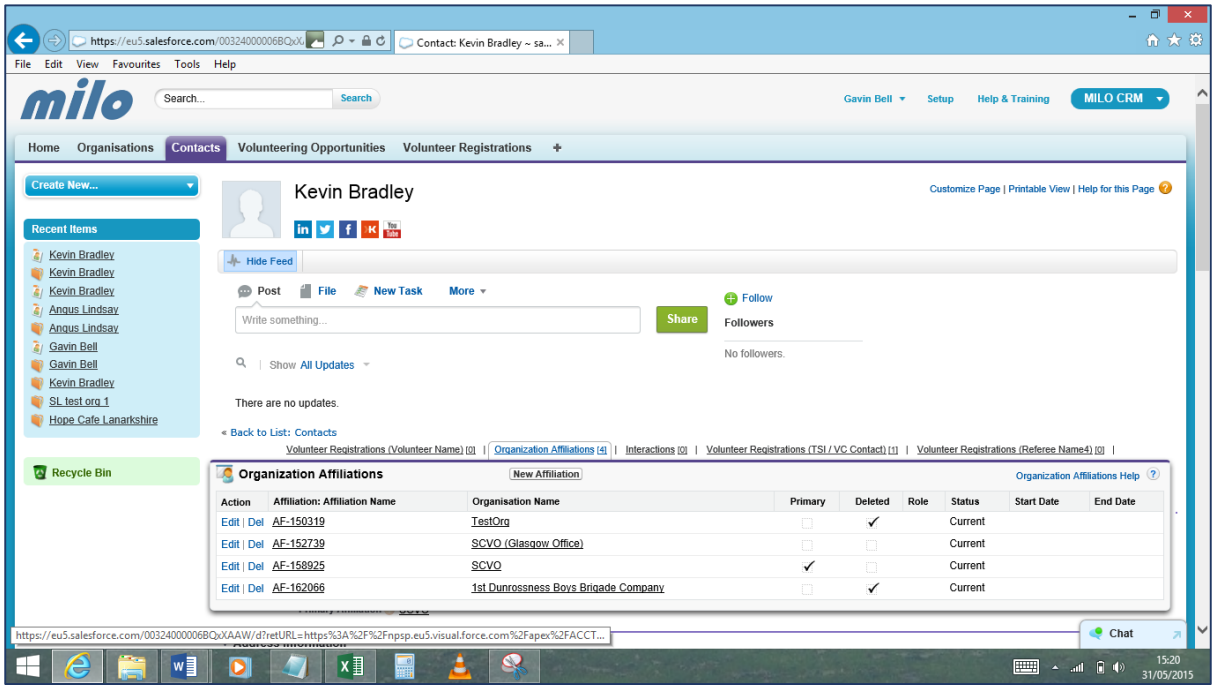


Associated entities are displayed at the bottom of the screen. This is where you can view any **volunteer registrations** or **organisation affiliations** associated with the contact record.

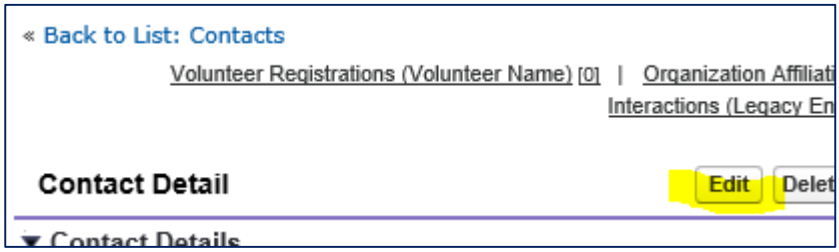


You can also see these entities at the top of the contact record. Hover the pointer over one of them to see associations, e.g. locations:

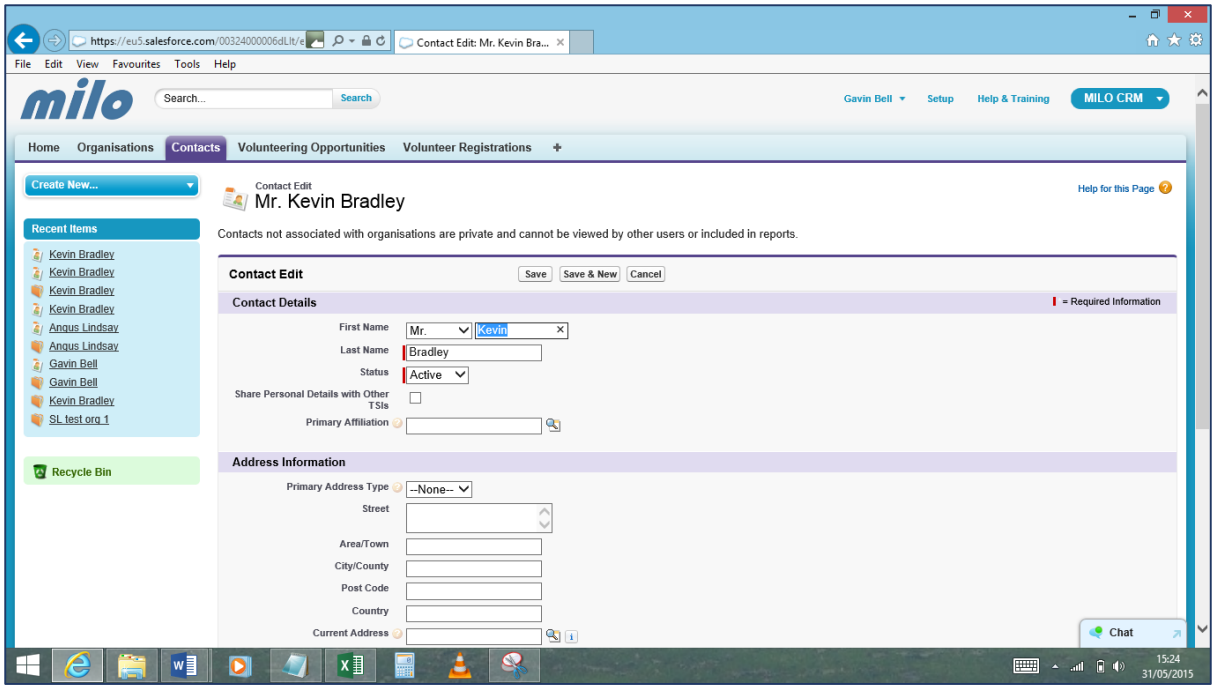




To make changes to a contact, click on the **Edit** button at the top of the screen.

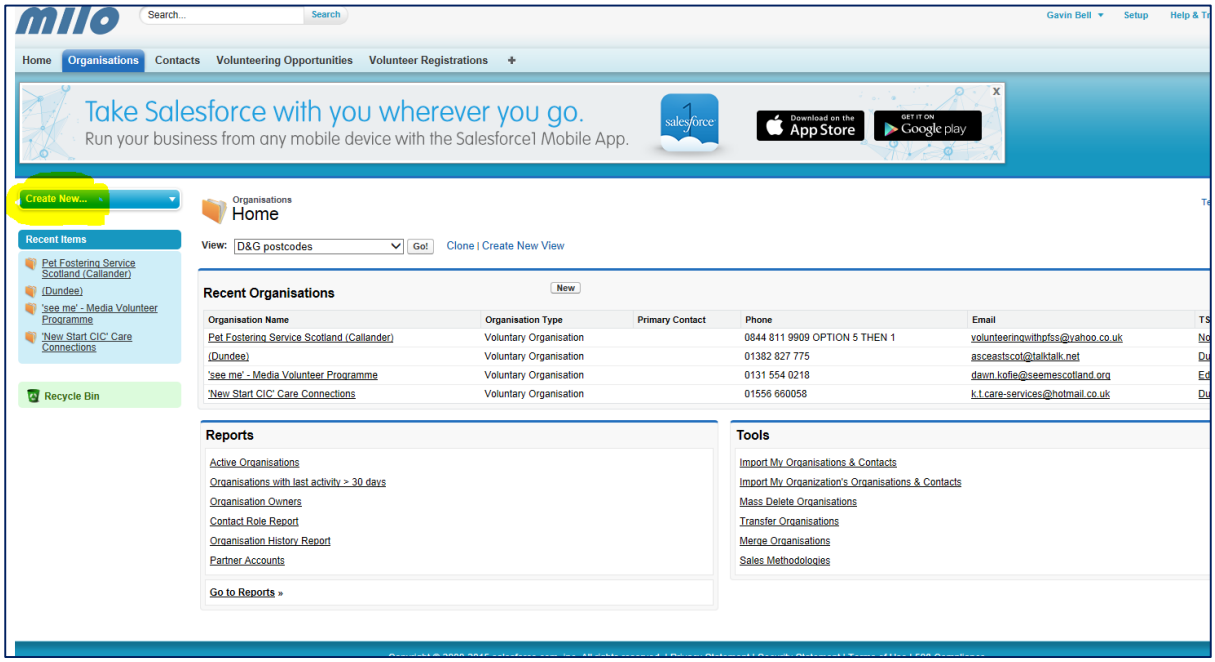


The page will open in edit view, allowing you to update and change any data on the contact, if you have permission to do so.

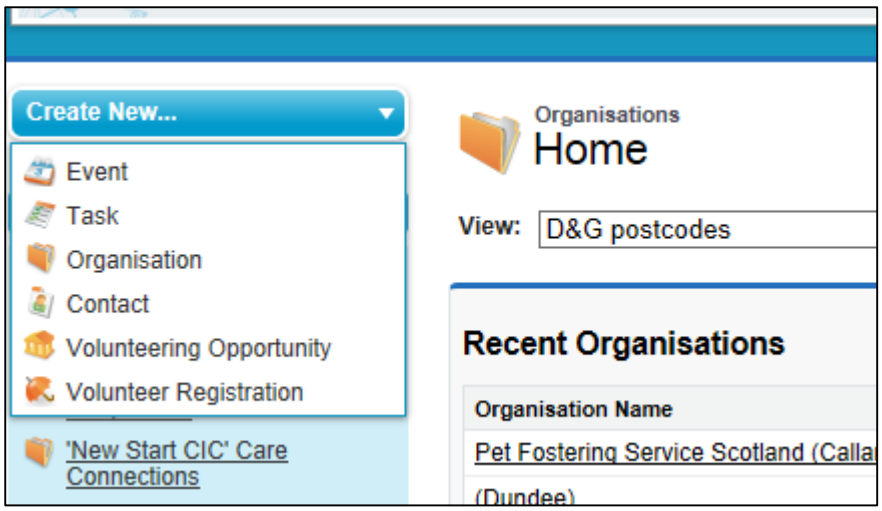


Create a new contact

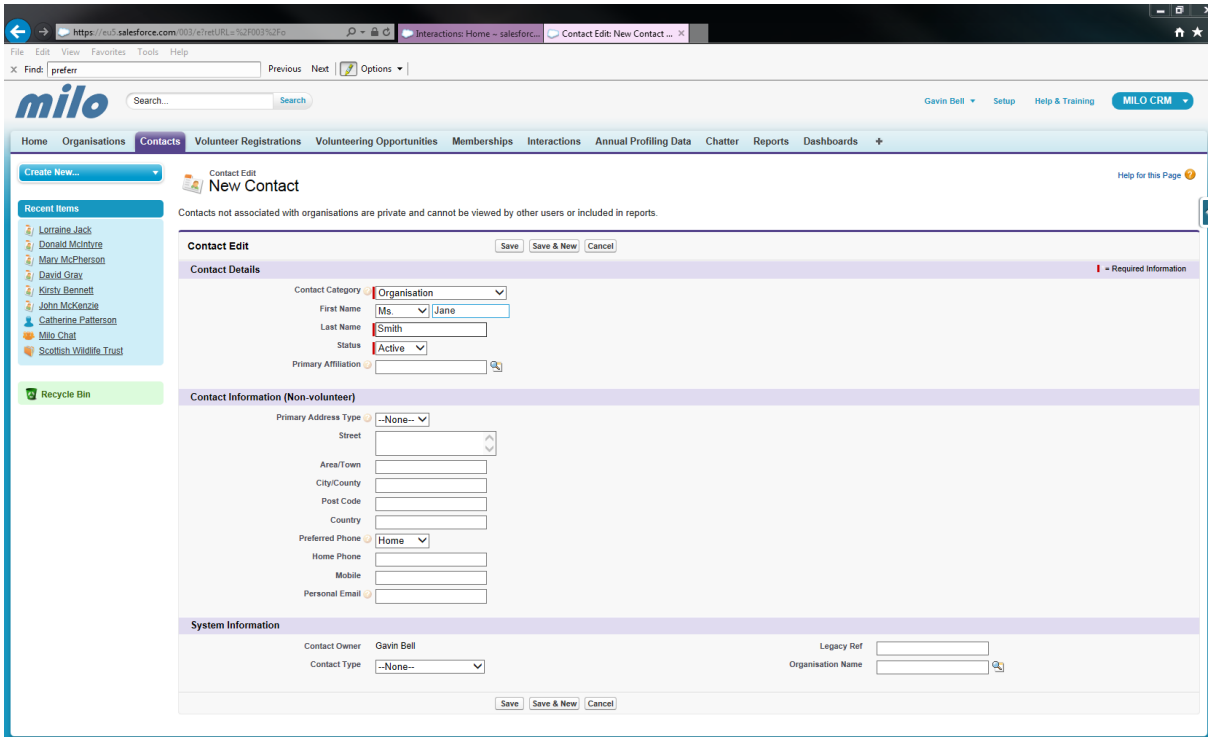
The easiest way to create any new record is to use the **Create New…** button on the left hand side of the page.



Click on **Create New…** and you will see the option to create a new Event, Task, Organisation, Contact, Volunteering Opportunity, or Volunteer Registration.



Select **Contact**, and a New Contact input page will appear. This looks the same as the edit screen, but is blank to allow you to input a new contact.

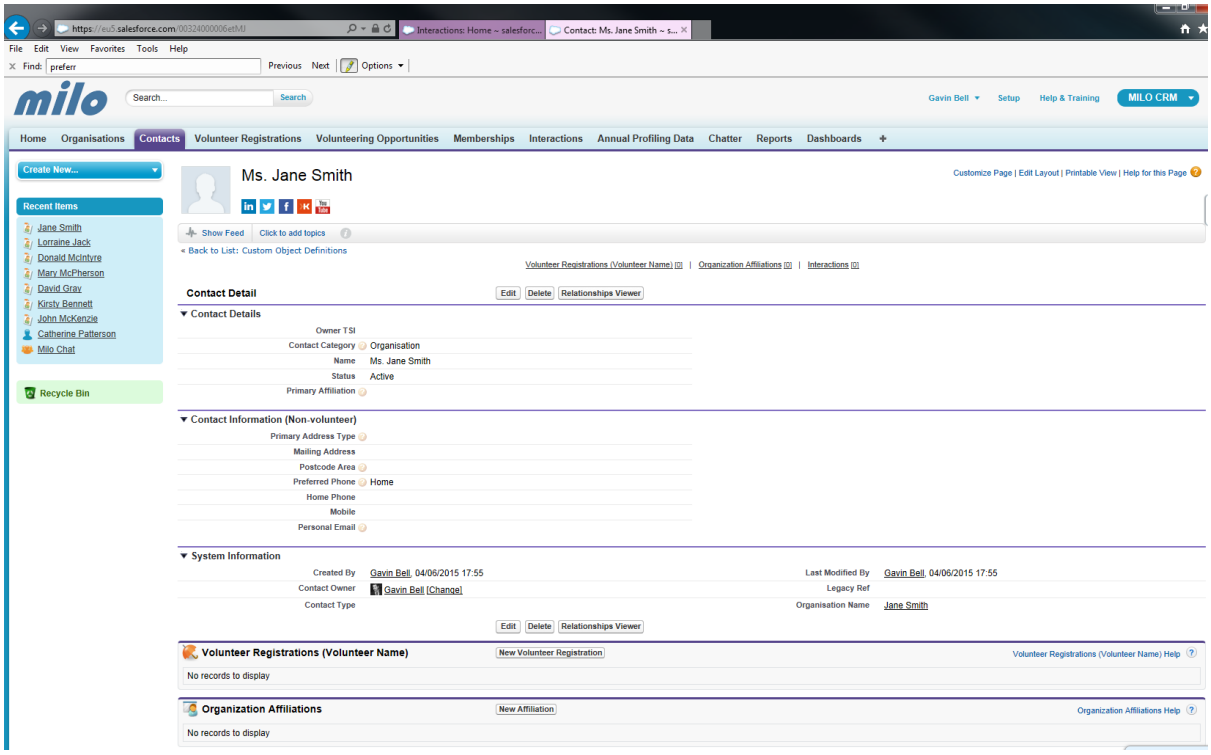


As in the previous system, some fields in each record type are mandatory. These are signified by a red bar next to the mandatory fields. You cannot save until all of these fields have been completed.

First select the category of contact: whether this will be a contact at an **organisation**, a **volunteer**, or a non-affiliated **individual** contact (e.g. an MP).

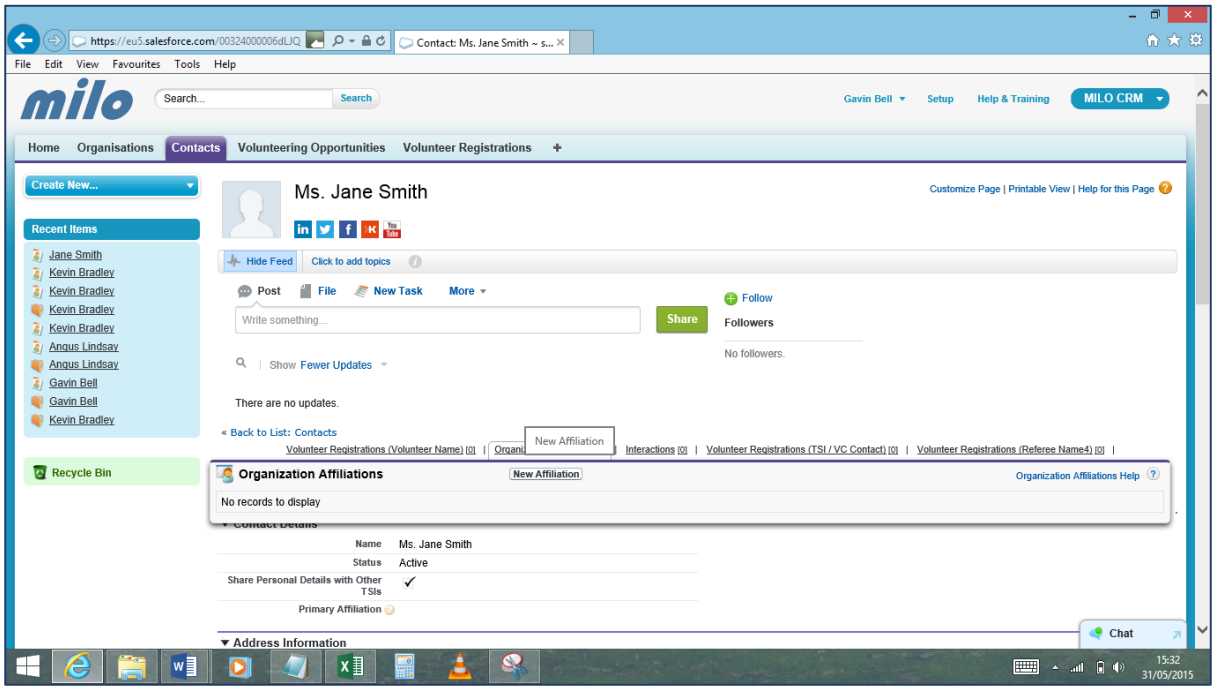
Note: there is an important change to recording contacts in the new system. Because it is not possible to restrict views of objects between TSIs, volunteer address and contact details are recorded within the **Volunteer Registration** record, not the contact record – don't worry, the system will not allow you to save a volunteer's contact details in the wrong place.

Once you have added the mandatory fields plus any other information, click **Save**. You will then see the view contact screen as before:

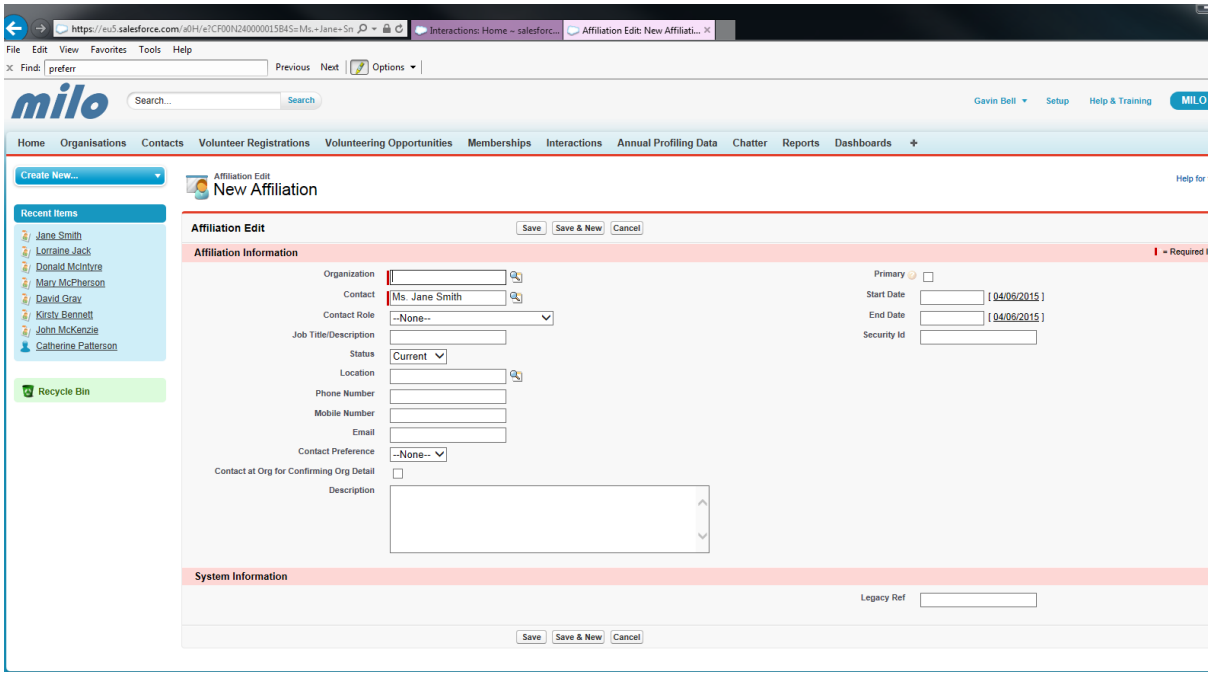


Adding organisation affiliations to a contact

You can now affiliate an organisations with your contact, or alternatively attach a volunteer registration. To add an organisation hover over 'Organization Affiliations' and click 'New Affiliation'.



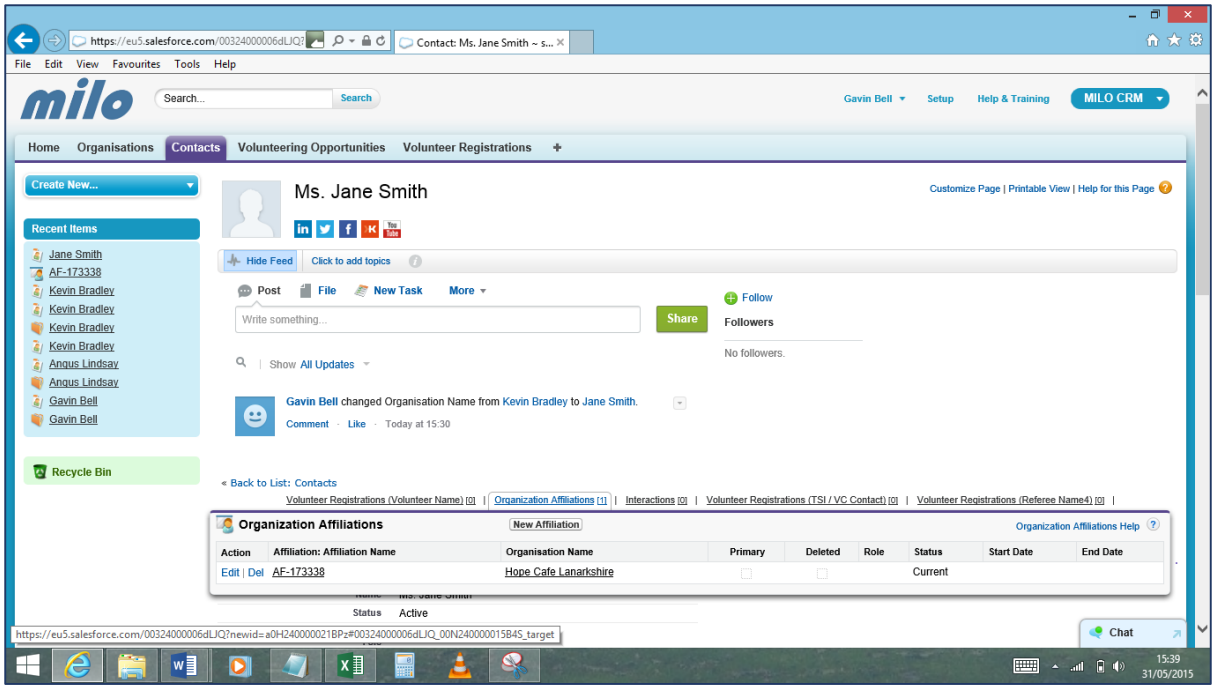
A new edit window opens up displaying the fields available for adding a new organisation affiliation to a contact record.



Click on the magnifying glass next to the Organisation field – you will see a list of recently viewed organisations, or you can use the search if the organisation you want is not on the list. When you see the organisation you want to associate the contact with, click on its name to select it and enter it into the Organisation field.

Complete any other details required (especially whether or not the contact is the primary contact for this organisation), and click Save.

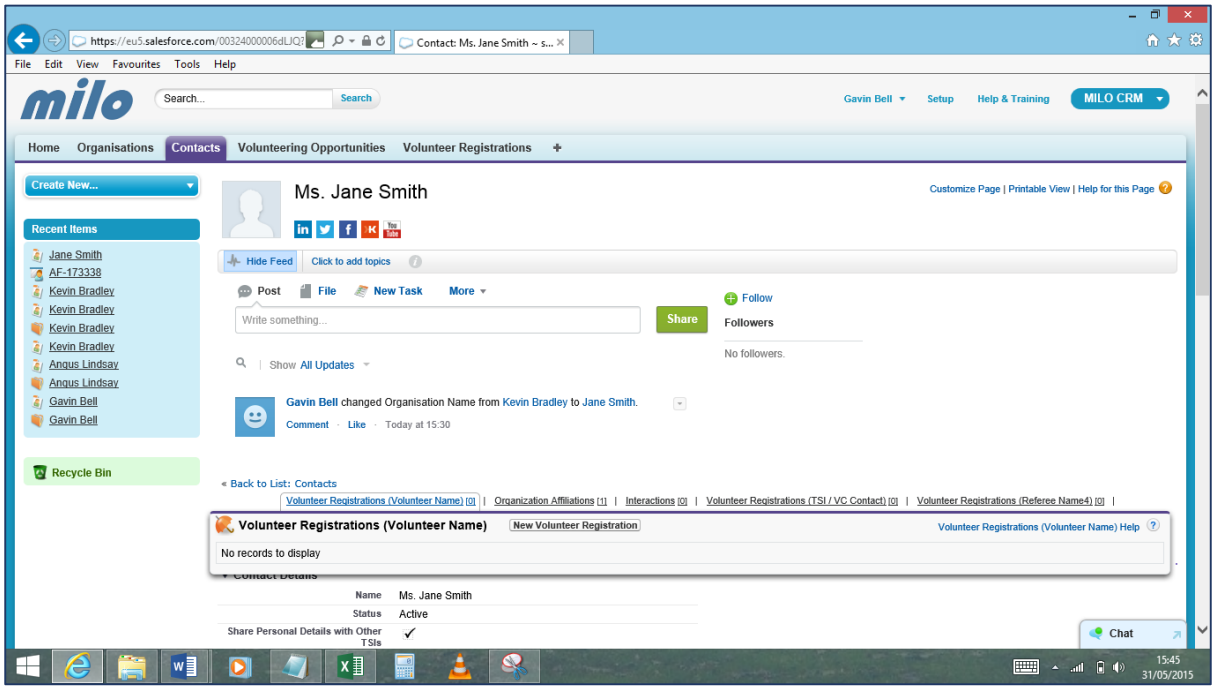
Now look at 'Organization Affliations' at the top of the record – you will see it now says (1) after the title rather than (0), because you have now added an affiliation. Hover over to see a summary of the organisation, whether primary contact etc.



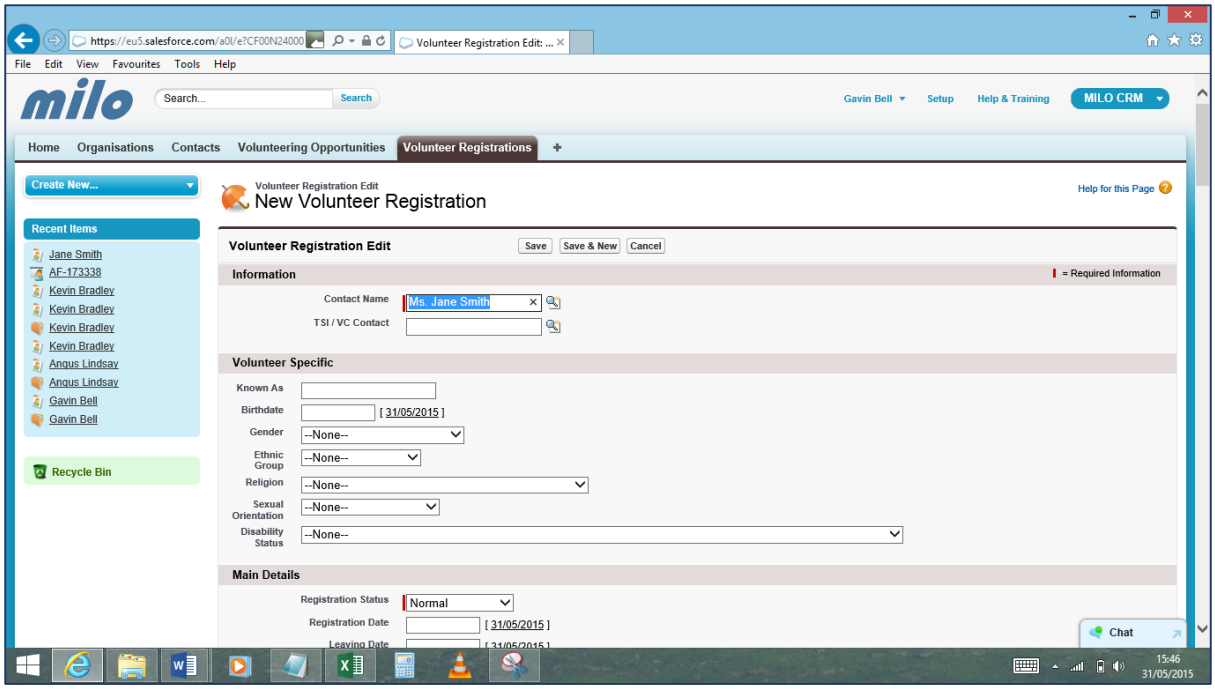
n.b. – you can also affiliate existing contacts to an organisation direct from the organisation record (see module 02). Obviously, if the contact does not exist yet you will have to create them following the steps above before they can be affiliated with an organisation.

Adding a volunteer registration to a contact

To make a contact a volunteer, you must attach a volunteer registration. This is very similar to the process of adding an organisation affiliation. First, go to the contact record and hover over 'Volunteer Registrations'. Click 'New Volunteer Registration'.

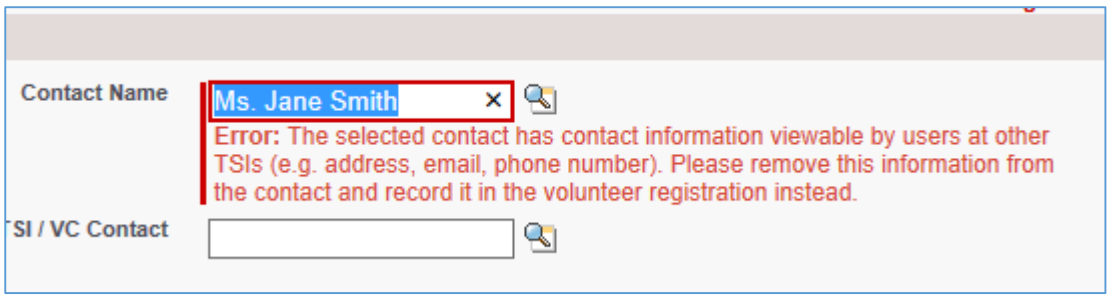


A new edit window opens up displaying the fields available for adding a new volunteer registration to a contact record.



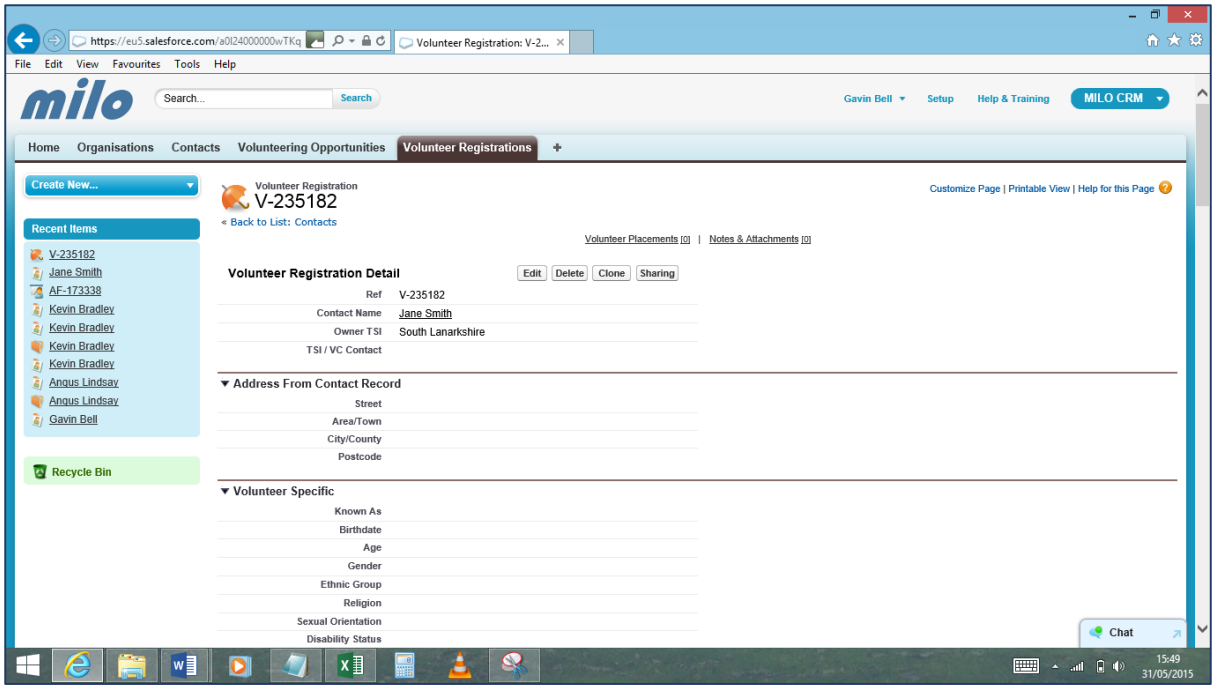
The fields in a volunteer registration are the same as those on the old Milo system (see module 04 for more details).

The main thing to remember is that address details for any volunteer should be saved in the registration, <u>not</u> the contact record. If you try to save a volunteer registration attached to a contact with a personal address or phone number, you get the following error:



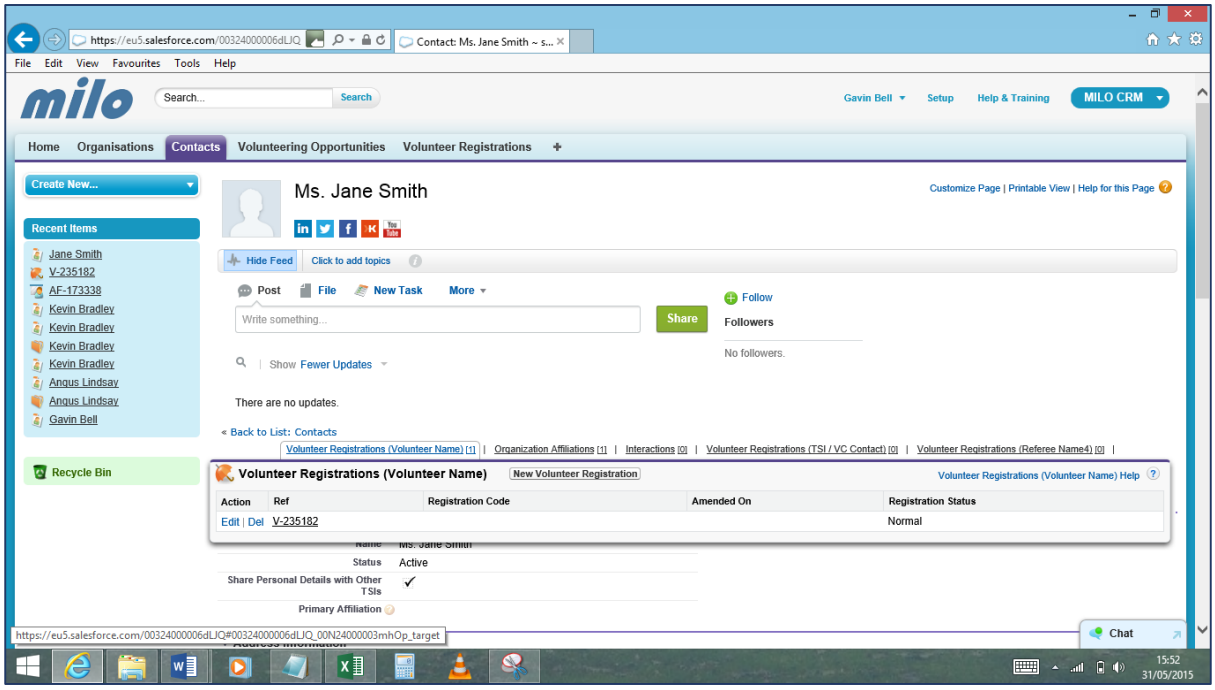
Complete all relevant information on the volunteer, ensuring that all mandatory fields are filled out, and click Save.

You will now see the view volunteer registration screen.



Go to **Recent Items** at the side and click back into the contact record.

Now look at 'Volunteer Registrations' at the top of the contact record – you will see it now says (1) after the title rather than (0), because you have now added a volunteer registration. Hover over to see a summary of the data in the registration.



n.b. – you can also attach existing contacts to a volunteer registration direct from create new volunteer registration (see module 04). Once again, if the contact does not exist yet you will have to create them following the steps above before they can be attached to a volunteer registration.

Summary

In the **Contacts** module, we have covered:

- Navigating to the Contacts home screen
- Searching for a contact
- View/edit contact records
- Create a new contact
- Adding an organisation affiliation and volunteer registration to a contact

These skills are transferrable across the other Milo objects (Volunteer Opportunities, Registrations etc). You can use the same techniques to navigate around Milo and start to explore the other features Milo has to offer.

Remember – for more step by step advice, see the individual training modules. If you have any problems or get stuck, you can contact the Milo team at milosupport@scvo.org.uk