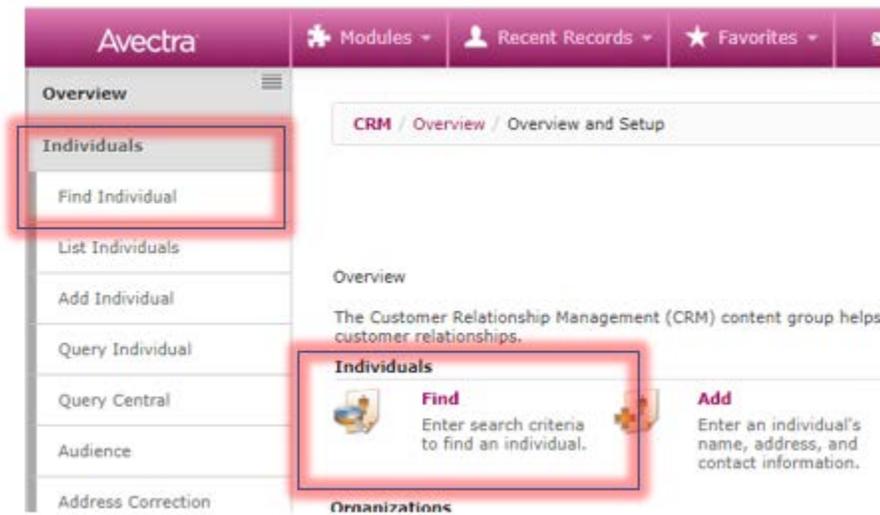


How to Search for Individuals

- 1.) From the Customer Relation Module (CRM) homepage, click on “Find” from the Overview Page or “Find Individual” from the left navigation menus



- a. From the “Find” Screen, enter search criteria. You can search on an unlimited number of fields.
 - i. The % key is used as a wildcard search. For example, if you want to search for an individual but only know the last three letters of the last name, you can enter “%TON” in the last name field. This search will ask for any person with a last name that ends with TON.
 - ii. A wildcard is always assumed at the end of every entry and is not necessary to enter.
 - iii. The search is not case sensitive.
 - iv. The search is space sensitive. For example, if you’re unsure if the last name is McDonald or Mc Donald, you’ll want to search on Mc%Donald.

Find - Individual	
<input type="checkbox"/> Advanced View	
Contact ID/CTA ID:	<input type="text"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>
SSN4:	<input type="text"/>
Alt ID/Employee ID:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>
E-Mail Address:	<input type="text"/>
Date of Birth (MM/DD/YYYY):	<input type="text"/>
Individual Sort Name:	<input type="text"/>
Name Alias:	<input type="text"/>
Organization Name:	<input type="text"/>
Org Acronym:	<input type="text"/>

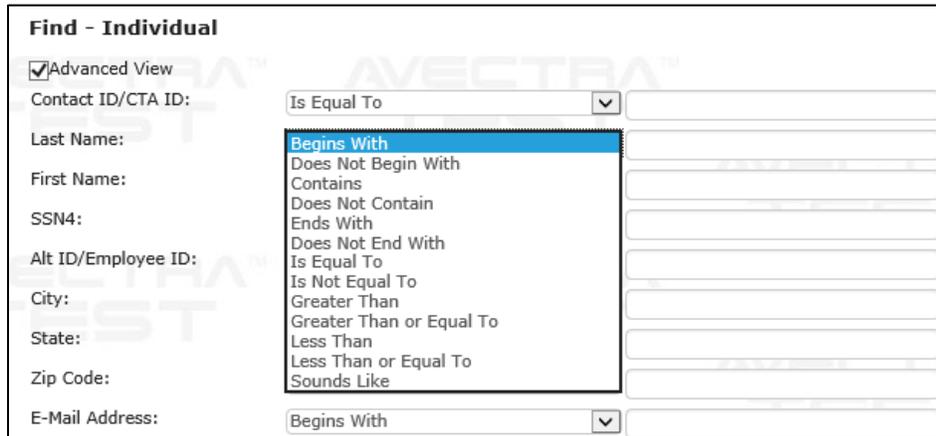
- b. Click “Go”

2. Advanced Search

- a. From the “Find” screen, populate the checkbox for “Advanced View”



- b. Each search item will now have a drop-down menu to the left of the free text field. These drop-down menus are used to further narrow down a search.

A screenshot of a search form titled "Find - Individual". At the top left, there is a checked checkbox for "Advanced View". Below this, there are several search criteria, each with a label, a dropdown menu, and a text input field. The criteria are: "Contact ID/CTA ID:" (dropdown: "Is Equal To"), "Last Name:" (dropdown: "Begins With", "Does Not Begin With", "Contains", "Does Not Contain", "Ends With", "Does Not End With", "Is Equal To", "Is Not Equal To", "Greater Than", "Greater Than or Equal To", "Less Than", "Less Than or Equal To", "Sounds Like"), "First Name:", "SSN4:", "Alt ID/Employee ID:", "City:", "State:", "Zip Code:", and "E-Mail Address:" (dropdown: "Begins With"). The "Last Name:" dropdown menu is currently open, showing the list of options. The "Sounds Like" option is at the bottom of the dropdown. The text "AVECTRA™" and "EST" are faintly visible in the background of the form.

- a. From the “Find” Screen, enter search criteria. You can search on an unlimited number of fields.
- b. Click “Go”

How to Edit Primary Address/Phone Number/Email

1. Edit Primary Address

- From the individual profile screen, click on the “Edit Name & Address” button located on the lower portion of “Additional Information”.

BRUCE MILLER

LEMON GROVE TCHRS ASSN
BRUCE MILLER
1705 Murchison Dr
Burlingame, CA 94010-4504

BRUCE.MILLER@GMAIL.COMZZ HOME
Phone: 000-111-2222 HOME
fax:

Additional Information
contact id: 0010303639

Web Login
Demographics
User Defined Demographics

MANAGE PHONE & E-MAIL
EDIT NAME & ADDRESS EDIT CONTACT INFO

- Highlight existing address and enter new address.
- Make sure “Do Not Validate” is unchecked
- Click “Save”.

Individual Name and Address Information

prefix: Please select
first name: DONNA middle name: middle name
last name: DUCKY suffix: Please select
designation: designation nickname: DONALD
organization: UNASSIGNED EMPLOYER # CA90001

address type: HOME
address: 7894 WATER STREET
address line 2
address line 3
city/state/zip: SAN JOSE California 95121
country: UNITED STATES congressional district: congressional
international province: international province
 do not validate
seasonal from: seasonal through:
 on hold

2. Edit Phone and Email

- From the individual profile screen, click on the “Manage Phone & E-Mail” button located on the lower portion of “Additional Information”.
- Add/edit phone number(s) and/or email(s)

BRUCE MILLER

LEMON GROVE TCHRS ASSN
BRUCE MILLER
1705 Murchison Dr
Burlingame, CA 94010-4504

BRUCE.MILLER@GMAIL.COMZZ HOME
Phone: 000-111-2222 HOME
fax:

Additional Information
contact id: 0010303639

Web Login
Demographics
User Defined Demographics

MANAGE PHONE & E-MAIL
EDIT NAME & ADDRESS EDIT CONTACT INFO

- Click “Save”.

How to Navigate to the Organization Profile from the Individual Profile

- 1.) From the Individual Profile, click on the “Go to Arrow” icon next to the local’s name on the Local Member Relations child form

BRUCE MILLER

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BRUCE MILLER
1705 Murchison Dr
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BRUCE.MILLER@GMAIL.COMZZ HOME
Phone: 000-111-2222 HOME
fax:

Additional Information
contact id: 0010303639

Web Login
Demographics
User Defined Demographics

MANAGE PHONE & E-MAIL
EDIT NAME & ADDRESS
EDIT CONTACT INFO

order entry event registration add request add membership add chapter membership add payment CTA Grants Demographics

Relations Contact Info Committees Correspondence Log/History More

local member relations

Add Work Location
Add Employer

Organization Name	Organization Type	Role	Commit	Start Date	End Date	Primary
LEMON GROVE TCHRS ASSN	LOCAL	ACTIVE MEMBER		9/1/2017		✓

organizations

Organization Name	Organization Type	Role	Title	Start Date	End Date	Primary
LEMON GROVE ELEMENTARY	EMPLOYER	EMPLOYEE		9/1/2017		✓
MT. VERNON ELEMENTARY	WORK LOCATION ✓	CLASSROOM TEACHER		9/1/2017		

current year end-dated local member relations

Organization Name	Organization Type	Role	Start Date	End Date	Primary	Voided?	Mem End
-------------------	-------------------	------	------------	----------	---------	---------	---------

- 2.) This will directly take you to the Local’s organization profile

Avecra

CRM / Organizations / LEMON GROVE TCHRS ASSN

LEMON GROVE TCHRS ASSN

Attn: FINNEY PIERRE
LEMON GROVE TCHRS ASSN
PO Box 756
La Mesa, CA 91944-0756

Phone: (619)460-3465 HOME
Fax: (619)460-9325 WORK

Additional Information
org id: 000002018
acronym: 1067
org type: LOCAL
addr type: BUSINESS
tax id: 33-0017745
e-mail: lemonygrove@test.orgzz

Agency Fee Local?

Google MASS END DATE PROCESS Custom Info EDIT NAME & ADDRESS EDIT CONTACT INFO

order entry add membership add chapter membership add payment mass payment collective payment

Relations Contact Info Committees Payments Log/History More

individuals

1 2 (B D F J L R S)

Name	Type	Title	Start Date	End Date	Primary Contact	Primary Affiliation
BRUNER, SUSAN	CTA 360		3/7/2017	8/31/2018		
DUFFETT, BARBARA	eWEB USER	ADMIN	2/1/2013			
FINNEY, PIERRE	CTA 360		3/7/2017	8/31/2018	✓	
JOHNSON, VERONICA	eWEB USER	LITE	12/2/2017	8/31/2018		
JOHNSON, VERONICA	CTA 360		3/7/2017	8/31/2019		
LEDWAK, CONCETTA	CTA 360		3/7/2017	8/31/2018		
R, GABRIELLE	eWEB USER		5/22/2018			
RIEDEL, JOSEPH	eWEB USER	LITE	12/2/2017	8/31/2018		
RIEDEL, JOSEPH	CTA 360		12/5/2017	8/31/2019		
RUVALCABA, BERTHA	eWEB USER	ADMIN	3/27/2014			

How to Find the Local's President Information

- 1.) From the Local's Organization Profile, click on the COMMITTEE tab
- 2.) Click on the Go To Arrow icon next to the President's name

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2 of 6

LEMON GROVE TCHRS ASSN

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 LEMON GROVE TCHRS ASSN
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 La Mesa, CA 91944-0756

Phone: (619)460-3465 HOME
 Fax: (619)460-9325 WORK

Additional Information
 org id: 000002018
 acronym: 1067
 org type: LOCAL
 addr type: BUSINESS
 tax id: 33-0017745
 e-mail: lemongrove@test.orgzzz

Agency Fee Local?

order entry add membership add chapter membership add payment mass payment collective payment

Relations Contact Info **Committees** Payments Log/History More

committee members

Individual	Committee Type	Code	Name	Position	Start Date	End Date
RUVALCABA, BERTHA	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	MEMBERSHIP CONTACT	4/1/2014	
FINNEY, PIERRE	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	PRESIDENT	2/7/2012	
SPITZER, ELLEN	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	SECRETARY	7/1/2013	
ADAME, ANA	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	SITE REPRESENTATIVE	12/2/2017	
GRANQUIST, MARY	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	TREASURER	5/17/2006	
JOHNSON, VERONICA	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	VICE PRESIDENT	12/2/2017	
JOHNSON, VERONICA	LOCAL LEADERSHIP	1067-LEAD	LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	VICE PRESIDENT	12/2/2017	

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- 3.) The President's information should appear

LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP

FINNEY PIERRE
 PIERRE FINNEY
 PO Box 756
 La Mesa, CA 91944-0756

macamoni1@gmail.com
 phone: (619)994-1958

fax:

Other Information
 code: 1067-LEAD
 position: PRESIDENT
 status: Active
 start date: 2/7/2012
 voting? No funded? No renewable? No
 comm pref.:
 rank: 10

Active Participation Future Participation Log

current committee positions

Committee	Position	Start Date	End Date
EAST COUNTY TCHRS UNISERV - BOWEN - UNISERV LEADERSHIP		1/27/2014	
LEMON GROVE TCHRS ASSN - LOCAL LEADERSHIP	21	2/7/2012	

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How to find the Local's Primary Staff Contact (PCS)

- 1.) From the Local's organization profile, click on the RELATIONS tab
- 2.) On the 2nd child form RELATED ORGANIZATION

CRM / Organizations / LEMON GROVE TCHRS ASSN

LEMON GROVE TCHRS ASSN

Attn: **FINNEY PIERRE**
 LEMON GROVE TCHRS ASSN
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Phone: (619)460-3465 HOME
 Fax: (619)460-9325 WORK

Additional Information
 org id: 0000002018
 acronym: 1067
 org type: LOCAL
 addr type: BUSINESS
 tax id: 33-0017745
 e-mail: lemonygrove@test.orgzzz

Agency Fee Local?

Buttons: MASS END DATE PROCESS, Custom Info, EDIT NAME & ADDRESS, EDIT CONTACT INFO

Actions: order entry, add membership, add chapter membership, add payment, mass payment, collective payment

Relations | Contact Info | Committees | Payments | Log/History | More

▼ individuals
 ▲ related organizations

Related to	Parent	Relationship	Start Date
AGENCY FEE LOCALS		AGENCY FEE	
CDD P		CTA DIRECTORIAL DISTRICT	
EAST COUNTY TCHRS UNISERV - BOWEN		UNISERV	
LEMON GROVE ELEMENTARY		EMPLOYER	
NDD 10		NEA DIRECTORIAL DISTRICT	
P-SD-2		ELECTORAL	9/1/2014
REGION 04		REGION	
SAN DIEGO SCC		SERVICE CENTER COUNCIL	
STAFF ASSIGNED - SAMANTHA WU		STAFF LOCALS	6/27/2015

- 3.) Next to the name of the Uniserv is the last name of the PCS for that local- you can look them up in the CTA Outlook.