CT 1.0: Intro

Clerk Tutorial 1

Start here: Intro

Exercise 1: Adding a Family (of one) (http://help.eadventist.net/article/131-ct-1-1-adding-a-family)

Exercise 2: Adding a Large Family (of four) (http://help.eadventist.net/article/132-ct-1-2-adding-a-large-family)

Exercise 3: Family Changes (http://help.eadventist.net/article/139-ct-1-3-family-changes)

Exercise 4: Fixing Mistakes (http://help.eadventist.net/article/140-ct-1-4-fixing-mistakes)

What you need

Demo account

eAdventist's "Demo" site (demo.eadventist.net (https://demo.eadventist.net)) allows you to practice without any danger of messing up the membership records on the "Live" site (www.eadventist.net (https://www.eadventist.net)).

The Family

eAdventist uses a simple, but powerful, definition of **Family** that makes entry more efficient. Each **Family** should include:

- People living at the same address

- At most, 2 married people

- If more than 2 married people, eAdventist will use "Married on" date to match spouses

Each family has one person designated as the **Primary Contact**. This person's name will be used on mailing labels for the family. Each family shares addresses, phone number and subscriptions (i.e. union paper, Adventist World).

Ok, let's try it...

Be sure that you do these exercises on eAdventist's Demo site (https://demo.eadventist.net), rather than the Live site (https://www.eadventist.net).

> Continue to Exercise 1: Adding a Family (of one) (http://help.eadventist.net/article/131-ct-1-1-adding-a-family)

RELATED ARTICLES

CT 1.1: Adding a Family (of one)

Clerk Tutorial 1: Basics

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Exercise 1: Adding a Family (of one)
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Exercise 3: Family Changes (http://help.eadventist.net/article/139-ct-1-3-family-changes)
Exercise 4: Fixing Mistakes (http://help.eadventist.net/article/140-ct-1-4-fixing-mistakes)

Exercise 1: Adding a Family (of one)

Let's start with a family that only contains one person, a single man named Steve Manning who has been taking Bible studies and attending your church. He is planning to be baptized and would like to receive church mailings. Use the following information to add him:

Last name	Manning
First name	Steve
Suffix	Jr
Church	Yours
Address	132 Sherwood Forest Rd, Annapolis MD 21401
Email	steve@pretend.net
Born on	February 27, 1985
Ethnic class	Your choice
Home phone	301-555-1111
Work phone	302-555-2222
Mobile phone	302-555-3333

Step 1 - Create a New Family

1. Choose the purple **People** menu section on the left, then choose **new family.**

2. On the top half of the **Person** screen, enter Steve's name, email, church, marital status, birth date, mobile phone and work phone. On the lower half of the screen, enter Steve's home phone and street address.

3. Click on the **Personal** tab and enter Steve's "Ethnic class".

4. Click the "Save" button. Steve has been added! Note that he is currently the "Primary Contact" for his Family. In fact, he's the only person in his Family. Also, note that his "Status" is currently "Nonmember".

> **TIP:** eAdventist will auto-certify the address to ensure that it meets postal formatting and verify that it is a valid, deliverable address.

> **TIP:** The "Allow promo mail", "Subscriptions" (for union paper and Adventist World) for this Family will be automatically set to your conference's defaults. However, you can change these values at the member's request.

Step 2 - Search for a Person

If you just completed Step 1, Steve's record is already on your screen. However, we want to learn how to find it again in the future.

1. Choose the purple **People** menu section, then choose **search**.

2. Enter a few letters of Steve's first and last names (e.g. "man" and "ste"), then click the "Search" button.

3. You should see Steve included in the search results. Click on his name to see his record - the **Person** page.

> **TIP:** Use **advanced search** if you need search criteria that aren't available in **search**.

> **TIP:** For searching, less is more. For example, searching for "ste" will find Steve whether he was entered as "Steve", "Steven" or "Stephen".

Step 3 - Enter a Baptism

Steve completed Bible studies and was baptized by Pastor Jones on August 7, 2016. Let's enter this baptism.

1. If you just completed Step 2, Steve's record is already on your screen.

2. Click the "Change Status" button.

3. On the **Change Status/Rebaptize** page, "Change" should be set to "to Member by", the drop-down should be set to "Baptism", and the "on" field should be set to "8/7/2016". Click the "Save" button.

4. This takes you to the **Baptism Information** page and you can enter "Baptized by", "Event" and "Original baptism place". These items are all optional. Click the "Save" button.

5. This takes you back to Steve's **Person** page. Note that his "Status" is now "Member".

> **TIP:** Need to change any of the information entered on the **Baptism Information** screen? Click the "Edit Person" button and choose the "Membership" tab. Make the necessary changes and click the "Save" button.

Step 4 - Print the Family Unit Record (FUR)

1. To print Steve's Family Unit Record (FUR) as a PDF, click the "Print Family" button.

> **TIP:** Some browsers (e.g. Chrome) can display PDFs. Macs come with software ("Preview") for displaying PDFs. PCs will need to have the free Adobe Reader or Adobe Acrobat installed. Your browser settings allow you to decide how PDFs are displayed and saved on your computer.

> **TROUBLESHOOTING:** If your computer does not display the FUR, check that you have the Adobe Reader installed. Also, check if your browser is blocking pop-ups and ensure that it allows popups for "www.eadventist.net" and "demo.eadventist.net".

> Continue to Exercise 2 - Add a Large Family (of four) (http://help.eadventist.net/article/132-ct-1-2-adding-a-large-family)

RELATED ARTICLES

📄 CT 1.0: Intro (/article/130-ct-1-0-intro)

📄 CT 1.3: Family Changes (/article/139-ct-1-3-family-changes)

📄 CT 1.4: Fixing Mistakes (/article/140-ct-1-4-fixing-mistakes)

📄 CT 1.2: Adding a Large Family (of four) (/article/132-ct-1-2-adding-a-large-family)

CT 1.2: Adding a Large Family (of four)

Clerk Tutorial 1: Basics

Start here: Intro (http://help.eadventist.net/article/130-ct-1-0-intro)
Exercise 1 **:** Adding a Family (of one) (http://help.eadventist.net/article/131-ct-1-1-adding-a-family)
Exercise 2: Adding a Large Family (of four)
Exercise 3: Family Changes (http://help.eadventist.net/article/139-ct-1-3-family-changes)
Exercise 4: Fixing Mistakes (http://help.eadventist.net/article/140-ct-1-4-fixing-mistakes)

Exercise 2: Adding a Large Family (of four)

The family includes Wendy, who was baptized and voted into your church last Sabbath. Her husband, Harold, is not a member yet and neither are her 2 children. Wendy should be the "Primary Contact", so it's easiest to enter her first. Use the following information to add her:

Last name	*(your last name)*
First name	Wendy
Gender	Female
Church	*(your church)*
Address	1 Dock St, Annapolis MD 21401
Born on	May 7, 1970
Work phone	302-555-9999
Mobile phone	302-555-8888

Step 1 - Add the First Person

1. Choose the purple **People** menu section on the left, then choose **new family.**

2. On the top half of the **Person** screen, enter Wendy's information. Click the "Save" button.

3. Click the "Change Status" button and enter Wendy's baptism, using last Sabbath's date.

4. On the **Baptism Information** screen, leave all fields empty and click the "Save" button. Wendy has been

added and is now a "member" of your church!

> **TIP:** eAdventist's "Auto-certify" will automatically fill in the "Postal Code" if the address is valid. You can test this by leaving "Postal Code" blank when you click "Save".

Step 2 - Add the Spouse

If you just completed Step 1, Wendy's record is already on your screen. Now you can add people to the family

1. Click the "New Person" button. Note that the new **Person** screen already has several fields filled with default values to save you keystrokes.

2. Add Harold with the following information:

First name	Harold
Church	*(your church)*
Gender	Male
Marital status	Married
Born on	October 8, 1978
Work phone	301-555-7777
Mobile phone	301-555-6666

3. Click the "Save" button. Harold is now a "nonmember" and Wendy is still the Primary Contact.

4. Wendy would like the union paper label to say "Mr & Mrs Harold *(your last name)*", rather than just "Wendy *(your last name)*", the Primary Contact. Click the "Edit Person" button. On the "Family Unit" tab, change the "Mailing name" to "Mr & Mrs Harold *(your last name)*" and click the "Save" button.

Step 3 - Add the Children

Wendy has 2 children - a son, Allen, and a daughter, Barbara.

1. Click the "New Person" button to add Allen.

2. Enter Allen's information: male, single, belongs to your church, born September 3, 1991. Don't click the "Save" button yet.

3. Allen is a sophomore at University of Maryland. Click the "Student" tab, set "Grade" to "14", set "School type" to "Non-SDA" and enter "University of Maryland" as the "School (Non-SDA)". Click the "Save" button.

4. Click the "New Person" button again to add Barbara.

5. Enter Barbara's information: female, single, belongs to your church, born November 15, 1992. Don't click the "Save" button yet.

6. Barbara is in 10th grade at Takoma Academy. Click the "Student" tab, set "Grade" to "10" and set "School type" to "SDA". Click the "Select" button beside "School (SDA)", find "Takoma Academy" and select it. Click the "Save" button.

Step 4 - Baptize a Family Member

Allen was also baptized last Sabbath at your church.

1. The "Family Unit" tab shows a grid listing everybody in the Family. Click on Allen's name to view his record.

2. Click the "Change Status" button and enter the baptism (**Change** to Member by "Baptism" on "*(last Sabbath)*").

3. Pastor Dewayne Richards baptized Allen. On the **Baptism Information** screen, set "Pastor" to "Dewayne Richards" and click the "Save" button. (NOTE: Only enter the pastor's name, **not** "Pastor Dewayne Richards").

Step 5 - Add a Temporary Address

Wendy and Harold often spend the summer in New England and would like any church mailings to be sent there.

1. Go to the **Person** page for any member of the family. Note that addresses belong to the **family**, so any address change will affect the **entire** family.

2. Note that the "Addresses" tab bar currently has the "Street" address selected and the word "Default" is displayed in blue above the address.

3. Click the "Edit Person" button.

4. Select the "Alternate" tab on the "Addresses" tab bar.

5. Enter the family's summer address: 75 South St, Gorham ME. Change the "Default address type" to "Alternate" and click the "Save" button.

6. The "Addresses" tab bar should have "Alternate" selected, "Default" should be displayed in blue above the address and Auto-certify should have automatically added the "Postal Code".

7. Although the "Street" address is still entered, any mailing labels will use the "Alternate" address.

8. When the family returns from vacation, click the "Edit Person" button, change the "Default address type" back to "Street" and click the "Save" button.

9. Any mailing labels will now use the "Street" address again.

Step 6 - Changing an Address

Wendy and Harold have just moved to "1410 West St", so the family's "Street" address needs to be updated.

1. Go to the **Person** page for any member of the family.

2. Click the "Edit Person" button.

3. Enter the new address and click the "Save" button.

4. Click on any other family member's name (in the Family Unit grid) to verify that the address change affects the entire family.

> **TRY:** Click the "History" link on the **Person** page and explore the tabs - "History", "Family", "Address" and "Phone". Note that any changes to "Work phone" or "Mobile phone" are on the "History" tab rather than the "Phone" tab because they belong to a specific Person rather than being shared by the Family.

> Continue to Exercise 3 - Family Changes (http://help.eadventist.net/article/139-ct-1-3-family-changes)

✉ *Still need help? Contact Us (/contact)*   *Last updated on June 29, 2017*

RELATED ARTICLES

📄 CT 1.0: Intro (/article/130-ct-1-0-intro)

📄 CT 1.1: Adding a Family (of one) (/article/131-ct-1-1-adding-a-family)

📄 CT 1.3: Family Changes (/article/139-ct-1-3-family-changes)

📄 CT 1.4: Fixing Mistakes (/article/140-ct-1-4-fixing-mistakes)

CT 1.3: Family Changes

Clerk Tutorial 1: Basics

Exercise 3: Family Changes

Let's start with a family that only contains one person, a single man named Steve Manning who has been taking Bible studies and attending your church. He is planning to be baptized and would like to receive church mailings. Use the following information to add him:

Step 1 - Child Goes to College

Wendy's son, Allen, is going to Andrews University for his junior year. He is not transferring his membership but would like to receive the union paper and church newsletter. We need to move him to a new family of his own.

1. Use **Person Search** to find Allen's record**.**

2. Click the "Change Family" button.

3. Ensure that "Create a new Family" is selected for the "Change" and click the "Save" button.

4. Verify that the **Person** screen now shows Allen as the only person in the new Family and that he is the Primary Contact.

5. On the "Family Unit" tab, enter his new address and phone number. 212 Meier Hall, Andrews University, 100 US Hwy 21, Berrien Springs MI 49104 and 269-555-7212.

6. On the "Student" tab, change his "Grade" to "15", change the "School type" to "SDA" and select Andrews University.

7. Click the "Save" button.

8. You can use **Person Search** to find Wendy's record and verify that Allen is no longer included in her family.

> **TRY:** Click the "History" link on Allen's record and see how your changes have been recorded.

Step 2 - Child Gets Married

Wendy's daughter, Barbara, has graduated and married Steve Manning - another member in your church. She needs to join Steve's family unit.

1. Use **Person Search** to find Barbara's record.

2. Click the "Change Family" button.

3. Select "Join an existing Family" and click the "Select" link that appears.

4. Use the **Select Family** pop-up to find Steve Manning. Note that this pop-up will search for the Primary Contacts of other families. (HINT: Enter "man" and "ste" to save time and find any name/spelling variations).

5. Select Steve from the search results and click the "Select" button. (HINT: you can also select Steve by double-clicking on his row).

6. On the **Change Family** screen, click the "Save" button.

7. The **Person** screen should display Barbara's record. Notice that Steve is now listed in the family members and as the Primary Contact.

8. Click the "Edit Person" button to update her "Last name", "Former/maiden name" and "Marital status".

9. Click on the "Personal" tab to enter her "Married on" date (Feb 14, 2017).

10. Click the "Save" button.

11. Finally, Steve's record also needs to be updated so click on his name in the Family Unit grid.

12. Click the "Edit Person" button and update Steve's "Marital status" and "Married on" date. Finally, click the "Save" button.

13. Use **Person Search** to find Wendy's record again and verify that Barbara is no longer included in Wendy's family.

Step 3 - A Member Dies

Sadly, you have been informed that Wendy passed away unexpectedly yesterday.

1. Use **Person Search** to find Wendy's record.

2. Click on the "Change Status" button.

3. Ensure that "Change" is set to "Deceased" and enter yesterday's date in the "on" field. Click the "Save" button.

4. Verify that Wendy's "Status" is now "Deceased".

5. There will be a warning at the top of the screen indicating that another person needs to be selected as Primary Contact in order for the family to continue receiving church mail. Don't bother making this change for this exercise.

6. Verify that Wendy is not listed in grid on the Family Unit tab. However, you can click on the "More..." link to see her record.**TIP:** Use **advanced search** if you need search criteria that aren't available in **search**.

Step 4 - Divorce

Unfortunately, part of your work as a clerk will involve splitting families as the result of a divorce. In this example, Steve and Barbara are divorcing, with Steve moving to an apartment.

1. Use **Person Search** to find the record for the individual moving out of the home. In this case, it will be Steve.

2. Click the "Edit Person" button. Change Steve's "Marital status" to "Divorced", then click the "Save" button.

3. To remove him from the family unit, click the "Change Family" button. You should see a warning to "Choose a new Primary Contact first".

4. Click the "Change" button next to the "Primary contact", select Barbara and click the "Save" button. Barbara should now be listed as the "Primary contact".

5. Click the "Change Family" button again. You should see the **Change Family** screen this time.

6. Choose "Create a new Family" and click the "Save" button.

7. This will take you to Steve's **Person** page. Note that the address is empty since this is a new family.

8. Enter 324 Main St, Laurel MD 20707 and click the "Save" button.

9. Steve is now in his own family unit.

TRY: Find Barbara's record and update her "Marital status". Notice that Steve is no longer listed in Barbara's family and that she is now the Primary Contact..

Continue to Exercise 4 - Fixing Mistakes (http://help.eadventist.net/article/140-ct-1-4-fixing-mistakes)

RELATED ARTICLES

📄 CT 1.0: Intro (/article/130-ct-1-0-intro)

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📄 CT 1.4: Fixing Mistakes (/article/140-ct-1-4-fixing-mistakes)

📄 CT 1.2: Adding a Large Family (of four) (/article/132-ct-1-2-adding-a-large-family)

CT 1.4: Fixing Mistakes

Clerk Tutorial 1: Basics

Exercise 4: Fixing Mistakes

Step 1 - Undoing a Status Change

What if you accidentally "decease" the wrong person? You may not even remember who you changed, but you need to make them a member again. How can you find this individual and correct the mistake?

1. Go to **Person Search,** change "Status" to "Deceased" and click the "Search" button**.**

2. As you scan the names in the search results, you will most likely spot and recognize the name. In this case, click on Wendy.

3. On Wendy's **Person** page, click the "Change Status" button.

4. Select "Undo last change". eAdventist automatically knows that it was "Deceased". Click the "Save" button.

5. Wendy's record has been corrected. Her "Status" should be "Member" and she should be included in the family members on the "Family Unit"

Congratulations! You've finished Clerk Tutorial 1 and you're ready for Clerk Tutorial 2 (http://help.eadventist.net/category/114-clerk-tutorial-2-transfers).

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