

Strategies for Efficient People and Address Management

2016CTAC



What are YOUR Challenges??

- Duplicate People Records
- Insufficient Information in People Records
- Mix of First Name, Last Name and Organization Name, partial addresses or no addresses
- A person can be an individual citizen with their home email and phone as well as a contact for an organization with corporate email address and phone
- Wrong People record being used related to a folder, property or payment

Other Challenges?

- People can have multiple current addresses
- Addresses change and want to be able to track previous addresses
- Want to associate a certain people record with a certain address to a folder
- Names change or there are short forms for name
 - Eg married name vs maiden name, multiple married names
 - Eg Bill vs William, Cathy vs Catherine

FIRST STEP: Make Some Decisions Corporately on your **People Master Data!**



Master People Data (cont'd)

'Organization' People Record

People | Property | Info | Attachment | Member(2) | People People | Certification | Payable | Folder | Address

CSDC Systems Inc **Active** [Edit](#) [Options](#)

General

Contact	Organization	Initials	Work
	CSDC Systems Inc		(888) 661-1933 e
Status	Type	Row ID	Parent ID
Active	Organization	256843	

Email
info@csdcsystems.com

Address

1705 Tech Unit 1 Mississauga Ontario
L7P 1L7

Free Form Address

1705 TECH UNIT 1
MISSISSAUGA L7P 1L7
CAN

Master People Data (cont'd)

'Individual' People Record

People | Property | Folder(3) | Attachment | Address | Certification

Mickey Mouse Active Edit Options

General		Address	
Contact Mickey Mouse	Organization	Initials	Mobile (555) 555-5555 e
Status Active	Type Individual	Row ID 256842	Parent ID
Email mickey.mouse@gmail.com			

Free Form Address

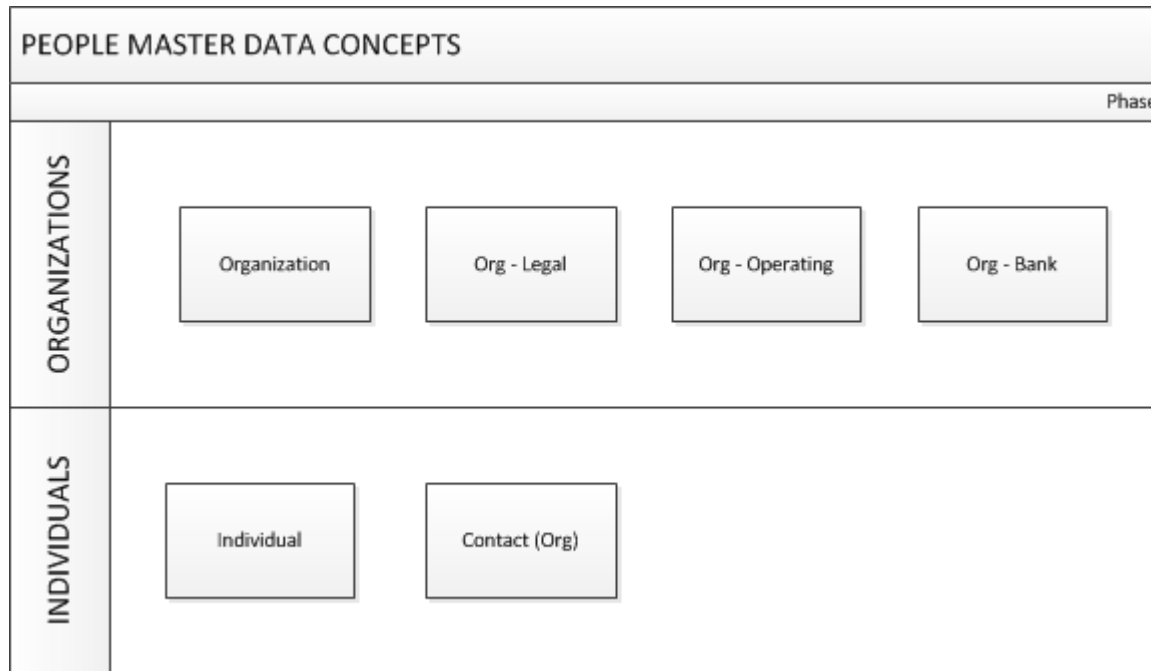
429 PINE ST
ONTARIO CA 91758
USA

Attachment

Comment

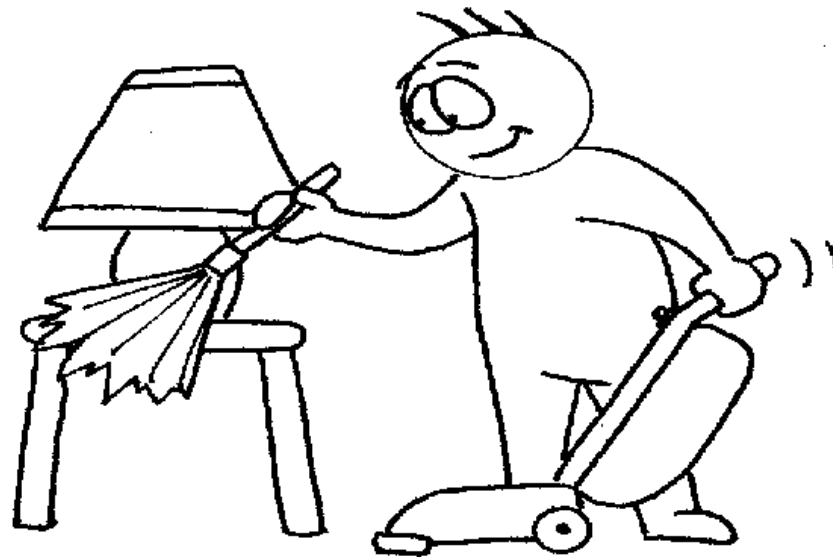
Master People Data (cont'd)

People Types (A6/A7)



PeopleCode in People record as opposed to 'Role'
associated to folder, property, payment, etc

Cleaning up the People Master Data AND Keeping it Clean!!!



Cleaning up People Records with Batch Scheduler Routines (A6/A7)

- Batch routines can be written to clean up existing people records – eg duplicate people records or orphaned people records.
- Scripts can run nightly or weekly and either auto-correct the issues or send an email to an employee to investigate and correct the issues.

SOME OF OUR EXISTING CLIENTS MAY SHARE SCRIPTS WITH YOU. IF YOU DON'T HAVE STAFF TO WRITE THESE SCRIPTS YOU CAN CONTRACT CSDC TO DO SO.

Replace Marked with Unmarked (A6/A7)

- Standard functionality available since A3 to be able to manage duplicate people records that have been attached to various folders, property, etc.
- Linkages are changed to the one 'unmarked' people record in the list. That leaves all the rest of the people records in the list as 'orphaned' ie no connection to folders, property, payments, etc.
- The orphaned people records can now be deleted using the Bulk – Delete functionality in A7

Replace Marked with Unmarked (cont'd)

Bulk Action ▾ List View Tile View Found 3 Records

Delete

Replace marked(n) by unmarked(1)

Mickey Mouse

Individual **Active**

Phone: (555) 555-5555 e

Email: mickey.mouse@gmail.c...

Address: 429 Pine St Ontari...

Row ID: 256842

Family RSN:

Mickey M Mouse

Individual **Active**

Phone:

Email:

Address: SK

Row ID: 256845

Family RSN:

Mickey Mouse

Individual **Active**

Phone:

Email:

Address: SK

Row ID: 256844

Family RSN:

^ Top

Replace Marked with Unmarked (cont'd)

The screenshot displays a web application interface. At the top left, a 'Bulk Action' dropdown menu is highlighted with a red box. The menu is open, showing a 'Delete' option with a trash icon. Below the menu, a message reads 'Replace marked(n) by unmarked(1)'. Three record cards are visible, each representing an 'Individual' with an 'Active' status. The first card is unselected, while the other two are selected with checkmarks. Each card displays contact information: phone, email, and address (SK). The record IDs are 256842, 256845, and 256844 respectively. A 'List View' and 'Tile View' toggle is present, and a 'Found 3 Records' indicator is in the top right. A 'Top' button is in the bottom right.

You can now use the Bulk Action to 'Delete' the selected records as they are now redundant and not linked to any folder, property, payment, etc. This is the improvement made in A7 as in A6 delete was not available in list view.

Replace Marked with Unmarked (cont'd)

The screenshot shows a CRM interface for a person record. The breadcrumb navigation path is "People | Property | Folder(3) | Attachment | Member | People People | Certification | Bond | Address". The "Folder(3)" link is highlighted with a red box. The record is for "Mickey Mouse" with a status of "Active". The record details are as follows:

Contact	Organization	Initials	Mobile
Mickey Mouse			(555) 555-5555 e

Status	Type	Row ID	Parent ID
Active	Individual	256842	

Email: mickey.mouse@gmail.com

Address: 429 Pine St Ontario CA 91758

Free Form Address: 429 PINE ST, ONTARIO CA 91758, USA

One 'Mickey Mouse' record remains and all three folders are attached to this record.

Restrict Master Data PeopleCode based on Flag in PeopleCode table (A7)


People Type and Defaults

+ Add ✖ Delete 💾 Save 🔄 Refresh ⬆️ Sort 📄 Query 📄 Export 🔍 Audit 🛠 Help Search

<input type="checkbox"/>	Code	Description	Description(French)	Web Display	Hide On People Flag	Access Code	
<input type="checkbox"/>	0	Occupant	Description(French)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	1	Applicant	Description(French)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	2	Owner	Description(French)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	3	Encryption	Description(French)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	5	Individual	Description(French)	<input type="checkbox"/>	<input type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	6	Contact	Description(French)	<input type="checkbox"/>	<input type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	7	CPO	Description(French)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	10	Organization	Description(French)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	15	Primary Contact	Description(French)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	16	Secondary Contact	Description(French)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co
<input type="checkbox"/>	20	Carpenter	Description(French)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Access Code	Co

Those unchecked are the only choices available in the Master Data People Record. The checked ones can still be chosen as 'Roles' related to a folder or property, etc.

Restrict Master Data PeopleCode

 Insert a people

General

Title	First Name	M Name	Last Name	Suffix
Title ▼	Donald	Middle	Duck	Suff ▼

Organization:

Initials:

Phone:

Phone Type:

Type:

- Bank
- Contact
- Individual
- Organization

People Validation Procedure A6/A7

- Can be used to ensure that adequate information is added to a people record (examples below)
 - OrganizationName only for Organization people type
 - First and Last Name only for Individual people type
 - Must have email address
 - People status can automatically be set to 'Active' if a new people record is added or updated if no current status

People Validation Procedure (Cont'd)

- Ensure that there is at least one of either an email address or a phone number
- Ensure that House Number OR Address Prefix is completed (ie ensure there is an address)
- Ensure proper format for either email address, zip code or postal code

Address Check A6/A7

- Your organization can connect to an addressing system, such as Melissa, and have the Address Adaptor Module setup in AMANDA to ensure that addresses entered in a people record are valid.
- The setup in A7 Admin is under Modules – Address Adaptor

Address Check (cont'd)

The screenshot shows a software interface for managing a person's address. The top navigation bar includes links for People, Address(4), Folder(5), Info, Certification, Installment, Attachment, Member, Payable, Property(1), Comment, and People People. The user profile for Sara Funduk is shown as Active with a Warning icon. The interface is divided into two main sections: General and Address.

General Section:

- Title: [Dropdown]
- First Name: Sara
- M Name: Middle
- Last Name: Funduk
- Suffix: [Dropdown]
- Organization: [Text Field]
- Initials: [Text Field]
- Phone: (555) 555-5555 e [Text Field]
- Home: [Dropdown]
- Type: [Dropdown]
- [Text Field] Phone Typ: [Dropdown]
- Status: Active
- [Text Field] Phone Typ: [Dropdown]

Address Section:

- Address Prefix: [Text Field]
- No.: 123
- Prefix: Prefix [Dropdown]
- Street Name: Anywhere [Dropdown]
- Street Type: Street [Dropdown]
- Direction: Direction [Dropdown]
- Unit: Unit [Dropdown]
- Unit No.: [Text Field]
- City: Waterloo [Dropdown]
- County: County [Dropdown]
- Community: Communit [Dropdown]
- Province: Province [Dropdown]
- Postal Code: N1K1K1
- Country: Country [Dropdown]

At the bottom of the form, there are three buttons: Cancel, Address Check (highlighted with a red box), and Save.

If address does not validate as correct with address database then a popup error message appears for the user.

People Function A6/A7

- Used to show existing people records with the same name to help prevent users from adding duplicate people records
- Function can specify any level of check

People Function (cont'd)

Checking People Before Insert X

Name	Status	People Type	Email	Address Line 1	Address Line 2	Parent RSN
Mickey Mouse	Active	Individual	mickey.mouse@gm	429 PINE ST	ONTARIO CA 91758	

Also Known As (AKA or Alias) (A6/A7)

- How can I make sure I find a people record if I don't know how the first name was entered?
 - Was it Cathy, Catherine, Kathy, Katherine, Kathryn ?
- What about when the last name changes?
 - Used to be Livingston then got married and changed to Kelley.
 - Got divorced and remarried and changed to Klaus.
 - Got divorced again and changed back to Livingston
 - Got remarried, yet again, and changed to Abbott
- **ONLY TRUTH CAN BE THIS STRANGE !!!!**

AKA (cont'd)

Also Known As ✕

+ Add

People RSN	Also Known As	Options
256837	CATHERINE	⚙️ ▼
256837	KATHERINE	⚙️ ▼
256837	KATHY	⚙️ ▼
256837	KELLEY	⚙️ ▼

✕ Cancel ✎ Edit

In A7 – Options -> 'Also Known As' in People window

In A6 – Button 'Alias' at bottom of People window

AKA (cont'd)

People [Cathy Abbott]

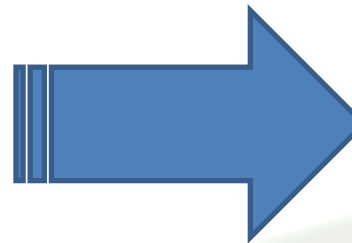
Advanced Search

Search by Example for People or Organization

Also Known As Sounds Like

Title: Title
First Name: Catherine
Middle Name: Middle Name
Last Name: Kelley
Suffix: Suffix

Result is Cathy Abbott
People Record



Cathy Abbott

Individual Active

Phone:

Email:

Address: 310 Waterloo Ave...

Row ID: 256837

Family RSN:

Multiple People Representing an Organization



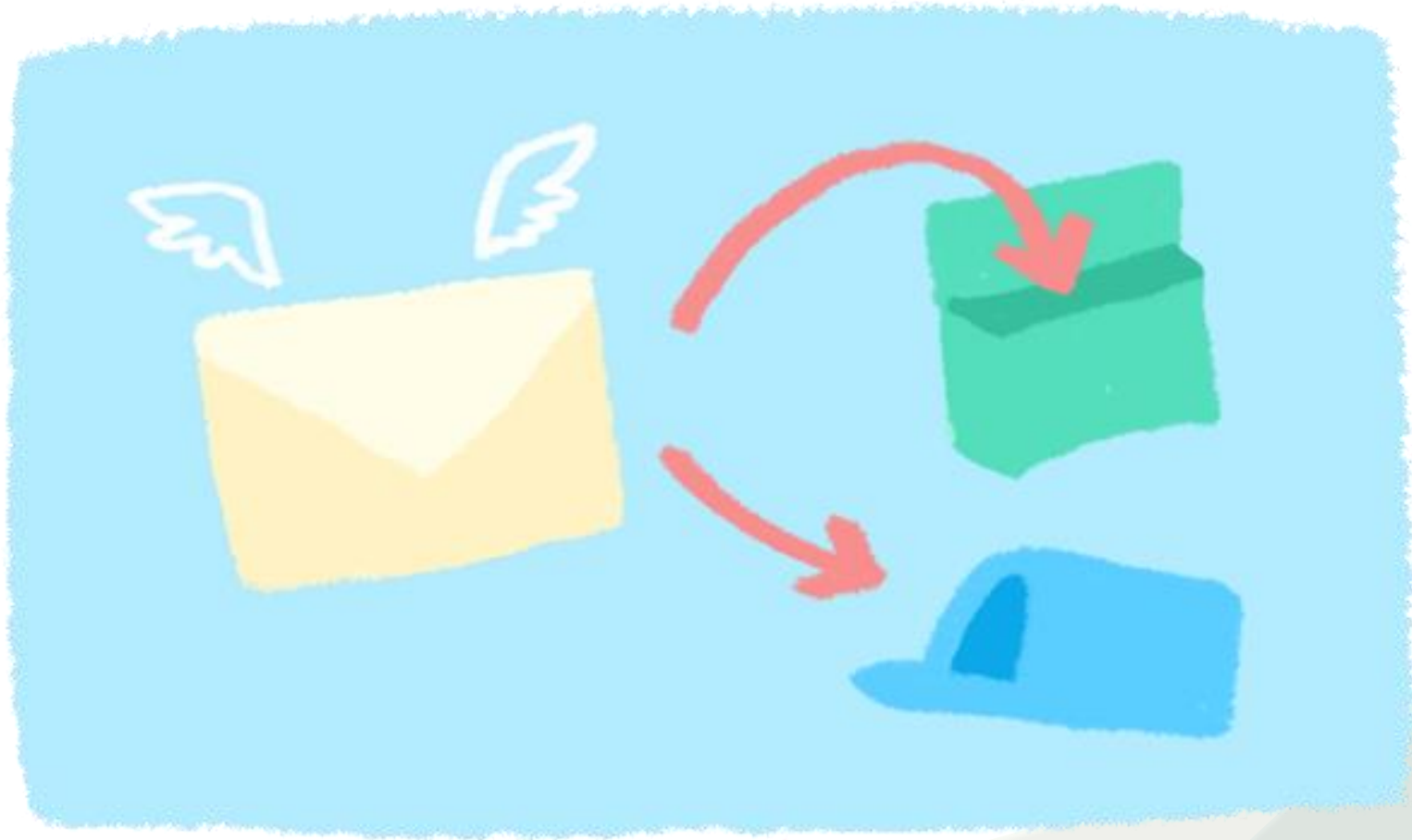
Member Tab

The screenshot displays a web application interface for managing members. At the top, there is a navigation bar with a hamburger menu, a home icon, and the text 'People'. Below this, a secondary navigation bar shows 'People | Property | Info | Attachment | Member(2) | People People | Certification | Payable | Folder | Address'. The 'Member(2)' tab is highlighted with a red box. Below the navigation, the main content area shows a list of members for 'CSDC Systems Inc', which is also highlighted with a red box. The list includes two members: Kevin Hebert and Cathy Abbott. For Kevin Hebert, the 'End Date' field is highlighted with a red box and shows '5/1/2016'. The interface also includes 'Edit' and 'Options' buttons for each member entry.

Name	Member RSN	Start Date	End Date	Member Type	Actions
Kevin Hebert	256673	6/5/2012	5/1/2016	Senior Partner	Settings
Cathy Abbott	256834	6/1/2013		Senior Partner	Settings

You can see by the effective dates that Kevin no longer is an active member of CSDC Systems Inc. (sorry Kevin)

Multiple Addresses



PeoplePeople Tab A6/A7

- Was called 'Address' tab in A6
- New people record is created
- PeoplePeople table links the people records to each other
- Kept for backward compatibility
- Suggest moving to Address tab

PeoplePeople Tab (cont'd)

People | Property | Folder | Attachment | Member | **People People(1)** | Certification | Bond | Address

Donald Duck Active Options

Address Type	Address	Effective Date	End Date
Vacation House	123 DEER LAKE	8/1/2016	

AMANDA PeoplePeople tab view

	PEOPERSN	NAMETITLE	NAMEFIRST	NAM...	ORGANIZATIONNAME	ADDRHOUSE	ADDRSTREET	ADDRSTREETTYPE
1	256846 (null)	Donald Duck	Donald	Duck	(null)	147	Pine	Ave
2	256847 (null)	Donald Duck	Donald	Duck	(null)	123	Deer Lake	PKWY

People table

PeoplePeople table

	PEOPERSN	ADDRESSPEOPERSN	ADDRESSCODE	EFFECTIVEDATE	ENDDATE
1	256846	256847	30 16-08-01	(null)	1

Address Tab A7

- **New in A7 with new Address table**
- When searching for a people record to relate to a folder can choose which address to use
- Various addresses can be used in merge docs or reports – eg Corporate Address vs Site Address or Site Address vs Mailing Address
- Copy from main address for address changes
- Conceptually you wouldn't need the address to be entered on the main people screen. You could add a 'Current Address' and a 'Previous Address' both on the 'Address' tab.

Address Tab in A7 (cont'd)

The screenshot shows the 'Address' tab for a person named Sara Funduk. The interface includes a navigation bar with 'People' and 'People [Sara Funduk]'. Below the navigation bar, there are several tabs: 'People', 'Address(4)', 'Folder(4)', 'Info', 'Certification', 'Installation', 'Attachment', 'Member', 'Payable', 'Property(1)', 'Comment', and 'People People'. The 'Address(4)' tab is selected, showing a list of addresses for Sara Funduk. The list has columns for 'Address Type', 'Address', 'Effective Date', and 'End Date'. There are four address entries, each with a gear icon for options.

Address Type	Address	Effective Date	End Date
Business	54321 Technical Ave	8/19/2016	
Vacation House	999 Peaceful St	8/29/2016	
Mailing	555 Anywhere St	4/1/2016	
Previous	PO Box 1234 Str A	1/1/2016	3/31/2016

Address tab in A7 People record

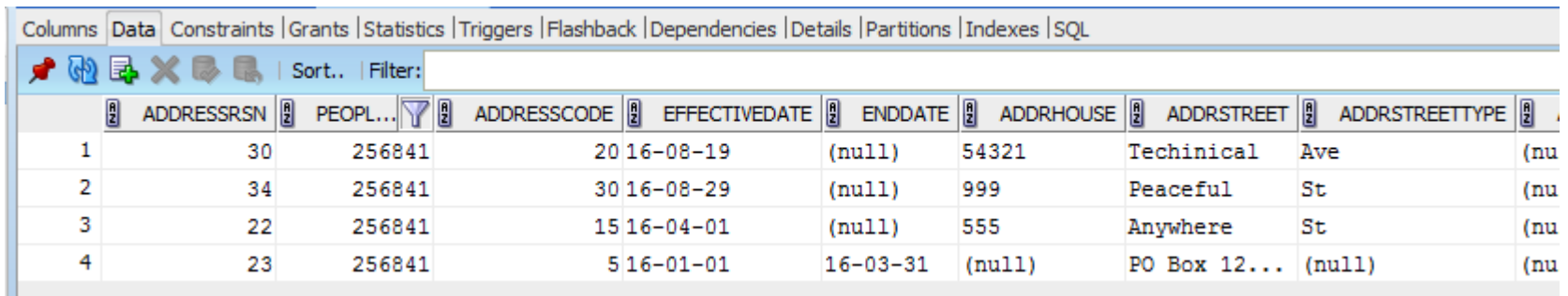
The screenshot shows a table view of the 'People' table in A7. The table has columns for 'PEOPLEPSN', 'NAMETITLE', 'NAMEFIRST', 'NAM...', 'ORGANIZATIONNAME', 'ADDRHOUSE', 'ADDRSTREET', and 'ADDRSTREETTYPE'. The first row of data shows a person with PSN 256841, name Sara Funduk, and address 123 Anywhere St.

PEOPLEPSN	NAMETITLE	NAMEFIRST	NAM...	ORGANIZATIONNAME	ADDRHOUSE	ADDRSTREET	ADDRSTREETTYPE
1	256841 (null)	Sara	Funduk	(null)	123	Anywhere	St

People table in A7

Address Tab in A7 (cont'd)

New Address table



The screenshot shows a database table with the following columns: ADDRESSRSN, PEOPLRSN, ADDRESSCODE, EFFECTIVEDATE, ENDDATE, ADDRHOUSE, ADDRSTREET, and ADDRSTREETTYPE. The table contains four rows of data.

	ADDRESSRSN	PEOPLRSN	ADDRESSCODE	EFFECTIVEDATE	ENDDATE	ADDRHOUSE	ADDRSTREET	ADDRSTREETTYPE	
1	30	256841	20	16-08-19	(null)	54321	Technical Ave	(nu	
2	34	256841	30	16-08-29	(null)	999	Peaceful St	(nu	
3	22	256841	15	16-04-01	(null)	555	Anywhere St	(nu	
4	23	256841	5	16-01-01	16-03-31	(null)	PO Box 12...	(null)	(nu

Address table in A7 for PeopleRSN 256841. Can have any number of addresses with their effective dates.

Address Tab in A7 (cont'd)

Main People record view

The screenshot displays a user interface for a 'People' record. At the top, there is a navigation bar with a home icon, the text 'People', and a tab for 'People [Sara Funduk]'. Below this is a breadcrumb trail: 'People | Address(4) | Folder(4) | Info | Certification | Installment | Attachment | Member | Payable | Property(1) | Comment | People People'. The main record header shows 'Sara Funduk' with 'Active' and 'Warning' status indicators, and 'Edit' and 'Options' buttons.

The record is divided into two main sections: 'General' and 'Address'. The 'General' section contains a table with the following data:

Contact	Organization	Initials	Home
Sara Funduk			(555) 555-5555 e

Status	Type	Row ID	Parent ID	Email
Active	Applicant	256841		

The 'Address' section is currently selected and shows the following information:

Address
123 Anywhere St Waterloo N1K1K1

Free Form Address
123 ANYWHERE ST
WATERLOO N1K1K1

The 'Additional Addresses' section is highlighted with a red rounded rectangle and contains a table with the following data:

Type	Address
Business	54321 Technical Avenue Waterloo Ontario N1N1N1 CAN
Vacation House	999 Peaceful Street Heaven Colorado 12345
Mailing	555 Anywhere Street Waterloo Ontario N1K1K1 CAN

Using Address Tab for ALL Addresses

People | Property | Folder(3) | Attachment | Address(3) | Certification

Mickey Mouse Active Edit Options

General

Contact	Organization	Initials	Mobile
Mickey Mouse			(555) 555-5555 e
Status	Type	Row ID	Parent ID
Active	Individual	256842	

Email
mickey.mouse@gmail.com

Additional Addresses

Type	Address
Current Address	408 Pineglen Courts W Ontario California 91758 CAN
Mailing	PO Box 9999 Stn B Ontario California 90123 USA

New A7 Functionality

Pick Address from People

People | Property | Folder(3) | Attachment | Address | Certification

Mickey Mouse Active Options

[Back To List](#)

General

Title	First Name Mickey	Middle Name	Last Name Mouse
Address Type*	Effective Date*	End Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Reference File	Reference File 2	Row ID 50	<input type="checkbox"/> Secured
<input type="text"/>	<input type="text"/>		

Address

Address Prefix

No.	Prefix	Street Name	Street Type
-----	--------	-------------	-------------

Free Form Address

<input type="text"/>
<input type="text"/>

- + Add New
- Pick Address from Property
- Pick Address From People
- Delete
- Audit
- Customize

New A7 Functionality

Pick Address from People (cont'd)

People | Property | Folder(3) | Attachment | Address(1) | Certification

Mickey Mouse Active Edit Options

General

Contact	Organization	Initials	Mobile
Mickey Mouse			(555) 555-5555 e

Status **Type** **Row ID** **Parent ID** **Email**

Active	Individual	256842		mickey.mouse@gmail.com
--------	------------	--------	--	------------------------

Address

123 Anywhere Ontario CA 91758

Free Form Address

123 ANYWHERE
ONTARIO CA 91758
USA

People | Property | Folder(3) | Attachment | Address(1) | Certification

Mickey Mouse Active Options

Address Type	Address	Effective Date	End Date
Previous	429 PINE ST	4/1/2016	9/20/2016

Address Tab in A7 (cont'd)

Adding the correct address to a folder

Folder | Property(1) | People(1) | Info(23) | Fixture | Fee | Process | Document | File | Inspection | Comment | Usage | Attachment | Certification
| Insurance | Condition | Correspondence | Clock

APP# 2013 100484 000 00 COM Commercial Building Internet Wait Edit Options

Required Primary People:Owner

Colin Wood
Person's Role: Owner
Address: 430 Main ST Boulder CO 80340
Telephone: (909) 876-3025 e
People ID: 10358
Email: c.wood@csdcsystems.com

Sara Funduk
Person's Role*: Applicant
Address: 123 Anywhere St Waterloo N1K1K1
Telephone: (555) 555-5555
Email: [Redacted]

Active Addresses

Address Type	Address Detail
Business	54321 Technical Avenue Waterloo Ontario N1N1N1 CAN
Vacation House	999 Peaceful Street Heaven Colorado 12345
Mailing	555 Anywhere Street Waterloo Ontario N1K1K1 CAN
People Address	123 Anywhere St Waterloo N1K1K1

Cancel OK

Address Tab in A7 (cont'd)

Folder People

Folder | Property(1) | **People(1)** | Info(23) | Fixture | Fee | Process | Document | File | Inspection | Comment | Usage | Attachment | Certification
| Insurance | Condition | Correspondence | Clock

APP# 2013 100484 000 00 COM Commercial Building Internet Wait Edit Options

Required Primary People:Owner

Colin Wood	Address	Telephone	People ID		
Person's Role Owner	430 Main ST Boulder CO 80340	(909) 876-3025 e	10358	No	
Email c.wood@csdcsystems.com	CommentComment				

Sara Funduk	Address	Telephone	People ID		
Person's Role* Applicant	555 Anywhere Street Waterlox	(555) 555-5555 e	256841	<input checked="" type="checkbox"/>	
Email	CommentComment <input type="text" value="Comment"/>				

Cancel Save

Demo in A7

- Brian will now show in A7 the components of
 - PeoplePeople
 - Address

- Questions?
- Comments?