Strategies for Efficient People and Address Management

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

Master People Data (cont'd)
'Individual' People Record
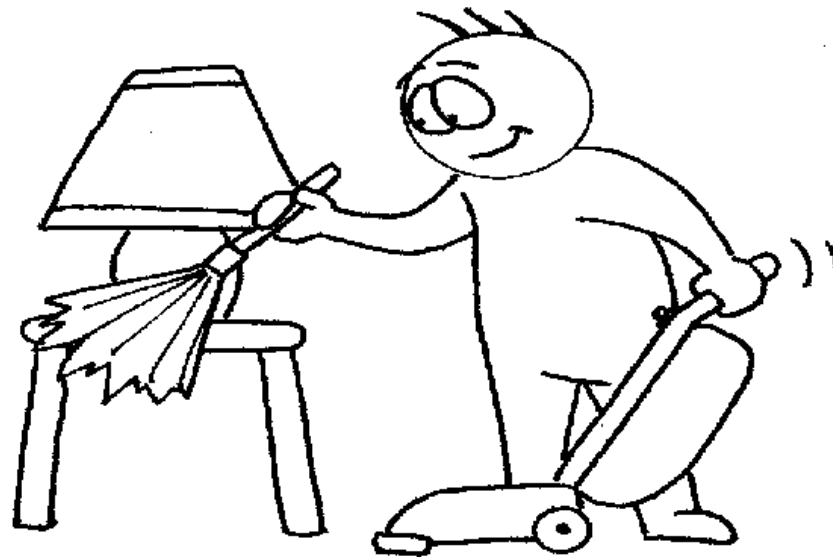
Master People Data (cont'd)
People Types (A6/A7)
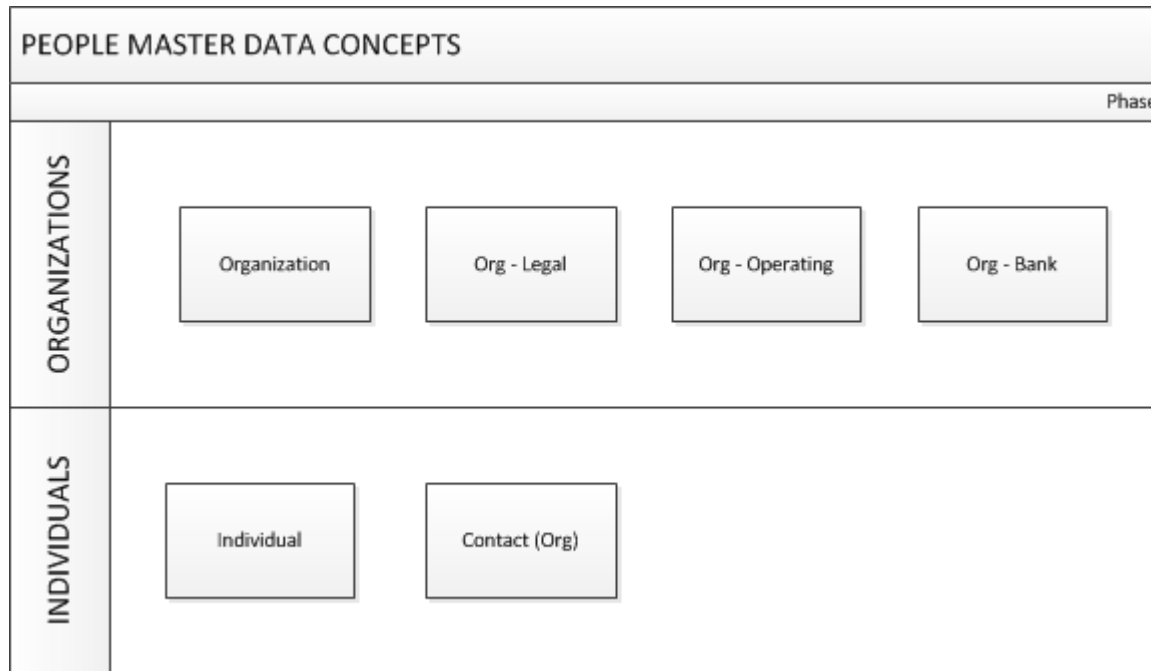
PeopleCode in People record as opposed to 'Role' associated to folder, property, payment, etc

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.

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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)

Replace Marked with Unmarked (cont'd)

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)

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)

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.

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Restrict Master Data PeopleCode

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

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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

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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

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Address Check (cont'd)

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

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People Function (cont'd)

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	

Checking People Before Insert

Use Selected People | Insert New People

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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)

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

In A6 – Button 'Alias' at bottom of People window
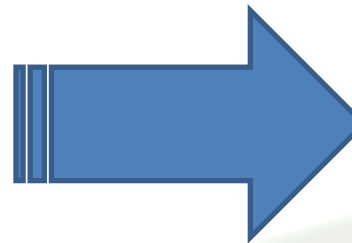
AKA (cont'd)

Result is Cathy Abbott
People Record

Multiple People Representing an Organization

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Member Tab

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

Multiple Addresses

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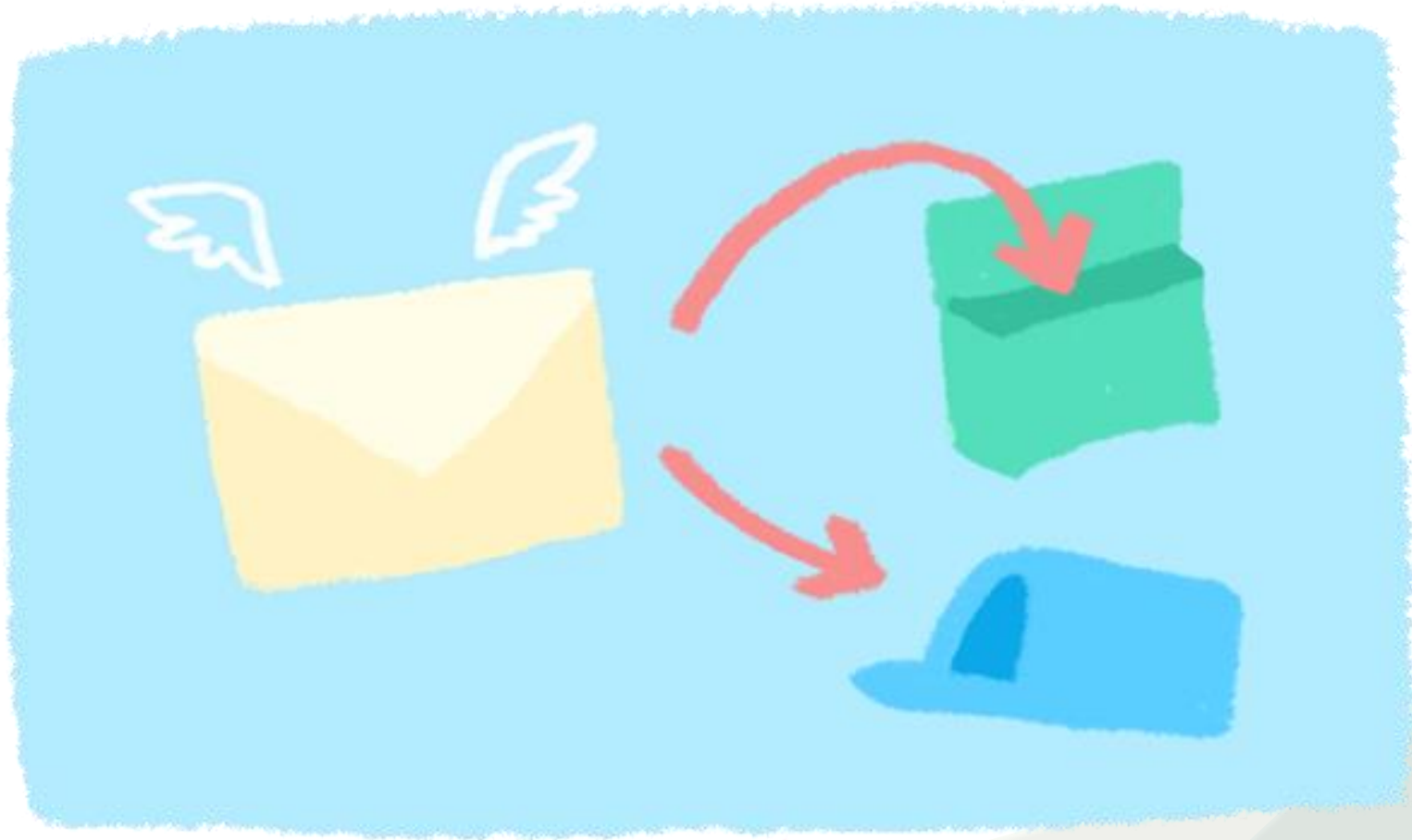
PeoplePeople Tab A6/A7

- 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)

AMANDA PeoplePeople tab view

People table

PeoplePeople table

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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.

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Address Tab in A7 (cont'd)

Address tab in A7 People record
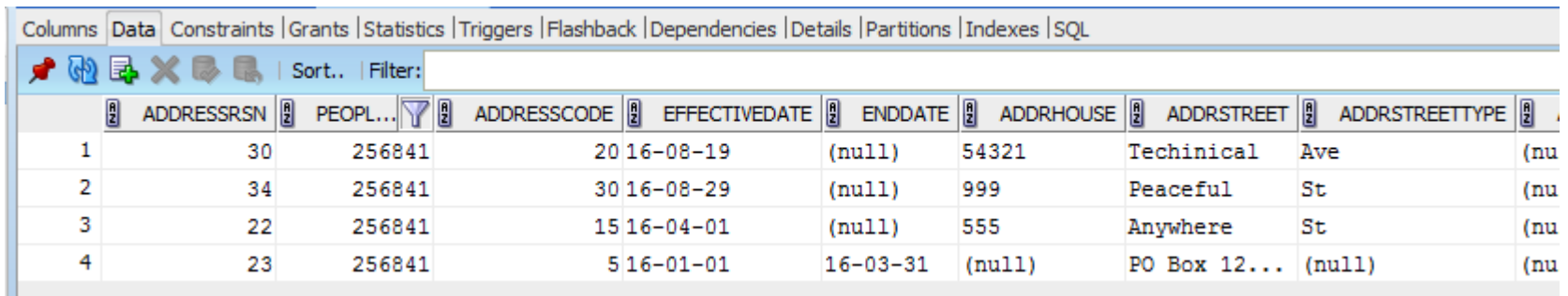
People table in A7

Address Tab in A7 (cont'd)
New Address table

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

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Address Tab in A7 (cont'd)
Main People record view

Using Address Tab for ALL Addresses

New A7 Functionality
Pick Address from People

New A7 Functionality
Pick Address from People (cont'd)

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 | Address | Telephone | People ID | 🖶 | ⚙ ▾
Owner | 430 Main ST Boulder CO 80340 | (909) 876-3025 e | 10358 | No

Email
c.wood@csdcsystems.com

CommentComment

Sara Funduk

Person's Role* | Address | Teleph
Applicant ▾ | 123 Anywhere St Waterloo N1 | 🖰 | (555) 5

Email | CommentComment
| Comment

✕ Cancel

Active Addresses   ✕

Address Type	Address Detail
Business	54321 Techinical 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

Person's Role	Address	Telephone	People ID	🖨	
Owner	430 Main ST Boulder CO 80340	(909) 876-3025 e	10358	No	⚙ ▼

Email
c.wood@csdcsystems.com

CommentComment

Sara Funduk

Person's Role*	Address	Telephone	People ID	🖨	
Applicant ▼	555 Anywhere Street Waterloo 👆	(555) 555-5555 e	256841	☑	⚙ ▼

Email

CommentComment

Comment

✖ Cancel   💾 Save

Demo in A7

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

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•Questions?

•Comments?

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