SVDP Database Tips

1. There are several ways to find a client.
    a. There is the Find tab or the A to Z page for the last name.
    b. There is the Search / Email tab.
    c. And the easiest way is:

        Go to the Display All page then hit CTRL F (Command F on Mac). This is a universal find function. Once you hit CTRL F, a small window will open up on your screen and then you can input the last name, last four digits of the phone number, street # and address, etc. The computer will go to each occurrence of that data.
2. Before adding a new Record, do a search to make sure that the client does not already have a record in the database.
3. If you get stuck in a new Record, the back arrow key will get you out.
4. The database will not accept two records with the same name. Therefore, add a "2" after the first name (not the last). This will allow you to see these two names, i.e. you have two people named Mary Garcia. On the second person, "Mary 2" is put in the First name field and "Garcia" is put in the Last name field.
5. When you add a new Record and the database determines that a record already exists for that person, the database will display the existing record. Therefore, you should hit Add Record with just the client's name entered first, in order to determine if a record already exists. Then go back to the record and add any other data that's needed and hit Add Record again to save the modified record. If you have a common name like John Smith, it would be better to use the Ctrl F find function and search to see if there is an existing record, since there could be multiple versions of John Smith (i.e. John W. Smith, John 2 Smith, etc.).
6. To create a new record, you only need to input a first and last name. The other fields can be left blank.
7. **After you input or edit data in a Client Record, you must hit Save. If you move away from the page without hitting Save, your data will be deleted.**
8. There should only be one record for an individual. If an individual has numerous alias, enter the alias in the Comments section of the record.
9. Summation of Income and Expenses in the client record will automatically occur once you hit Save.