4HONLINE

Contacts and Groups

Created: October 24, 2013

OVERVIEW

Frequently you find the need the ability to include non-volunteer adults in your communications. With a few simple steps you can enter their contact information and they will receive your mail and emails just like the enrolled families. You can also use groups for enrolled youth that you work with on a regular basis, like ambassadors or youth leader council, etc.

First you create a group just like a club. Second you create a "family" to hold the people. Third you create the non-volunteer adult as a Contact and assign the person to the group.
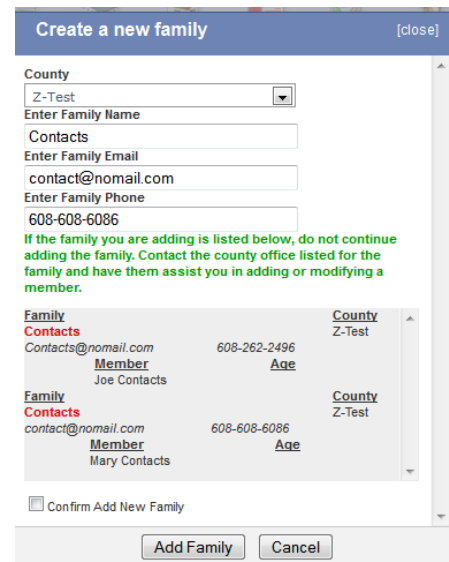
CREATING A GROUP

Creating a new group is similar to creating a club.

- Click on the **Groups** icon and then click on **Add Group**. A group called 'County Extension Board' has already been created that you can use.
- Enter the group **Title**.
- Select the **Group Type** – Camp, Group, School, or Other.
- Select the **Delivery Mode**. All delivery modes are available except clubs. If the group is a community, in-school, after-school, or military club, they should be created as a club, not a group.
- Select if you want to share this group with Members or not. If shared, they will be able to see the group and add themselves to it. Uncheck the **Share this group with Members** box if you do not wish members or leaders to see this group.
- Click the **Save** button to create the group.

CREATE A HOLDING FAMILY

You create a family on the Search -> Families screen. *(If the non-volunteer adult happens to be a member of an existing enrolled family, you can skip this step.)*

- Click on the **Add Family** button.
- Enter the Family Name, Email, and Phone.
- Click on the **Add Family** Button.
- If there is another family with similar information, you will get a message alerting you. If this is not a duplicate, check the **Confirm Add New Family** box and click on the **Add Family** button again.
- Enter a Mailing Address, City and Zip, then click on the Continue button.

The family is now created and ready to have members added. This method would also work for adding regular enrolled families.

ADD A CONTACT

Contacts are added in a similar manner as youth and adults. In the **Add A New Family Member** drop down box, select **Contact**, then click on the **Add Member** button. (Only staff can add contacts; families do not see this option.)

Enter the information requested. Be sure to change the email, street address and phone number to the actual information. Then click on the **Continue** button.

On the Participation screen, select the group from the drop down list and click on the **Add Group** button, and then click on the **Continue** button.

Contact Personal Information

Profile Information

Email	contact@nomail.com
First Name	Mary
Last Name	Contacts
Mailing Address	12 Fifth Quarter Street
City	Madison
State	Wisconsin
Zip Code	53703
Gender	Female
Primary Phone	608-608-6086
Correspondence Preference	Mail
4-H County	Z-Test

The non-volunteer adult is now able to receive mailings and emails just like your enrolled members and leaders. You can even setup reports using groups as a filter.

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