Enter New People Record

Description: This page provides step-by-step instructions for adding new individuals to Elvanto, including verifying existing records, entering personal details, assigning giving numbers, and updating e-Transfer information for new donors. The process ensures that all records are up to date and properly categorized for tracking and communication purposes.

Purpose: To ensure accurate entry of new people records into Elvanto, preventing duplicate records and maintaining organized donor and visitor information.

Procedure

1. Go to the People Page on Elvanto.
2. Check if the person already exists in Elvanto to avoid duplicates.
   - Use the Search icon (magnifying glass) to search by first or last name. If you find no matches, proceed to the next step.
3. Enter all available information for the person.
4. For new donors, assign a giving number. Check Elvanto's Giving Number Report and use the next sequential number after the highest one listed. For example, if the highest number is 000368, assign 000369. Enter this number in the Visitor Record section.
5. For new donors using e-Transfer, add their e-Transfer email to the Visitor Record section.
6. Click the Save button.

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