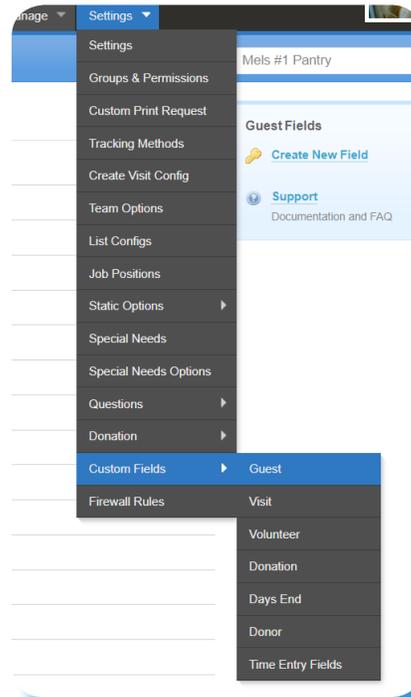


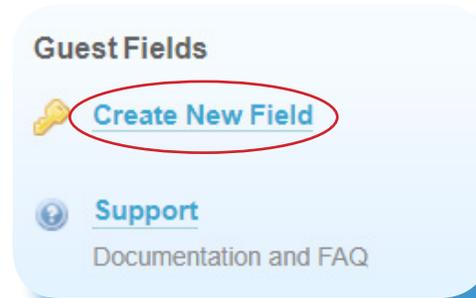
SEARCHING FOR OTHERS IN THE HOUSEHOLD

Here is a temporary fix to search for others in the household until FBM can add a permanent search feature.

Start by creating a Custom Guest Field. Go to Settings > Custom Fields > Guest.



Click on 'Create New Field' next to the gold key.



Fill in the 'Field Name' with a title that your volunteers will understand when filling out the guest record. Change the 'Field Type' to a Text Box.

A screenshot of the 'Create New Field' form. Two red arrows point to the 'Field Name' and 'Field Type' fields. The form contains the following fields:

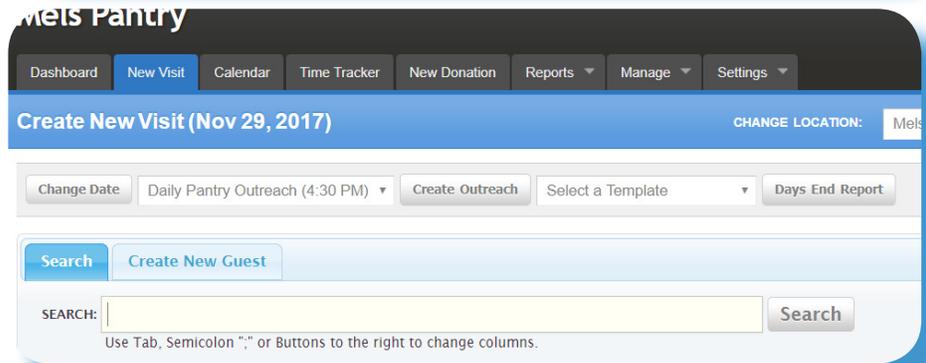
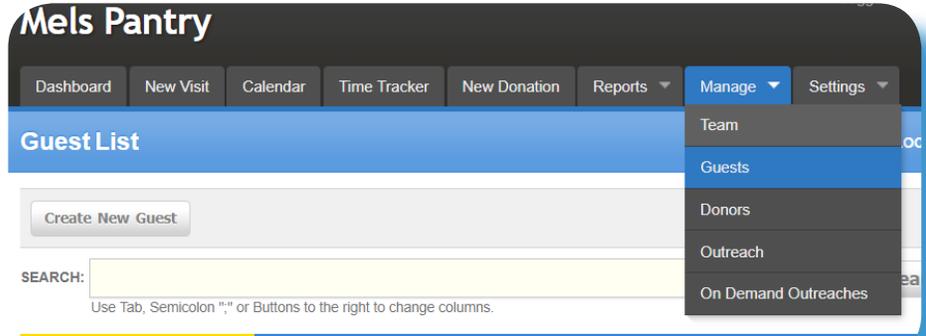
- Field Name:** Other in Household Search
- Field Type:** Text Box
- Set if Required:** Not Required
- Others Living in Home Type 1:** Hide
- Answer Options:** (empty text area)
- Role:** Volunteer
- Status:** Show

There are 'Submit' buttons at the top and bottom of the form. Small text below the 'Set if Required' field provides instructions: 'Yes No Option: Functions when creating a new guest account only. Text Box, Text Area, Date, Radio, Checkbox, Email and Phone fields: Functions on both new guest accounts and when editing existing guest accounts. Does not function for Select Box, Relationship and Single File Upload fields.' Below the 'Others Living in Home Type 1' field, it says: 'Only usable with Field Type - Select Box, Yes No Option, Text Box, Date and Number. Set if Required: works only for the primary record holder and does not make the field required in Others Living in Home Type 1.' Below the 'Answer Options' field, it says: 'For Radio Buttons, Checkboxes and Select Box fields only. No commas, one value per line only, no empty lines and no spaces after a line entry. Entry format "key : value" or "value" Example "1 : apple" or "apple" (No Quotes)'

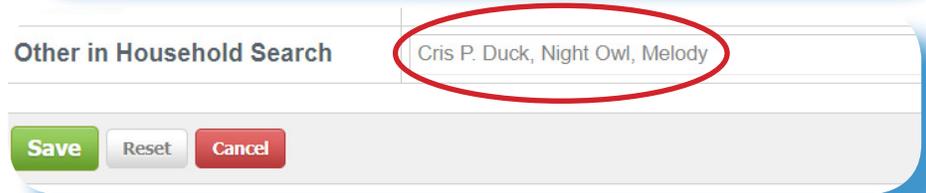
Now go to a guest record and fill in the field. You can access the guest record two ways.

*Manage > Guest. Under the Manage tab you can search for an existing guest and edit their record or you can create a new guest. →
or

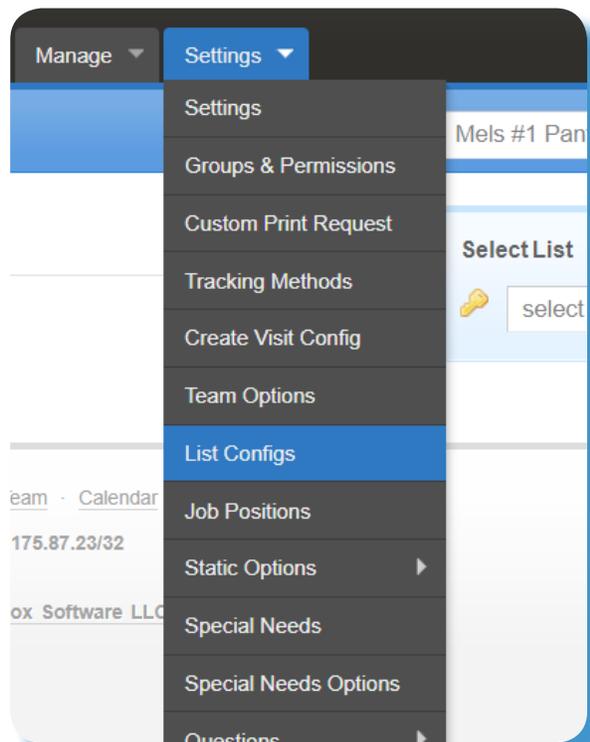
*New Visit. Under the New Visit tab you can search for an existing guest and edit their record or you can create a new guest. →



Search for and Edit one of your guests. Fill in the field you created with the members of the household. Use a comma between each name. Click 'Save' when you are done.



Next go to Settings > List Configs, to set up this field as a search field.



Click on 'Select a List' next to the gold key. Choose a list you want to add your new field to.

***If you are going to use this temporary fix, you may considered adding it to both 'Manage Guests' and 'Create Visit Search'.

Next under 'Add Items to List', click on the field.

Click 'Add Item'.

The screenshot shows a light blue panel titled "Select List". On the left is a gold key icon. To its right is a dropdown menu with "select a list" selected. The dropdown is open, showing a list of options: "select a list", "Visited List", "Donor Search", "Manage Team", "Manage Guests" (highlighted in blue), "Create Visit Search", and "Relationship Search".

The screenshot shows a light blue panel titled "Add Items to list". On the left is a gold key icon. To its right is a dropdown menu with "Middle Name" selected. The dropdown is open, showing a long list of fields: "Household Total", "Updated At", "Created At", "Physical County", "Save Count", "Barcode", "Childrens BDAY months", "Last Registration Date", "Certified Until Date", "Pick Up Person", "Example of Radio Buttons", "Example of Select Box", "Number of Females", "Number of Males", "males", "females", "Place of Employment or School", "Employment Status", "Last Grade Completed", and "Other in Household Search" (highlighted in blue).

The screenshot shows a light blue panel with two sections. The top section is titled "Select List" and contains a gold key icon and a dropdown menu with "Manage Guests" selected. The bottom section is titled "Add Items to list" and contains a gold key icon and a dropdown menu with "Other in Household Sear" selected. Below the dropdown is a blue button with the text "Add Item", which is circled in red.

Now, left click, hold, drag and drop the field into the order you want it.

First First Name	Edit Remove
Last Last Name	Edit Remove
Other in Household Search Other in Household Search	Edit Remove
Date of Birth Date of Birth	Edit Remove
Physical Address Physical Address	Edit Remove

You can test it by going to the search bar in Manage > Guests or in New Visit.

In this example I tabbed through the first two fields and typed in 'cr' in the 3rd field. When I hit tab key again it searched for any 'cr' matches.

You are now able to include 'Others in the Household' as a search criteria.

[Create New Guest](#)

SEARCH: ; ; Cr; |
Use Tab, Semicolon ";" or Buttons to the right to change columns.

First	Last	Other in Household Search	Date of Birth
Earl E.	Bird	Cris P. Duck, Night Owl, Melody	Dec 31, 1969

Showing 1 to 1 of 1 entries (filtered from 45 total entries)