

CDOL Tip of the Week. April 23, 2012

CDOL Feature: Using “Copy From” when editing addresses and phone numbers

This tip can potentially save a user a lot of time when editing or adding addresses and phone numbers. CDOL can display and use existing phone numbers and addresses from within the same organization as well as from a member’s membership record. That means that:

- If an address or phone number exists on the membership record of an individual being added to an assignment

or

- If an address or phone number is already entered for the individual on another address tab or other phone type within the current organization

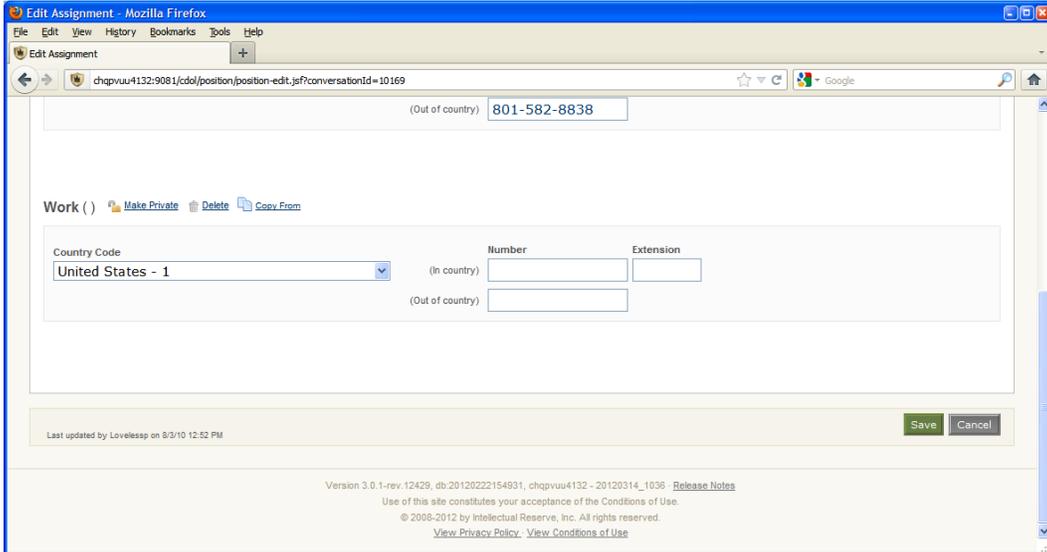
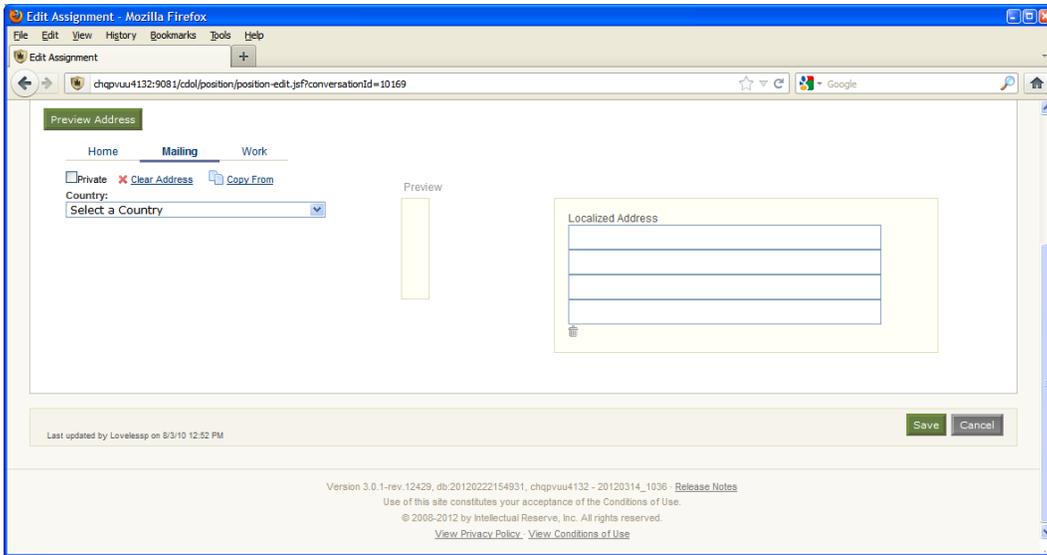
or

- If an address or phone number needed is listed as one of the current organization’s addresses or phone numbers or one of the primary contact’s addresses or phone numbers

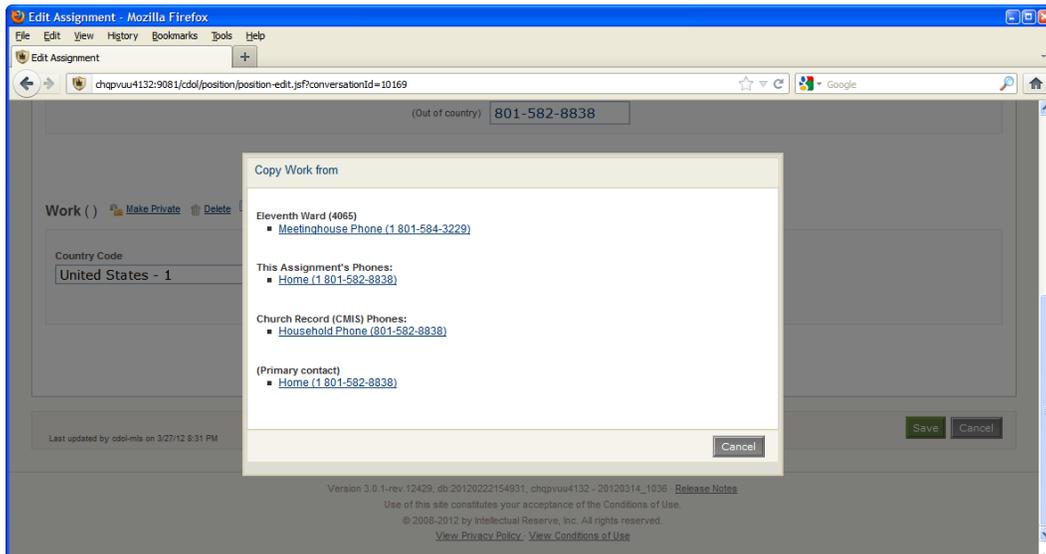
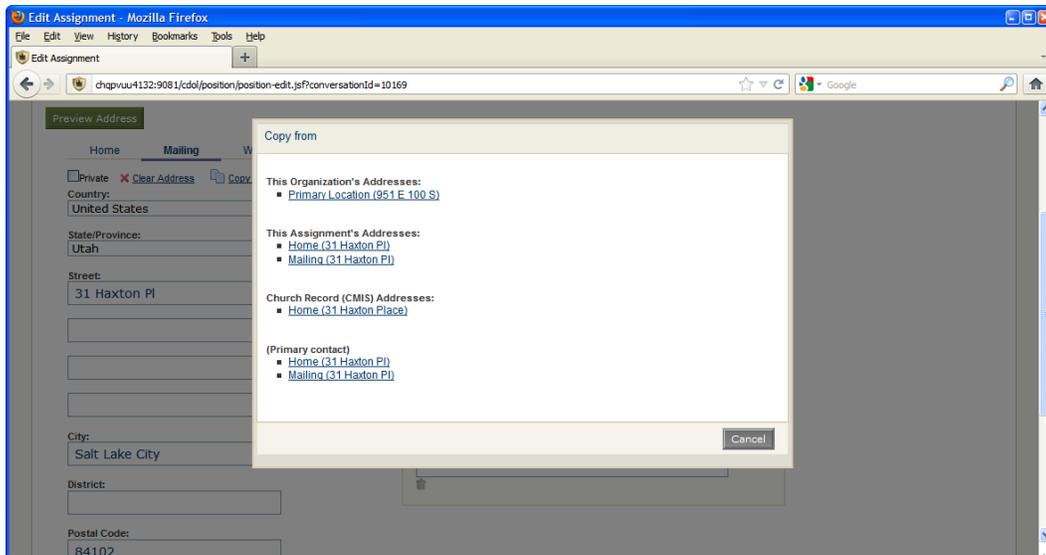
. . . then the data can be copied by using “Copy From” found in the edit screen at the top of the fields for the address or phone number data.

To use this feature:

1. Get to the correct tab needed in the edit screens (either the Addresses tab or Phone Numbers tab)
2. Select the data to be added or updated (select an address type or phone number)
 - a. If editing an address, the user must select both the address type from the available selections found beneath the button and also have “Edit Address” button enabled
 - b. If editing a phone number, the user may either edit an existing number or, if a new number is being added, select from the displayed list of other phone number types not yet populated, if any
3. In the section of the screen where the data can be populated the user should find a “Copy From” at the top of the section to be edited:



4. Select "Copy From" to display the window from which existing data can be selected:



5. The selection window for data is divided into a few different sections, each clearly labeled, designating where the information is from. If the data is populated in the selection window, the user can simply click on the underlined piece of data to be copied and the selection window should close while the selected data will transfer to the data field(s) of the active address or phone number. If the data on the selection window does not display the address or phone number to be added, then the data does not exist to be copied in this manner and the user making the change will have to enter the data manually on the data entry screen
6. When finished, the changes must be saved to commit the data to the database