Proc 14112_Relating PERSONS to ORGANIZATIONS (Facil)

CREATING AN ORGANIZATION

1.   In Facil, click Organizations.
2.   Click the button on the bottom of the Organizations window that has a triangle and a star on it to create a new Organization.
3.   In the Org Name field, enter the Organization's Name.
4.   In the status field, use the dropdown to choose Active or Inactive.
5.   In the Type field, use the dropdown to choose the appropriate type of organization.
6.   Leave the Expiration field blank.
7.   Enter all available Contact Info in the fields provided.
8.   Enter any additional information in the Notes field.
9.   X out of the Organizations window in order to be prompted to save the record.
10.   Click OK to save the record.

ASSOCIATING A PERSON WITH AN ORGANIZATION

1.   In Facil, click Person.
2.   Use the dropdown next to the Locate Person ID field to find the person.
3.   When you find the correct person's record, click on the Organizations tab.
4.   Under the Organization heading, use the dropdown to select the Organization to which this person belongs.
5.   If you know the persons Position or Title, enter that information in the Position in Organization field.
6.   X out of that window in order to be prompted to save the record. Click OK to save the record.