Creating a Person/Household in Axiom

Updated Jul 13, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new Veracross Community. Please update your bookmarks.

Here is the new version of this article in the Veracross Community.

Overview

People are most often added to the database automatically as part of online inquiries, event registration, etc., but they can be added manually in Axiom as well. This article details how to add a new person record and associate them to a household in Axiom.

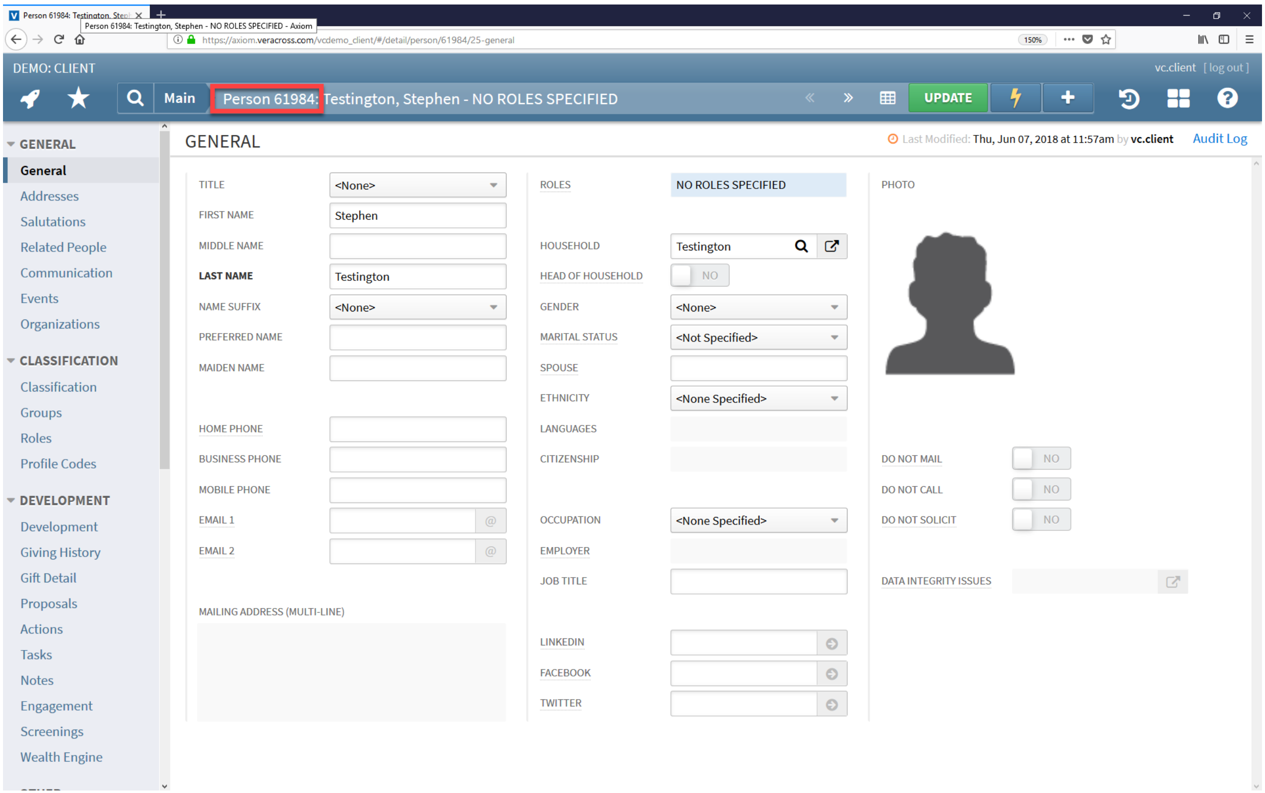
This video shows the steps for adding a person to the database, creating a new household, and placing them in it.

Creating a Person Record

1. Navigate to the **Main** homepage, hover over the “+ Add” drop-down menu, and click**Add a Person.**
2. Fill in as many fields as desired on the new person detail screen. The only required field

(indicated by bold font) is the Last Name field.

3. Click the green **ADD PERSON** button.



The person has been created in Axiom with a unique and automatically assigned person ID. In the example video, Stephen Testington's person ID is 61984.

Associating a Person With a Household

If a household does not exist for the new person, it will need to be added. If one already exists, it simply needs to be associated with the new person.

To determine if the household already exists:

1. In the Household field located in the center column of the person record, click on the Search icon (magnifying glass) to bring up the Advanced Search option.
2. Type in the Household name (usually defaults to the Last Name of the Head of Household) in the Name field.
3. Click the **Run Query** button.

If the desired Household appears:

1. Ensure that the correct household is checked.
2. Click **Select Household**.
3. Click **Update** on the person record.

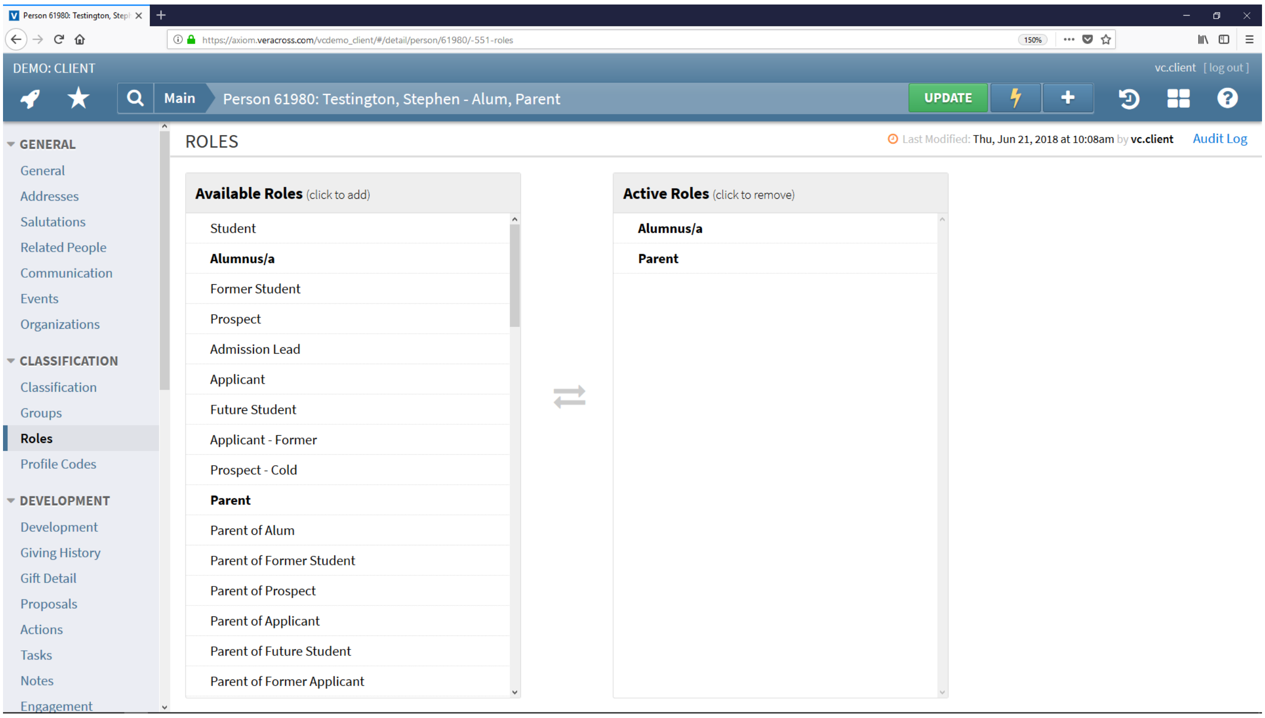
If the desired Household does not appear:

1. Click **Add New Record…**
2. Fill in the fields on the blank household detail screen. The only required field is the Name field, which in most cases is the last name of the Head of Household.
3. Click **ADD HOUSEHOLD** to create a new household record with household ID.
4. Close this pop-up household window to return to the household advanced search screen.
5. Click **Run Query** and follow the steps in the “If the desired Household appears” section.

Assigning Person Roles

Assigning Roles dictates the permissions and experience the user has within Axiom and/or Portals. It also helps define current and future relationships of the person.

To assign a person Role:



1. Click on the **Roles** tab in the person detail record.
2. Select the appropriate roles from the Available Roles section.
3. Ensure that the correct roles are displayed in the Active Roles section. Newly added roles will have a green + icon next to them.
4. Click **Update** on the person record.

Adding Person Relationships

Person relationships can also be created and defined in Axiom. If the person does not yet exist, they will need to be created. If they already exist, then they can be searched for and, once found, have the relationship defined. The video below demonstrates searching for another person, creating a person through this search, and defining the relationship between the two people.

Creating Person-to-Person Relationships

To determine if the person already exists:

1. In the **Related People** tab of the person record, click on the green **Add Record...** button.
2. In the blank record that appears below, click on the Search icon to open the Advanced Search option.
3. Type in the Full Name (Last Name, First Name) in the designated field and click **Run Query**.

If the desired Person appears:

1. Ensure that the correct person is checked.
2. Click **Select Related Person**.
3. Choose the proper relationship in the drop-down menu of the Relationship column.
4. Click **Update** on the person record.

If the desired Person does not appear:

1. Click **Add New Record...**
2. Fill in the fields on the blank person detail screen. The only required field is the Last Name field.
3. Click **ADD PERSON** to create a new person record with person ID.
4. Close this pop-up person window and return to the related person advanced search screen.
5. Click **Run Query** and follow the steps in the “If the desired Person appears” section.