How to Add a New Individual in GAIL

This guide will provide written instructions on how to add new **individuals** to GAIL.

Some **important information** to note: **It's okay** if you do not know *all* the information about a new person. Enter what you do know and leave the other fields blank. Information can always be added or updated at a later date.

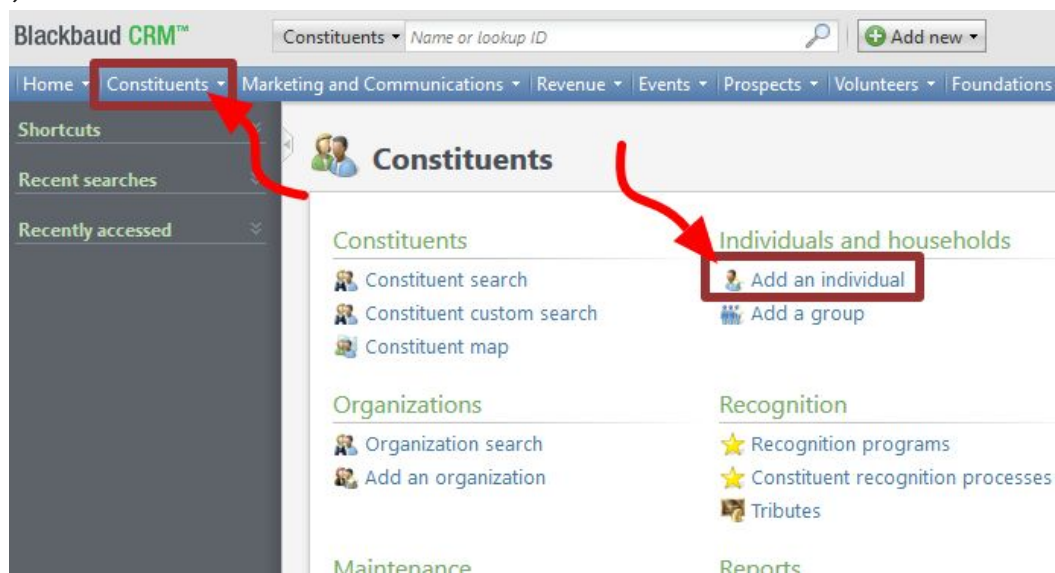## To add a new **individual**:

Before you begin

Use the **constituent search** function in GAIL to ensure that the individual you wish to add does not already have a constituent profile.

➢ If you are having difficulty locating someone you think is already in the system, try using some advanced search options like *check nickname*, *include fuzzy search on name*, and *check deceased*.

Step 1

From the GAIL home screen, click on the **constituents** tab on the blue functional area bar near the top of the screen, then select **add an individual** (under the *individuals and households* section).

In the *add an individual* dialog box that pops up, there will be many text boxes where you can input the constituent's information.

To create a new constituent records, the minimum amount of information is:
- **last name**
- **first name**
- **one way to contact** this individual (*address*, *phone number*, or *email address*).

Should you happen to have more complete information about a new individual, feel free to complete as many additional fields as you can.

When you've entered all your information you should next fill out the box labeled **information source** (under *primary contact source*). You should select your department as you are the source of this information being entered!

Select **save** and the new individual's constituent record will be created and you will be taken to it!

On occasion, when you hit **save** a *possible duplicate matches* box may appear. This is because GAIL thinks that the individual you are trying to add may already exist in the system.
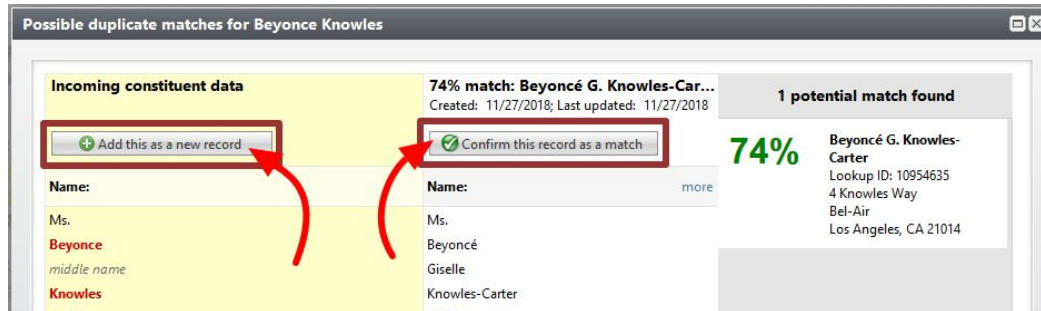
Compare the information you entered (the yellow column) to the existing record (the center column) to determine whether you're making a duplicate record or not.

If you think you are making a duplicate profile, click the **confirm this record as a match** button.

If you're sure the information you entered is not the same person as the potential matches listed, click **add this as a new record**.