Using the Alias Field

The Alias field can be very useful to avoid duplicating clients who go by nicknames or street names. If you add an alias to a client's ServicePoint record and you search for a client by first name alone ServicePoint will search both the First Name field and the Alias field. You can add an Alias when you are adding a new client by simply typing the client's alias into the Alias field before clicking Add New Client with This Information.

For example, I have a client, Norma Jeane Morenson who goes by another name: Marilyn Monroe. I enter her as Norma Jeane because that is her legal name. However, the next person who looks for her looks for her as Marilyn because that is the name she goes by and does not find her and adds her as a new client. This client is now duplicated in ServicePoint. If I had added Marilyn as an Alias to Norma Jeane, the next person would have been able to find Marilyn.

Client Search								
🕕 Please Search the System before adding a New Client.								
	First	Middle	Last	Suffix				
Name	marilyn							
Alias		Any name e	entered in the First Na	me field will	search for			
Social Security Number	□ - □ - □	clients with	that first name or clie	nts with that	alias			
Social Security Number Data Quality	-Select-		•					
Exact Match								
Search Clear Add New Client With This Information Add Anonymous Client								
Client Number								
Enter or scan a Client ID numb	er to go directly to that	Chent's profile.						
Client ID #	Submit							
Client Results								
ID Name 🔶			Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
🖊 🙀 778 🛛 Mortenson, Norm	a Jeane			06/01/1926	Marilyn Monroe			o 🔍
🥖 📚 779 🛛 vos Savant, Mari	lyn							0 🔍

If a client has both an alias for both first name and last name, you will not be able to search for their alias last name. This is why it can be helpful to search by just first name and if you do not find your client then to search by just the last name. For example, if I searched for my client and I searched for her as Marilyn Monroe (with both her first name and her last name), I would not find her. If I searched for my client just by Monroe (her last name), I would not find her. If I searched for her as just Marilyn (her first name), I would see that there was someone named Norma Jeane Mortenson with an alias of Marilyn Monroe.

To add an Alias to an existing client in ServicePoint:

Click the Client Profile tab and click the pencil next to Client Record:

Client Information				Service Transact	tions		
Summary Clien	nt Profile 📕	1: Click on t 2: Click on t	he Client F he pencil r	Profile tab ext to Client	t Record to ad	d an Alias to	your client
Name	Dwyer, Andy						
Alias							
Social Security							
SSN Data Quality							
Age							

Type the nickname or street name into the Alias field in the window that pops up and click Save

Client Record	1			×
🔺 Ed	iting the Client Re the Unique ID	cord Informa and the Clie	ation could afi nt Search.	fect
Client Re	cord			
	First	Middle	Last	Suffix
Name	Andy		Dwyer	
Alias	Burt Mackli	n		
so Type t	ne alternate n	ame into	the Alias	field
ss	io alcontato n	anno nneo	1107 1100	nond