

## 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.

ID	Name ^	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
778	Mortenson, Norma Jeane		06/01/1926	Marilyn Monroe			0
779	vos Savant, Marilyn						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:

1: Click on the Client Profile tab  
2: Click on the pencil next to Client Record to add an Alias to your client

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

Type the alternate name into the Alias field