One Click

Search for a Person
Integrated Case Workspace

Search Criteria

Reference	

Additional Search Criteria

Full Last Name	albertan
Full First Name	joe
Date of Birth		Gender
Address Line 1		City

Search   Reset

The One Click feature is the ability to move from the search areas directly to editing or another page in one click.

The One Click feature only works for those individuals already registered in Mobius.

Note: The One Click feature will not display if you select Search and Register Person.

To begin select **"Search for a Person"** and **always** double and triple check you are selecting the **correct person**, before proceeding with the One Click.

Search Results (Number of Items: 1)

Person	Address	Date of Birth	Registered?	One Click Nav
▶ Joe Albertan - 9418932001		Apr-15-1985	Yes	📌 ▾

Select the One Click Nav and the following options are available: **Actions** or **Navigation**.

Actions provide the option to jump to Edit. Selecting Edit will open the Person Information Page Modify page.

Navigation allows you to navigate directly to a page.

Administration ▶
Background ▶
Cases ▶
Contact ▶
Financial ▶
Identity ▶
Tasks
Verifications ▶

One Click Nav

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Actions ▶
Navigation ▶

Addresses
Attachments
Communication Exceptions
Communications
Contacts
Email Addresses
Interactions
Notes
Phone Numbers
Web Addresses

For Example: If you needed to update a person's phone number you could do that in One Click. Select the Search for Person, enter their name and birthdate, and confirm it's the correct person. Select One Click, Navigation, Contact, Phone Numbers. The next page displayed would be the Phone numbers page of that person.

📌 ▾
Actions ▶
Navigation ▶

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