

Post User-Defined Keywords

With this quick posting, you can post user-defined keywords, such as "Disability", and associated statuses, such as "Wheelchair", to multiple records. These display in the Personal window.

In the Members navigation pane, click **Quick Posting > User Defined Keywords**. Select whether you want to use [automatic updating](#) or [individual entry](#).

1. Select the automatic updating method option, and click **Next**.
 2. If you included fund selections, select the funds to use to filter the list. Click **Next**.
 3. Select the keyword option you want to post, and click **Next**.
 4. To assign different keyword statuses to each member, select the first option. Or, to assign the same one to your entire list, select the second option, and select the status.
 5. Click **Next**.
 6. [Select which records you want](#) to build a list of members, then click **Next**.
 7. Review your list. If needed, add or edit any keyword information.
 8. When you're ready to post to the selected records, click **Next**.
 9. To post, click **Finish**.
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1. Select the individual entry method option, and click **Next**.
 2. Select the keyword option you want to post, and click **Next**.
 3. Select the keyword status, select a member, and click **Add Member to List**. Repeat this for each member you want to update. When you're finished, click **Next**.
 4. Review your list. If needed, add or edit any keyword information.
 5. When you're ready to post to the selected records, click **Next**.
 6. To post, click **Finish**.

Related Topics

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