To view a consolidated SmartPad for multiple contacts –

- Open the SmartPad for one of the selected contacts.
- Click the **Consolidated SmartPad** button on the SmartPad toolbar.
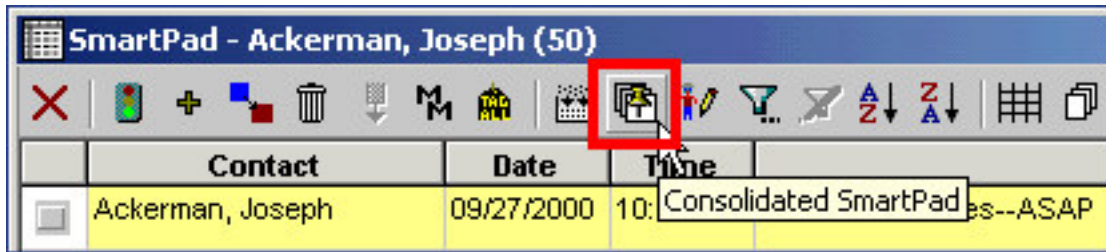

Figure 1: The Consolidated SmartPad button.

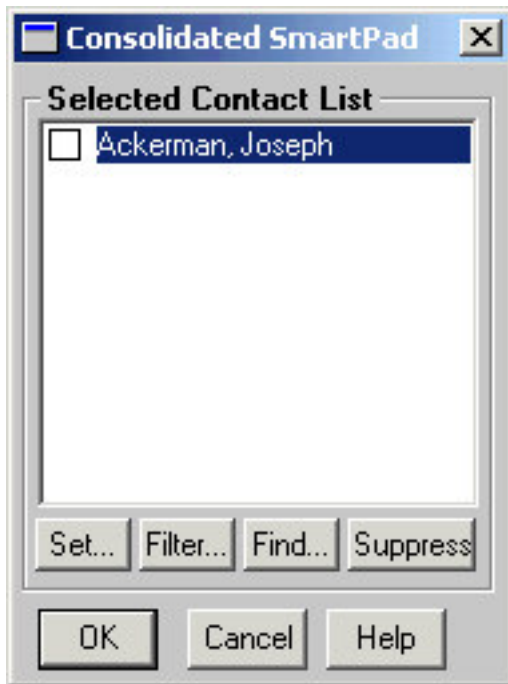- CDS will open the **Consolidated SmartPad** search tool.

Figure 2: The Consolidated SmartPad search tool.

- You can perform a search for contacts to add to the Consolidated SmartPad based on set membership, filter information, or by using a general search. To perform a general search, click the **Find** button on the **Consolidated SmartPad** tool.

- Use the Last Name, First name convention to search for the desired contacts.
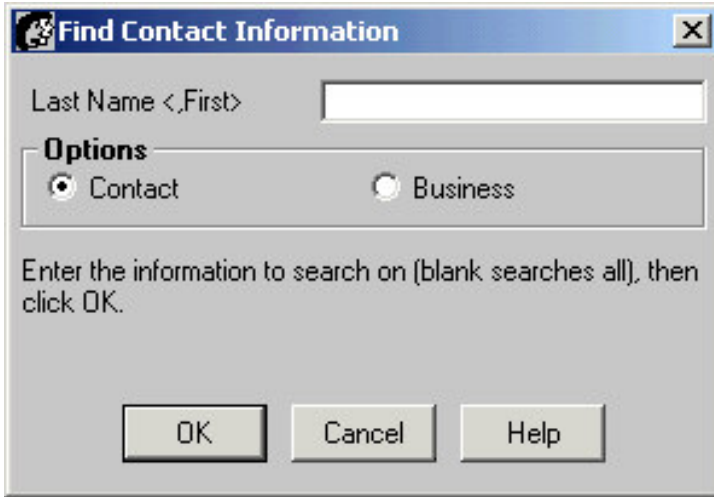- Click **OK**.

Figure 3: The Find Contact Information search tool.

- CDS will display a list of contacts meeting the entered search criteria.

Figure 4: The Contact List (search results displayed).

- Select contacts by tagging the entries in the Contact List summary screen then click the **OK, Select** button.
- CDS will add the selected contacts to the **Selected Contact List** section of the **Consolidated SmartPad** search tool.
- Place a check in the box next to the contact records to add contact SmartPad information to the Consolidated SmartPad.
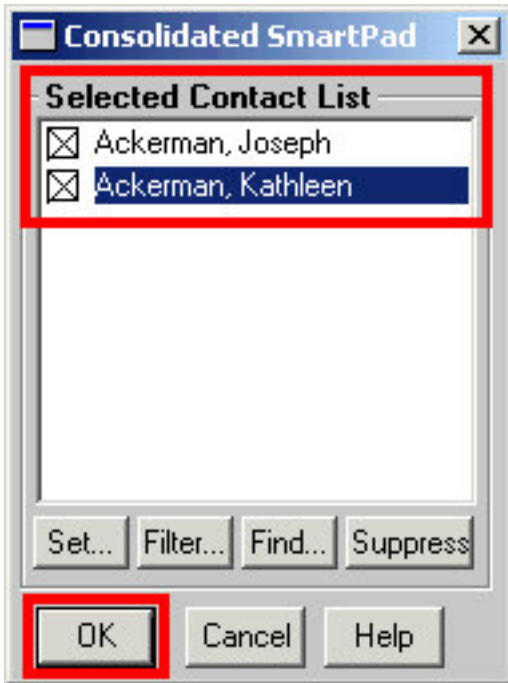- Click **OK**.

Figure 5: The Selected Contact List section of the Consolidated SmartPad search tool.

- CDS will open a Consolidated SmartPad displaying SmartPad entries for all selected contacts.

Figure 6: The Consolidated SmartPad.

Note: When the Consolidated SmartPad is closed, the individual SmartPad of each selected contact will reset. The next time the SmartPad record of one of the selected contacts is opened, SmartPad information for only the selected contact will be displayed.

To open a Consolidated SmartPad based on Household information –

- Open the SmartPad for one of the selected contacts.
- Click the **Consolidation by Household** button on the SmartPad toolbar.

Figure 7: The Consolidation by Household button.

- CDS will open a Consolidated SmartPad displaying records for contacts linked as family members to the original contact on the **Key Relations** tab of the Contact Record.

Figure 8: Contacts linked as Family relations in the Key Relation Summary of the Key Relations tab.

Note: Dependent records do not have SmartPad records. Consequently, no information for linked dependents will appear in a SmartPad consolidated by Household.