

LSAC Unite Essentials

Managing Person Records - Individuals

Updated: 3/15/2024

## Exercise 1 - Customize the Display for Person Records JD

**Task** Organize the layout for a person record and set the default layout.

**Scenario** To make sure that your school's prospects and applicants receive communications from your office, it's important to keep everyone's email addresses up to date.

To help you work more efficiently, move the Contact Information section on the person record for a person in the Prospect stage. Then save the layout as the default for all your person records.

If you'd like to try the exercise on your own without detailed instructions, feel free to do so. If not, detailed instructions follow.

### Guided Practice

This training exercise has three parts. The first part walks you through how to find a person record. The second part walks you through how to set the default layout. The third part walks you through how to confirm your person records default to the new layout when opened.

#### Part 1: Find the Person Record

1. Click **PEOPLE**.
2. On the Search Criteria tab, click **Clear**.
3. In the Person Search Fields area, click the Stage field and select *Prospect*.
4. Click the Expected Enroll. Year field and select **2024**.
5. Click **Search**.

## **Part 2: Set the Default Layout**

1. Notice the records on the Search Results page. Click any name to open the person record.
2. In the person record, click the Gripper icon on the Contact Information panel. Drag and drop to place this panel first in the Person Detail area.
3. Click **Set as Default View**.
4. Click **X** to close the record.

## **Part 3: Confirm the Default Layout**

1. On the Search Results tab, select any record that is different from the one you worked with in Part 2.
2. Confirm the record layout.
3. Click **X** to close the record.