Exercise 2 - Add a Grouping to Multiple Person Records – JD

Task   Edit multiple people records to add a grouping.

Scenario You have a group of prospects that attended a recent event. Now you want to add the **Fall Recruiting Leads** grouping to their records to add more information and indicate where their contact originated. After adding the grouping, you will check one person's record to verify the correct grouping appears.

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 the person records. The second part walks you through how to edit the records to add a grouping. The third part walks you through how to check one person record to verify the accuracy of the grouping.

Part 1: Find the person records

1. Click **PEOPLE**.

2. In the *Search Criteria* tab, click **Clear**.

3. From Person Search Fields area, select:

   a. Stage: **Prospect**
   b. Person Status: **Interested**
   c. Expected Entry Year: **2024**

4. Click **Search**.

5. On the Search Results tab, find your records by filtering the Last Name, First column to show records that contain your Greek letter.

6. Click any column's Grid Settings menu and select **Columns**.

7. Add the columns **Grouping**, **Grouping Date** and **Prospect Program Degree** by clicking the checkbox next to the field in the column chooser - to use the *Filter Columns* textbox to locate the columns quickly.

8. Click **Save**.

9. Filter the **Prospect Program Degree** column to ensure you are working with your JD prospects.

Part 2: Add the Grouping

1. Select all the records.

2. Click **Actions**.

3. Click **Edit**.

4. In the Edit options, click **Apply the same edit to all selections** if it is not selected.

5. Click **Continue**.

6. From the Available Fields area, select the **Grouping** checkbox. Notice that the Grouping Date and the Grouping fields are auto selected.

7. Click **Add**

8. Click **Continue**.

9. Select **Fall Recruiting Leads-[Greek]** from the Grouping drop down menu options.

10. Specify the Date, entering today's date.

11. Click **Submit**.

12. Verify your changes.

13. Click **Confirm**.

Part 3: Check the Grouping

1. On the Search results list, notice the Grouping column now displays **Fall Recruiting Leads-[Greek]** along with the Grouping Date you updated.

2. If you would like to look in a person's individual record, select one person's name.

3. Expand the **Source/Groupings** panel.

4. Notice the Grouping **Fall Recruiting Leads-[Greek]** and its date.

5. Click **X** to close the record.