LSAC Unite Essentials
Managing People Part 3
Updated: 5/6/2024

Exercise 2 – Inline Edits: Add Specific Information to Multiple Prospects LLM

Task   Use inline edit to add information to prospects.

Scenario   You have handwritten notes with the preferred names of people who attended your recent event. Preferred names were not included in your import so now you will edit the records with that information.

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 four parts. The first part walks you through how to find the person records. The second part walks you through how to organize the grid. The third part walks you through how to edit a variety of records of multiple people at once. The fourth part walks you through how to verify the edit.

Part 1: Find the Person Records

1. Click **PEOPLE**.

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

3. Under Person Search Fields, find Stage and select **Prospect** from the dropdown menu.

4. Click **Search**.

Part 2: Organize the Grid

1. On the *Search Results* tab, find your records by filtering for your Greek name on the Last Name, First Name column.

   a. Click the Grid Settings menu [icon]. Within the menu, select **Filter**, **Contains,** then enter the text to reflect [Greek]- with no space between your Greek and the dash.

2. Add additional columns.

   a. Click the Grid Settings menu [icon] on any column. Within the menu, select **Columns**, then enter text in the *Search Columns* textbox to locate the field.

   b. Using the *Search Columns* textbox, add the columns **Prospect Program Degree** to the Grid, if not already showing.

   c. Click **Save** within the menu. The new column appears in the grid to the right.

3. Select **Filter, Contains**, and enter **LLM** to filter within the Grid Settings Menu.

4. Click **Filter.** You should have between five and seven people in your results.

Part 3: Edit the Prospect Program Information

1. Select check boxes for the LLM prospects with your Greek letter in the grid.

2. Click **Actions**.

3. Click **Edit**.

4. Select **Make individual edits to each selection**.

5. Click **Continue**.

6. In the **Search available** lookup textbox, enter in the name **prefer**.

7. Select the field **Preferred Name** found in the Person (Update) section by clicking on the checkbox.

8. Click **Add**.

9. Click **Continue**.

10. Update the **Preferred Name** field for each person, using any preferred name you like. You can either click the hyperlinked person's name to focus on the individual record or place your cursor in the cell within the grid to edit the name.

11. Click **Submit**.

12. Verify your changes.

13. Click **Confirm**. The checkmark in the circle in a green bar appears, stating your changes have been saved.

14. Click **X** to close.

15. Click **Yes**.

16. Remain on the *Search Results* tab and leave the people on the grid.

Part 4: Verify the Prospect Information

1. Add the column **Preferred Name** if it is not in your grid.

    a. Do this by clicking the Grid Settings menu on any column. Select **Columns**.

    b. To find the column quickly, enter text in the *Search Columns* textbox to locate the field – such as **pref**.

    c. Click the checkbox next to the column name and click **Save** in the menu and return to the grid.

2. Notice this column shows the data you entered.