Exercise 2 - Organize a Grid and Save the View JD

Task   Organize the Search Results grid and save the view.

Scenario   The dean asked you to manage contact information for all prospects from Florida. Search for those prospects and create a view so you can come back to the information any time you need it.

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 perform a search to find prospects from Florida. The second part walks you through how to organize the grid and save the view. The third part walks you through how to open the grid view.

Part 1: Find the person records

1. Click **PEOPLE.**

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

3. From Person Search Fields, select Stage and choose **Prospect**.

4. Select **Permanent State/Province of Residency** and choose **Florida**.

5. Click **Search**. You will have over 1,000 records in your search results grid.

Part 2: Organize the grid and save the view

1. On the Search Results tab, add the column **Permanent State/Province of Residency**.

a. Do this by clicking the Grid Settings menu icon ⋮ in any column header. Select **Columns**.

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

c. Click the checkbox next to the column name within the column chooser menu.

d. Scroll within the column chooser, or type in the textbox, to find the next columns.

e. Deselect the checkbox next to the names of these columns to hide them:

    i. App Status

    ii. App Sub-status

f. Click **Save**.

2. Click **My Views**.

3. Click **Create New View**.

4. Enter the view name: *Florida Prospects*

5. Click **Save**.

6. Click **Close**.

7. Click **HOME**.

Part 3: Open the view

1. Click **PEOPLE**.

2. On the Search Results tab, click **My Views**.

3. Click the name of the view: **Florida Prospects**.

4. Click **HOME**.