

LSAC Unite Essentials
Managing Person Records - Individuals
Updated: 5/3/2024

Exercise 4 – Edit a Contact Card JD

Task: Update contact information for a person.

Scenario: Tom Dutta matriculated recently. He provided you with an updated email address of tduttatraining@geemail.com. Update Tom's primary email address, and ensure email is his preferred contact method so that you can send him orientation 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 two parts. The first part walks you through how to find the person record. The second part walks you through how to edit a contact card record.

Part 1: Find the Person Record

1. Click **PEOPLE**.
2. On the Search Criteria tab, click **Clear**.
3. Enter the last name: Dutta.
4. Enter the first name: Your Greek letter
5. Click **Search**.

Part 2: Update Email Address and preferred method of contact

1. On the Search Results tab, find the Tom Dutta record with your Greek letter.
 - a. Notice the Contact Card Column in the grid.

2. Click the Contact Card **icon** for the person.
3. Click **Edit**.
4. Update Primary Email to tduttatraining@geeemail.com.
5. Select Email as preferred method of contact.
6. Click **Save**.
7. Click **X** to close the contact card.
8. Click **Home**.