

Change How Users Enter Names

Each user can select a preferred method for entering names in the program.

Useful Information

Remember, when set to **All Access** or **View Only Access**, a user can change his or her preferences. Otherwise, the security administrator must set up and maintain these for each user.

To set user preferences, on the Administration tab, click **Users & Passwords**.

1. Locate the appropriate user.
2. In the navigation pane, click **User Preferences**.
3. Select a Name Breakdown option. See the Additional Field Information below for more on these options.
4. Click **Save** at the top.

Additional Field Information

Enter name parts on separate lines

This is the default option. When you begin entering a name, the Name Breakdown window automatically displays so you can enter the parts of the name: Last Name, First Name, Title, and Suffix. As parts of a name are entered on separate lines, the name formats for the Name, Mailing Name, Formal Salutation, and Informal Salutation are built.

Enter entire name on a single line - automatically display dialog

When you begin entering a name, the Name Breakdown window automatically displays. In the **Name** field, enter the last name, first name, title, and suffix. As you enter the entire name on the single line, the Mailing Name, Salutation, and the parts of the name (Last Name, First Name, Title, and Suffix), are filled in automatically. You can edit the name fields at any time.

Enter entire name on a single line - do not automatically display dialog

The Name Breakdown window doesn't automatically display. In any **Name** field, enter the last name, first name, title, and suffix. To verify the Name, Mailing Name, Formal Salutation, and Informal Salutation formats are correct, click the ellipsis icon (...) after the **Name** field.

Related Topics

[Set Up Users and Passwords](#)
[Assign Access and Privileges](#)
[Users and Passwords](#)