


Customizing the Find Person Window

You customize the Find Person window to display selected fields next to an individual's name in the grid. The selections you make are stored by user name and do not affect other ACS users' settings. For example, you can customize the Find Person window to search by envelope number by using the **Search** selection mode and selecting **Include Envelope Number**.

You can also customize how to [search for and locate individuals](#) in the Find Person window.

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Right-click the Find Person grid, then select **Customize**.
4. On the **Grid** and **Options** tabs, select the appropriate options, then click **OK**.

Additional Field Information

The Grid Tab



You can use the **Grid** tab to select specific display settings for the Find Person grid by choosing the settings that you want. You can also select the fields that you want to display next to an individual's name in the Find Person grid.

Settings

- **Auto Size Column Width** — Select this option to automatically resize the columns to the maximum width of the Find Person grid.
- **Show Grid Lines** — Select this option to display grid lines between records in the Find Person grid.

Fields

Select the additional fields to display in the grid area of the Find Person window from this list. To select a field from the list, double-click the field. You can select

unlimited additional fields to display in the grid area of the Find Person window. You can also sort the order of the selected fields in the list using **Move Up**  and **Move Down** . Some fields, such as the **Display Name** field, are required. An automatically selected check box displays next to all required fields.

The Options Tab

You can use the **Options** tab to choose how to search for and locate individuals, sort records, and choose the information you want to display in the Find Person grid.

Selection Mode

- **Locate** — Select to locate names in the Find Person window by scrolling to the letters of the last name as you enter them in the selection field (the field displays as **Enter Last Name** when this option is selected).
- **Search** — Select to narrow down the list of individuals based on your search criteria.



Include Address/Phone

Select to include the address and phone number as search fields. When you choose this option, selection boxes labeled **Address** and **Phone** display in the Find Person window. You can enter as many numbers and/or letters as needed for the address or phone number. If you search by address, and the matching record has family members associated with it, the records for all family members display. This option is only available when you select **Search** as the **Selection Mode**.

Include Envelope Number

Select to include the envelope number as a search field. When you select this option, a selection box labeled **Env. #** displays in the Find Person window. You can enter an envelope number and the matching record displays. This option is only available when you select **Search** as the **Selection Mode**.

Use Search for Prior/Next

Select to cycle through the results returned in a search, filter, or according to what you enter in the **Enter Last, First Name** field. You can cycle through records by clicking **Prior**  and **Next** , while viewing a record in the View/Edit Individual window. To view records not included in the search, clear this option.

Sort List By

The **Sort List By** options you select determine how names are sorted each time you log into ACS.

- **Last Name** — Select to sort the list of individuals alphabetically in the Find Person window by last name.
- **First Name** — Select to sort the list of individuals alphabetically in the Find Person window by first name.
- **Group by Family** — Select to group all members of the same family together, even if they have different last names. The overall sort order is by last name.

Settings

- **Show Address** — Select to display the highlighted individual's address in the area below the Find Person grid. When choosing fields to display on the Grid tab, remember that while the Address field is an available option, the address can also be viewed in the Find Person window by right-clicking on a highlighted name.
- **Show Sort/Filter Options** — Select to display the Sort List By and Show Results For options below the Find Person grid.
- **Shift to Edit mode after add** — Select to automatically access the Add/Edit Individual window after entering a new individual. This saves valuable time if you want to enter additional information immediately after adding a new individual. If cleared, ACS returns to the Find Person window.