


Unite Education Program v6.4

Job Aid: 5241

Organize a Marketing Grid

In Unite, you can organize marketing grids to change the way data appears and have a more focused view of information that is important to you. Marketing grids are in the EVENTS and JOURNEYS areas of Unite. The steps to organize a marketing grid differ depending on what you want to do.

To sort records by column

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. On the column header where you want to sort the information, click .
4. On the menu, click **Sort A to Z**, **Sort Oldest to Newest**, or **Sort Lowest to Highest** to sort the rows in ascending order, or click **Sort Z to A**, **Sort Newest to Oldest**, or **Sort Highest to Lowest** to sort the rows in descending order.




To filter records alphanumerically

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. Click a letter to display only records with names that begin with that letter.

Note

You can click # to display only records that begin with a number or click **All** to display all records.



To filter records by column

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. On the column header where you want to filter the information, click .
4. On the menu, click .
5. From the list box, select the filter operator you want to apply.
6. In the field below the operator, enter the value you want to use for the filter.
7. Click .





To adjust the column width

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. Drag the right column border to the left or right to decrease or increase the width of the column.





To move a column

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. Click .
4. Drag and drop the column name to a new location in the list.
5. Click .

To hide a column

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. Click  .
4. Click  on the column name you want to hide.
5. Click  .
6. Click  .

To show a column

1. Open a browser and log on to Unite.
2. Navigate to the marketing grid you want to organize.
3. Click  .
4. Click  .
5. Click the columns you want to add.
6. Click  .
7. Click  .