


Unite Education Program v6.4

Job Aid: 5328


## Share a Marketing View with a Team Member

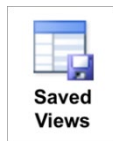
Unite has many system views for marketing grids, and all users have access to these views. However, you can also add a custom view. If the custom view you add could be useful to another user or a team of users, you can share it. There are two main steps to share a marketing view with one or more users.

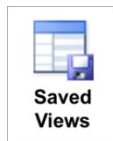
### Part 1: Select the view

1. Open a browser and log on to Unite.
2. On the main menu, click JOURNEYS.
3. Navigate to the marketing grid that you want to share.
4. Click  .







#### Note

If the **Create view** button is not visible on the command bar, click  to see additional buttons.



5. On the *Advanced Find* tab, click  .
6. Next to the name of the view you want to share, select the check box.

## Part 2: Share the view

1. On the *Saved Views* tab, click  **Share** .
2. Click  **Add User/Team** .
3. Click the check box beside each person with whom you want to share the view.
4. Click  **Select** .
5. Click  **Add** .
6. Click  **Share** .
7. Click  **X** to close the *Advanced Find* window.