

Unite Education Program v9.0

Job Aid: 5713

## Add a View to a Grid

On many of the main grids in Unite, you can save a view after sorting, filtering, grouping, or organizing the information. You can set a default view if there is a particular arrangement you need to see often, and you may have the option to share a view with a team member. The steps to add a view differ depending on whether you want to add a view to an admissions grid or add a view to a marketing grid.

### To add a view to an admissions grid

1. Open a browser and log on to Unite.
2. Navigate to the grid.

#### Note

Admissions grids are in the PEOPLE, APPLICATIONS, REVIEWS, REPORTS, and UTILITIES areas of Unite.

3. Organize the grid in the way you want to see the data.

#### Note

You may need to sort, filter, or increase the items per page to see all records in the grid.

4. Click **My Views**.
5. Click **Create New View**.
6. In the **View Name** text box, enter a name for the view.
7. If you want to make the view the default view, click the check box for **Set as Default View**.

8. Click  .

### To add a view to a marketing grid

1. Open a browser and log on to Unite.
2. Navigate to the grid.




#### Note

Marketing grids are in the EVENTS and JOURNEYS areas of Unite.

3. Organize the grid in the way you want to see the data.

#### Note

You may need to sort, filter, or increase the items per page to see all records in the grid.

4. Click  .
5. Next to **Create View**, click  .
6. Click **Save as new view**.
7. In the **Name** text box, enter a name for the view.
8. In the **Description** text box, enter a description for the view, if applicable.
9. Click  .

### **Related resources**

- [5387 - About Views](#)
- [5714 - Edit a View](#)
- [5420 - Delete a View](#)
- [5328 - Share a Marketing View](#)