

LSAC Unite Essentials
Managing People Part II - Grids and Views
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Exercise 1 - Search for People LLM

Task Search for people with a first law degree from a specific country.

Scenario You want to know how many prospects you have in Unite who earned their first law degree in India. Search for prospects and then organize the grid to show the people with their first law degree from India.

If you'd like to try the exercise on your own without detailed instructions, feel free to do so. If not, detailed instructions follow.


Guided Practice


This training exercise has two parts. The first part walks you through how to find the person records. The second part walks you through how to view the data by organizing the grid.

Part 1: Find the Person Records

1. Click **PEOPLE**.
2. In the Search Criteria tab, click **Clear**.
3. From Person Search Fields, select Stage and choose **Prospect**.
4. Click **Search**.
 - You will have several thousand records in your search results.

Part 2: Organize the Grid

1. On the Search Results tab, add the column **First Law Degree Country** to the grid.
 - a. Do this by clicking the Grid Settings menu icon  in any column header. Select **Columns**.

- b. To find the column quickly, enter text in the *Search Columns* textbox to locate the field – such as *first*.
 - c. Click the checkbox next to the column name.
 - d. Click **Save** in the column chooser menu to return to the grid.
2. Click the Grid Settings menu icon  in the **First Law Degree Country** column header.
 - a. Filter within the Grid Settings Menu by filtering. Select **Filter, Include**, then enter the text to reflect: India
3. Click **Filter**.
4. You should see a number of records with India listed as **First Law Degree Country**.