LSAC Unite Essentials
Managing People Part 4
Updated 5/6/2024

Exercise 1 - Create a Grouping – LLM

Task   Add a lookup value to the Grouping field

Scenario   To track prospects for next spring, you want to put them all in one grouping. Add the grouping entitled *Incoming Spring 2025* to the Grouping field. You will use this grouping in the next exercise.

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

Add the Grouping Value

1. In Unite, click the Greek username to expand the System Configuration menu.

2. Click **Global Settings**.

3. Click the **Fields** tab.

    a. Collapse the left navigation pane to increase the Fields workspace

4. Filter the Field Name column to show Grouping.
   Tip: Use the operator **Contains** and type the letters **gro** to filter

5. Click **Grouping**.

6. Click **+Add New Lookup Value**.

7. Enter **Incoming Spring 2025- [Your Greek Letter]** in the Field Value name box.

8. Verify the Active check box is selected.

9. Click **Save**.

10. Click **Save**.

11. Click X to close the LSAC Unite Setup window.