LSAC Unite Essentials
Managing Person Records - Individuals
Updated: 3/15/2024

Exercise 2 - Delete a Person Record JD

Task: Delete a person record from Unite.

Scenario: Several weeks after receiving an online application for Minnie Emerson, a student worker mistakenly added a new person record in Unite for Minnie (in the Prospect stage). Delete the person record that was added by the student worker.

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 record. The second part walks you through how to delete the record.

Part 1: Find the Person Record

1.   Click **PEOPLE**.

2.   On the Search Criteria tab, click **Clear**.

3.   Enter the last name: Emerson.

4.   Enter the first name: your Greek letter

5.   Click **Search**.

Part 2: Delete the Person Record

1. On the Search Results tab, note there are two Minnie Emerson records with your Greek letter.

2. Look at the grid columns to identify the record in the Stage of Prospect and the Person Status of Lead.

3. Click the checkbox of Emerson, [Greek]-Minnie who has the Prospect stage.

4. Click **Actions**.

5. Click **Delete.**

6. Select **Delete Full Record.**

7. Click **Continue**.

   a. Note the message that you are deleting a person with no application.

8. Click **Submit.**

   a. Note the message about deleting a person from Unite.

9. Click **Yes to** delete.

   a. Notice the single Emerson, [Greek]-Minnie record with the Applicant Stage.