



**Manager Database**

**Groups Guide**

**v1.0**

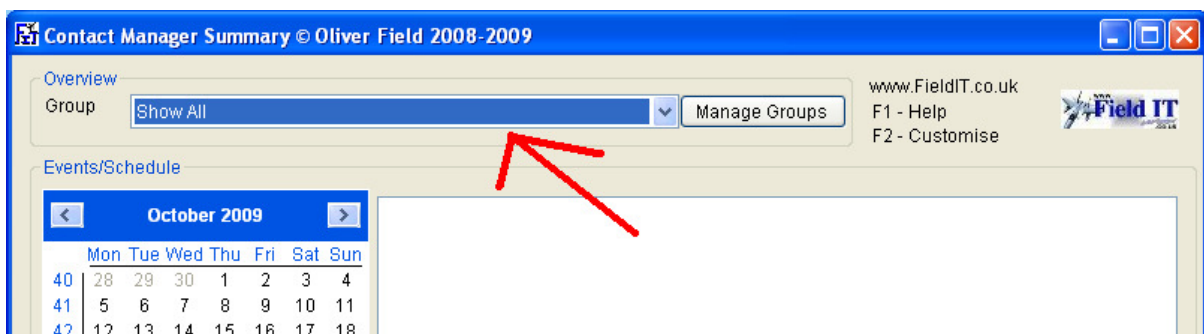
## Introduction

Groups are a way of dividing your contacts/projects into easily manageable groups. An example would be dividing your contacts into:-

- Department (e.g. Sales, Marketing, Support)
- Communication Type (e.g. Email Newsletter, Postal Newsletter)
- Region/Location (e.g. Buckinghamshire, London, Nottinghamshire)

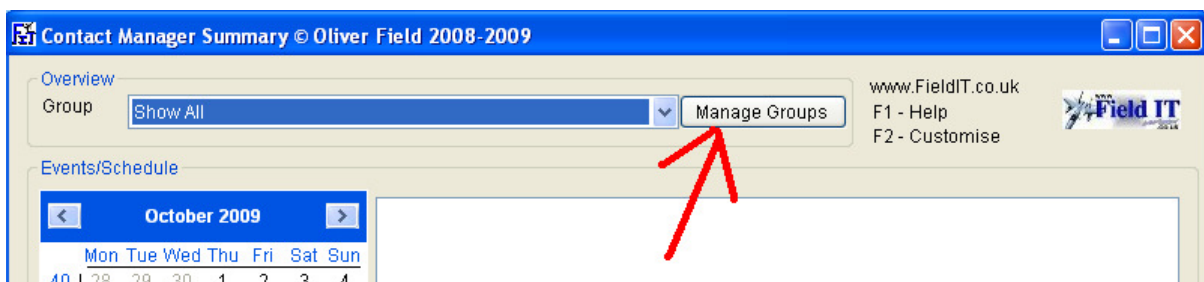
## How do I view my contacts by a group?

To view your contacts by group you must use the Group drop down list on the top right of the Summary screen. By default the system will “Show All” contacts in all groups.



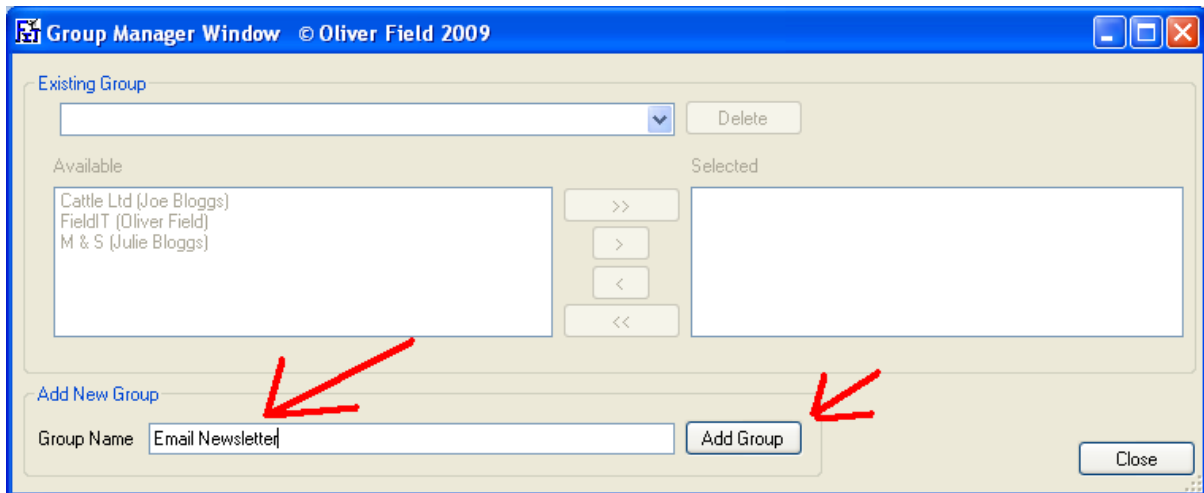
## How do I add a group?

To add a new group you will need to access the “Manage Groups” window. Please press the “Manage Groups” button on the Summary screen as shown below.



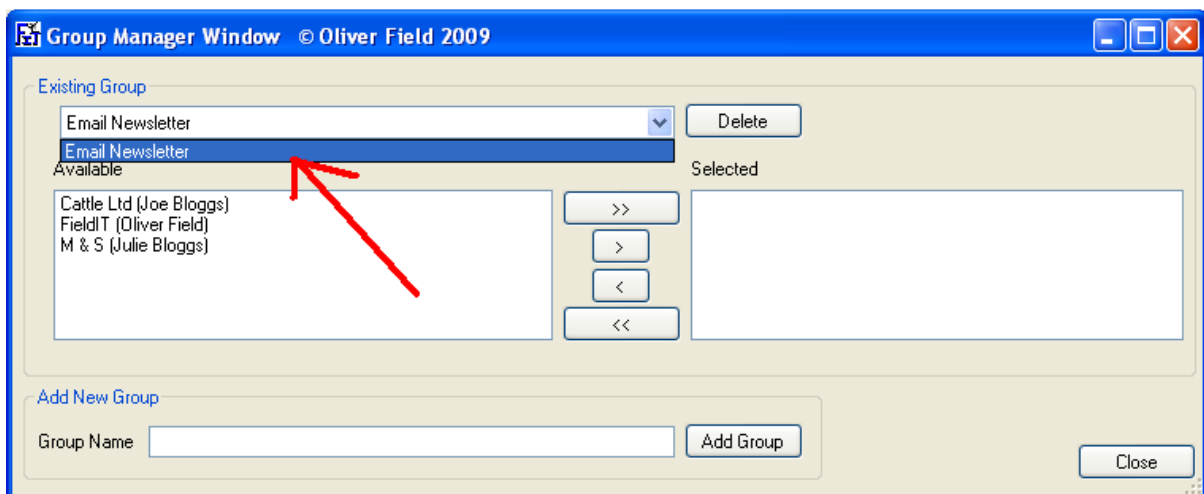
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Once the manage group window has opened you can enter a name for the new group you would like to create. In the example below we have created a new group called “Email Newsletter”. Press “Add Group” button once the desired name has been entered.



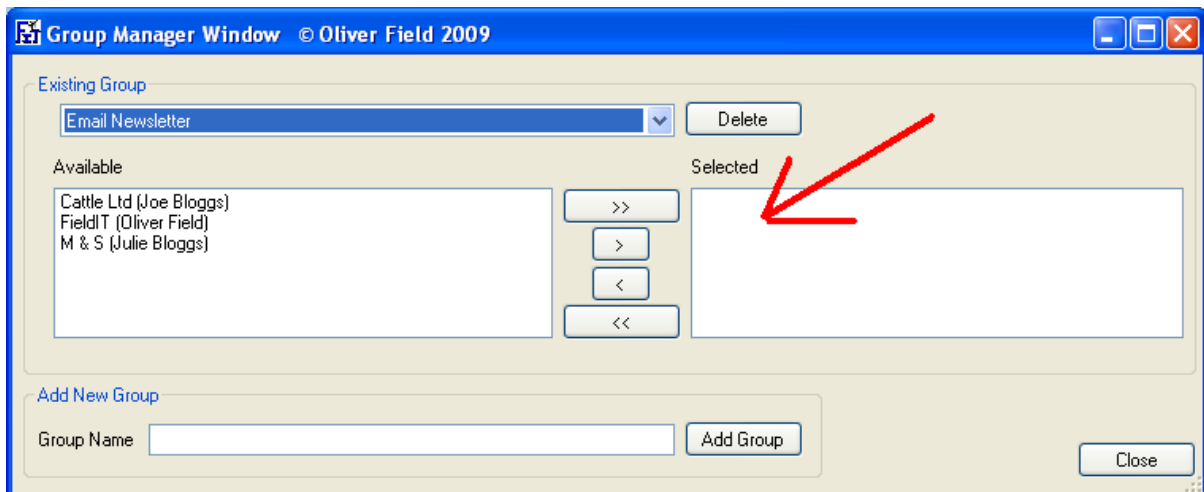
## Viewing a group and all the Projects/Contacts it contains.

In the “Group Manager Window” within the “Existing Group” section select the group you wish to manage.

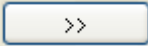


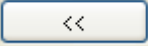




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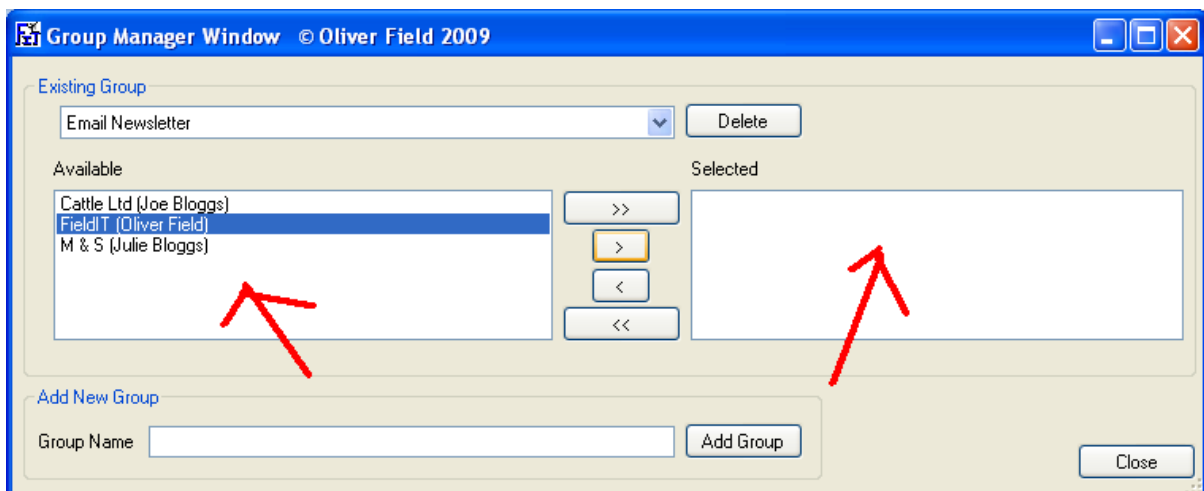
As you can see below this group contains no members.



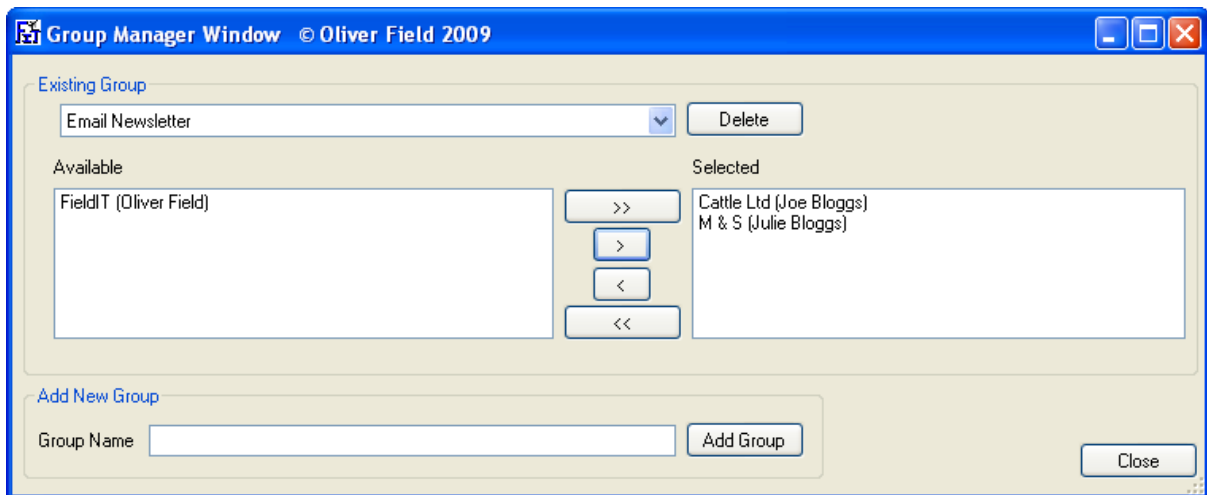
What do the arrow buttons do?

	Move all contacts into the group. All contacts will move into the right "Selected" Box. The group will contain every contact.
	Move the selected contact into the group. The group will now contain this contact.
	Move the selected contact out of the group. The group will now not contain this contact.
	Move all contacts out of the group. All contacts will move into the left "available" Box. The group will contain no contact.

To use  and  buttons you will need to select a contact. To select a contact please click on the item within the list.

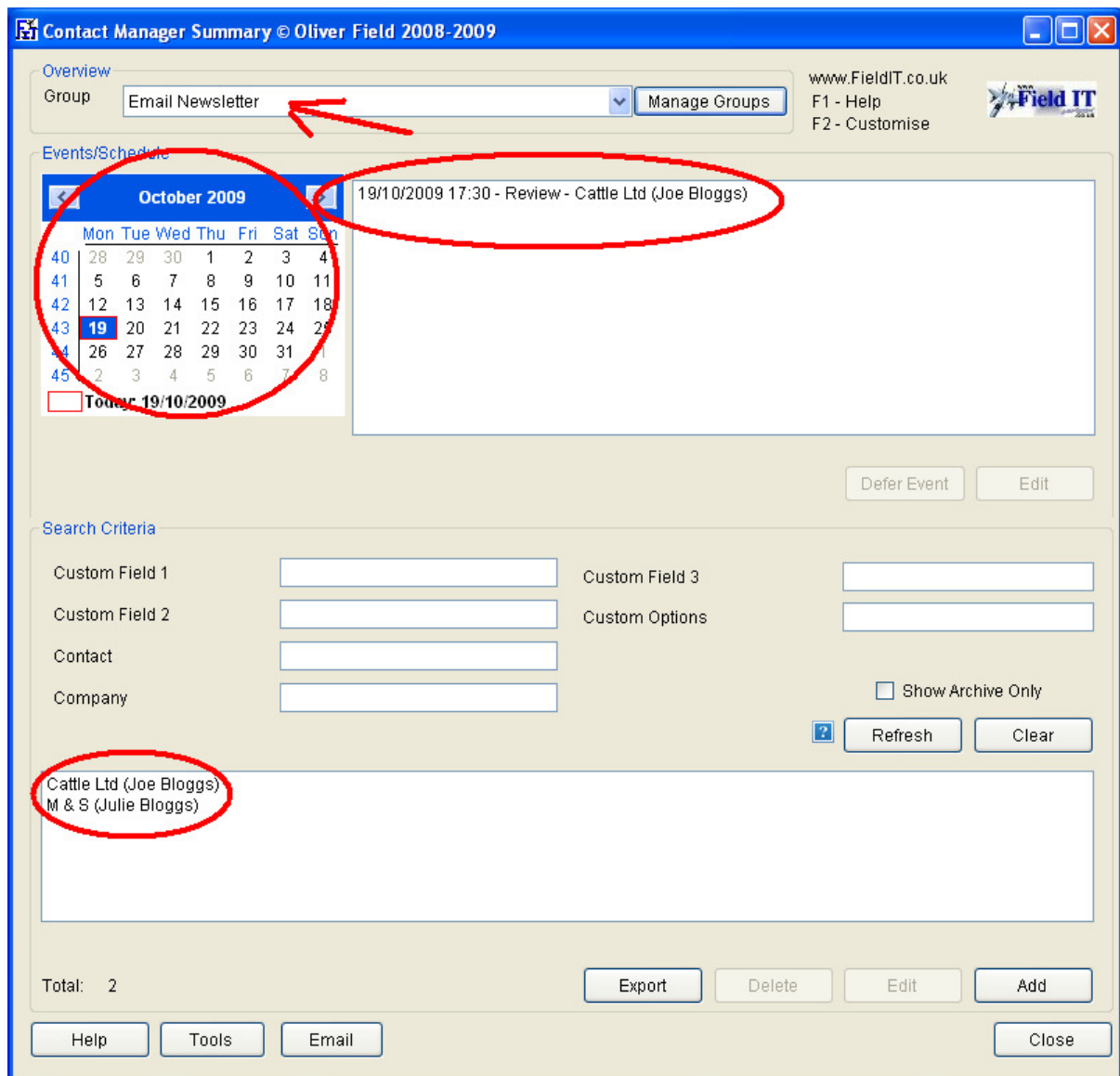


The example below shows that "Cattle Ltd" and "M & S" are members of the "Email Newsletter" group.



## What happens when I view my contacts by group?

As you can see below, if you create a group called “Email Newsletter” and add “Cattle Ltd” and “M & S” your summary screen will only show events and calendar entries for members within that group.



## What else can I do by group?

If you have purchased the “Email” module you can bulk email all members of a group with a custom email. E.g. Newsletter