

Enterprise - How to Create Contact Groups

Last Modified on 01/13/2020 2:07 pm CST

[Daily Webinar - How to Create and Utilize Contact Groups](#) from TempWorks Training on Vimeo.

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Quick Steps

To Manage Contact Groups

1. Navigate to all options > contact groups
2. To add a new group press the + icon
3. To remove a group, select it and press the X icon
4. To view group details, select the group on the left and it will display information on the right

How to add a contact to a contact group

1. Navigate to the profile of the contact you wish to add to a group
2. Select the + icon next to Contact Groups
3. Choose from a list of groups
4. Select save to add contact to contact group

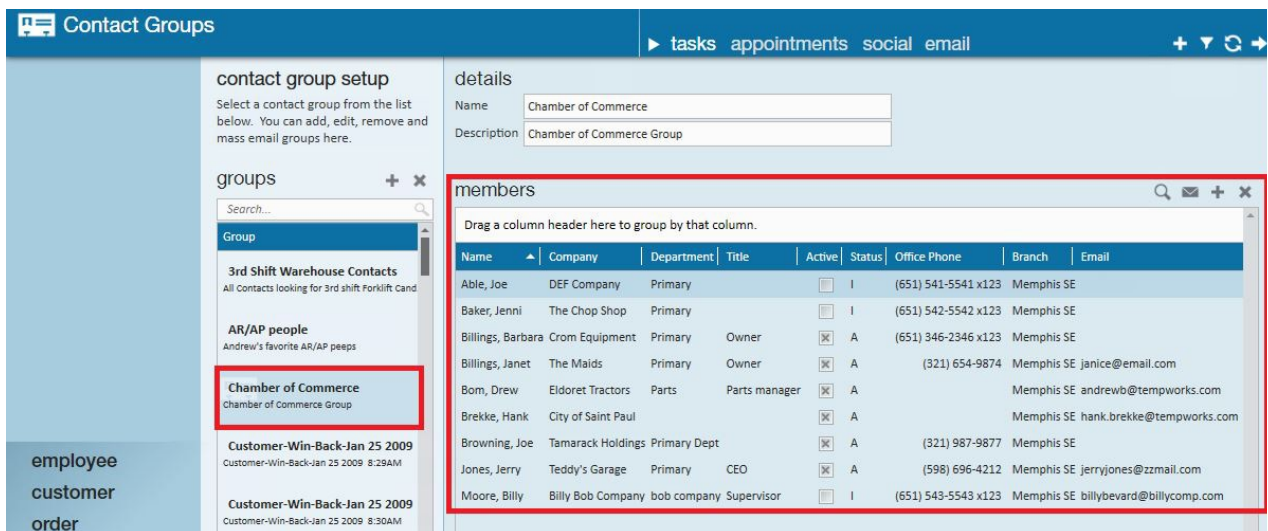
Complete and Detailed Steps

Contact groups in Enterprise will allow a user to have a static list of contacts and are typically utilized for mass communications, such as resume mailers and marketing

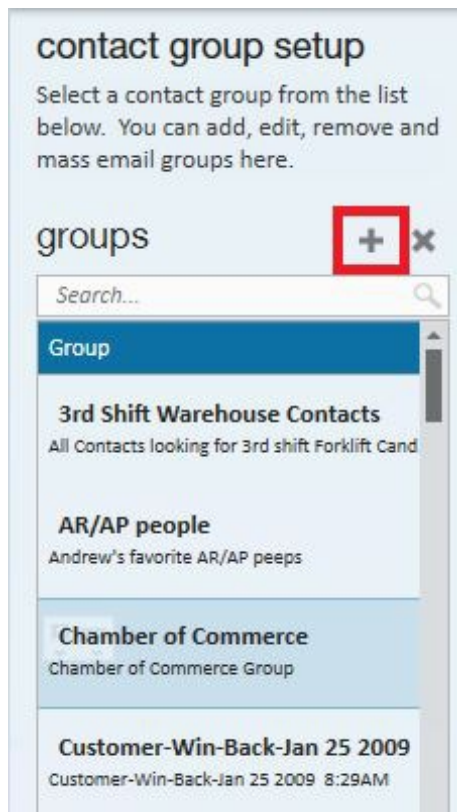
promotions. To create a new group, or to view the groups that currently exist, navigate to all options and select contact groups:



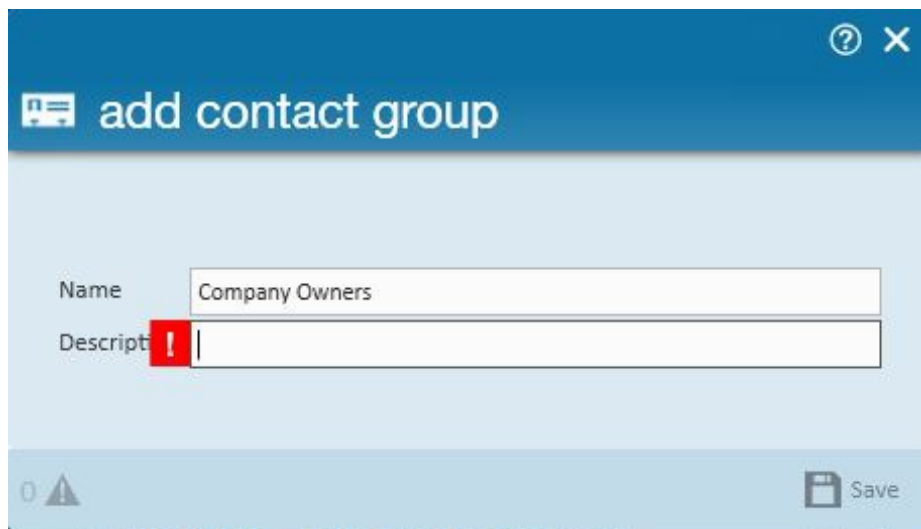
Select a contact group to view the members of that group:



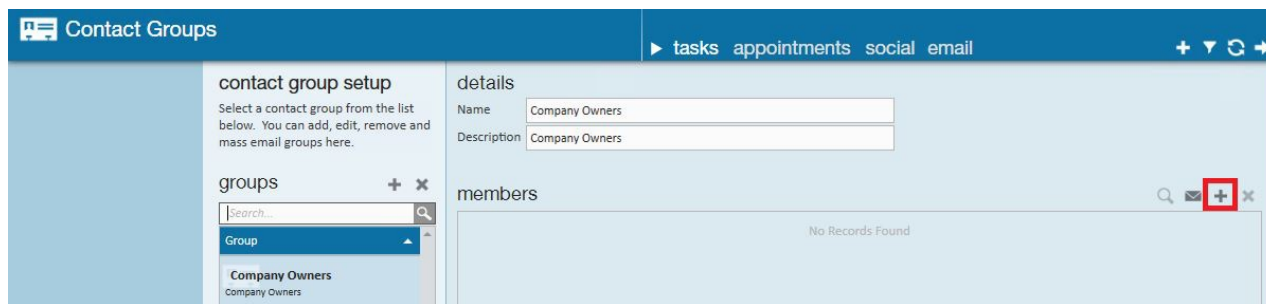
To add a contact group, click the + icon above the list of contact groups:



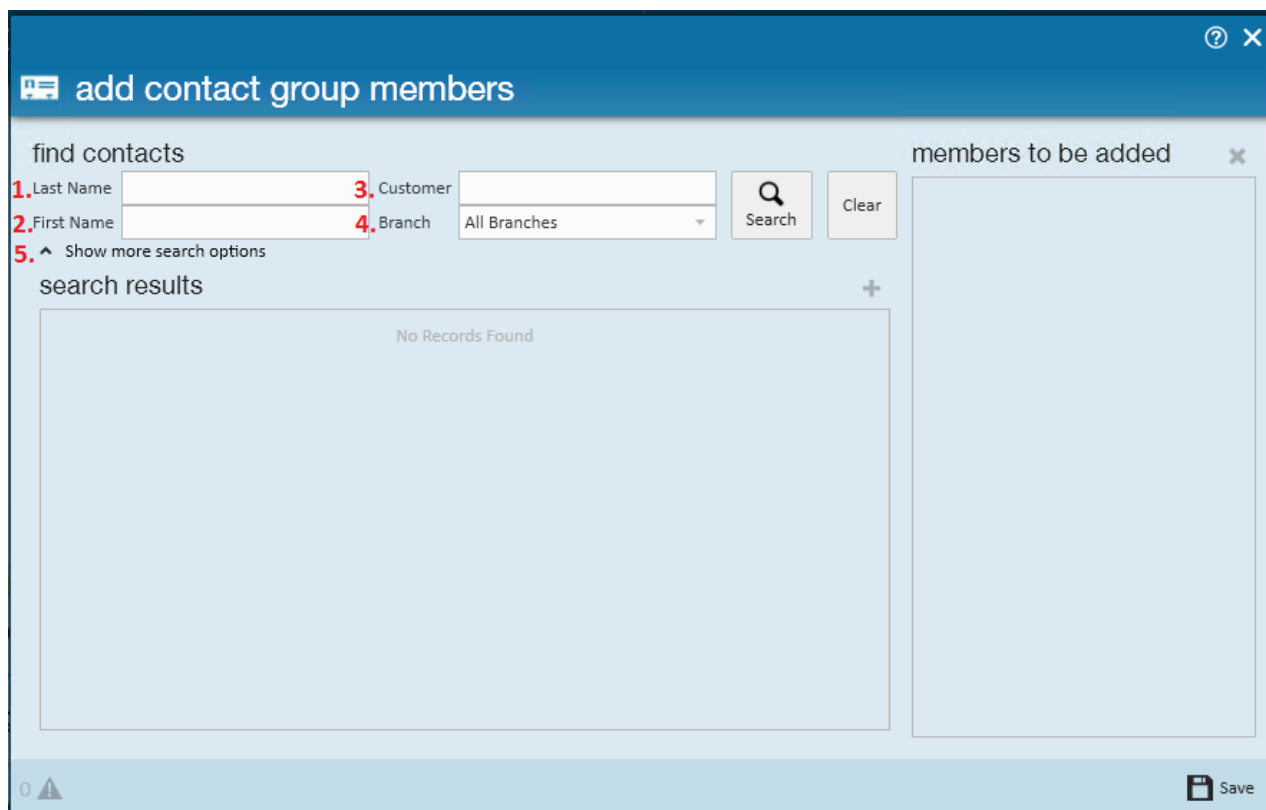
The "add contact group" window will open. Name the group and enter a description:



Note Fields with a red exclamation mark are required and you will not be able to save the new record without completing the information in those fields. To add members to the contact group click the + icon in the members table.



This will open the "add contact group members" window:



Search for contacts by: 1. Last name 2. First name 3. Customer 4. Branch
Clicking (5.) show more search options will provide more criteria for:

- Contact id
- Customer id
- Status
- Rep name

add contact group members

find contacts

Last Name: Customer: Search

First Name: Branch:

Contact ID: Customer ID:

Status: Rep Name:

▼ Hide options

search results

Drag a column header here to group by that column.

Conta...	Last Name	First Name	Customer...	Department	Title	Active	Status
508	Dennis	Mandi2	Crom Equip...	Primary		<input checked="" type="checkbox"/>	A
2129	Billings	Barbara	Crom Equip...	Primary	Owner	<input checked="" type="checkbox"/>	A
981	Pugeot	Paul	Crom Equip...	Primary	Supervisor	<input checked="" type="checkbox"/>	A
8752	Roberts	Jill	Crom Equip...	Primary	New Accounts Su...	<input checked="" type="checkbox"/>	A
2183	Potter	Kevin	Crom Equip...	Primary	Manager	<input checked="" type="checkbox"/>	A
8987	Sanders	Vera	Crom Equip...	Primary	Dir of HR	<input checked="" type="checkbox"/>	A
461	Sylvester	Bonnie	Crom Equip...	Clerical	Owner	<input checked="" type="checkbox"/>	N

members to be added

Billings, Barbara
Owner
Crom Equipment

Save

Once search results are returned, click to (1.) highlight the contacts to be added to the contact group then (2.) select the + icon. The added contacts will be (3.) displayed to the right. Once all contacts have been selected click (4.) save.

Note To select multiple contacts at once, hold down the ctrl key on your keyboard and click each contact you wish to add. To select a large group of contacts hold the shift key on your keyboard while making a selection.

After contacts have been selected, (2.) click the + icon and all contacts will be added.

details

Name:

Description:

members

Drag a column header here to group by that column.

Name	Company	Department	Title	Active	Status	Office Phone	Branch	Email
Billings, Barbara	Crom Equipment	Primary	Owner	<input checked="" type="checkbox"/>	A	(651) 346-2346 x123	Memphis SE	
Blyss, Janice	Blyss Real Estate	Corporate	Owner	<input checked="" type="checkbox"/>	A	(321) 345-3455	Memphis SE	Janice@BlyssRE.com
Gunderson, R...	Colonial Real Est...	Corporate	Owner	<input checked="" type="checkbox"/>	A	(321) 987-9874	Memphis SE	Robert@colonial.com
Smith, Mary	Blyss Cosmetics	Primary	Owner	<input checked="" type="checkbox"/>	A	(321) 686-8458	Memphis SE	mary@blyss.com

1. 2. 3.

Once contacts have been added to the group, use the buttons in the upper right corner to:

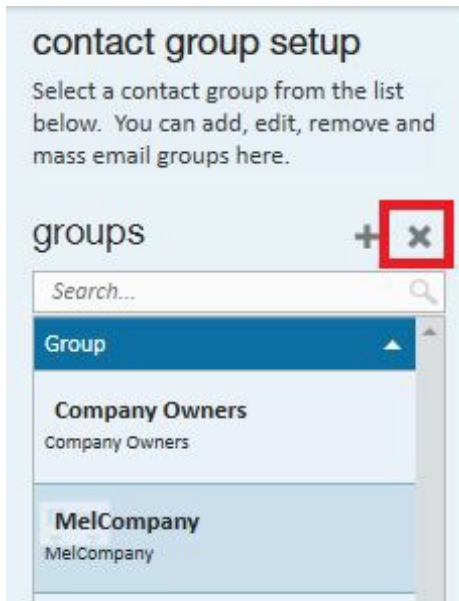
1. View the contact record that is currently highlighted

Note If multiple records are highlighted, Enterprise will navigate to the first contact record in the highlighted list.

2. Send a mass email to the highlighted contacts

3. Remove the contact that is highlighted from the contact group

If a contact group is no longer needed, delete it by clicking the x button:



Contacts can be a member of multiple contact groups. To view which contact groups a contact belongs to, look under the contact groups section of their visifile.

Jane Frank
Polar Printing (Manufacturing), Hiring Manager
99 Neil Armstrong Blvd. (651) 222-1122
Eagan, MN 55121 ID: 8855

! Bi-Weekly Service Calls Due G. Johnson Licen

tasks appointments social email

visifile

- details
- documents
- integrations
- messages
- tasks
- search

contact snapshot

Title: Hiring Manager Status: Active
Company Name: Polar Printing Branch: Memphis SE
Email: jane@polarprinting@gmail.com Date: 2/11/2015 10:19:00 AM
Notes: Easiest to get a hold of Jane before 8 am otherwise she is on/off the floor all day.

phone/email
jane@pola
(651) 222-1

messages

Date	Action	Message	Rep
3/2/2015	Task	Spoke with Jane, pos is pending approval, on a budget freeze,...	shawna.bradt
2/20/2015	Task	Left a message for Jane, will try her again on Monday.	shawna.bradt
2/11/2015	Message	Personal call summary: Hiring 10 machine opps 2nd shift, 24...	shawna.bradt
2/11/2015	Sales Meeting	Meeting went great, has two machine operator positions ope...	shawna.bradt
2/11/2015	Cold Call--1st Cont	set meeting with Jane for tomorrow at 9:00 a.m.	shawna.bradt

personal call list

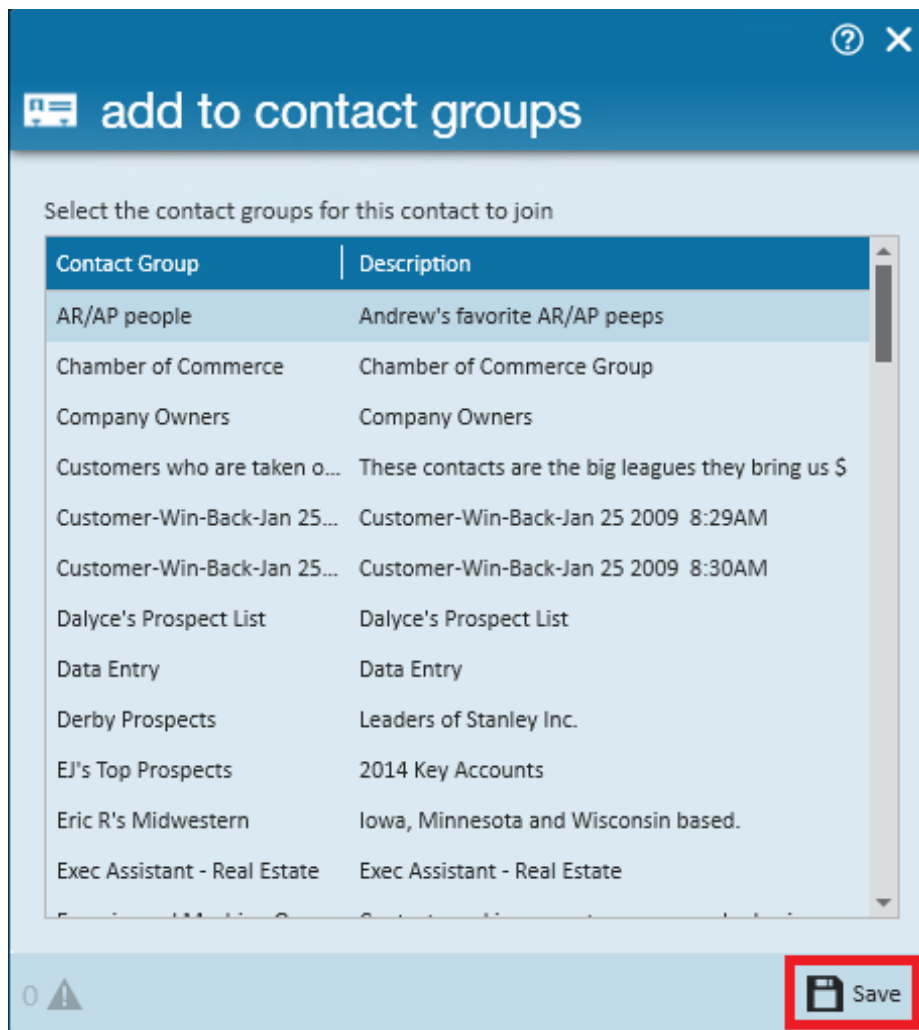
Date	Summary	Repname
2/11/2015	Hiring 10 machine opp...	shawna.bradt

contact groups + x

Name	Code
3rd Shift Warehouse Contacts	2nd
Holiday Contacts	WEL
Manufacturing Managers	

employee
customer
order
assignment
contact
pay / bill

To remove a contact from the highlighted contact group(s), (2.) press the x button(1.) Press the + icon to add the contact to an existing contact group. This will open the "add to contact groups" window:



Select which contact group(s) they should be added to and click save to finish.

Related Articles