

## Groups

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Groups are subsets of your database. They provide a way to group contacts with something in common without creating a separate database. For example, you might want to create a group containing all your sales prospects, a group containing all customers with sales over \$100,000 a year, a group containing all customers that buy or might buy a certain product, and so on. A contact can be part of more than one group. A group is permanently maintained as part of your database, but groups can be edited or deleted, and contacts can be added to or removed from a group.

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*A Group Record is just another type of contact record with different fields.*

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Take a good, hard look at the contacts in your database. Are there 5 or 6, or 20 or 30 that you are always working with together? That you send the same types of information to? That you visit for the same reasons? That you call on a regular basis? That always show up on the same reports? Put them in a group. It is quick and easy, you will find it much easier to work with them in ACT!, and you'll be less likely to leave one out when you are making calls or sending letters.

Groups can help you track *opportunities*. And the more opportunities you have, the more sales you will make. Here are just a few examples:

- ✓ One of your contacts is a business that is part of a franchise. If you sell to one business in the franchise, you can sell to others, after all they are all in the same business! Gather the names of other businesses in the franchise, and put them all in a group named for the franchise. Then when you send a letter to one, send the same letter to them all. Call one about your new product line, call them all. Just bring up the group name, and you have all the businesses in the franchise at your fingertips!

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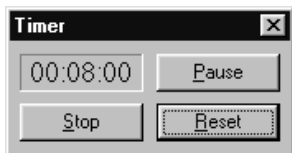
*One contact can be part of many groups, and therefore, many opportunities.*

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- ✓ Your company has yearly, seasonal promotions. You have regular customers that you know will buy enough during the promotion to put you over your sales quota for the year. But it's difficult to reach all of them at the right time. Put them all in a group named for the promotion. When the season approaches, you can send them mailings all at once! You can give each of them a call in just a few minutes! You can give them the special attention they need quickly and easily (and they will be impressed enough to give you the sales).
- ✓ You're the recruiting officer for the local Chamber of Commerce and the Spring drive is coming up. You've been given a list of prospective members. But how do you keep track of them all—and notify them of the recruiting luncheon in time? Put them in a "Chamber Prospects" group, and reach them all at the same time!

### How to Create a Group

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It will take you about 8 minutes to create a group.

Now how do you put those scattered contact records into a tidy group?

1. Following the instructions in the previous section, "Lookups," create a lookup to quickly gather the contacts you want included in the group.

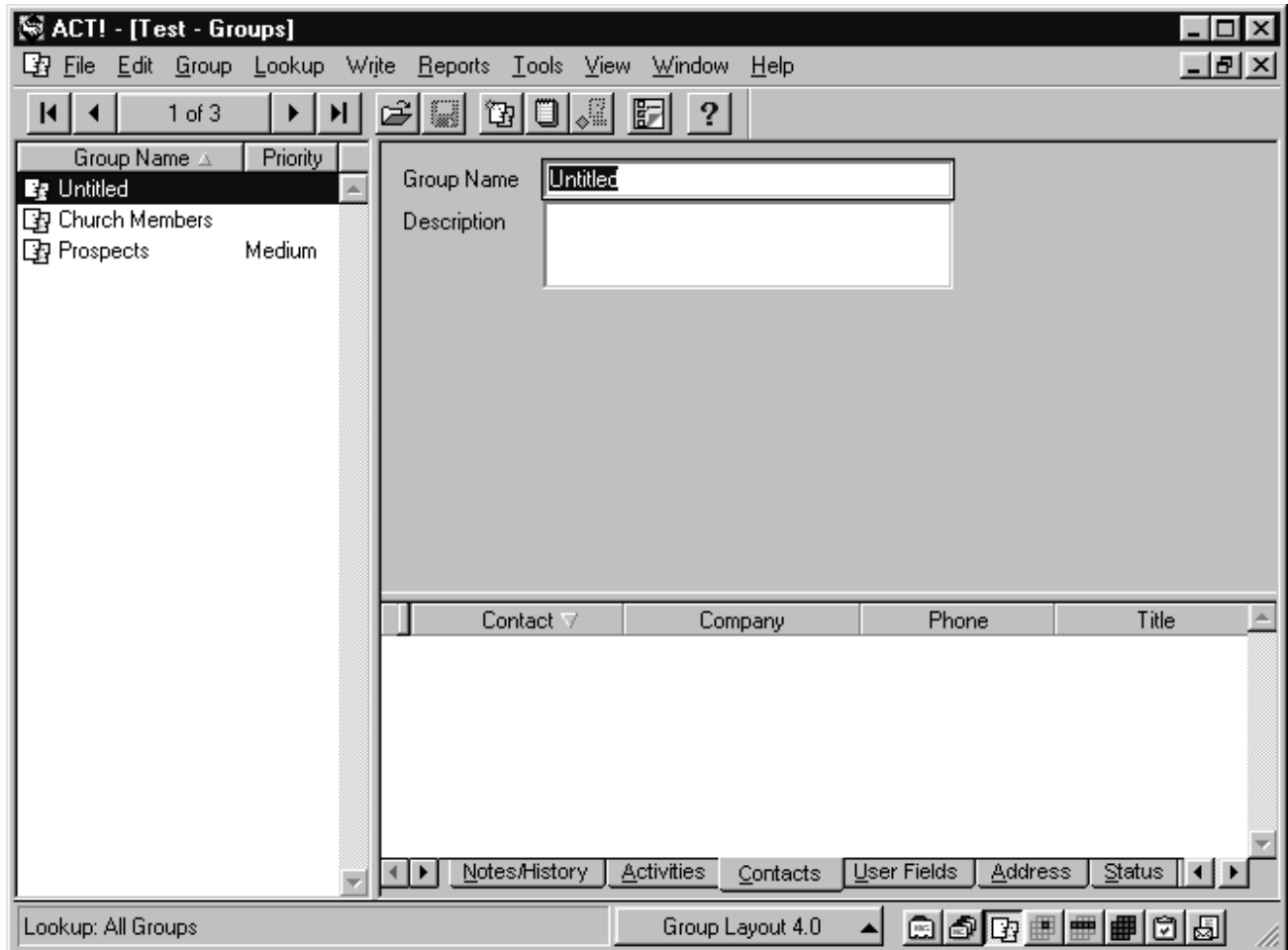


2. Click on the Groups button at the bottom of the screen.

The group screen is displayed.

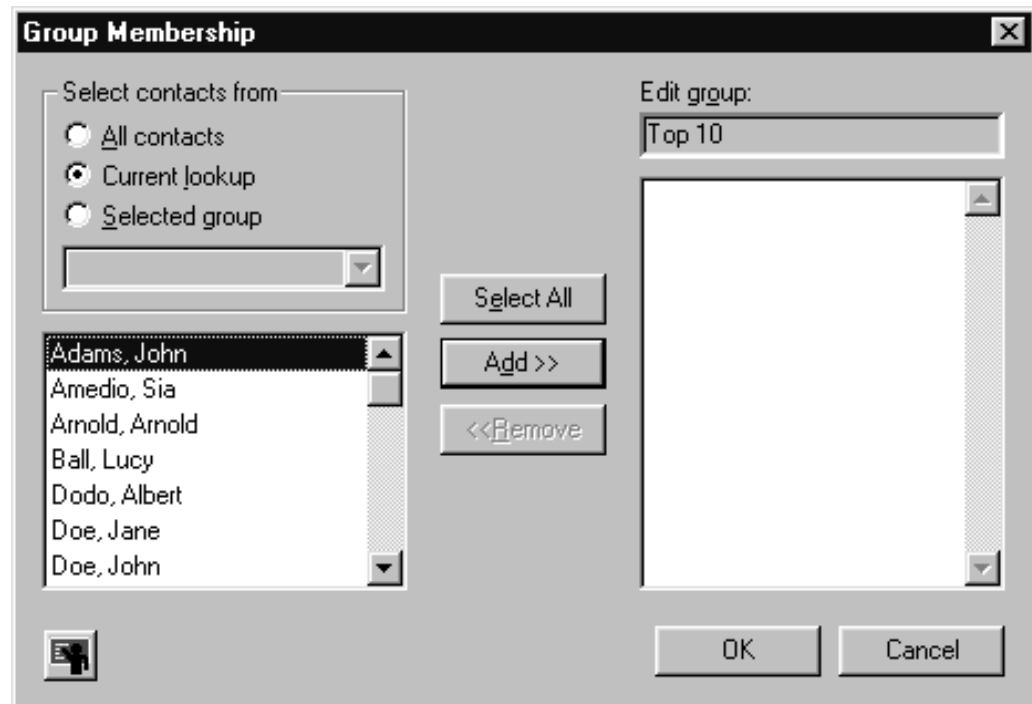


3. If you have not created any groups yet, "Untitled" appears as the group name. If there is already a group in your database, select the New Group tool from the toolbar to display an "Untitled" group (or click the right mouse button and select New Group from the shortcut menu).



4. Type the name you want to give the group in the “Group Name” field and press [Enter]. The name replaces “Untitled” in the Group Name list on the left.
5. Type a description for the group in the “Description” field.
6. Click on the Group Membership tool in the toolbar. The Group Membership dialog box is displayed.





7. Click on **Current Lookup** under “Select contacts from.”

The contacts in the lookup you created are displayed in the contact list.

8. Click on **Select All**. All the contact names are highlighted.
9. Click on **Add>>**. The contacts are moved to the group list on the right.
10. Click on **OK**. A group containing the specified contacts is created.

Note that the group screen has tabs at the bottom to view different windows, just as the contact screen does.

11. Now select the **Contacts** tab at the bottom of the screen. All the contacts in the group are listed.

Contact ▾	Company	Phone	Title
Debbie Walton	Onsight Group	972-999-5555	
Doug Markbright	Pasta To Go	916-555-1919	President
Sia Amedio	Pasta To Go	916-555-1919	

Double-click to display contact record.

12. Click on the **User Fields** tab.

You can enter field data for the group in these fields, and you can rename them and create drop-down lists, just as you did for the contact screen. (Remember to select Groups as the record type in the Define Fields dialog box.) Use these fields to enter information relating to the group.

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***Suggested group field names:***

- Opportunity
  - Review Date
  - Group Leader
  - Primary Objective
  - Outcome
  - Reasons Outcome
- 

13. Click on the **Address** tab.

You can enter division, address, city, and state information for the group if the group contains contacts from the same company or division.

14. Now click on the Status tab.

Create Date	5/18/98	Priority	<input type="text"/>
Edit Date	5/18/98		
Merge Date			
Public/Private	Public		
Record Creator	Jane Doe		
Record Manager	Jane Doe		

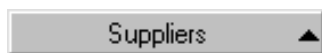
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*Mastering  
groups will  
increase  
your  
income!*

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Statistics for the group record are displayed, and you can enter a priority to indicate the importance of the group. You can also make the group private if other users have access to your database and you don't want them to have access to the group.

- ✓ From the Group screen, to display the contact records for a group, double-click on the group name in the Group Name list.
- ✓ From the Group screen, to display a specific contact record from the group, double-click on the contact's selection button in the contact list.
- ✓ To change the group of contact records you are viewing, use the Groups switch.



Helpful Hint 

Create REFERRAL groups to shorten your sales cycle. Put the names of the contacts you want to use as referrals for a specific purpose into a group. Then, when someone asks for a referral list, just pull up the appropriate group, and generate a quick report listing their names and phone numbers.

If you already have a group that contains much of the same information (user fields, address, status) as one you want to create, select the group, click the right mouse button, and select Duplicate Group from the shortcut menu.



### What You Can Do With a Group

Now that you have grouped your contacts into categories, what can you do with the group records?



1. You can keep notes for the group. At the group screen with the group selected, press [F9] to write a note.
2. You can attach a file to a group record. At the Notes/History window for the group, bring up the shortcut menu, select **Attach File**, and select the file to attach.
3. You can assign a note, history, or attachment from a contact record to a group record. With the Notes/History window in the contact record displayed, select the note, history, or attachment, then click on the **Details** button. Select the group from the "Group assignment" list, and click on **OK**.

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If you are at the contact screen and have a group selected (using the Group switch), any notes, histories, or attachments created are automatically assigned to the group record.

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	Date	Time	Type	Regarding	Contact
	5/19/98	11:28 AM	Note	Remember to give Ed report on group	Sia Amedio
	5/5/98	2:38 PM	Call Received	status of materials... liked phone pitch "you keep it very simple" asked him to send me xls of status.	Sia Amedio

4. You can associate an activity with a group. You can't use the group record to schedule an activity for the group, but an activity scheduled for a *contact* or contacts in the group can show up in the group record. When you schedule an activity for a contact, select the group from the "Associate with group" drop-down list (Schedule Activity dialog box, Advanced Options tab).

### How to Schedule Activities for a Group

OK, now you know how to make the activities and notes for contacts in a group show up in the group record, but what if you want to actually schedule a call or meeting or write a letter or proposal to every member of a group at the same time?

1. Select your monthly calendar.
2. Go to the month that you want to schedule the activity.
3. Right click on the date that you want to schedule the activity, and select **Schedule: Call, Meeting, or To-do** from the shortcut menu.
4. Select the purpose of the activity from the "Regarding" drop-down list, and enter the date, time, duration, priority, and so on in the Schedule Activity dialog box.