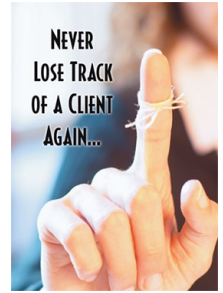


# SendOutCards - Training Tips #2

## Set up Your Group Names - Add a Contact - Send a Card



### Setting Up Your Group Names

The purpose of creating a group is so that you can categorize your contacts in a way that will make it easier to send the same card to more than one person at a time.

This can also be a good organizational tool to make it easier to find contacts in the future. Groups might include obvious ones like Family, Friend, Employee, Client, Inactive Client, Referral Partner, etc.

Step 1: Click on "Manage Groups" (far right of the red tool bar at the top of the page).

Step 2: In the box under "Add a New Group", type in the name of the new group that you would like to create and then click the "Add Group" button.

### Once you have created groups, you can add people to a group in two ways:

1. When you are entering new contacts you can **scroll down to the bottom of that contact record** and check all group boxes that apply to that individual. (People can belong to as many groups as you'd like.)
2. **Another way to add a Contact to a Group is to** - Click on "Contact Manager" from the red bar at the top. Then click "List All Contacts". Next click "Uncheck All" then go back and place a checkmark to the left of each name you want to add to a given group. Then click on the Add Checked to a Group link, at the top right of the page and all of the checked names will be added to that group. **(Caution: Do not click the "delete" button unless you want to delete someone from your database!** Just uncheck their name to exclude them!
3. **To find someone in a group**, go to Contact Manger. Scroll to the bottom of the page and click on "Clear Group Selection". Then select the group you want to look up by placing a check next to it. Click on "Find Contact". This will pull up a list of all of the people listed in that group.

### How to Add a Contact

- **Add a Contact:** Click on "Add New Contact" in the red bar at the top of the page and add the names and contact information of the first few people you'd like to send cards to.
- **Importing your database:** As an alternative to adding contacts one at a time, you can import your database. View the webinar on this topic by clicking on "System Training Webinars" on the Main page.
- **Send out a few cards to people you know.** These could be "Thinking of You" cards, "Thank You" cards or "Special Occasion" cards. Pull up the name of the person you'd like to send a card to by clicking on "Contact Manager" and doing a search for their name. Then click "Send Card".
- **Alternatively, you can select a card first.** Then when you get to the "Recipient Information" you can click "Find Existing Contact". Do a search for their name and select the name of the person you'd like to send this card to.
- **If the person you are sending a card to is NOT yet in your contact manager**, click on Card Catalog, select the card, enter the address of the person you'd like to send the card to and once that card is sent, they will be added to your contact manager.

Keep in Contact - Keep in Mind \* SendOutCards - Bring in Business

Have fun sending out cards!

Be sure to let your sponsor / coach know if you have any questions or if you would like to discuss any ideas.