How to Create "Groups" in the Contacts Module in UVC

It is possible to create a "grouping" of existing clients that are part of the same family or simply part of a specific group (like an Insurance Company). The possibilities are endless when creating groups in the Contacts Module.

There are two methods in which you can create "groups" in UVC. You can then decide internally which method is best suited for your team needs.
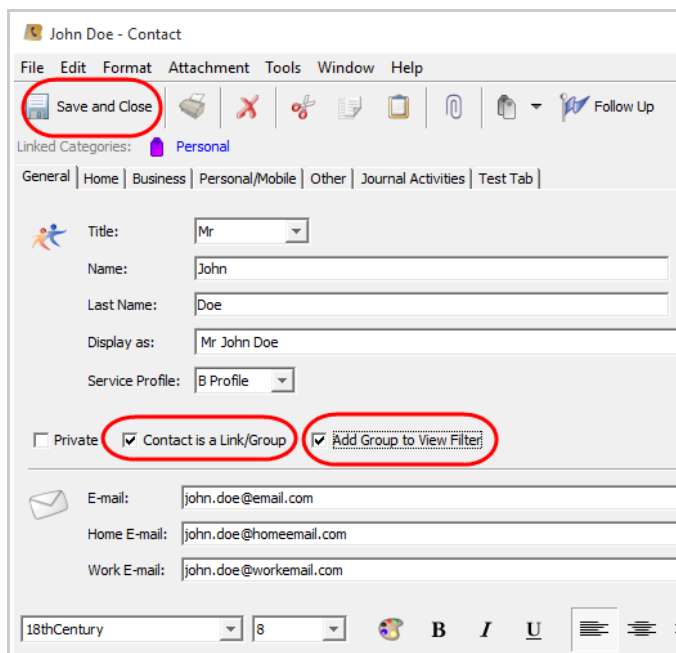
1. The **first method** is better suited in linking members of the same family together in a group. Your first step is to select one contact that is part of that family. That selected contact will be the considered the "main primary parent" of that group.
    In my example I have 3 clients and I want all 3 clients to be under one single family group:

    - Mr John Doe
    - Mr Tony Stark
    - Ms Jane Mary Doe

    In this example I will choose Mr. John Doe as the "main primary parent" of that group:

2. I double click on Mr John Doe and click on the option **Contact is a link/Group.**
    If you wish you can click on the **Add group to View Filter**. This option will enable this group to be filtered in your **View** option. But we recommend only clicking on this optio for distribution groups rather than family groups.
    Click on **Save and Close** button to save your changes


3. Not only is Mr. John Doe a contact in my list but he is also also considered a "group".
    You will notice that that there's an icon that will appear next to the contact's name that has an orange and blue character. This icon signifies a "Group".

4. To add the two other clients to this new group you simply have to right click on the "group" you created (with Mr John Doe) and select the option "Manage groups/relationships for contact".
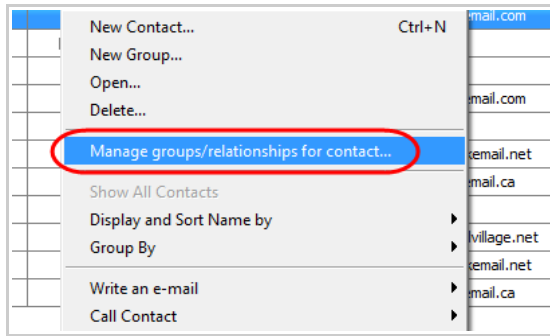
Then simply find and select the clients you want to add to this new "group".
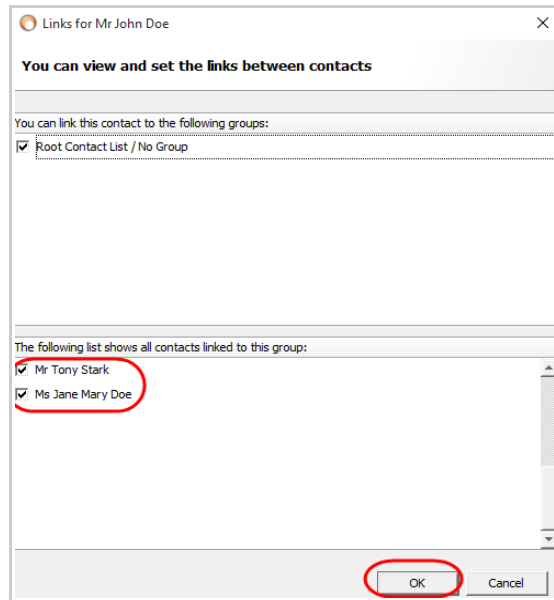
*Note: A*s an alternative you can also drag and drop the contact(s) to this new group.

Once you click on **OK** button you will see that Mr Tony Stark and Ms Jane Mary Doe are now under the Mr John Doe family group. All 3 clients are now under 1 family group.

⊟ Mr John Doe	john.doe@workemail.com	(613)222-4141 Ext 1002			Personal	28-Oct-1971
Mr Tony Stark	tony.stark@workemail.net			Stark Industries	Personal	
Ms Jane Mary Doe	jane.doe@workemail.ca	(613)898-7774 Ext 0011			Personal	11-Jun-1975

1. The **second method** is to create a group and then link all clients under that new "Group". Creating a new group is mostly used for distribution lists (ex: group all insurance contacts under one single group or group all corporate contacts under one single group etc...). Some of the following steps are similar to the first method mentioned above.

2. Go to your **Contacts Module** in UVC.
    Select the **Contact** name header which should be located at the top right of the contact screen.
    Right click and select the option to create **New Group...**
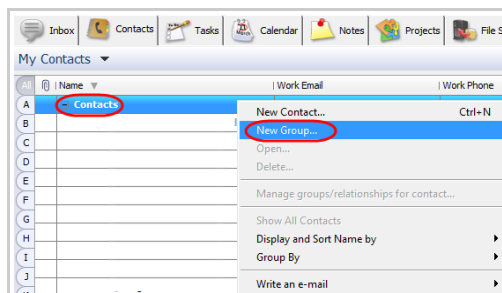
3. Enter the information related to this group.
   In this example I will name this group the **The Doe Family** and click on the option **Contact is a link/Group** and if you wish click on the **Add group to View Filter**. This option will enable this group to be filtered in your **View** option. We recommend clicking on this option only for distribution groups rather than family groups.
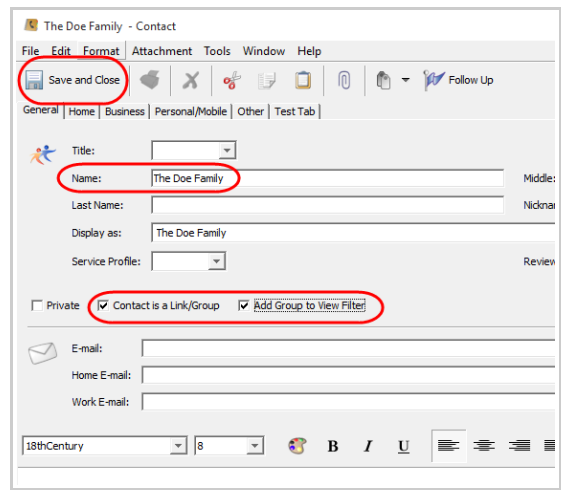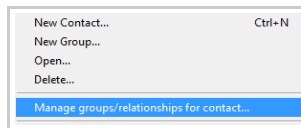
   Click on **Save and Close** button to save your changes

4. This will create by new family Group. You will notice that that there's an icon that will appear next to the group name that has an orange and blue character. This signifies a "Group".
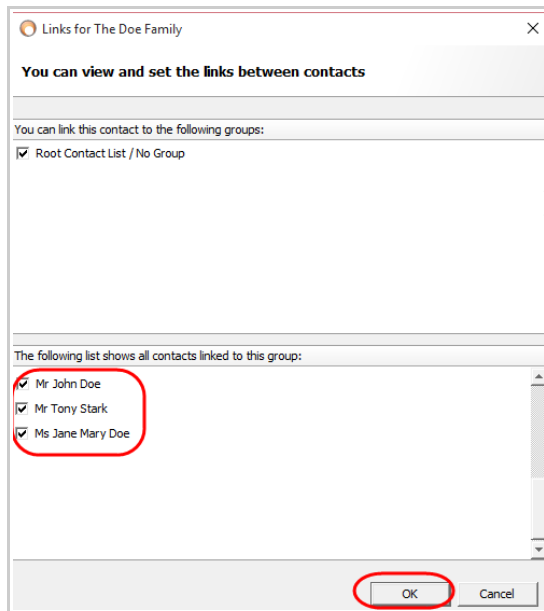

5. Right click on this new group and select the option **Manage groups/relationships for contact**.

6. Add all of the clients that you would like to link inside this new group.

   Note: In this grouping method I will also select John Doe because using this method I created a new "group" and did use an existing clicking to convert him as a group.

   Note: As an alternative you can also drag and drop the contact to the new group.

   Once done you will see the new group **The Doe Family** with every client I selected in the previous step:

7. You will need to select the option **Groups** under "Group By" in the **Contacts Module**. If you do not select this option **you will not** be able to see the groups you recently created under either scenario mentioned above.

You simply need to right click and select that option.