Creating and Communicating with a Group on TidyHQ



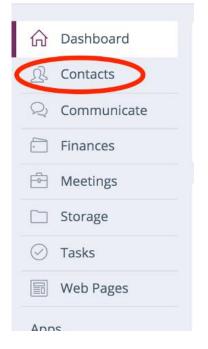


Creating and Communicating with a Group on TidyHQ

Creating a Group on TidyHQ

Creating a group on TidyHQ will allow you to keep a group of contacts stored in one place. You can then export this group or send emails through TidyHQ to this group.

1. Select Contacts from the options on the left-hand side



- 2. To make viewing easier, scroll down to the bottom and change the **Contacts per page to 500.**
- 3. Scroll back up. You can filter the contacts based on the fields that you would like to select the group based on. You can utilise the **Filter** or **Advanced Filter** options next to the search bar.



4. Go to the list and tick any member who you would like to add to the group (on the left of their name). Alternatively, you can select all by ticking the box next to the contact heading.

Dashboard	Contac	ts							
R Contacts	Q. Na	ame, Phone, ID, Compar	iy or Email	3 of 20	Actions ~	TFilter Advanced Filte	IS NEW	1	⊞ &+
Q Communicate									
Finances		ontact 🗸	ID Number	Email		Membership Level	Membership Status	Membershi	p Start Dat
Meetings		john.mcdonough@cy	clinį	john.mcdond	ough@cycling				
Storage	0 0	Cycling Australia							
🕝 Tasks		Cycling Australia							
Web Pages		Nicole Adamson	AC429838	nicole.adams	son@cycling.o	CA: Ride - Adult - Annual	Active	06-08-2020	
Apps						CA: Ride Plus - Adult (19-6	Expired	29-07-2019	
3illing Admins & Roles		Alex Anasson	AC444305	alex.anasson	@auscycling	CA: Ride - Adult - Annual	Cancelled		
Organisation Settings	V					Non-Riding - Annual	Cancelled		
Archive						Race - All Discipline - Adult	Cancelled		
Trash Help & Support						Race - All Discipline - Adult	Active	13-01-2021	
neip a support						Race Club Add-On - Adult	Cancelled		
		Declan Curran		iasharrison1	9@hotmail.com				

- 5. Scroll back up and select Actions (next to the search bar) and Add to Group.
- 6. Click +New Group and name it suitably. Click Add.

You have now created a group! To communicate with this group from TidyHQ, please see the instructions below.

- 1. Select **Communicate** from the options on the left-hand side.
- 2. In the **Pick a Contact or Group** bar, start typing the name of the group you have created. Click on the group and add any other contacts or groups you would like to send the email to.

Dashboard	New Email + New -		
၌ Contacts			
Communicate	🗟 Inbox 🛛 🚿 Sent	Archives Pick a Contact or Group	
Finances	Pick a Contact or Group	Who would you like to send your email communication to? You can send it to	
Meetings		as many Contacts or Groups as you would like.	
Storage	Subject		0
Tasks	Scheduled to be sent at		0
Web Pages	2.4		
pps	Body	Format - B I A- = = = = = = @ Source	
Billing			
dmins & Roles			

- 3. Adjust the email accordingly and add the **Subject** and **Body** required. Choose to add any attachments to the email.
- 4. Click Send.