

Creating and Communicating with a Group on TidyHQ

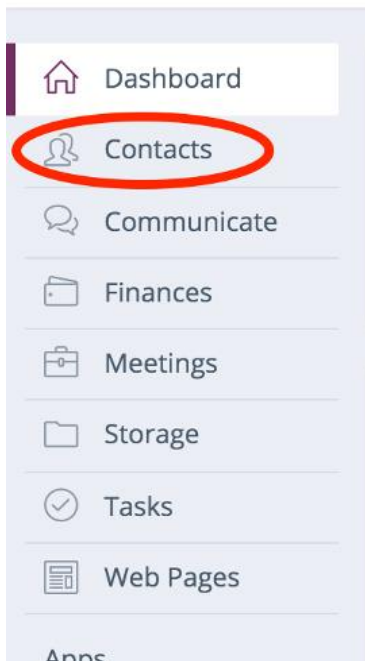


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Creating a Group on TidyHQ

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.

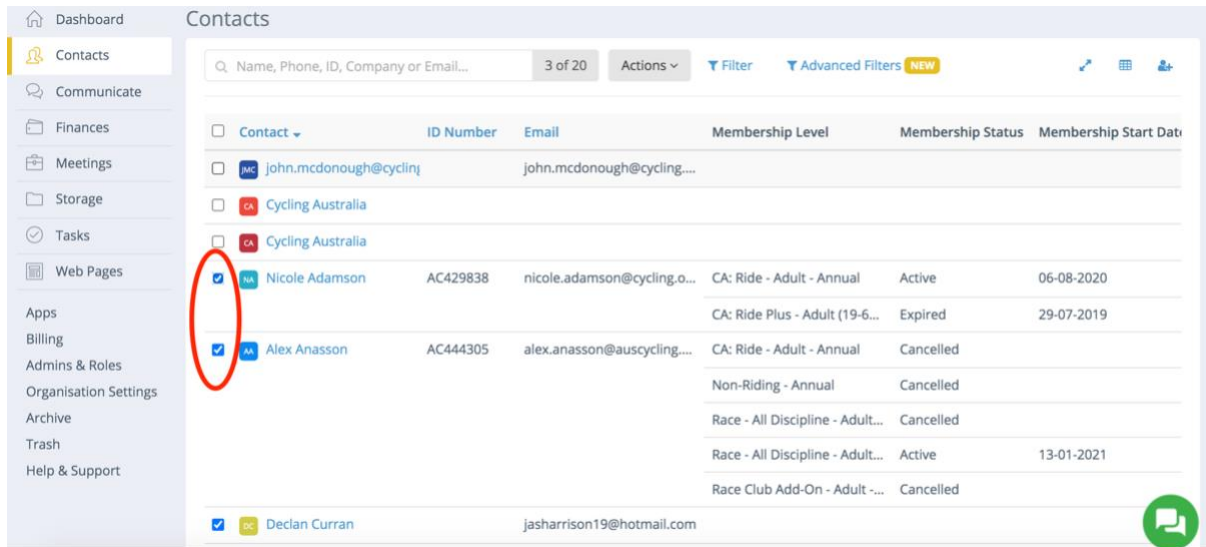
1. Select **Contacts** from the options on the left-hand side



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.



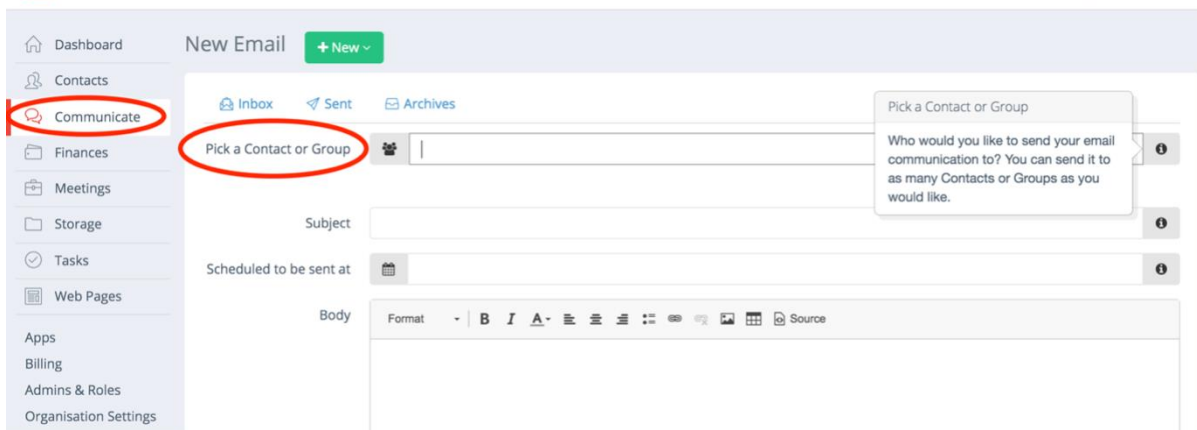
4. Go to the list and tick any member who you would like to add to the group (on the left of their name). Alternatively, you can select all by ticking the box next to the contact heading.



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.



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