

5.7 Group/Mailing Lists

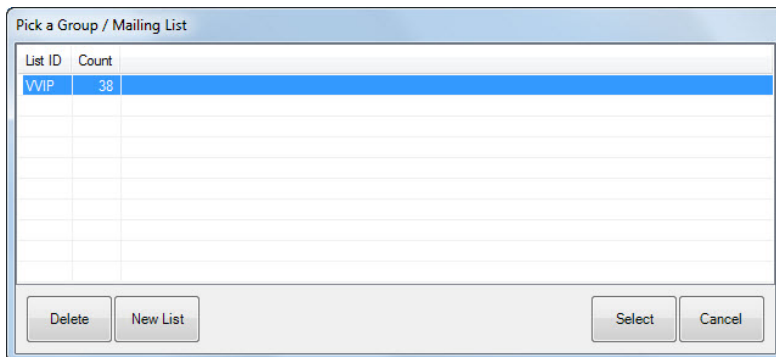
The Edge allows you to create and maintain lists of customers for marketing and reporting purposes and those lists can be used throughout the program. There are two ways you can accomplish this in the program. The group/list option is found under Customer Export. You can also add customers to lists through the **Customer Filter** under the **Other Keys** tab. List membership also appears as a filter in the Customer find filter. For example, if you want to send an email, from the customer find area of Email function, specify the desired list and those members will be added to the email recipient list. For a video tutorial about working with customer filters, go to <http://www.screencast.com/t/MkdH1e7iQmqR>.

5.7.1 Creating a New Group/Mailing List from Customer Find

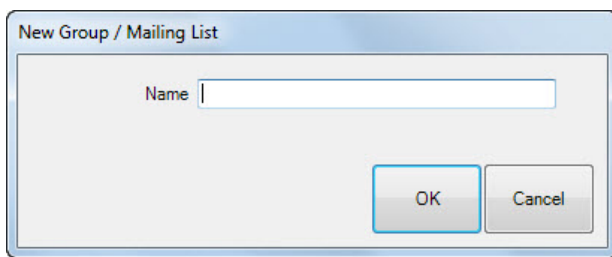
1. Select **Customer ► Find**.
2. Enter criteria for customers that should be in the list and select **OK**. This will return a list of matching customers in a customer list window.

ID #	Last Name	First Name	Spouse Last	Spouse First	Phone	Phone	Email	Email	Address	Company	Street
001-00000	Ben	Cash			WORK	245-0830	HOME	cben@msn.com			
001-00000	Ben	Cash			HOME	292-4318	HOME	cberri@msn.com			
001-00001	Haverstraw	Zombie			HOME	630-2350					
001-00001	Haverstraw	Zombie			WORK	386-2546					
001-00002	Gunpowder	Faye			HOME	874-1685	WORK	gunpowder.faye@msn.com	DEFAULT		476 Sandersville St
001-00002	Gunpowder	Faye			SUMMER	788-1916	WORK	gunpowder.faye@msn.com	DEFAULT		476 Sandersville St
001-00002	Gunpowder	Faye			WORK	951-2537	WORK	gunpowder.faye@msn.com	DEFAULT		476 Sandersville St
001-00008	East	Mike	Beaton	Carol	WORK	798-5969	WORK	mike_east@aol.com	DEFAULT		748 Center Conway Ave
001-00008	East	Mike	Beaton	Carol	HOME	420-0464	WORK	mike_east@aol.com	DEFAULT		748 Center Conway Ave
001-00012	Waycross	Dee			HOME	531-3708	HOME	waycrossdee@aol.com	DEFAULT		285 Imler St
001-00012	Waycross	Dee			WORK	980-0549	HOME	waycrossdee@aol.com	DEFAULT		285 Imler St
001-00025	Telferner	Pat	Zavoral	Ann	HOME	620-0092	WORK	p.telferner@msn.com	DEFAULT		497 West Fargo St
001-00025	Telferner	Pat	Zavoral	Ann	HOME	620-0092	WORK	p.telferner@msn.com	DEFAULT2		357 La Crescent Ave
001-00025	Telferner	Pat	Zavoral	Ann	WORK	992-1677	WORK	p.telferner@msn.com	DEFAULT		497 West Fargo St
001-00025	Telferner	Pat	Zavoral	Ann	WORK	992-1677	WORK	p.telferner@msn.com	DEFAULT2		357 La Crescent Ave
001-00026	Evanston	Staci			HOME	961-8624	WORK	staci.evanston@yahoo.com	DEFAULT		532 Rollins Rd
001-00026	Evanston	Staci			WORK	822-0821	WORK	staci.evanston@yahoo.com	DEFAULT		532 Rollins Rd
001-00033	Fair	Zombie			HOME	276-3728					
001-00033	Fair	Zombie			WORK	530-4355					
001-00034	Dunnigan	Shirley			HOME	269-1514			DEFAULT		415 Jenkinsburg Ave
001-00034	Dunnigan	Shirley			WORK	813-0745			DEFAULT		415 Jenkinsburg Ave
001-00036	Rib	Jill			WINTER	595-6033	WORK	jill.rib@msn.com	DEFAULT		172 Peytona Dr
001-00036	Rib	Jill			WORK	942-5633	HOME	jill.rib@yahoo.com	DEFAULT		172 Peytona Dr
001-00036	Rib	Jill			WINTER	595-6033	HOME	jill.rib@yahoo.com	DEFAULT		172 Peytona Dr
001-00036	Rib	Jill			WEEKEND	397-9859	WORK	jill.rib@msn.com	DEFAULT		172 Peytona Dr
001-00036	Rib	Jill			WEEKEND	397-9859	HOME	jill.rib@yahoo.com	DEFAULT		172 Peytona Dr
001-00036	Rib	Jill			HOME	283-8839	WORK	jill.rib@msn.com	DEFAULT		172 Peytona Dr
001-00036	Rib	Jill			HOME	283-8839	HOME	jill.rib@msn.com	DEFAULT		172 Peytona Dr

3. Select **Group/Mailing List** from the bottom of the window. The **Pick a Group/Mailing List** window will appear with existing groups.



4. Select **New List** to create a new group. This will return the **New Group/Mailing List** window where you are asked to provide a name for your new group.



5. Enter a name and click **OK**. You have successfully created and saved a list of customers.

5.7.2 Managing Existing Groups/Lists

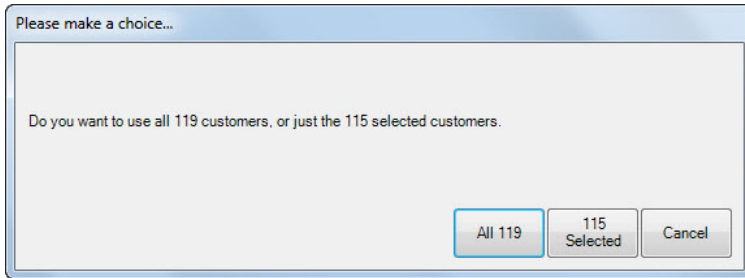
To bring up an existing customer group/list:

1. Select **Customer ► Find** and go to the **Other Keys** tab.
2. From **Group/Mailing List** drop-down menu, select your list, and select **OK**.
3. A list of customers in that particular group will be shown.

To remove customers from an existing group/list:

1. Using **Customer ► Find**, select the **Other Keys** tab
2. Use the **Group/Mailing List** drop-down menu to find the group you wish to edit.
3. Select **OK** to close the **Group/Mailing List** filter.
4. Select **OK** from the **Customer Find** filter to start the search. A list of customer in the group will appear.
5. Right click anywhere in the list and select **Show Checkboxes** from the context menu.
6. Right click again anywhere in the list and select **Check All**.
7. Go through the list and uncheck those customers you wish to remove.
8. Select **Group/Mailing List** and choose your group/list again.
9. Select the name and select **Select**.

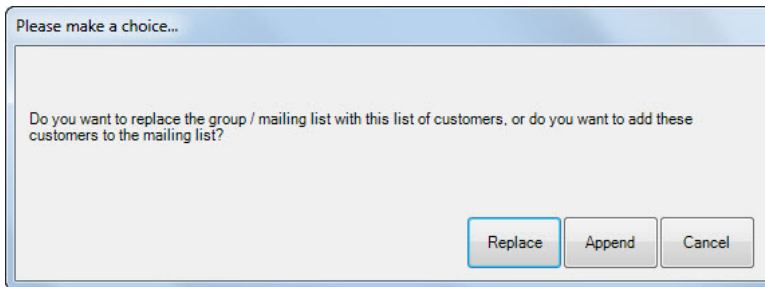
10. You will be prompted to indicate whether you wish to use all customers or just those you selected. Choose just those you selected.



11. You will be prompted to indicate whether you wish to **Replace** or **Append**. Select **Replace**.

To add customers to an existing list:

1. Use **Customer ► Find** to bring up those customers you wish to add.
2. Right click anywhere in the list and select **Show Checkboxes**.
3. Check all customers you wish to add to this list. You can right click again to use the **Check All** option.
4. Select **Group/Mailing List** at the bottom and choose the group/list to which you want to add these customers.
5. You will be prompted to indicate whether you wish to use all customers or just those you selected. Choose just those you selected.
6. You will be prompted to indicate whether you wish to **Replace** or **Append**. Select **Append**.



5.7.3 Managing Lists from the Customer Record

You can manage what groups/lists a customer belongs to directly from their customer record. This method only allows you to add/edit/delete one customer at a time from a group/list. To do so:

1. Select **Customer ► Find**, look up a specific customer, and double click to open his or her record.
2. Select the **Other Keys** tab.

- The pane on the right side contains all currently active groups/lists. You can assign this specific customer to a group by checking it, or uncheck it to remove them. Also, you can create new groups/lists here with the **New Group/List** button at the bottom.

