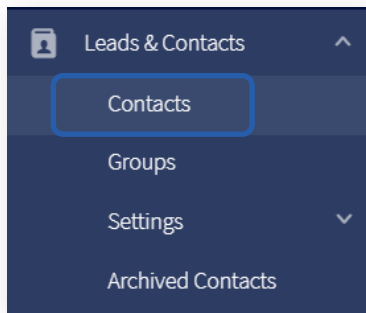


## Getting Started

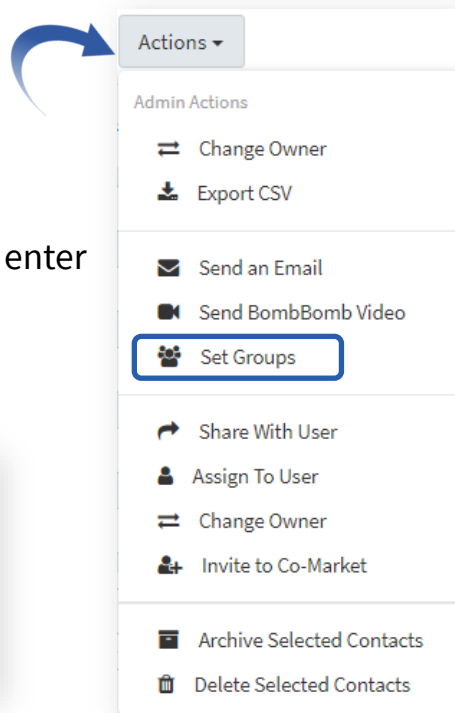


1. Login to Total Expert Now.
2. Access **Leads & Contacts** in the main menu.
3. Select **Contacts**.

## Adding Contacts to a New Group

<input type="checkbox"/>	Actions	First Name	Last Name
<input checked="" type="checkbox"/>		Anthony	Thomas
<input checked="" type="checkbox"/>		Beth	Bonds
<input checked="" type="checkbox"/>		Buster	Pecsi
<input checked="" type="checkbox"/>		Cam	Stern
<input checked="" type="checkbox"/>		Christina	Carlson
<input type="checkbox"/>		Cora	Thompson
<input type="checkbox"/>		Daryl	Pence

1. Select the contacts that you would like to add to a new group.
2. Select **Actions** at the top of the screen
3. Select **Set Groups**.
4. In the **Add a New Group** field, enter the name of the new group.
5. Select **Add a New Group**.

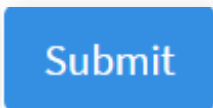


**Assign Lead Groups**

Action

Add Groups  
 Remove Groups

6. Select **Submit**.



## Adding Contacts to an Existing Group

<input type="checkbox"/>	Actions	First Name	Last Name
<input checked="" type="checkbox"/>		Anthony	Thomas
<input checked="" type="checkbox"/>		Beth	Bonds
<input checked="" type="checkbox"/>		Buster	Pecsi
<input checked="" type="checkbox"/>		Cam	Stern
<input checked="" type="checkbox"/>		Christina	Carlson
<input type="checkbox"/>		Cora	Thompson
<input type="checkbox"/>		Daryl	Pence

1. Select the contacts that you would like to add to a new group.
2. Select **Actions** at the top of the screen
3. Select **Set Groups**.
4. Select the Group that the selected contacts should be added to.



Actions ▾

Admin Actions

- Change Owner
- Export CSV
- Send an Email
- Send BombBomb Video
- Set Groups**
- Share With User
- Assign To User
- Change Owner
- Invite to Co-Market
- Archive Selected Contacts
- Delete Selected Contacts

**Note:** You are able to select multiple groups to add the selected contacts to.

### Assign Lead Groups

Action	<input checked="" type="radio"/> Add Groups <input type="radio"/> Remove Groups
<input type="text" value="Add a new Group"/> <span style="background-color: #0070c0; color: white; padding: 2px 10px; border: none;">Add New Group</span>	
Groups	<input type="checkbox"/> Business Banking - 1 <input type="checkbox"/> Event attendees - 2 <input type="checkbox"/> Mobile Banking Users - 5 <input type="checkbox"/> Platinum Credit Card - 2

6. Select **Submit**.

