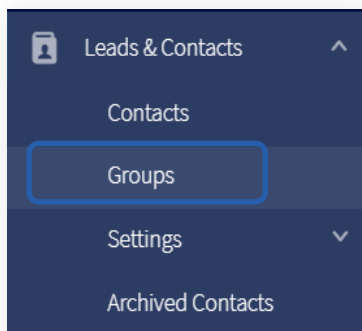


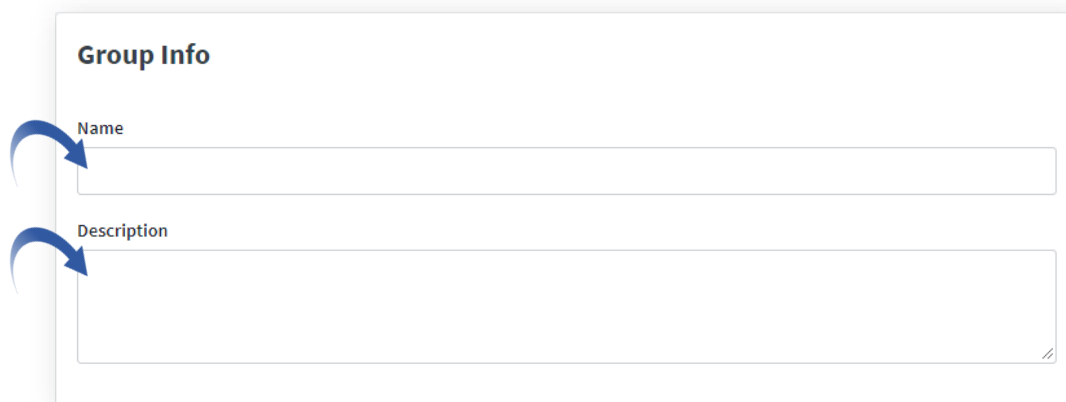
Getting Started



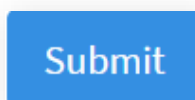
1. Login to Total Expert Now.
2. Access **Leads & Contacts** in the main menu.
3. Select **Groups**.

Creating an Standard Group

1. Select **+Create** in the upper left corner of the screen.
2. Enter the **Name** of the group you would like to create.
3. Enter a **Description** of the group.

A white form titled 'Group Info'. It has two input fields: 'Name' (a single-line text box) and 'Description' (a multi-line text box). Blue curved arrows point to each field from the left. There is a small icon in the bottom right corner of the description box.

4. Select **Submit**.

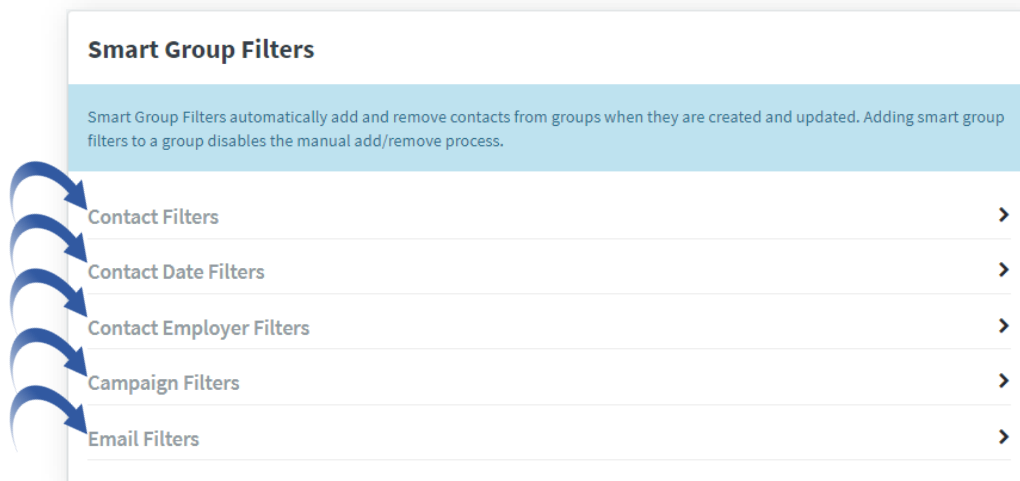


Creating a Smart Group

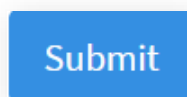
1. Select **+Create** in the upper left corner of the screen.
2. Enter the **Name** of the group you would like to create.
3. Enter a **Description** of the group.
4. In the **Smart Group Filters** select the filter(s) which will establish the criteria that determines what contacts are automatically placed into or removed from the group. Selecting a filter category will expand that category to provide you with the available criteria.



Note: You may utilize multiple filters to create the Smart Group.



5. Select **Submit**.



Note: The smart group will auto-populate with all contacts that meet the filter criteria. Any new contacts added to your contact list will automatically be added to the smart group if it meets the filter criteria.