What are Groups?

In addition to individual Contacts, your database comes with a Group functionality. This is similar to “Households” in typical CRMs. To allow full flexibility, the Flipcause CRM allows you to have various types of Groups: Household, Business, Nonprofit, Foundation, School, Team, Club, Association, Religious Organization, Media Organization, Fraternity, Sorority, Other, or just a general Group.

How do Groups work?

- The Group Record will reflect a cumulative total of all the contributions and activities made by all members in that group.
- Every Group will also have a primary contact whose information will serve as the contact information (email address, phone number, etc.) for the entire group.
- Contacts can be part of multiple Groups. For example, if Christy Yip is one of your contacts, she can be part of the Yip Family Group (Household) along with other family members of hers that are in your database, as well as the Flipcause Group (Business) along with other colleagues of hers that are in your database.
- Any time a Contact Record is created, a Group Record is also created for it, and that Contact becomes the Primary Contact for its Group. The Group Record that is automatically created will be named after the Contact. For example, when a Contact
is created for Alex Paranada, he is automatically part and primary of the Alex Paranada Group Record. However, once this is created, you can rename the group to anything you like, or add Alex to another Group if that is more appropriate. You can only delete the original, automatically-created Group, after Alex is added to another group.

- Even though Groups are created automatically, for them to work correctly and reflect the most accurate information, you will want to keep them maintained manually, as in the above example. To get the full utility out of your CRM, you will want to ensure to put your related Contacts into the appropriate Groups.
- Every individual Contact must be part of a Group, even if it's just their own individual group. In fact, most of your Contacts will be on their own in their respective Groups. We explain why this matters in the below section on how to use Groups vs. Contact Records.

**When would I use Groups instead of Contacts?**

Usually, when you'd like to send an email appeal, it makes sense to email every single person (Contact) in your database. This is when you would pull a report of all Contacts and their email addresses.

But often, when you want to send out an appeal with a physical mailer, you don't want to send 5 copies of the same letter to the same address. This is when it becomes useful to put your Contacts into Groups - whether it's by their households, work places, or other groups that might make contributions as a unit.

By using Groups and ensuring that the Primary Group Contact's mailing address is accurate, you can pull a report of your Groups for the purpose of creating a mail merge to send out physical letters or postcards. This way, each business, household, organization, or other location will receive only one mailing for the entire group.

This is exactly why every Contact must be part of a Group - you want to be sure all individuals get their own mailer, too.
**How should I use Business Contacts with Groups?**

Some organizations need the individual Contact Record to reflect a business/organization itself rather than any single person within that business. In these cases, be sure to indicate the Contact Type as "Business" and input the business/organization name instead of a first and last name.

Whenever you add a Contact Record, it will create a Group Record automatically. This works the same way with Business Type Contacts - they will get a Group Record also named after the Business name, and that Business Contact will be automatically the Primary Contact for the Business Group. You can certainly also add individual Contact Records to this same Group.

Whether your Business or Organization type Groups have a Business or Individual type Contact Record as their Primary Contact is up to you!