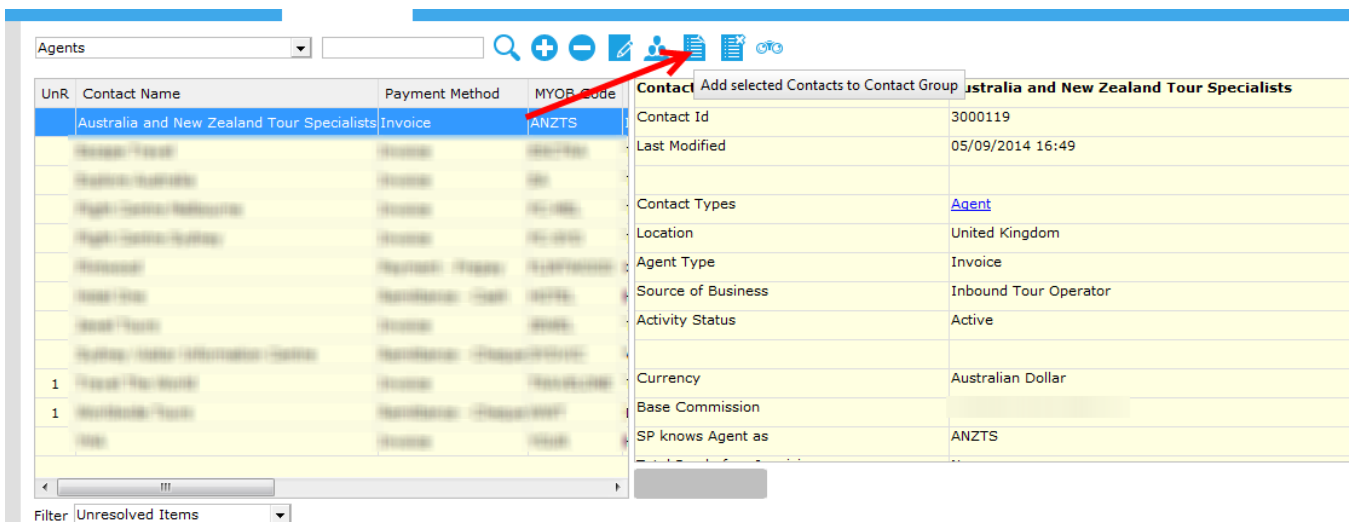


How to: Assign or Remove Contacts/Agent to Contact Group(s)

1. Find the **Contact** you wish to allocate to a Contact group
2. Select the  icon



The screenshot shows the 'Agents' interface. On the left, a table lists contacts with columns: UnR, Contact Name, Payment Method, and MYOB Code. The contact 'Australia and New Zealand Tour Specialists' is selected. On the right, a detailed view of this contact is shown, including fields like Contact Id, Last Modified, Contact Types, Location, Agent Type, Source of Business, Activity Status, Currency, Base Commission, and SP knows Agent as. A red arrow points to the 'X' icon in the top toolbar, which is used to assign or remove contacts from a group.

UnR	Contact Name	Payment Method	MYOB Code
	Australia and New Zealand Tour Specialists	Invoice	ANZTS
	...	...	...
1	...	...	...
1	...	...	...

Contact: Australia and New Zealand Tour Specialists	
Contact Id	3000119
Last Modified	05/09/2014 16:49
Contact Types	Agent
Location	United Kingdom
Agent Type	Invoice
Source of Business	Inbound Tour Operator
Activity Status	Active
Currency	Australian Dollar
Base Commission	
SP knows Agent as	ANZTS

3.

Sel	Contact Name	Payment Method	Tencia Code	Source of Business	Product	Con
☒	Puffing Billy	Invoice	PUFFING_BILLY	(default)		Con
☐	Puffing Billy Operations	Payment - Prepay	PBROPS	(default)	20% Special ITOs API TI - Net Pri	Last
☐	Puffing Billy Preservation Society	Invoice	PBPS	(default)	TO-MC 15% & LAKE 20% - Net Pi	Bus

Add Contact(s) to...

Results

- TO - 10%
- 10% single 10% return School
- 10% single 20% return School
- TO - 20% ATM Special
- TO-MC 15% & LAKE 20%
- TO - 20%
- TO - 25%
- The Andrews Foundation Funding Gr
- Archived
- TO-MC 10% & LAKE 20%
- Incentive Belgrave to Em/Lake Tier 1
- Incentive Belgrave to Em/Lake Tier 2
- OTA-API 20%
- Partnership Program
- Payment - Other (Prepay)
- Schools & Education

Select Cancel

filter: Unresolved Items

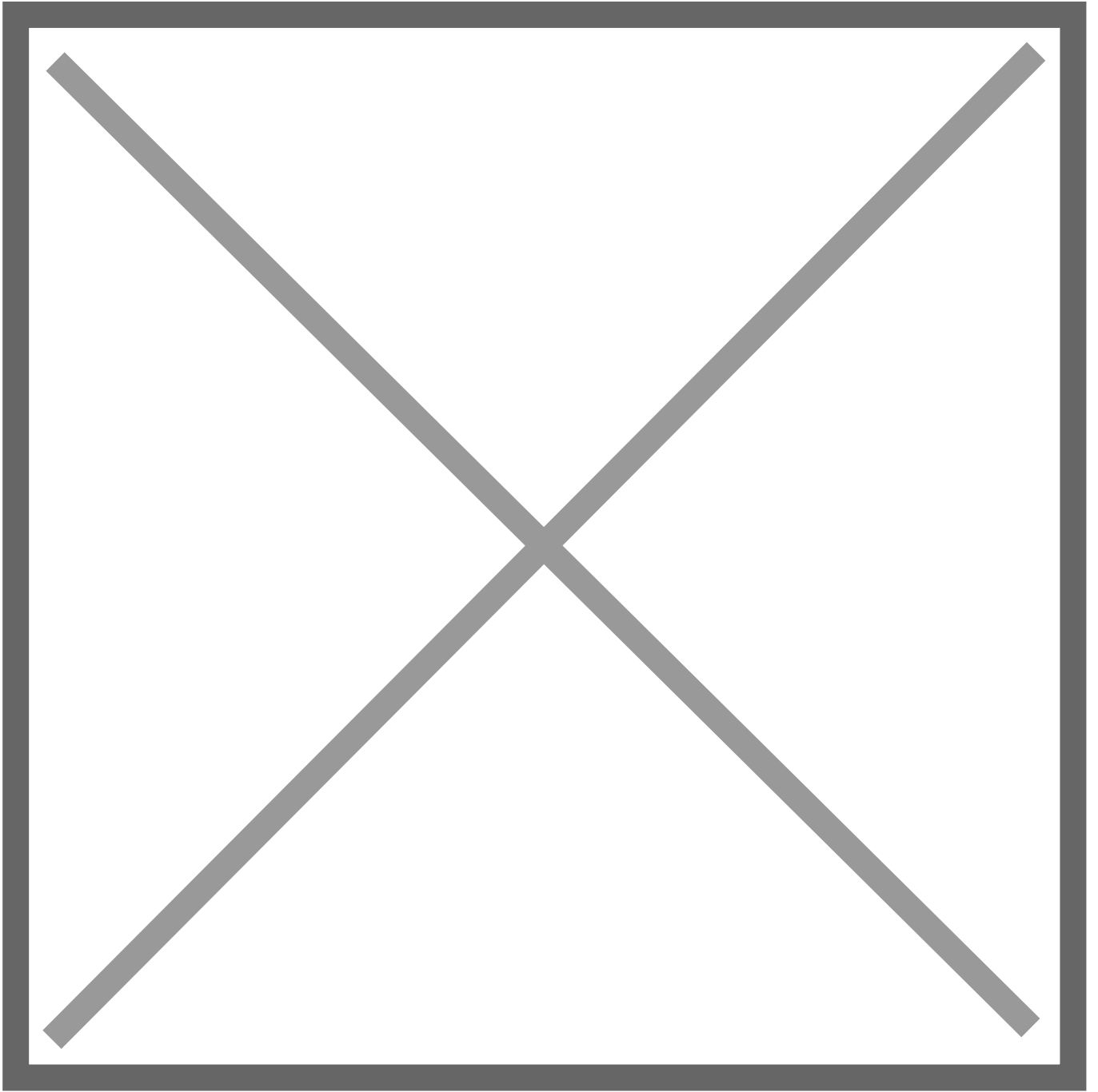
Date/Time	Subject	From	To
-----------	---------	------	----

- This will pop up the list of Contact Groups that can be allocated, double click on the one you wish to add
- Repeat until you have added all the Contact Groups you wish to.

You can add multiple Contacts (agents) to a Contact Group at the same time. However, you **cannot** add multiple **Groups to a Contact**, this has to be done one at a time.

To remove a contact group from a contact

- Right click on the Contact Group you wish to remove
- Select Delete



Revision #1

Created 2025-08-11 04:35:54 UTC by Dylan Healey

Updated 2026-07-14 05:06:48 UTC by Dylan Healey