



Vision Computer Programming Services, Inc.
801 2nd Street, Suite A Safety Harbor, FL 34695
888-425-6964 email@visioncps.com www.visioncps.com

How to Use Groups Effectively

When do you want to create groups in the Member Tracking System?

Groups can be used for field trips, annual membership, sports teams, summer camp and more.

Follow the steps below to create and use a Field Trip to the Zoo group.

1. From the Main Menu, click on Groups.
2. Click on Add Group button in the lower left hand corner and type Field Trip to the Zoo and click OK.
3. Add Members to the group from the right side by double clicking on a name or click on a name and click the green arrow. Add multiple members to the group by clicking on a name and hold down the shift or control key to select multiple members. Click on the green arrow to move them into the new group.
4. Flag this Group for:
 - a. Quick Entry Hardcopy – print the Quick Entry Hardcopy broken down by Groups
 - b. QE Mobile – record attendance in QE Mobile by Group
 - c. Quick Entry Fire Drill Report - print the Fire Drill Report broken down by Groups
 - d. Quick Entry Scan Contacts – during Quick Entry Check Out the Group will be displayed so staff will know where the member is in the building
 - e. Use In Web Registration – Groups are things that parents choose from to sign up members for in Online Web Registration
5. Set a Maximum # Allowed in Group if you have caps for certain programs
6. Active checkbox allows you to mark old Groups inactive so you only see current Groups in your day to day work

Buttons on the bottom:

7. Rename Group – click this to change the name of a group
8. Consolidate Groups if you have created duplicates. Click on Consolidate Groups. Select the group on the left to delete and then select your correct group in the dropdown on the right. Click on the green arrow to consolidate the groups into one.
9. Make Groups Active/Inactive so your older groups are not displayed in Groups dropdowns in other areas of the program. Uncheck the groups you no longer want displayed/active.
10. Create Certificates for a group by clicking on the Select All button under the Current Group Members box on the left and then click on the Certificates button. To change the layout of the certificate, see the Quick Tip on ID Cards.
11. Apply a Fee to a group by clicking on the Select All button under the Current Group Members box and then click on the Apply Fee button. Choose the Account, fill in a Comment and Charge Amount and click on the Apply Fee button. This will apply the fee to all members of the group who are selected.
12. Group Copy & Move – copy, move or remove members from 1 group to another
13. Create Member Messages – create messages for members in a group that will show in their Members screen on the Notes/Msgs tab

14. Reports can be pulled by a group. Example:
- a. Close the Groups screen and click on Reports on the Main Menu.
 - b. Choose the Emergency List/Field Trip Report or Permission Slips/Waiver forms.
 - c. On the Universal Selection Engine, click on the Groups checkbox on the left.
 - d. Choose:
 - i. Show Active Groups Only
 - ii. Show Groups for All Units or one Unit
 - iii. Select Members belonging to at least one group – if you choose two or more groups a member will be chosen if they are in at least one group
 - iv. Select Members belonging to ALL groups – if you choose two or more groups a member will be chosen if they are in ALL the chosen groups
 - v. Select Members belonging to NONE of the groups – if you choose any groups a member will be chosen if they are not in any of the groups
 - vi. Check the ‘Put Selected Groups at Top of List’ to bring the chosen groups to the top if you have many groups for easier viewing
 - e. Choose the Field Trip to the Zoo group on the right and click on Continue.
 - f. This report will print a list of members with their phone & contact information or the Permission Slips/Waiver Forms.

NOTES:

- Groups can be selected for any report in the Member Tracking System that uses the Universal Selection Engine.
- Fees can be applied to groups.
- Certificates can be created for groups.
- Mailing Labels can be created for groups.
- Create as many groups as you need.
- Members can be a part of as many groups as needed.

EXAMPLES:

Summer Camp 2019
Summer Camp 2020
Field Trip to...
Summer Camp Week 1 2020
Summer Camp Week 2 2020
Summer Camp Week 3 2020
Summer Camp Week 4 2020
Soccer Spring 2020
Baseball Summer 2020