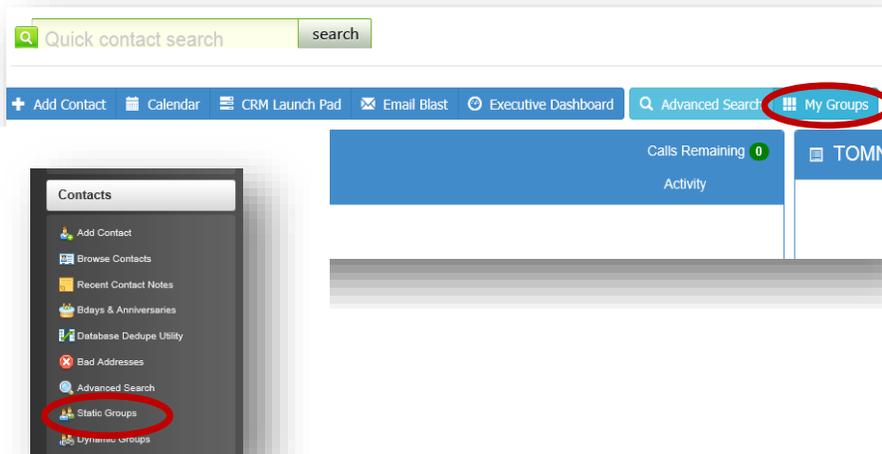




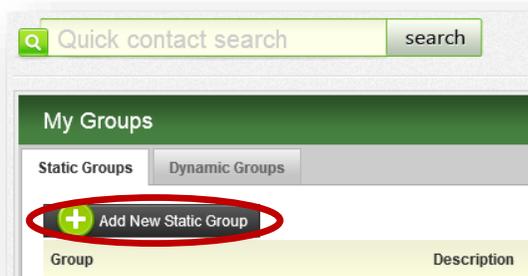
Creating Static and Dynamic Groups

A static group is one you move people into and out of based on your criteria. A Dynamic Group is a group you've created with data filters. People move in and out of the group based on information in their contact records. By creating groups, you can target messages you send to your contacts.

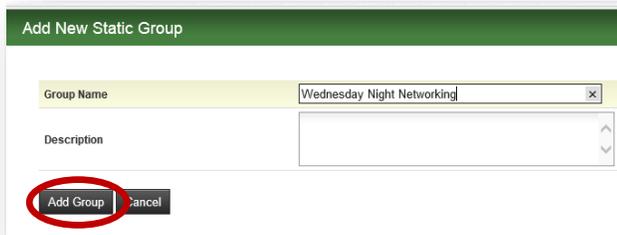
Static Groups:



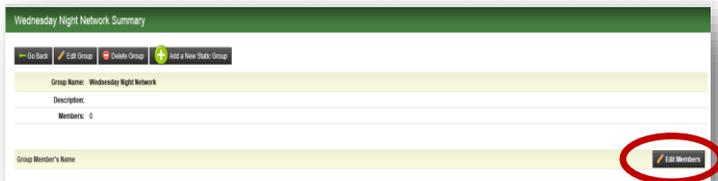
From your Surefire Home Page, click **My Groups**, or from anywhere in Surefire, click **Static Groups** on the right side navigation bar.



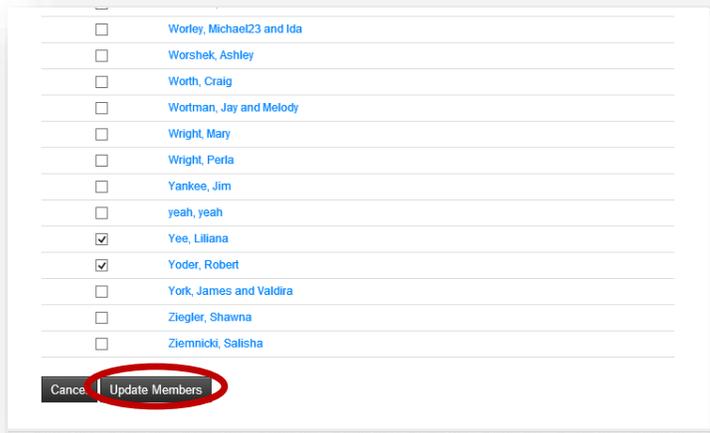
Click **Add New Static Group**.



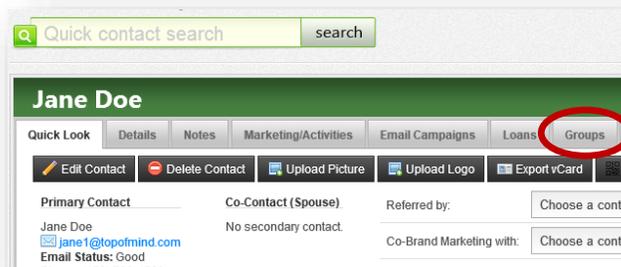
Give your group a description and a name, then click **Add Group**.



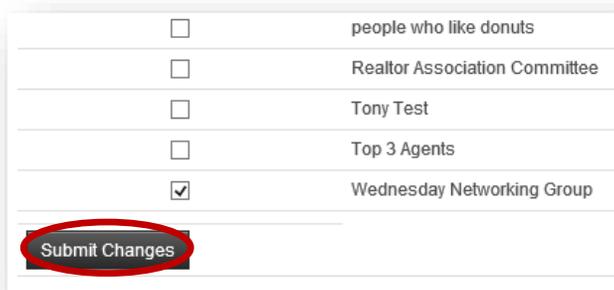
Click on **Edit Members** to add members to your group.



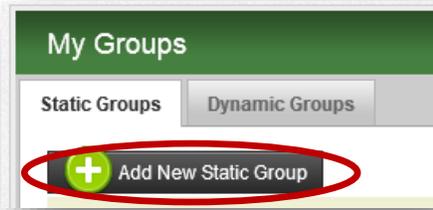
You'll see a list of everyone in your database. **Check the boxes** next to the names of people you want to add to your group. When you've finished, scroll to the bottom and click **Update Members**.



Alternatively, you can add group members individually by typing the name in the **Quick Contact Search** bar, then clicking on **Groups**. This is a good way to add new contacts to groups.



From there, check the box next to the group name then click **Submit Changes**.

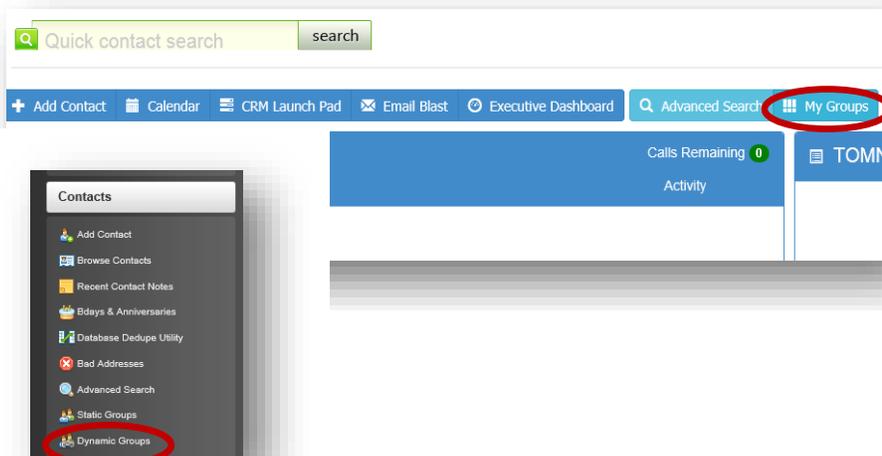


Best Practice: Create a Static Group of your top three Realtor partners. Go to **Groups** and **Add New Static Group** for Top 3 Agents.

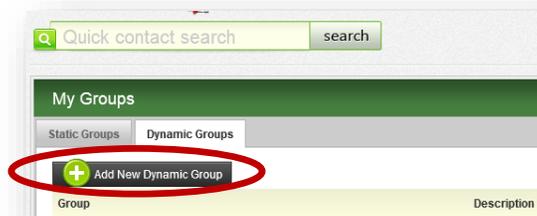


For each member, type the name in the **Quick Contact Search** bar, click on the **Groups** tab, then click next to the Top 3 Agents group name. Click **Submit**. Now you have a quick way to blast your top referral partners.

Dynamic Groups



From your Surefire Home Page, click **My Groups**, or from anywhere in Surefire, click **Dynamic Groups** on the right side navigation bar.



Click **Add New Dynamic Group**.

Create Dynamic Group

Go Back

Group Name: FHA High Interest

Description: Clients with FHA loan over 5k

Give your group a name and a description. For our example, we created an FHA High Interest group.

Loan Type: FHA

Lien Number

Loan Purpose

Loan Occupancy

Locate data filters that will help provide members. In this case, for **Loan Type** we chose FHA, and for **Loan Status** we chose Closed.

Subject Property Zip

Loan Status: Closed

Loan Product

Loan Rate (% Range): 5

Loan Principal (\$ Range)

For **Loan Rate (% Range)**, we chose 5 for the lower end of the range and left the upper end blank. This insures that any loan rate higher than 5% will be part of the group.

Processor

Marketing Assistant

Create Group

Click **Create Group**.

It's that simple!

surefire
by top of mind