Use of Groups

Refers to:
client form → group tab

You use this to link this company to other companies that are grouped with this one, e.g. parent companies and those that share the same invoice address.

To add a parent, click on the **Select Parent** button, then select the company from the database. If the company is not listed you can click on the **Add** button and add the details to the database.

To add a subsidiary company, click on the **Add Subsidiary** button, then select the company from the database. If the company is not listed you can click on the **Add** button and add the details to the database.

You can click on the **Expand** button to view any existing connections for the highlighted company. If the company subsequently becomes independent or is bought by another company, click on the **Detach from Parent** button to remove the link to a parent company.

See also Contact Trees
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