# GROUPS

## User Guide

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# GROUPS USER GUIDE

## Introduction

### Overview

Advisor360°® offers grouping functionality when looking at information across your practice (accounts, people, insurance policies, households) or within a specific household.

### Where to Find It

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**Practice360°** > **PEOPLE**
**Practice360°** > **CRM ACTIVITIES**
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## Groups in Practice360°

In the Practice360°® HOUSEHOLDS, ACCOUNTS, PEOPLE, CRM ACTIVITIES, WORKFLOWS, and INSURANCE tabs, you can create two types of groups: **DynamicGroups** and **Static Groups**.

### Dynamic Groups

Dynamic Groups let you filter data based on certain criteria and save those filters as a group. Every time you access a dynamic group, people are automatically included in the group if they meet the criteria selected. Use dynamic groups to track people who are:

- Residents of a particular state.
- High net worth people or households.
- Missing key personal information (for example, a Social Security number (SSN) or date of birth (DOB)).
- At a certain period in their retirement or approaching retirement.

**Creating and Saving a Dynamic Group**

1. Go to the ACCOUNTS tab in Practice360°.

> The same procedure can be performed in the HOUSEHOLDS, PEOPLE, CRM ACTIVITIES, WORKFLOWS, and INSURANCE tab.

2. Select the **Filter** icon next to the **Practice360° Group** drop-down menu.
3. Apply your filter preferences then select **Apply**.
4. Select the Save icon next to the **Practice360° Group** drop-down menu.
5. Enter a group name and determine who can view the group then select **Save**.
6. After a dynamic group is created it appears in the **Practice360° Group** drop-down menu on the Accounts tab as well as any **Households/Accounts/Group** drop-down menu on a report filter page that applies to the type of group.

**Naming Dynamic Groups**

As a best practice, when naming dynamic groups:

- Standardize your naming conventions with everyone allowed to create and view groups so that names make sense across your office.
- Be sure group names distinguish between static and dynamic groups, if applicable.
- Editing or deleting people from Groups or changing filters will apply those changes for anyone who can view those groups.
- Because groups appear alphabetically, think about how you name those groups and if you want certain groups listed together.

**Editing a Dynamic Group**

1. Select the filter icon next to the Practice360 Group drop-down menu, then select the filters you want to associate with the dynamic group (or uncheck any that you want to remove).
   - Select **Apply**. All households that meet your filter criteria appear.
   - The various filter criteria you selected appear horizontally, under the Practice360° Group drop-down menu.
2. Select **Save.**
   - The Save as a Dynamic Practice360° Group window appears.
   - To keep the same name for the group, select **Replace a group with this selection** and then select the group from the Group Name drop-down menu.
3. Select **Save.**

> When viewing a dynamic group, if you select **X** next to a filter, the screen refreshes and the list of households no longer include the deleted filter. This action does not, however, delete the filter from your saved group unless you re-save the group following these steps.

### Deleting a Dynamic Group

1. From the Practice360° Group drop-down, select the **group**.
2. Select the **Delete Group** icon (X).
3. Verify the results.

## Static Groups

Static Groups do not change unless you actively add or remove people to them. To create a static group, you must first locate the people you want to be in the group. Examples of static groups are:

- Extended families or people.
- All clients who work for the same company.
- Client seminars.
- Appreciation event.

### Creating and Saving a Static Group

1. Go to the Accounts tab in Practice360°.

> The same procedure can be performed in the Households, People, CRM Activities, Workflows, and Insurance tab.

2. Select the **Filter** icon next to the **Practice360° Group** drop-down menu.
3. Apply your filter preferences then select **Apply**.
4. Select the corresponding checkbox of the accounts you want to add to the group.
5. Select the **ACTION: I want to...** drop-down menu and choose **Save Selected Accounts as a Group (Static Group)**.
6. Enter a group name and determine who can view the group then select **Save**.

   You can also add accounts to an existing static group by selecting **Add to an existing group** and choosing the appropriate group from the **Group Name** drop-down menu.

7. After a static Group is created it appears in the **Practice360° Group** drop-down menu on the Accounts tab as well as any **Households/Accounts/Group** drop-down menu on a report filter page that applies to the type of group.

### Adding People to a Static Group

1. On the Practice360° People tab, check the box to the left of one or more clients you want to add to the group.
2. Select **ACTIONS: I want to...** and choose **Save Selected People as a Group (Static Group)**.

3. Select either **Create a new group** or **Add to An Existing Group**.

4. Select the **Group Name**.

5. Select who can view the group.

6. Select **Save**.

**Adding a Household to a Static Group**

You can also add a household to a static group at **Client360° > Contacts tab > Household details.**

1. From the Practice360° HOUSEHOLD tab, select the check boxes next to the Households (or People/CRM Activities if you're creating a Static Group on those tabs) that you would like to be part of the group.

2. Select **ACTIONS: I want to…** and choose **Save Selected Households as a Static Group**.

3. Select **Add to An Existing Group** and pick the group to which you want to add the household, then decide who can view the group, and select **Save**.

**Removing a Household from a Static Group**

1. Select the group from the Practice360° Group drop-down menu.

2. Select the check boxes next to the Households (or People/CRM Activities, if you're working with a Static Group on those tabs) you want to remove from the group.

3. Select the **ACTIONS: I want to…** drop-down and choose **Remove Selected Households from Group**.

4. Verify the household is removed from the group.

## Groups in Client360°

Client360° uses smart groups which are automatic groupings of accounts based on registration type including Individual, Joint, Trust, Retirement, and Education, as well as for Closed Accounts and Additional Assets. An Account can only reside in one smart group.

You can also create an unlimited number of custom groups in a household in Client360°. Accounts can be linked to more than one custom group.

### Using Existing Groups

1. There are several subtabs within Client360° where you can view and sort a household's data by group:

   - **Client360° > Portfolio > Overview/Holdings/Activity/PIP/SWP**
   - **Client360° > Trading > Overview**

2. Use the **Account/Group** drop-down menu to select a group.

## Groups Tab

The ability to create Client360°® groups provides an easy way to view information for a collection of accounts within a household. Groups in Client360° are also used when creating Investor360°® ID's. Once an ID is created it is linked to a group of accounts. It can be linked to view all accounts in a household or a custom group. Once a group is linked to an Investor360° ID, the client will be able to view those specific accounts.

**Creating a Group within a Household**

1. Go to **Client360° > Administration > Groups**.
2. Under the **Account and Groups** section select **Create New Group**.
3. In the **Create New Group** pop-up window enter a name and select **Save**.
4. The new group is added as a column in the **Account and Groups** section. Select which accounts you want to add to the group (selections are automatically saved to group).

> When you select an account/group the page will filter based on the accounts in that group. The selection will be remembered when you navigate between pages.

## Household Rebalance Groups

The Household Rebalance Group function in Client360° allows you to create a group of accounts to be rebalanced together. When rebalanced, all accounts in a group will be combined and use the model assigned to the group. Certain account types cannot be assigned to a household rebalance group. For this reason, future accounts cannot automatically be added to this group.

**Creating a Household Rebalance Group**

1. Choose a household in Client360°.
2. Select **PLANNING tab** > **Models** subtab.
3. Select **Add/Edit Household Rebalance Groups**.

> You can also go to **Client360°** > **ADMINISTRATION** tab > **Groups** subtab.

4. Under the **Account and Groups** section, select **Create New Group**.
5. Enter a name and select **This is a Household Rebalance Group** checkbox.
6. Select a model > **Save**.

   The new Household Rebalance Group is added to the list.

## Benchmark Groups

Benchmark groups are a selection of benchmarks that can be assigned to a household, an account, or a group of accounts.

By default, all Advisor IDs will be assigned to the default benchmark group; however, additional benchmark groups can also be created and assigned to your Advisor IDs.

Benchmark groups can be assigned in both Client 360° and Practice 360°. In most cases, an advisor will use the default benchmark group for an Advisor ID, but if they want to assign a different benchmark group to an Advisor ID for a household or account, they can do so in Client360°.

If the default benchmark group of an Advisor ID is changed in Practice360°, it will only affect households and accounts that use the default benchmark group for that Advisor ID. Any households or accounts that do not use the default benchmark for the same Advisor ID will not be affected by the change.

Benchmarks for groups of accounts cannot be managed directly via Practice360°.

### Creating a Benchmark Group

1. Go to **Client360° > ADMINISTRATION** tab **> Benchmarks** subtab or **Practice360° > ADMINISTRATION** and select the **Manage Benchmarks** link from the Benchmarks tile.
2. Select **Create/Edit Benchmark Groups**.
3. Select **Add a New Benchmark Group**.
4. Choose an **Advisor ID**, enter a name for the group, select and move over up to six items from the **Available** list, then select **Save**.
5. The new Benchmark Group is now visible on the Manage Benchmarks page.

### Editing and Deleting a Benchmark Group

1. Go to **Client360° > ADMINISTRATION** tab **> Benchmarks** subtab or **Practice360° > ADMINISTRATION** and select the **Manage Benchmarks** link from the Benchmarks tile.
2. Select **Create/Edit Benchmark Groups**.
3. Select the Actions drop-down menu next to the Benchmark group you want to edit or delete.
4. Select **Delete Benchmark Group** or **Edit Benchmark Group**. If you are editing a Benchmark group, make the appropriate changes then select **Save**.

### Assigning a Benchmark Group to a Household

1. Go to **Client360° > ADMINISTRATION** tab **> Benchmarks** subtab.
2. In the top row under Benchmark Group, select a benchmark group from the drop-down menu.

This benchmark group will act as the Household Selection. All individual accounts within a household default to the Household Selection as their benchmark group.

### Assigning a Benchmark Group to an Account

Individual accounts within a household can be assigned their own benchmark group.

1. Go to **Client360° > ADMINISTRATION** tab **> Benchmarks** subtab.
2. In the row of the account, select a benchmark group from the drop-down menu.

Selecting **Household Selection** will assign the default benchmark group specified in the top row of the table.

### Assigning Default Advisor IDs

1. Go to **Client360° > ADMINISTRATION** tab **> Benchmarks** subtab.
2. Select **Create/Edit Benchmark Groups**.
3. Select **Add IDs** pencil icon for the appropriate Benchmark group.
4. Select the corresponding checkbox for the Advisor ID you want to assign to the Benchmark Group then select **Submit**.

# Glossary

## Advisor360°

A financial technology platform that integrates everything you need to serve your clients and run your business from any computer, tablet, or phone.

## Client360°

Our integrated platform for portfolio, trade, document, contact, and wealth management. The hub of your practice, you can view client account balances and information, make trades, access account paperwork and other documents, create client goals, and much more.

## Investor360°

Investor360° is a website that allows your clients to view most of the same information you see in Client360°. It is permission based so advisors can determine what they want each client to see.

## Practice360°

Our advisor-facing platform for practice-level information and reporting.