Manage Records for Groups and Businesses

The Groups & Businesses window displays the records of businesses and communities that you have contact with but that aren't a part of your diocese.

Adding a Group or Business

1. On the Diocese tab, click **Groups & Businesses**.
2. At the top, click **Add Group**. The Primary Information window displays.
3. Enter the Group/Bus Name and Group/Bus ID.

> **Useful Information**
>
> For your convenience, you can configure DioOffice to assign ID numbers automatically. For more information, see Set ID Number Options.

4. Enter the primary information about the group or business.
5. Use the links in the left navigation to enter any other information. See the Additional Fields panel below for details.
6. Click **Save**.

Adding and Viewing Documents

In several Groups & Businesses windows, you can add and view additional documents that support the information you entered. Click **Add Documents**, and upload the documents. For more, see Add and View Documents.

Finding Fund History Entries

You can search all group/business records for certain fund history information. From any group/business financial window, click **Find History Entries** in the navigation pane. Enter any relevant data for the entries you want, and click **Find Matching Entries**. To view the record associated with an entry, select it in the grid and click **Lookup/OK**.

Additional Field Information

Mailing Address
If the institution doesn't have a mailing address different from the street address, you can leave this field empty.

Personnel/Individuals
Click **Add Assignment/Affiliation** to insert a person with a position or role at the group/business. Use the tabs to view information about the selected person. Click **Load Personnel** to view the personnel record.

Documents
Enter the location (file name) where a file is saved on your computer. Click **View Document** to open the file with the default program set for your computer.

> **Note**
>
> This does not save the document in the program; it only opens the document from the location on your computer. If you delete the file from the location you enter, it does not display in the program.

History Log
Displays a grid where you can record the date and description of significant historical events with an institution. For more, see Manage an Institution's History Log.

Letters, Etc.
Displays a grid where you can keep track of multiple forms of incoming and outgoing correspondence for an individual. For more, see Track Interactions With People.

Rates/History/Keywds
Manage funds in this window. For more information, see Manage Development Funds.

Billing Address
Displays the billing address for the institution associated with a particular fund. For more, see Edit a Billing Address.

Individual Letter, Label
Access a report wizard with the option to create a custom label, envelope, or letter report. For more, see Address and Send a Letter.

Related Topics

Manage Records for Diocesan Offices, Departments, and Organizations
View the Group, Business Overview
Parishes and Facilities
Manage an Institution's History Log
Manage Development Funds