Create groups to organize your clients

Manage your clients · https://www.primaryrecord.com/docs/create-groups-to-organize-your-clients/

To help organize your clients, you can group or tag them with labels. Labels are not mutually exclusive, and you can categorize clients but different tags, like medical conditions or geographical location.

You can organize your client records by using category tags, filters, and sorting.

See all your clients

1. On a mobile device or computer, open a browser, and sign into Primary Record.
2. At the top left, click **Clients.**

Organize your clients

Here are a few ways to organize your client list:

- **Search**: You can search for a specific client by name or category tag.
- **Sort**: You can sort clients based on statuses, category tags, or alphabetize by their client or point of contact name.
- **Filters**: Use filters to search for clients by name, status, or category tag. For example, you can filter clients based on a specific condition (e.g., COPD) or by location (e.g., Indianapolis).
- **Bulk actions**: Multiple clients with the same status can be selected to perform bulk actions, like archiving, sending files, or recording visits. Bulk actions are only possible for clients with the same status.