

Using Contact Groups

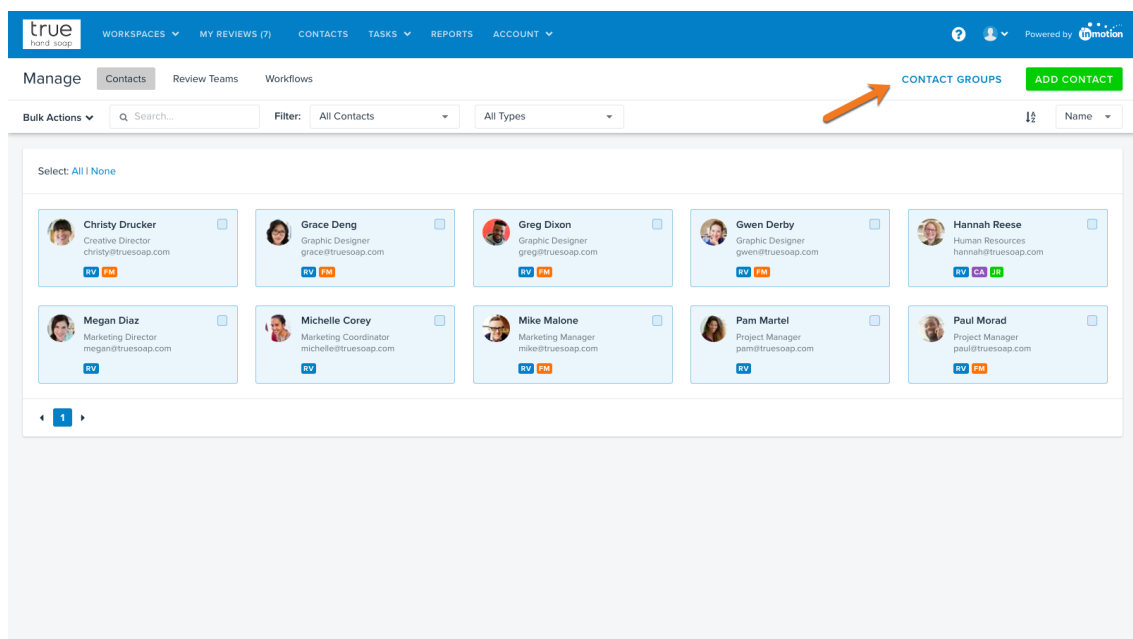
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What are Contact Groups?

A contact group is a way to organize contacts together for easy filtering in your contact list. For example, if you wanted to group contacts by department, i.e. Marketing, Creative, External Clients, etc., you could then search by these groups when uploading a proof for review. Only Administrators can create and view Contact Groups by default. Staff user level access to these groups is assigned on the user record.

Creating a Contact Group

1. Navigate to **CONTACTS** and select **CONTACT GROUPS** in the top right.



2. Provide a name and description for the filter group you wish to add, then click **CREATE**. Once you're done adding contact filter groups, click **DONE** to go back to the contact management page.

Contact Groups Editor

Add a New Contact Group

Name

Marketing

Description

CREATE

Edit an Existing Contact Group

No contact groups have been returned.

DONE

Assigning a Contact to Contact Groups

- To assign an individual contact to a contact group, click to select the appropriate contact card and click **Edit Contact Groups** under **Memberships**.

Contact Editor

Definition Help

DELETE CONTACT

Contact Details

Contact Name

Megan Diaz

Tag


Marketing Director

Email

megan@truesoap.com

Phone

Current Picture


Remove

Upload New Picture

Choose File
No file chosen

Memberships

Owner

Paul Morad (me)

☐ Private

[Edit Subscriber Alert Settings](#)

[Edit Contact Groups](#)

Review Teams: None

Permissions

☐ Reviewer Forwarding

☐ Enable as Feedback Manager

Grants a reviewer the ability to hide other reviewers' comments and/or mark comments to be ignored.

SAVE

- Check the box next to the applicable Contact Group(s) and select **DONE**.

Contact Group Membership

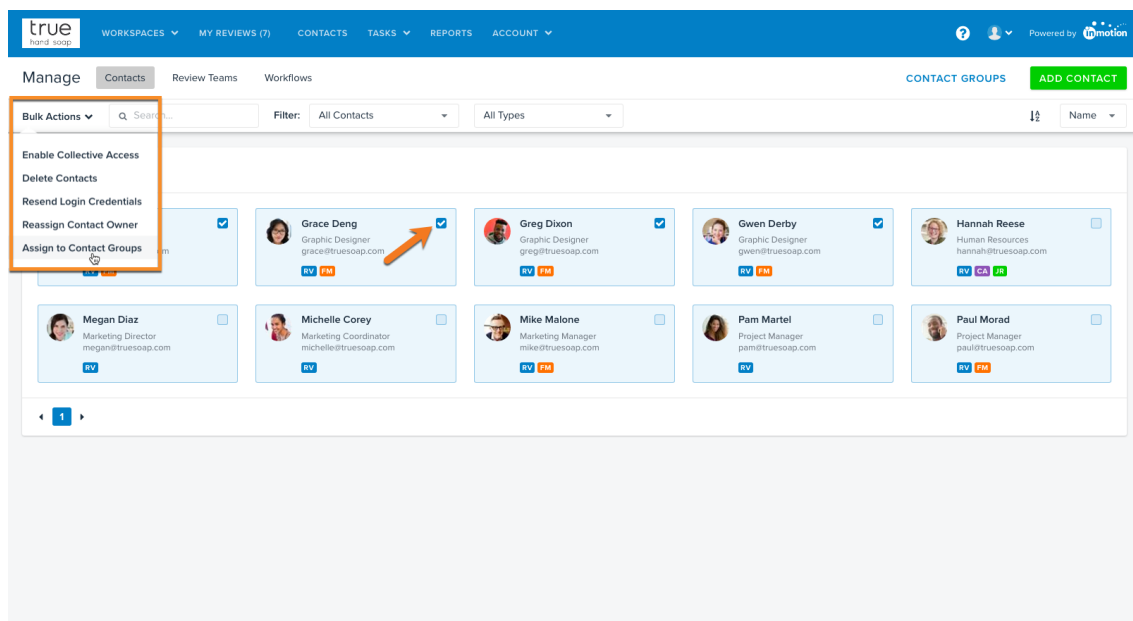
Select the Contact Groups that this Contact should belong to:

☐ Creative
 ☐ External Clients
 ☒ Marketing

DONE

Bulk Assigning Contacts to Contact Groups

1. To bulk assign contacts to a contact group, navigate to **CONTACTS**.
2. Check the box in the top right of each contact card that you would like to assign to a certain contact group.
3. Select **Bulk Actions** in the top left and choose the option, '**Assign to Contact Groups**'.



The screenshot shows the True Soap CRM interface. The top navigation bar includes 'true hand soap', 'WORKSPACES', 'MY REVIEWS (7)', 'CONTACTS', 'TASKS', 'REPORTS', and 'ACCOUNT'. Below this, the 'Manage' section has tabs for 'Contacts', 'Review Teams', and 'Workflows'. A 'CONTACT GROUPS' link and an 'ADD CONTACT' button are on the right. A 'Bulk Actions' dropdown menu is open, showing options: 'Enable Collective Access', 'Delete Contacts', 'Resend Login Credentials', 'Reassign Contact Owner', and 'Assign to Contact Groups'. An orange arrow points to the checkbox in the top right corner of the 'Grace Deng' contact card, which is also checked. Other contact cards visible include Greg Dixon, Gwen Derby, Hannah Reese, Megan Diaz, Michelle Corey, Mike Malone, Pam Martel, and Paul Morad.

4. Check the appropriate Contact Group(s) and click **OK**.

Are you sure?

Choose from the available options below to assign the selected **4** contacts to the appropriate Contact Groups.

☒ Creative
 ☐ External Clients
 ☐ Marketing

CANCEL OK



Staff User Access to Contact Groups

If you would like to allow staff users to filter by Contact Groups, you need to enable access accordingly on each staff user record.

1. Navigate to **Account > Account Settings > Users/Groups**.
2. Click on the applicable user record.
3. Check the applicable box(es) in the '**Contact Filter Groups Access**' section.

My Account Close

Overview Company Info **Users/Groups** Customize DAM Access

Edit Existing User Resend Credentials Delete User

Edit user information in the fields below then select save.

Name:
Title:
Email:
User Name:
Additional Return Notification Recipients:
These emails will receive notifications when your Reviews are completed.
Separate email addresses with a comma (email@home.com,email2@home2.com)

RESET PASSWORD
Password:
(Password criteria: should be at least 5 characters)
Re-type Password:

USER TYPE
☐ Admin
Full access to all features of the application including global administrator features.
(Admin access should be limited to only key personnel)
☒ **Staff**
Provides access to upload, sort, search and edit proof details as well as manage contacts and view reports. (Most common User Type)
☐ CSR
Similar access as the Staff User Type but upload capabilities have been removed.
(Recommended for sales and customer service users)

TAGS
Role ?
☐ Copy Writer
☒ Designer
☐ Web Developer
☐ Project Manager

PERMISSIONS
☒ **Reviewer Permissions**
Allow this user to access and review pending proofs they have been invited to participate on as a reviewer from their workspace.
☒ **Public Contact Access**
Allow access to public contacts
If unchecked, this user will only be able to view contacts, review teams and workflow teams that they have created or have access through as a contact filter group (restriction does not apply to administrators).
☐ **Job Launch Manager**
Allow this user to access, manage and review pending Job Launch.
Includes the ability to migrate Job Launch into Project.
☐ Allow this user to use an enhanced Job Launch workspace.
☐ **Job Launch Submitter**
Allow this user to submit Job Launch.

CONTACT FILTER GROUPS ACCESS Select: **all** / none
☒ Creative ☒ External Clients ☒ Marketing

USER GROUPS
None

Save Cancel

4. Click **Save**. Repeat this process for any additional staff level users.

Filtering by Contact Group



You can filter by Contact Groups on both the **Contact Management** page and the **Select Reviewers** step of posting content for review. Choose the appropriate Contact Group from the **Filter** dropdown menu to narrow your search.

