Using Contact Groups

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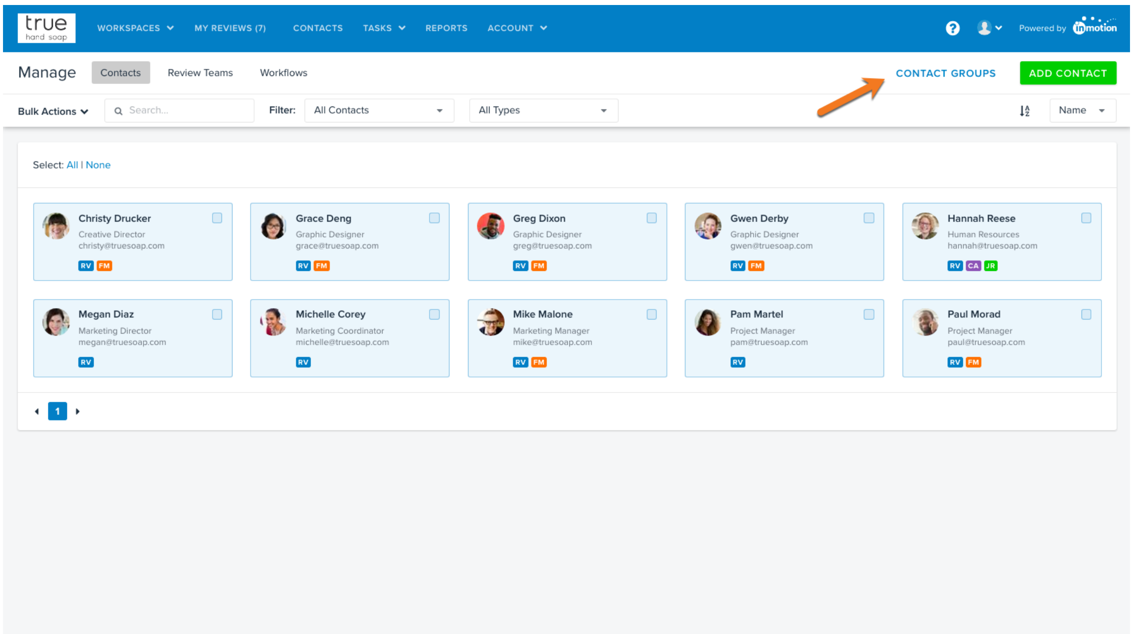
What are Contact Groups?

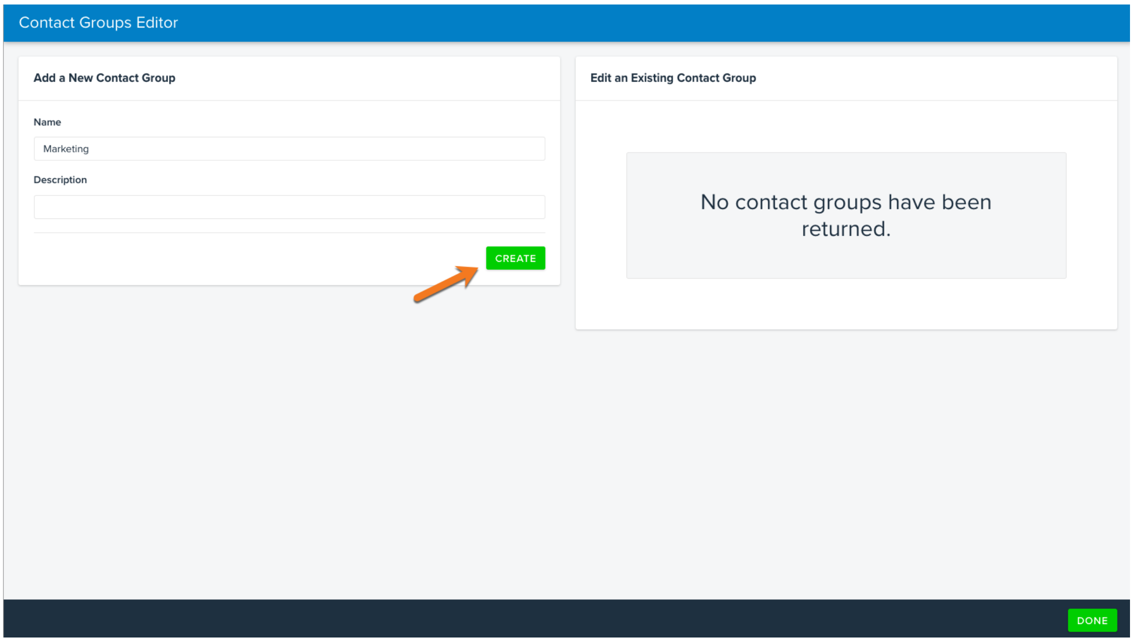
A contact group is a way to organize contacts together for easy filtering in your contact list. For example, if you wanted to group contacts by department, i.e. Marketing, Creative, External Clients, etc., you could then search by these groups when uploading a proof for review. Only Administrators can 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.

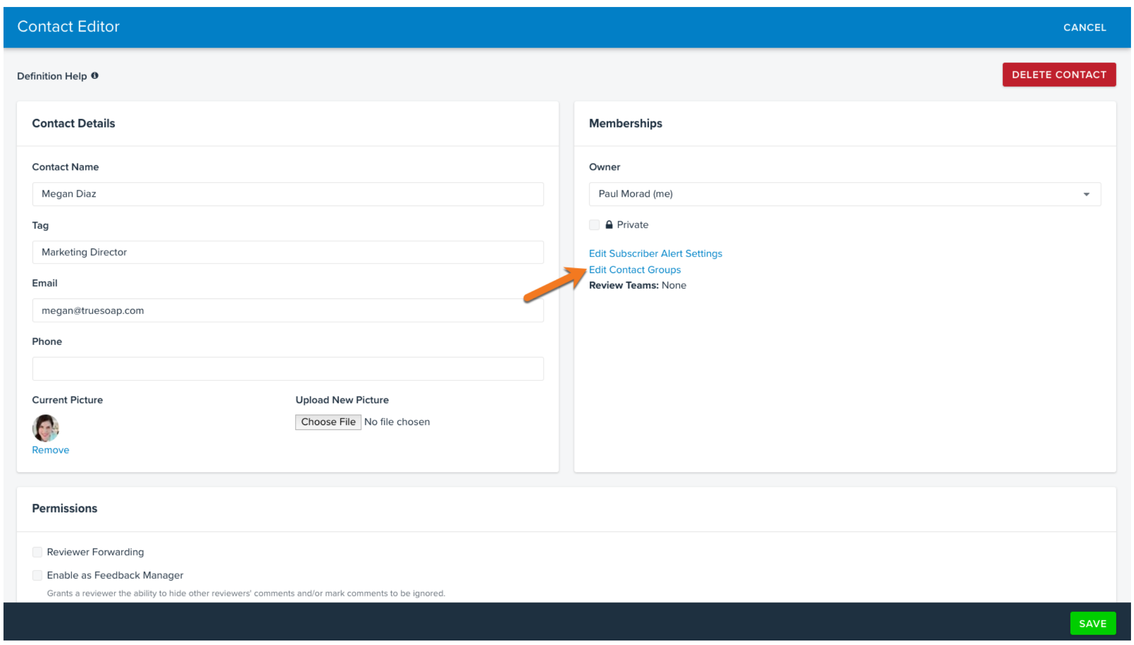


2. Provide a name and description for the filter group you wish to add, then click **CREATE**. Once you're done adding contact filter groups, click**DONE** to go back to the contact management page.

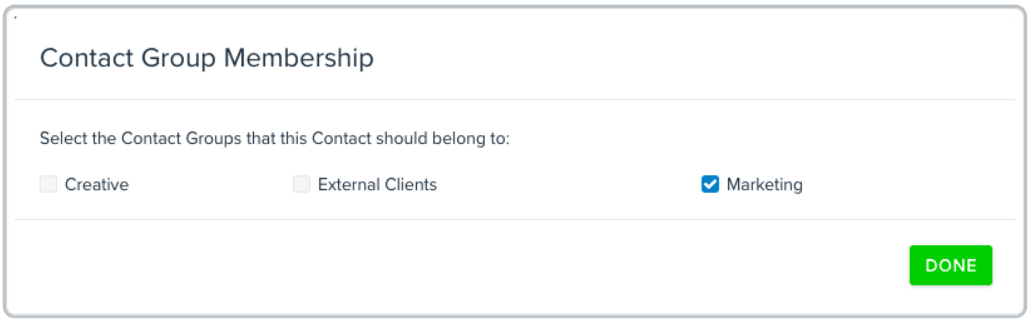


Assigning a Contact to Contact Groups

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

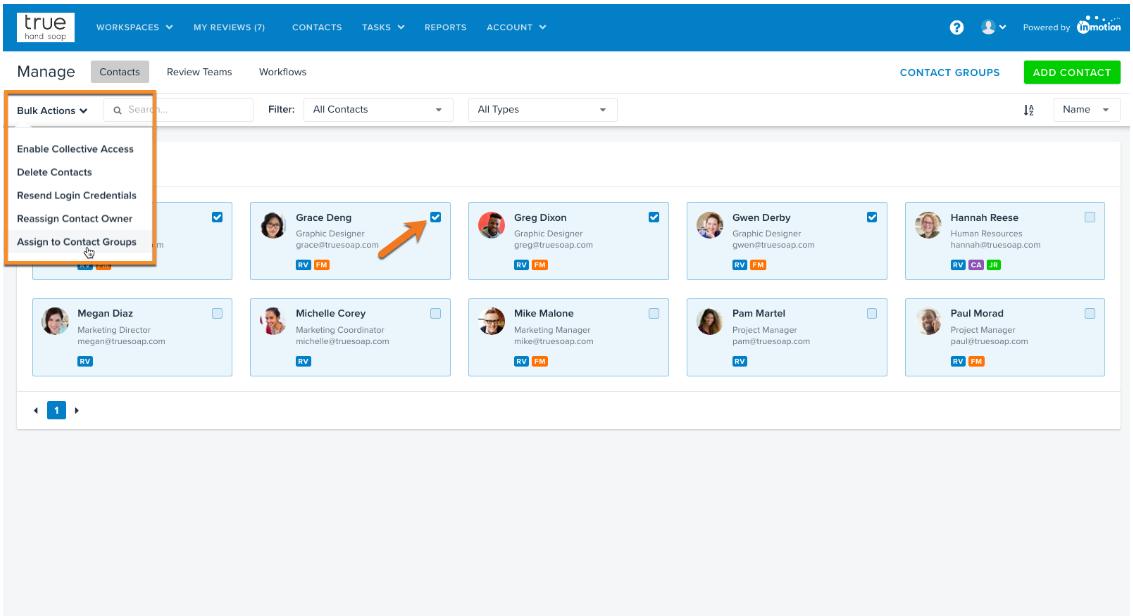


2. Check the box next to the applicable Contact Group(s) and select **DONE**.

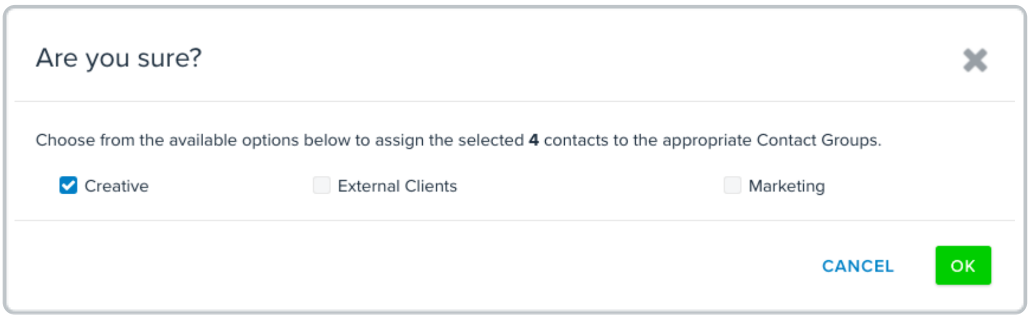


Bulk Assigning Contacts to Contact Groups

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.'**



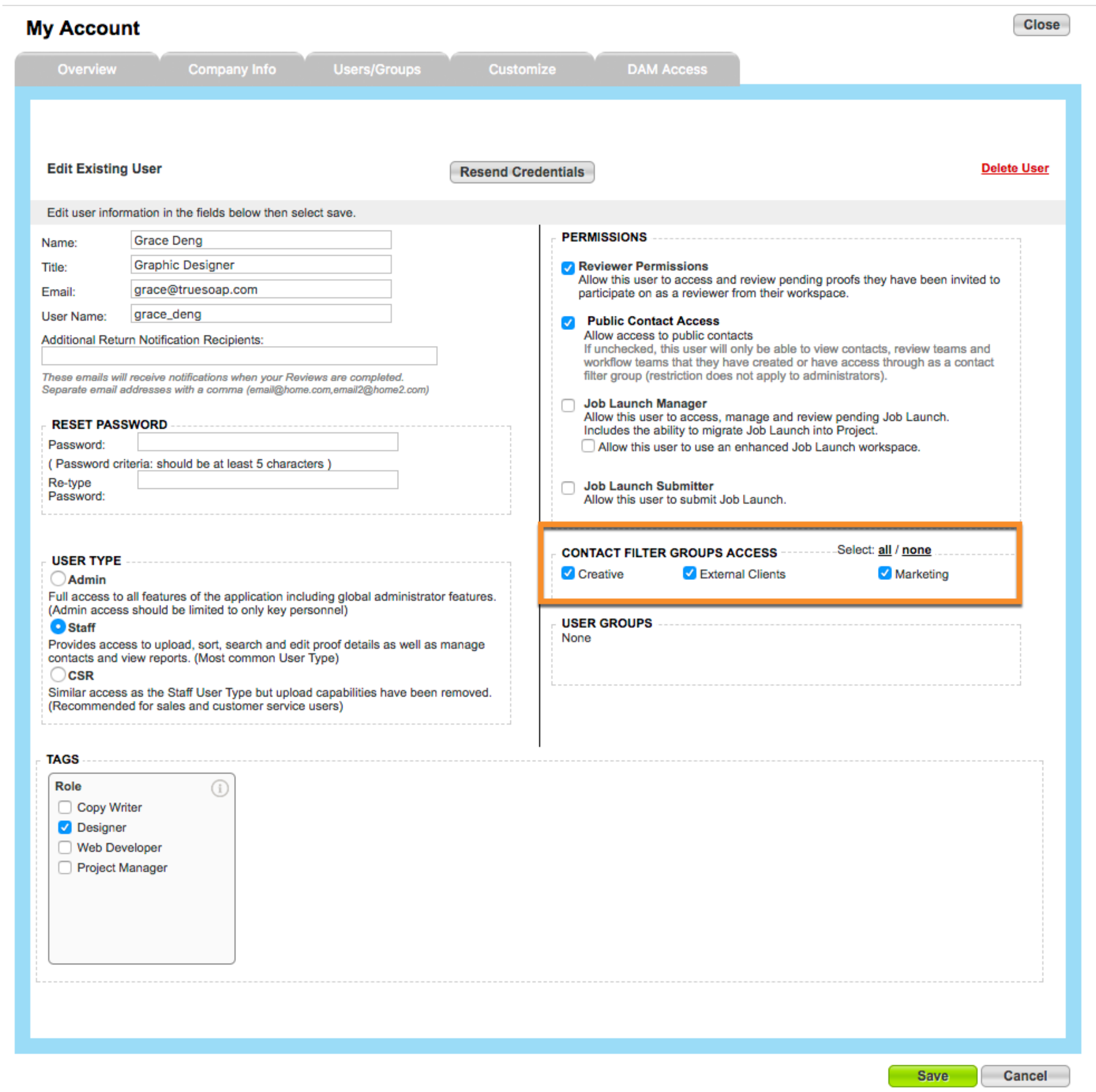
4. Check the appropriate Contact Group(s) and click**OK**.



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.



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.