

Quick Sheet MN: Managing Groups

Group Settings

The Group Management sub tab is located under the Contacts Tab. Here, you can create groups, change their hierarchy, and manage group membership. Using Group Management in the Everbridge platform provides an easy way to organize contacts, replicate organizational hierarchy, and manage user message sending capabilities.

🐴 Add Group 👔

All Cor	ntact Groups	
Act	ive Demo Group	
Jan Bro	ad Institute Demo	I
Jan Shi	ipping Team	
🖃 🚛 CA	Region	
	Water Main Brea	k Response Tea
🖃 💵 Re	call Response Te	am
	Analytical Team	
يلد خ	EOC Team	
	QA Shipping T	eam

Adding Members to a Group

To manually add members to a group, navigate to the contacts tab, search for and select the contacts you wish to add. Once the contacts are selected, all you need to do is click add to group and choose the group you wish to add the members to. While this process is simple, it can be time consuming for large numbers of contacts.

l. I.	
Groups	
Networking Response Team Active Demo Grou	р
US Region	

🐴 Add Group 🕕	Active Demo Group			
Al Al Contra County Al Carl Contra County A	Add Contact Move Remove 🕶			
	E First Name	ML	Last Name ~	
	Milton		Addams	
	E The		Bobs	
	Chris		Bragg	
	Annell		Del Rio	
	Andrew		Evangelos	
	Peter		Gibbons	

Creating and Organizing Groups

Creating a group is as simple as clicking the Add Group button. Once the group has been added, you can change the name clicking the pencil icon. To change the location of the group, drag and drop it where you would like it to go. You can nest groups underneath each other to create a tree that mirrors the hierarchy of your organization. Org Hierarchy allows you to select a master group for a notification, which will also select the sub groups nested beneath it. You can also individually select a sub group only.

Image: Million Addams MillionBu Image: Matthew T Ard 999999	ontact	s				
First Name Middle Initial Last Name ⇒ Suffix External I Milton Addams MiltonBu I Matthew T Ard 999999	Conta	octs Uploads	Groups Rules			
Image: Million Addams MillionBu Image: Matthew T Ard 999999	Delete Add to group Download					
Matthew T Ard 999999		<u>First Name</u>	Middle Initial	Last Name \$	<u>Suffix</u>	External Id
	◄	Milton		Addams		MiltonBurn
	•	Matthew	т	Ard		999999
IN <u>Ine</u> Bobs BobsCor	◄	The		Bobs		BobsConsulta

Managing Groups via File Upload

Groups can also be managed via uploads. In the Groups field of the CSV file, you can list the names of the groups you wish to assign a contact to. To assign a contact to multiple groups, use the pipe character "|". This character is made using the shift key + the backslash key (located directly above the enter key). To add a member to a group without deleting the existing groups, use an asterisk before the new group names to add to, i.e., *|New Group. If a group is present in the upload, but not the system, it will be created automatically.