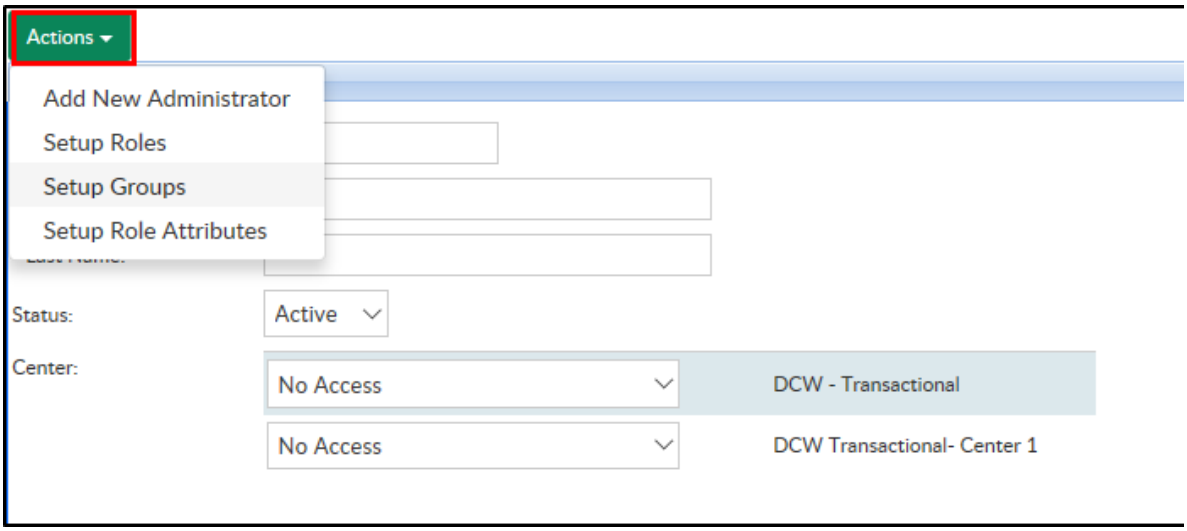
Admins, Setup Groups

Last Modified on 12/04/2018 10:18 am EST

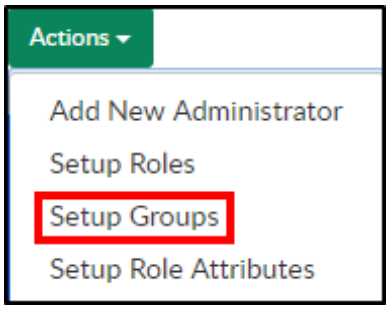
Setting up groups allows administrators to group individuals together to give/remove certain permissions.

To setup a group:

1. To setup a Group, click Action

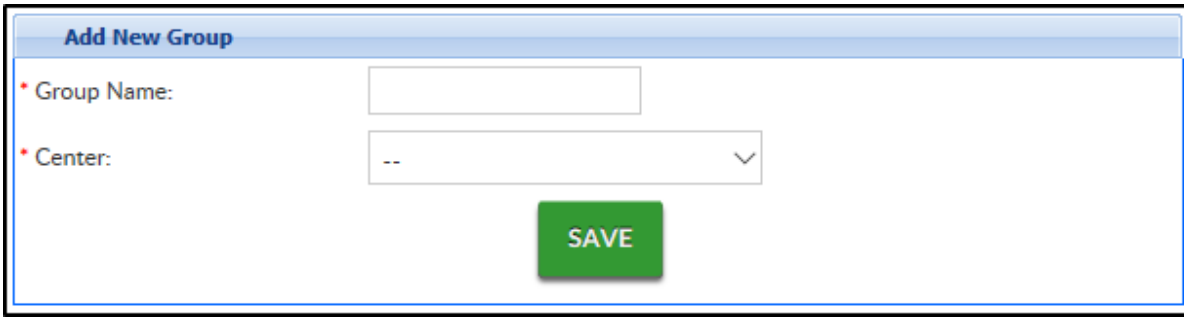


2. Select Setup Groups



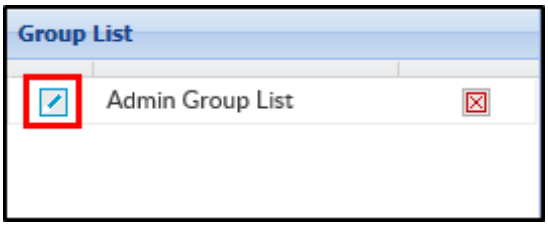
3. Click Add Group

4. Complete the Add New Group section

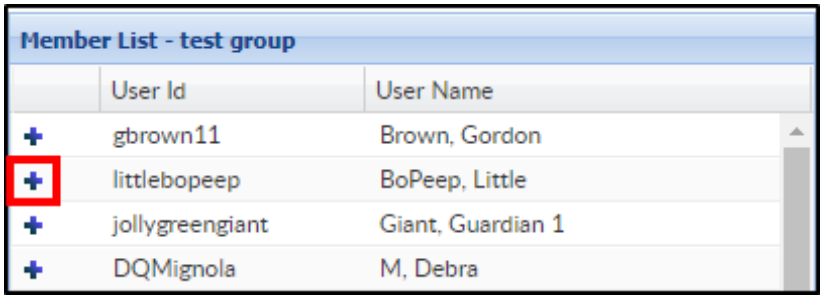


- Enter a Group Name - this is the name of the group or role
- Select the Center or business level from the drop-down

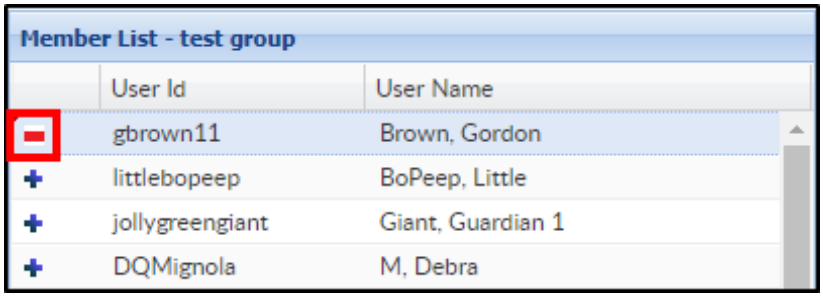
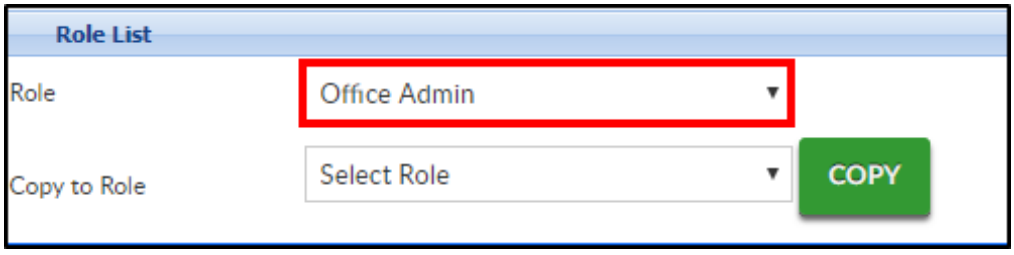
5. Click Save
6. Click the Edit icon to the left of the group name to add users to the lists



7. Click the + icon to add users to the group



8. If the person is already a member, the + icon will turn to a - icon



Please Note: To setup roles for the group added above click here . On the Setup Roles screen, select the name of the group created