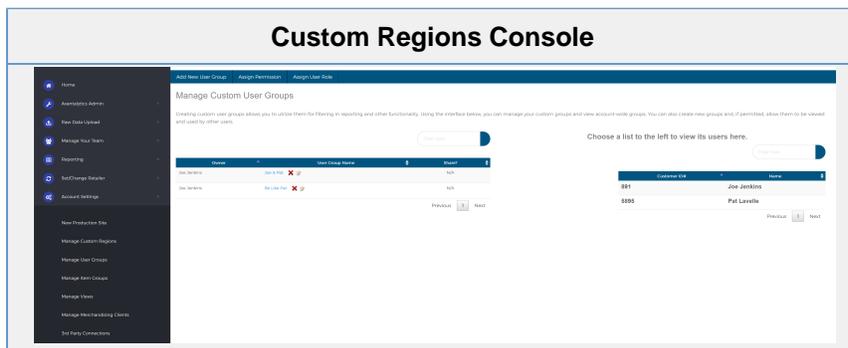# Creating User Groups

Overview

Creating user groups is very much like creating custom regions or item groups, except the metric being grouped are users. Each user has a customer ID which is unique and all user groups consist of lists of customer IDs within your organization. The main benefit of user groups is for managing large homogeneous groups users - users who should share the same privileges and have access to similar resources.

Perhaps one of the most obvious user groups might be or "field sales people" - generally companies have dozens to hundreds of persons who all need similar access to the system. User groups were made to make managing these situations.

To create user groups, simply have a list of your users customer IDs ready in Excel. If you don't know where to get them - they can be had via report Company User Listing (100), which will provide a list of all users in your account. Creating users can be done through clicking on "Account Settings" and choosing "Manage User Groups". When you click on this, you'll see an interface similar to what is shown below.
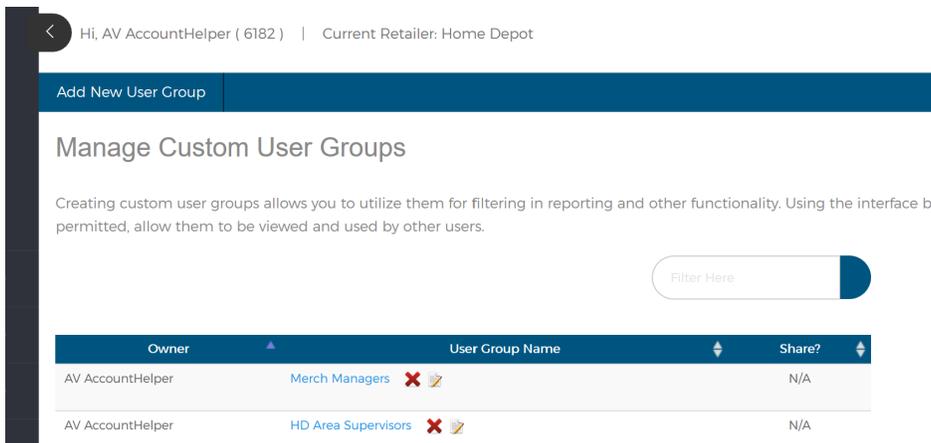
Learn About Popular Use Cases

- How to Create an Insight Panel View Using Custom Regions

Related Links

- Learning Views
- Sharing Views

Adding New Groups

Once you're in this interface find the blue button on the top called "Add New User Group" and click on it. It looks like below:

As you click on it you'll see a pop-up menu similar to below with your users names in the listing. The interface calls for a **Group Name** and then allows you to either select multiple users from the list (with filtering below it to assist if your user count is large) or if you are using the report 100 output - you can simply copy and paste the customer IDs for the users directly in the input at the bottom. either way, when you're done - just click create group and you're all set.

Add New Custom User Group

Enter a group name and a list of users customer IDs below separated by commas.

Group Name: _____

Select Users:

```
6182 - AV AccountHelper
6326 - Joseph Adamo
6327 - Rakib Ahmed
6325 - Mohammed AKashem
6294 - Jose Alcazar
6295 - Mohammed Aslam
6304 - Wayne Baker
6305 - Will Bradley
6328 - Anthony Brizendine
6306 - Angela Burdett
6330 - Fany Cabrera
```

type here to filt

Customer IDs: _____

Create Group   Dismiss

Using Custom User Groups

There are several primary uses of the custom user groups. The most helpful is through the ability to share views you may have made with users on their mobile apps. The applicability is that you can create a view and be the owner of the view, then enable a group of users to view this on the mobile app - thereby ensuring each sees what you want them to see as well as relieving each user from having to create their own view or copy yours. In this way, managers and management can construct in-depth custom views and share them easily with explicit groups of users.

To learn more about how to do this read the following about views:

Sharing Views

Editing User Groups

You can edit a user group by clicking on the notepad next to the user group name. The current list of customer IDs will be shown. The easiest way to add a user is via the lookup feature. Simply enter a first or last name and the autocomplete will give you the matches. Select one and hit Add. Repeat to add more users. When you're done, hit the update button.

Alter/Update Users

You can search for users below and add them to the list. To delete a user, remove the customerid from the comma separated list.

5916

Lookup User

Jon

5946 - Jon Lewis

Add

Dismiss   Update