

How to...
GROUPS



How to... Groups

Groups are containers for Contacts that allow you to ring fence and organise your data.

Group contents will remain unchanged unless, as an administrator you add or remove Contacts, Contacts unsubscribe, Contacts change their public Group preferences, and/or you have connected your account to an online signup page or via API.

Groups are great for lists of contacts that don't change often e.g. staff lists, proof lists, trade show lists, attendees and no-show lists. But often you can improve efficiency by using [Segments](#).

The Groups area of Contacts

The Groups area is where you have the ability to create and manage your account's Groups.

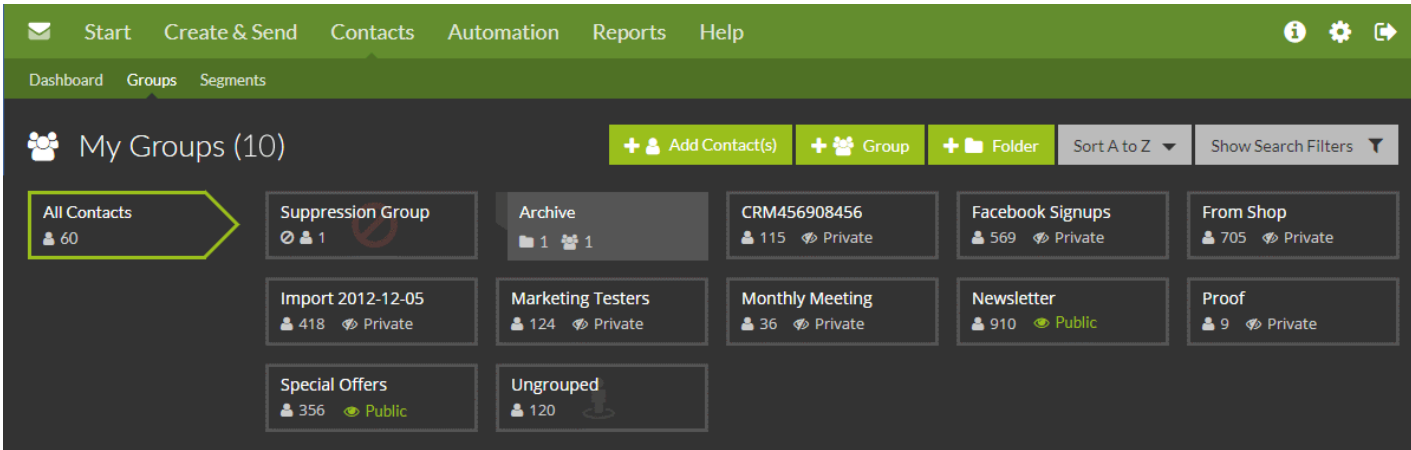
In the 'My Groups' heading of this area you will see a total number of Groups in brackets.

This top half of the screen also includes tools to Add Contact(s), add a Group, add a Folder, sort your Groups on screen, and apply Search Filters.

Below this, you will see a list of all the Groups that you have stored in your account, some of which maybe in a folder. Groups can be organised in folders and sub-folders.

Clicking on a Group shows you the Contacts within it in the table below.


From this screen you can also click to view All Contacts, and to view Contacts who are not in a Group.



Once you have a list of Contacts listed on screen, there are tools to assist you in moving these to other existing or Groups.

This guide will take you through all the options available in this part of your account.

How to create a Group

1. On the Groups screen click the green 'Add Group' button 
2. **Step 1: Type** - Choose either Public (visible to your Contacts if they click to update their Preferences) or Private (only seen by Account Administrators and not by your Contacts)
3. **Step 2: Name** - Give your new Group a short distinctive name
4. **Step 3: Description** - Give your Group a description (optional)
5. **Step 3** - Click the 'Create' button
6. From this point you can choose to simply open your new (empty) Group or to continue by adding Contacts to your new Group

See also: [How To... Import Contacts](#)

[How To... Public & Private Groups](#)

How to view a Group

1. Open the Groups area in the Contacts section.

Groups are automatically shown in an A-Z order by name but can be re-ordered using the 'Sort by' dropdown. Each Group has an 'Edit' button (see How to edit a Group, below) and details of how many Contacts are in the Group.

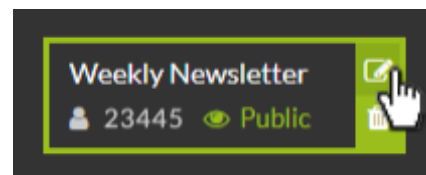
2. Click on a Group.
3. The table in the bottom half of the screen will load details of the Contacts in the Group, in a new 2nd tab. This new tab shows the name of the Group along with the number of Contacts in the Group.



4. There is also a button that lets you toggle between part and full table view to easily show more Contacts on screen at any time.
5. This screen caters for up to two tabs at any one time, one as a route back to viewing All Contacts plus one other, so you can switch between tabs at any time.

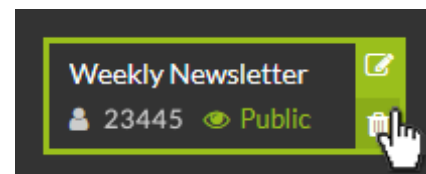
How to edit a Group's name and description

1. Hover over the Group you wish to edit so a green border appears
2. Click the 'Edit' button on the top right
3. On the Group Card that opens, you can rename your Group and change or add to its description.
4. You can also view the Group's ID (useful if connecting a signup form on a website to your account) and how many Contacts are in the Group.
5. Changes will be auto-saved. Click 'Close' when all changes have been made.



How to remove a Group

1. Hover over the Group you wish to remove so a green border appears
2. Click the 'Remove' button on the bottom right
3. Click to 'Confirm Remove'.



Note...

Removing a Group does not remove the Contacts within the Group. They will remain in your account, associated with other Groups if applicable.

How to add Contacts to a Group

You can add Contacts to a Group in a number of ways.

During the process of creating a new Group:

1. On Step 3 of creating a new Group, click the 'Add Contacts to new Group' button
2. At this point you can either add a Contact manually or upload a file of multiple Contacts

During the process of adding Contacts to your account

There are two main methods of adding Contacts to your account.

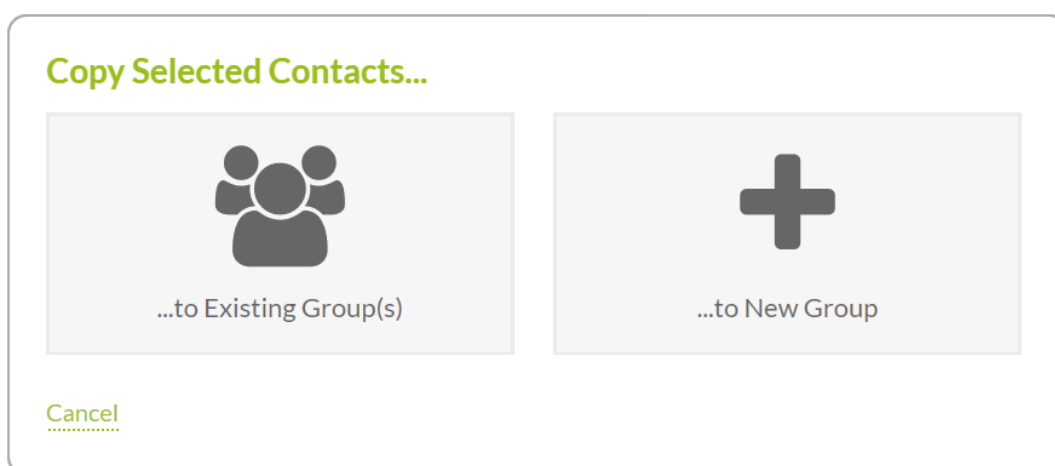
1. If adding one Contact with the manual entry method - after inputting their details you will have the option to add the new Contact to an existing Group or Groups, or to add to a new Group. If choosing the latter you will be guided with steps on making the new Group.
2. If adding multiple Contacts by uploading a file - on Step 4 of the process you will have the option to add the new Contacts to an existing Group or Groups, or adding to a new Group. If choosing the latter you will be guided with steps on making the new Group.

See also: [How to... Import Contacts](#)

By using the 'Copy...' button below the table

Within the Groups area there is an option to 'Copy' selected Contacts to existing or a new Group. This button is at the bottom-right every time you have a table of data on view. You may be viewing All Contacts, a particular Group of Contacts, or a filtered list of either.

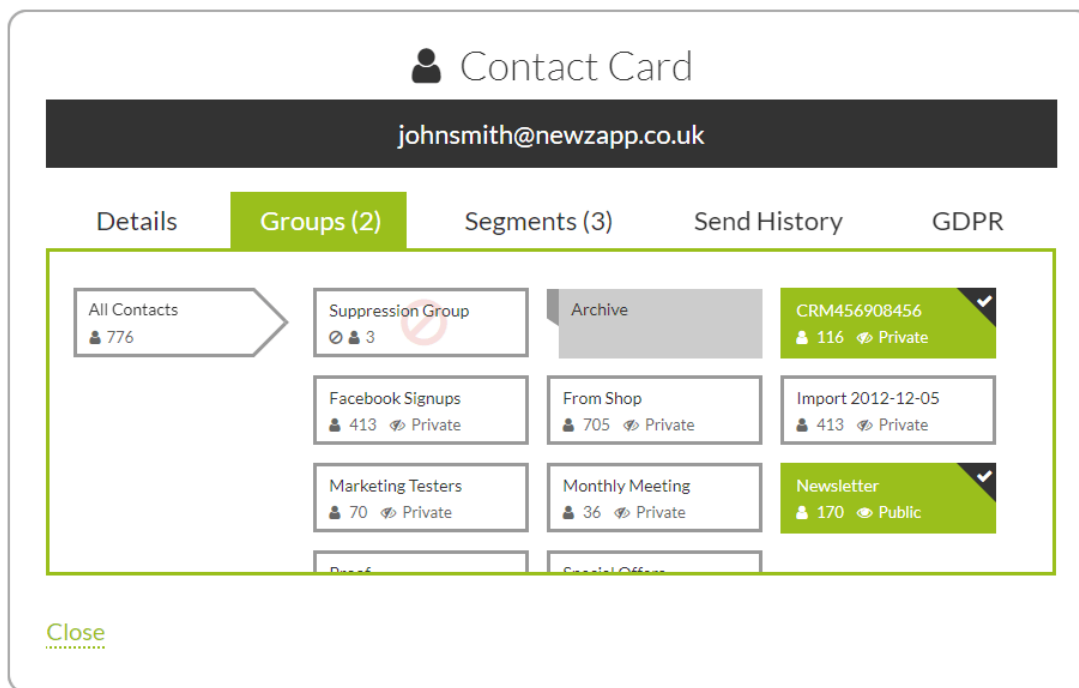
1. Click the 'Copy...' button, bottom right of the table



2. Choose from the screen whether you wish to copy the selected Contacts to existing Group(s) or to a new Group.
3. If copying to an existing Group(s), the next screen shows you a view of all Groups in your account. Click to select the Group(s) you wish to copy your selected Contacts to. You can click as many as you like and you can click to de-select to remove a Contact from a Group.
4. Click the 'Save & Close' button.
5. If copying to a new Group, you will be taken through 3 steps to create the new Group.

With tools available when editing a current Contact

1. Find the Contact whose Group associations you want to edit, open their Contact Card and click on the Groups tab.



2. This tab shows you which Groups a Contact is currently in, highlighting them in green with a tick in the corner.
3. Click to select the Group(s) you wish to add your Contact to. You can click as many as you like and you can click again to remove from a Group.

For more information on getting the most from your NewZapp account, visit our [Knowledge Base](#) or contact us on support@newzapp.co.uk.