:reate a Shared Contact Group

:t Modified on 04/25/2025 1:26 pm EDT

:reating a Shared Contact Group allows you not only to send messages to groups but also to share those roups across your organization. This enables employees working on specific tasks (e.g., denials or ollections) to ensure timely notifications are sent to the appropriate individuals.

Who can create Contact Groups?

Users with the Contacts permission set to Shared...... can create new contact groups or edit their own contact groups.

Auth Reps and Admins can edit any Shared Contact Group.

1. Select **Home** > **Messages**.
2. Click the **Create New Group** button.
3. Add a name for the new group.
4. Click the **Add Contacts** button.
5. Check the ***Share this group*** box.
6. Select who to share it with (**All Users**, **Admins Only**, or **Auth Reps Only**) or click **Add Contacts** to manually add contacts to your group.

   When using the "Select Contacts" option, the contacts will be sorted by their respective customer, and it includes a search field for easier navigation.

7. **Optional**: You can manually remove any users from your list with the "Remove" option.
8. Click **Save,**