

Create, Edit and Delete Groups

Help Article

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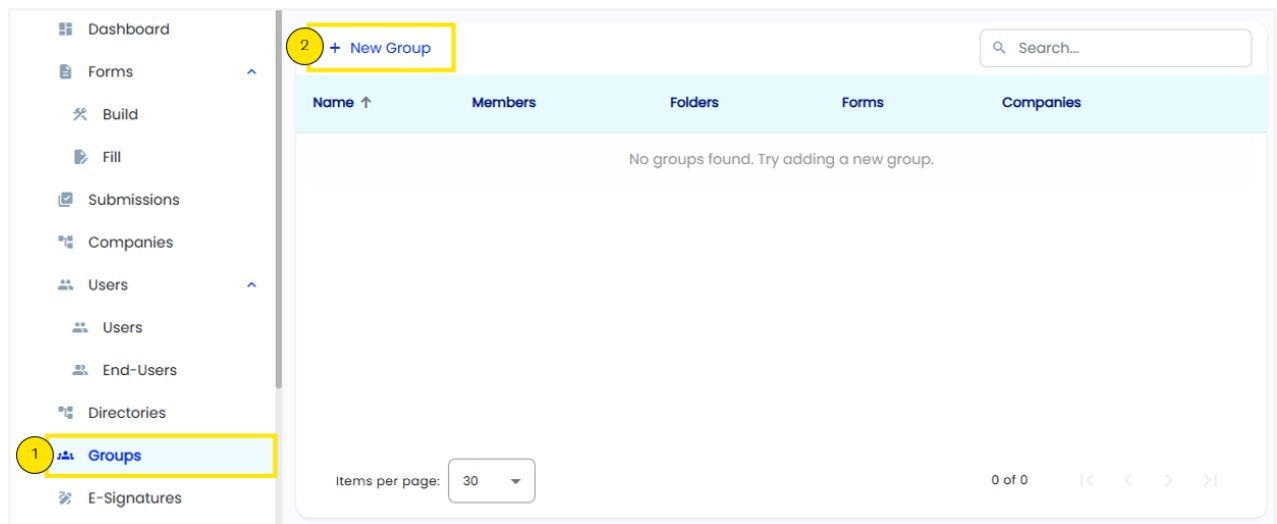
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1. Create a New Group

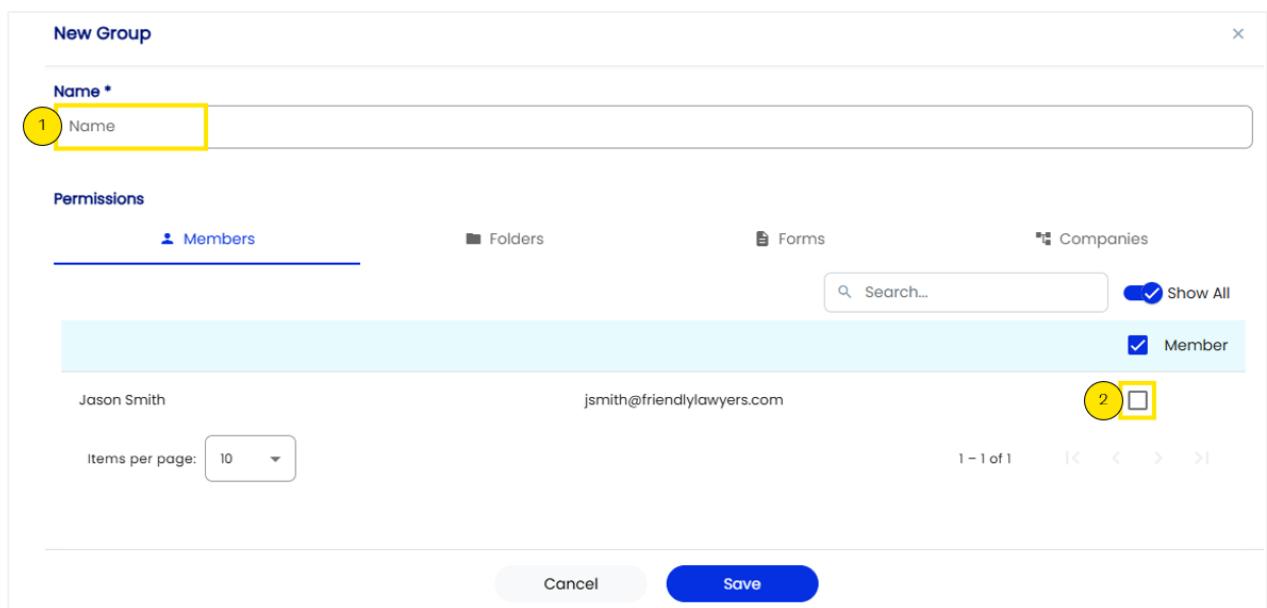
A group can be created to streamline the process of assigning permissions. All members of the group will have the permissions assigned to the group. To create a new group:

1. Click **Groups** in the navigation menu.
2. Click **New Group**.



The **New Group** pop up opens.

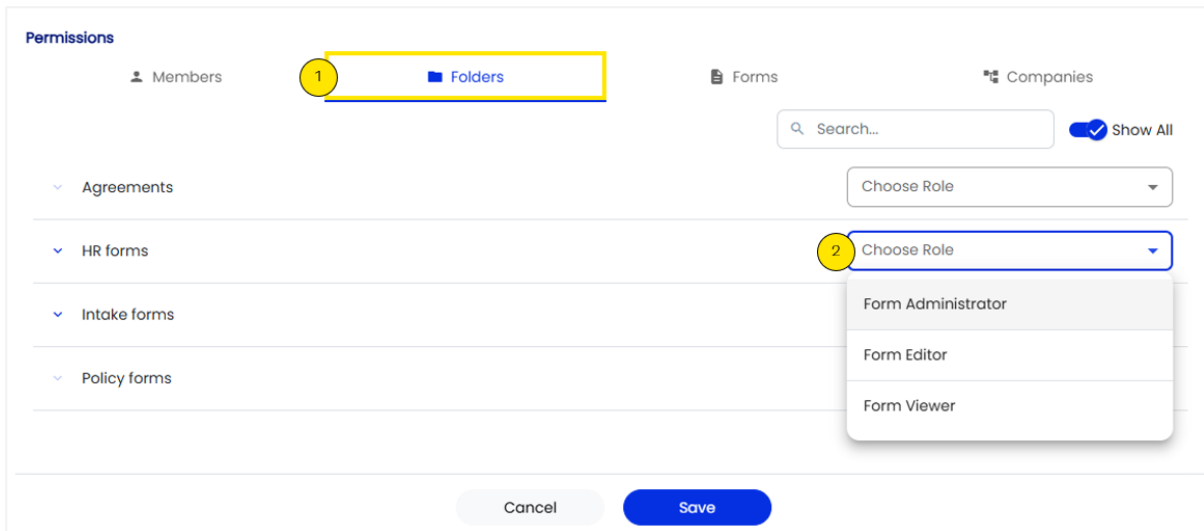
1. Give the **group** a name that can be recognised.
2. Tick the **box beside the name** of all the users who need to belong to the group.



1.1 Assign Permissions to the Group

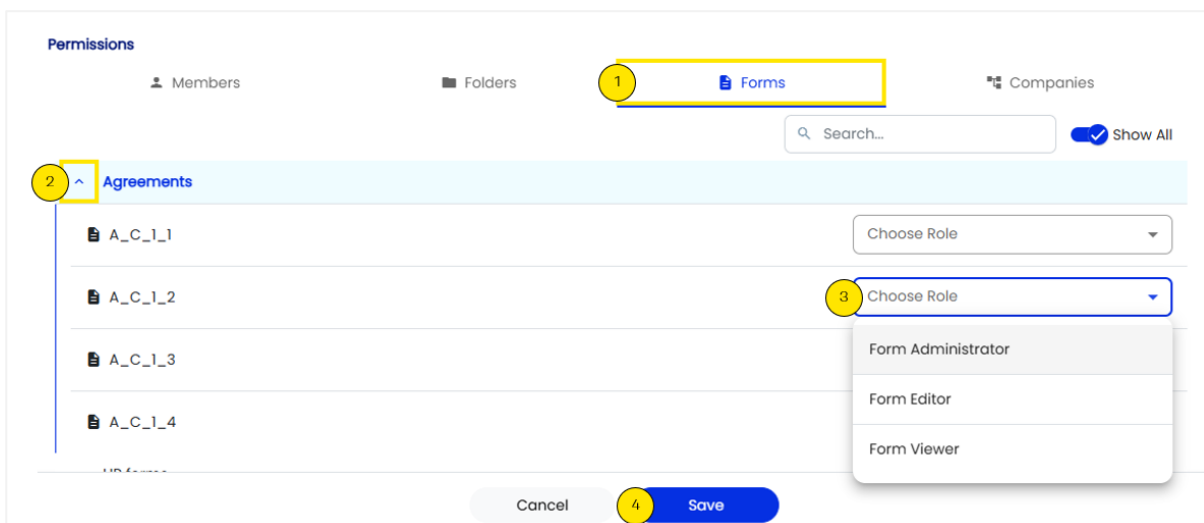
We can now assign permissions for the group. This process is like the process to assign permissions for individual users. To assign permissions for folders:

1. Click **Folders**.
2. Use the **Role selector** beside each folder to select the role the members of the group will have in each folder.



Follow the same process to assign permission for individual forms.

1. Click the **Forms** tab.
2. Open the **list of forms**.
3. Select a role from the list that the members of the group will have for each form.
4. When all permissions are set, click **Save**.





Note: When generating documents, you can assign permissions to a group so that the group members are the only users that can access the submissions (this can also be done for administrators and builders).

1.2 Edit or Delete a Group

To reopen the group editing window, click the pencil shaped edit button.

To delete the group, click the trash can shaped button.

+ New Group		Search...		
Name ↑	Members	Folders	Forms	Companies
Editors	2	0	0	0
		 		

Note: The **Companies** tab is a legacy feature that will be removed in a future release. It's not recommended that any data is saved in the Companies tab.
