Groups

Overview

A group is a named list of team members, such as a regional sales team or a support squad. Groups change what people can see only if their role includes one of the "group" permissions. You need the "Manage team members" permission to create and manage groups.

How groups affect access

Two people are peers if they share at least one group. A person in several groups can see content from the peers in all of them. What a member can see depends on the group permissions in their role, set under Admin > Roles (see Roles and permissions):

Area	Permission	What the member can see
Conversations	Read group conversations	Conversations where they, or anyone in their group, took part.
Insights	Read group insights	Insights from conversations where they, or anyone in their group, took part.
Topics	Read group topic models, Manage group topic models	Topic sets owned by them or anyone in their group, plus the topic sets Alchemer Voice provides for workflows, Tracker, and examples. Manage also allows creating and editing them.
Labels	Read group labels, Manage group labels	Labels owned by them or anyone in their group. Manage also allows creating and editing them.
CRM records	Read group CRM data	Records from the CRM connections where people in their group have CRM user accounts, matched by email address.

Roles with the "all" or "team" version of a permission (for example "Read all conversations") already see everything, so groups make no difference to them. The built-in Viewer, Creator, and Admin roles don't use the group permissions by default. To limit people to their group, create a custom role that includes the group permissions and not the "all" ones, then assign it. See Roles and permissions.

Create a group

In Admin > Groups, select Create group, then rename the new group and save. Group names must

be unique, ignoring case.

Manage members

People must already be on your team, so invite them first (see User Management).

Open the group and use the Members card to add or remove people. Changes apply immediately. A person's groups also appear on their profile in Admin > Team.

Delete a group

Open the group and select Delete. Members lose the visibility the group gave them but stay on your team. Removing someone from your team also removes them from all groups.

Troubleshooting

- **Someone in a group can still see everything:** Their role probably has an "all" or "team" permission, such as the built-in Viewer role. Groups only narrow access when the person's roles use the group permissions instead.
- **The Groups tab is missing:** You need the "Manage team members" permission.

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