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Documentation Modules Account Settings

Groups

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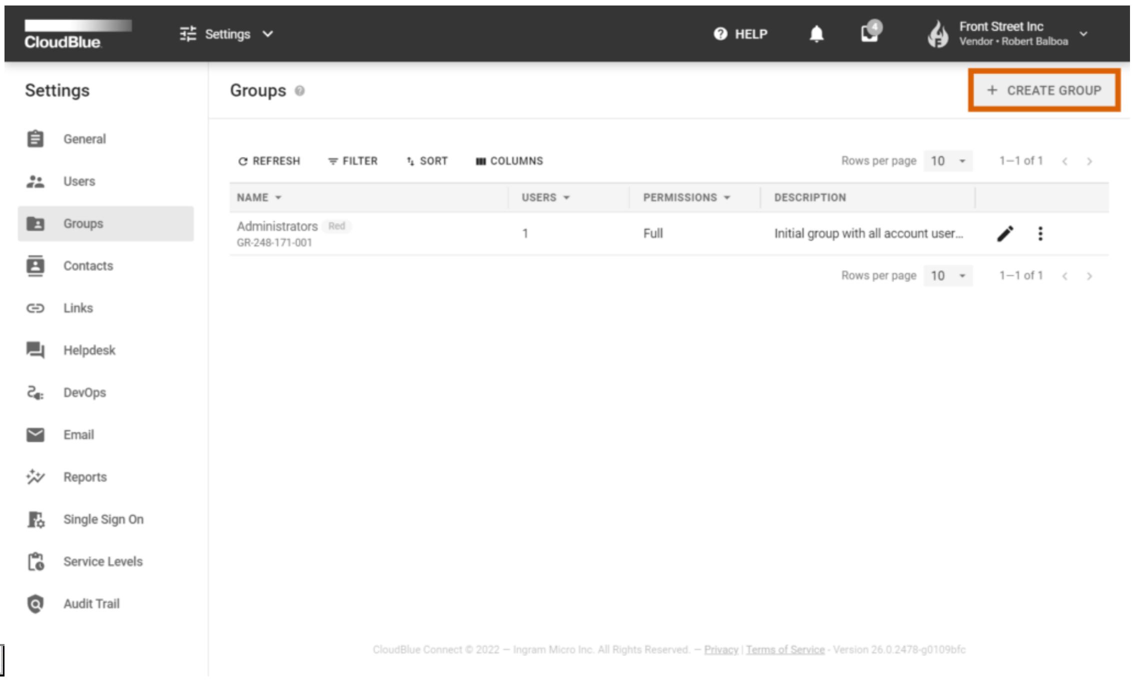
Access the **Groups** menu to create a new group of users, manage group permissions, add existing users to a group or delete groups from the account.

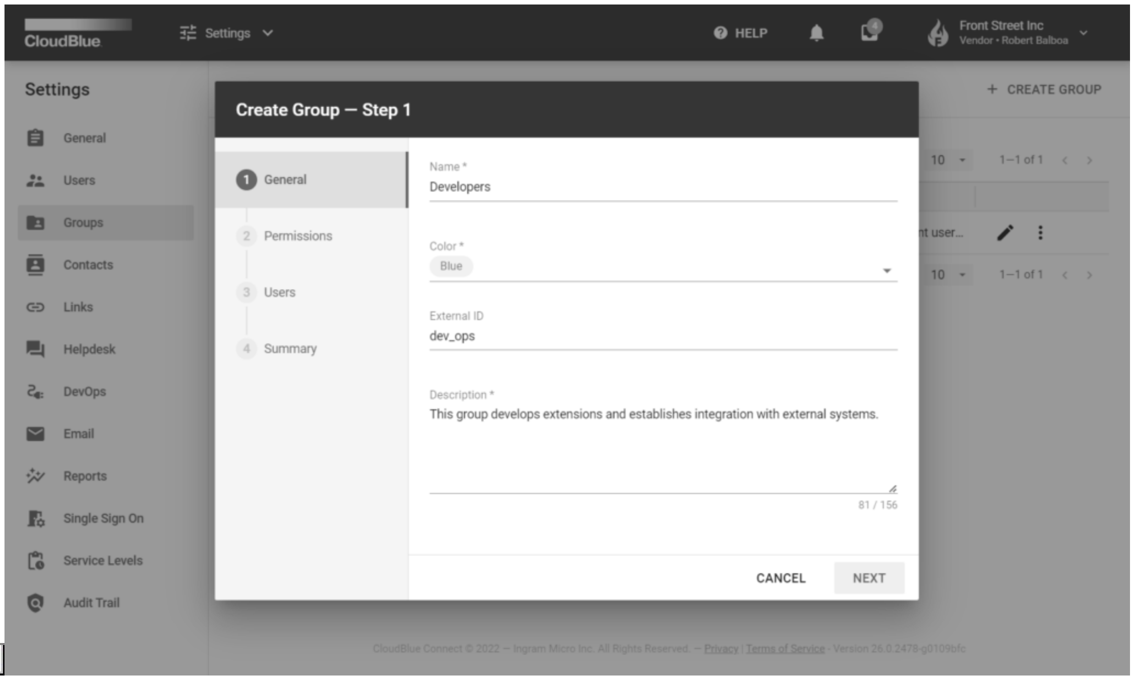
By default, the system provides a group that is called “Administrators”. This group includes all permissions that can be manually adjusted. Group permissions define what Connect modules are available for your specified group of users. Therefore, your users can access Connect modules that are included in their group permissions and cannot access excluded modules.

The following instructions showcase how to add groups to your account, manage your groups, and adjust group permissions on the CloudBlue Connect platform.

Adding Groups

Click the **Add Group** button to launch a group creation wizard. The following wizard steps help you configure a new group:

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Settings
HELP
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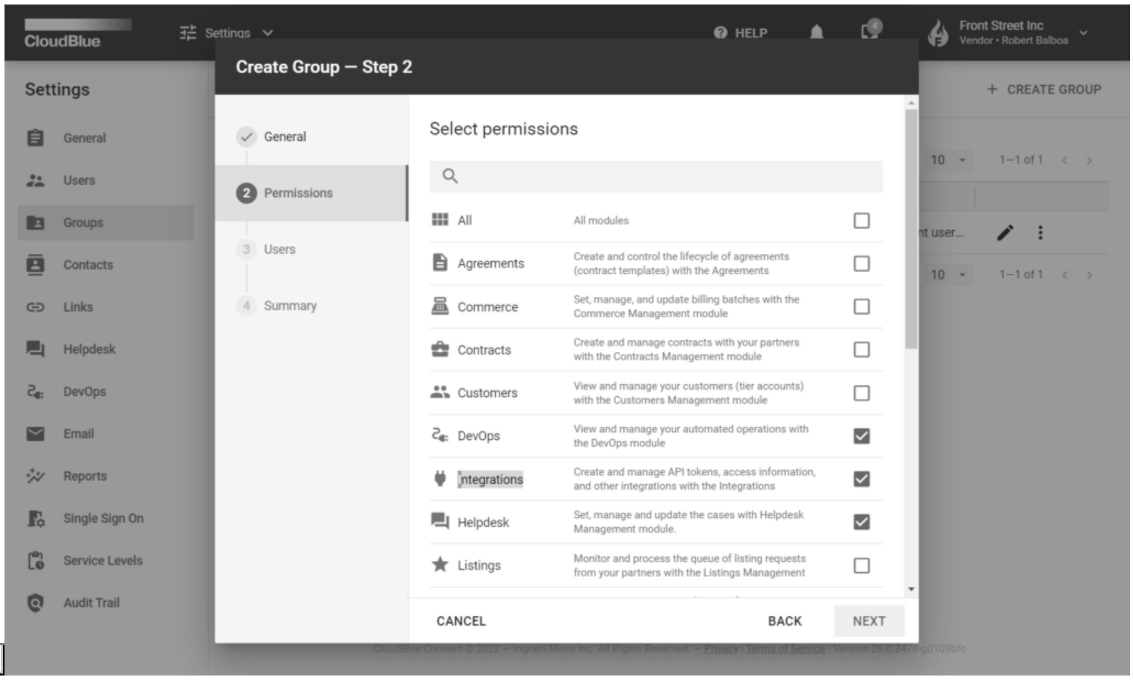
Settings
General
Users
Groups
Contacts
Links
Helpdesk
DevOps
Email
Reports
Single Sign On
Service Levels
Audit Trail
CREATE GROUP
Create Group — Step 1
1 General
2 Permissions
3 Users
4 Summary
Name *
Developers
Color *
Blue
External ID
dev_ops
Description *
This group develops extensions and establishes integration with external systems.
81 / 156
CANCEL
NEXT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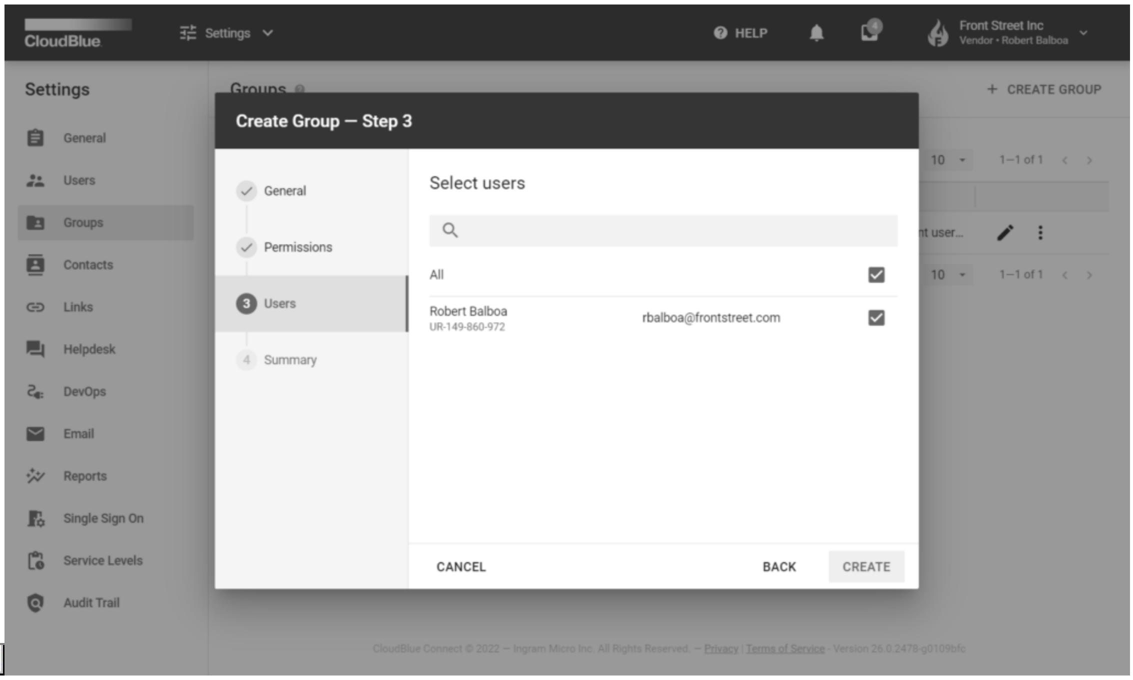
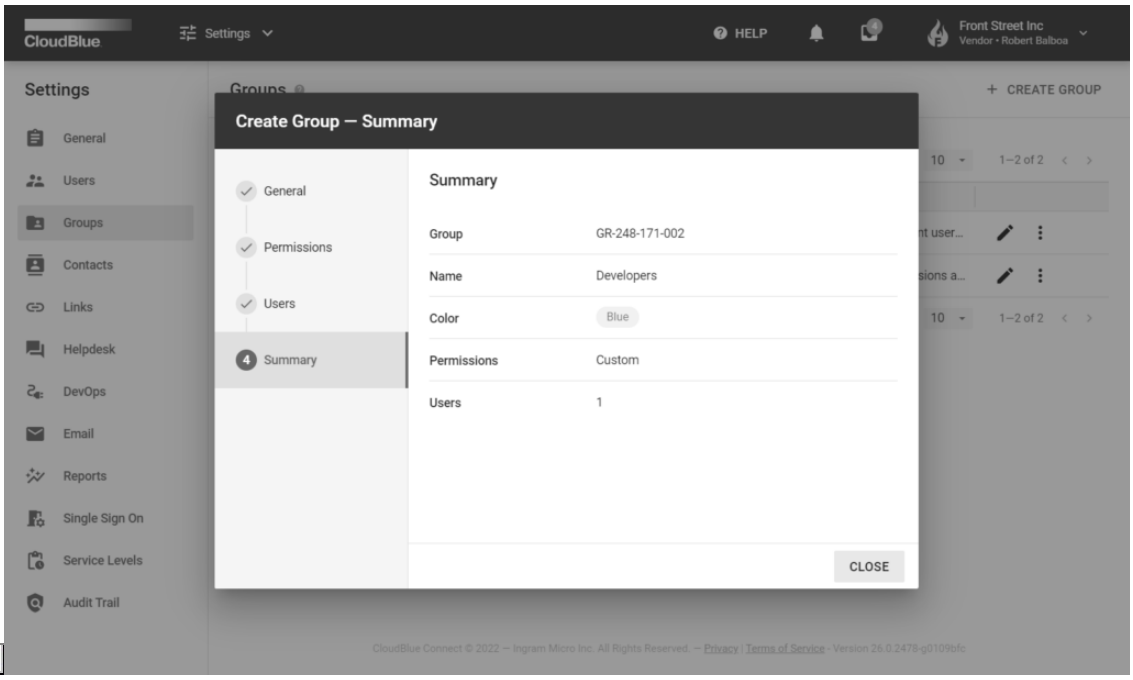
Audit Trail
CREATE GROUP
Create Group — Step 2
General
2 Permissions
3 Users
4 Summary
Select permissions
All
All modules
Agreements
Create and control the lifecycle of agreements (contract templates) with the Agreements
Commerce
Set, manage, and update billing batches with the Commerce Management module
Contracts
Create and manage contracts with your partners with the Contracts Management module
Customers
View and manage your customers (tier accounts) with the Customers Management module
DevOps
View and manage your automated operations with the DevOps module
Integrations
Create and manage API tokens, access information, and other integrations with the Integrations
Helpdesk
Set, manage and update the cases with Helpdesk Management module.
Listings
Monitor and process the queue of listing requests from your partners with the Listings Management
CANCEL
BACK
NEXT

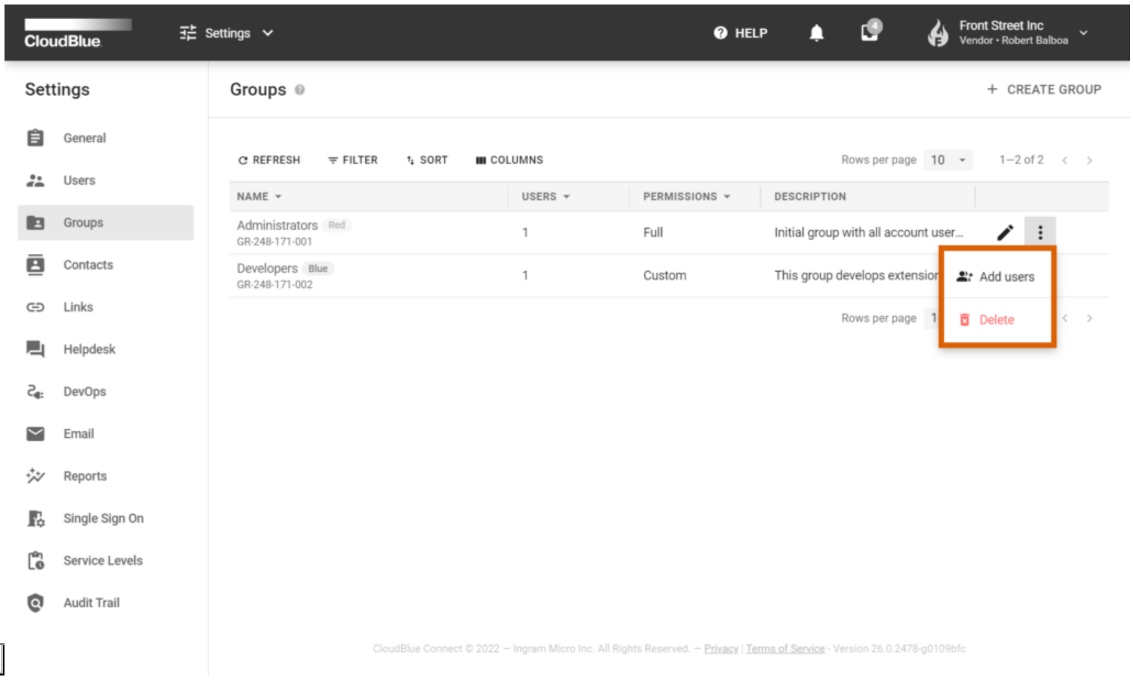




1. **General**: Define your group name, color marker in the UI, description and external ID.
2. **Permissions:** Select required group permissions depending on the group functions.
3. **Users:** Select available account users.
4. **Summary:** Review your created group summary screen.

Manage Your Groups

Locate your group and click the vertical ellipsis (⋮) icon on the corresponding row:

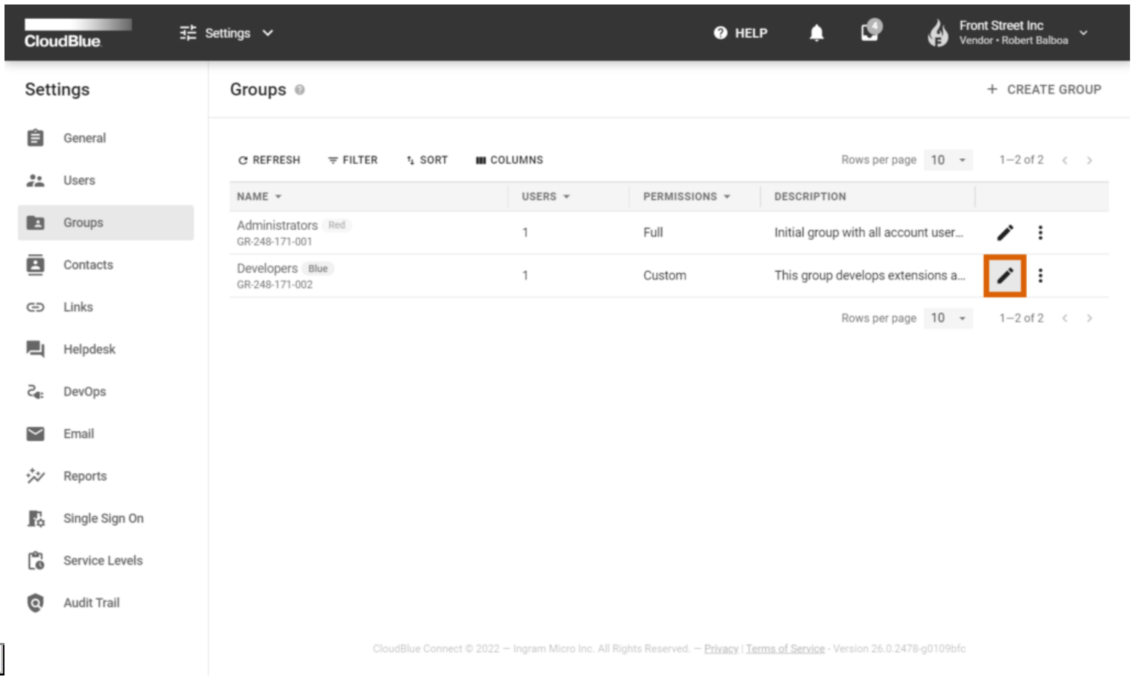


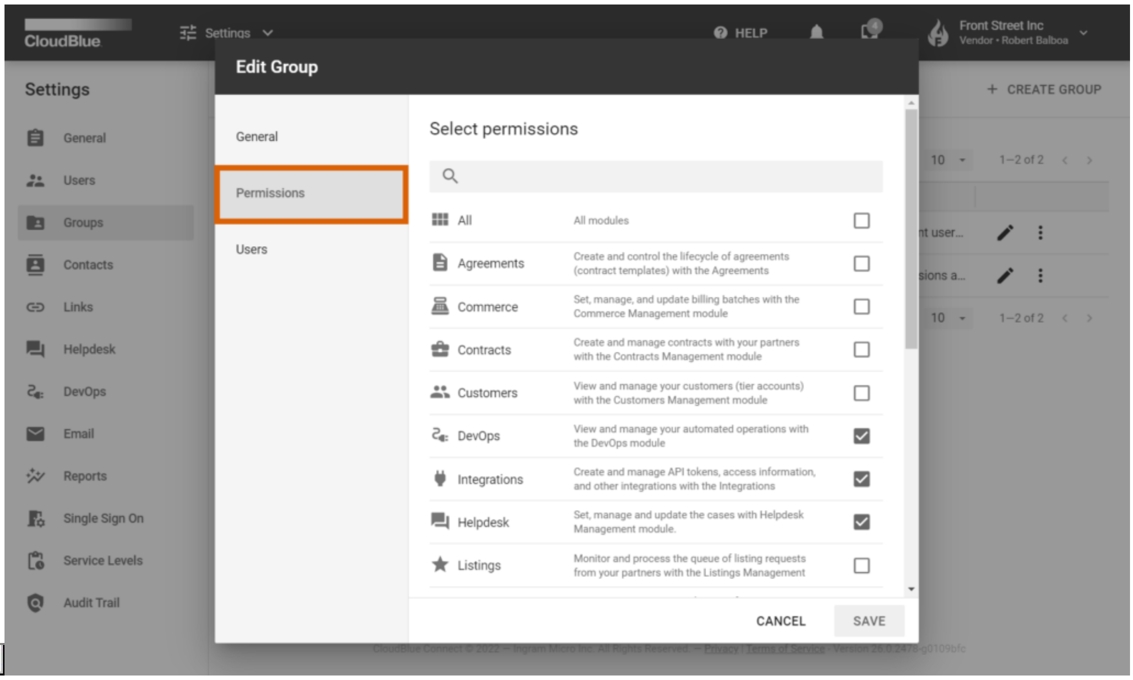
Thereafter, click **Delete** to remove this group or click **Add users** to assign new users to your selected group.

> Users and Groups
>
> Note that each user must belong to at least one group. Therefore, make sure to assign your new users to a right user group with relevant permissions.

Editing Groups

Edit permissions, included users and other general group data by clicking on the **edit** icon next to your selected group.





For instance, in case you need to change group permissions, navigate to the **Permissions** tab and exclude or include required Connect modules in the list.

Make sure to click the **Save** button to save your adjustments.