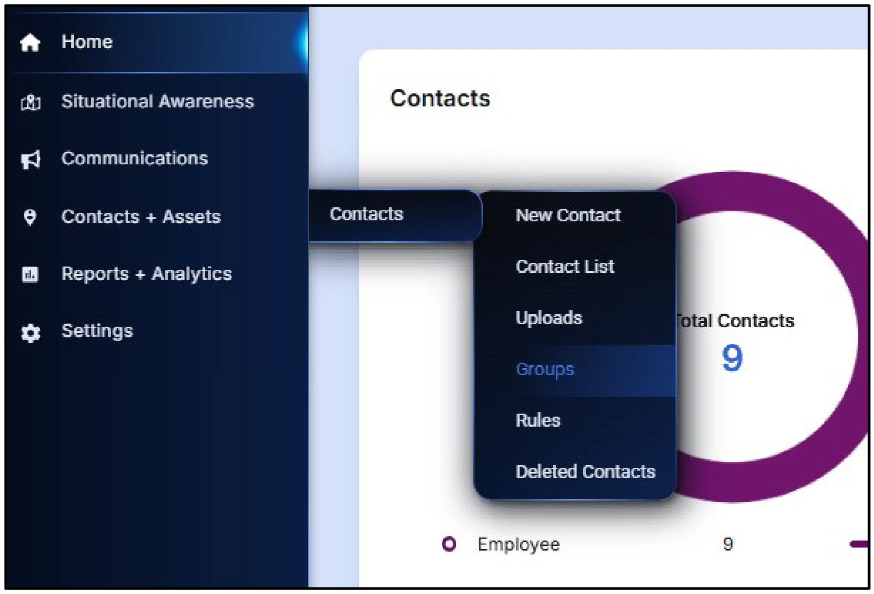
Creating Groups and Contacts

Creating Groups

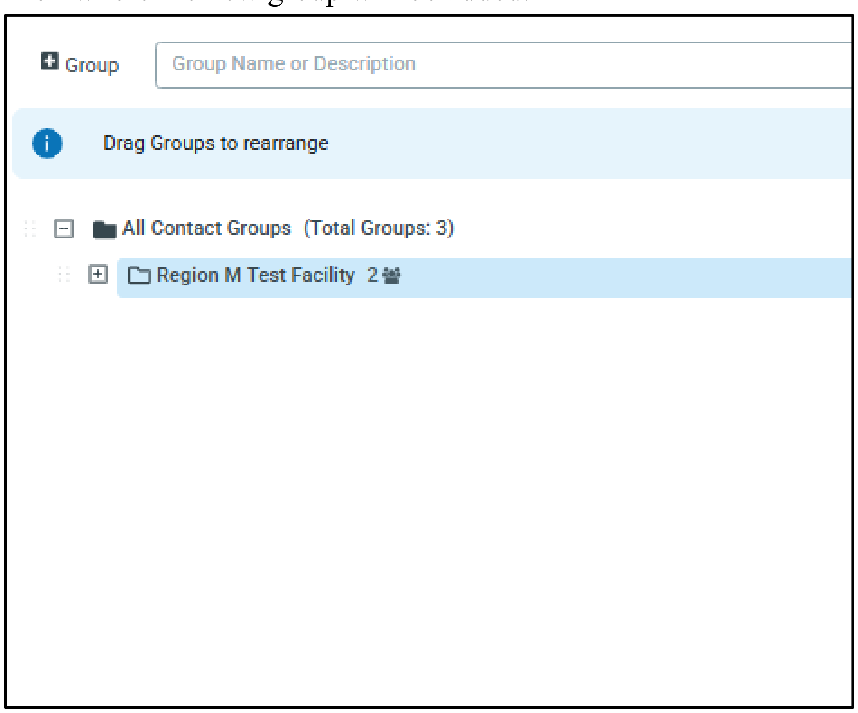
There are two different ways to create groups in Everbridge. The manual method and by using the Contact Upload Template.

Manual Method

a) From the Organization's Dashboard, hover over the **Contacts + Assets** menu, then **Contacts** and select **Groups**

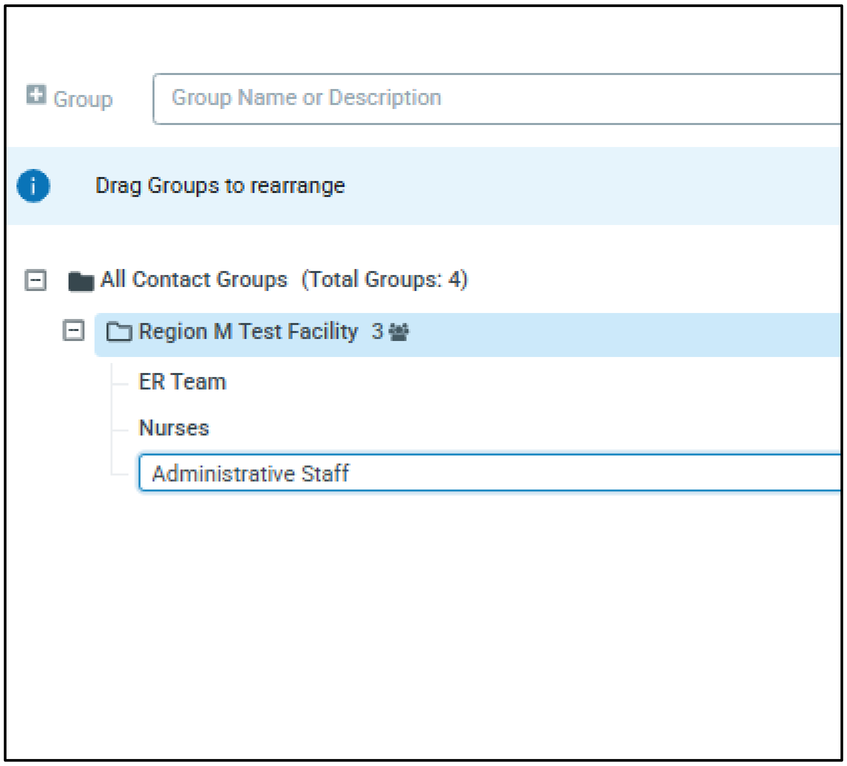


b) Select the location where the new group will be added.



Creating Groups and Contacts

c) Click + **Group**. A box will populate under the location that was selected for the new group. Enter the name of the group and click anywhere outside of the box to save the group.



Creating Groups Using the Contact Upload Template

To create groups using the Contact Upload Template, input the Group name in the Groups column in the format of ***|Group Name** and if adding more than one group for a contact, separate the group names by a pipe delimiter.

H
Groups
separate multiple groups with pipe delimiter
*|AH Administration|AH Command Staff|AH Operatic
Example
*|SBHS Nursing|SBHS All Staff
*|SBHS Nursing
please follow the example above for creating groups
the asterisk and pipe symbol (shift and back slash keys) are required

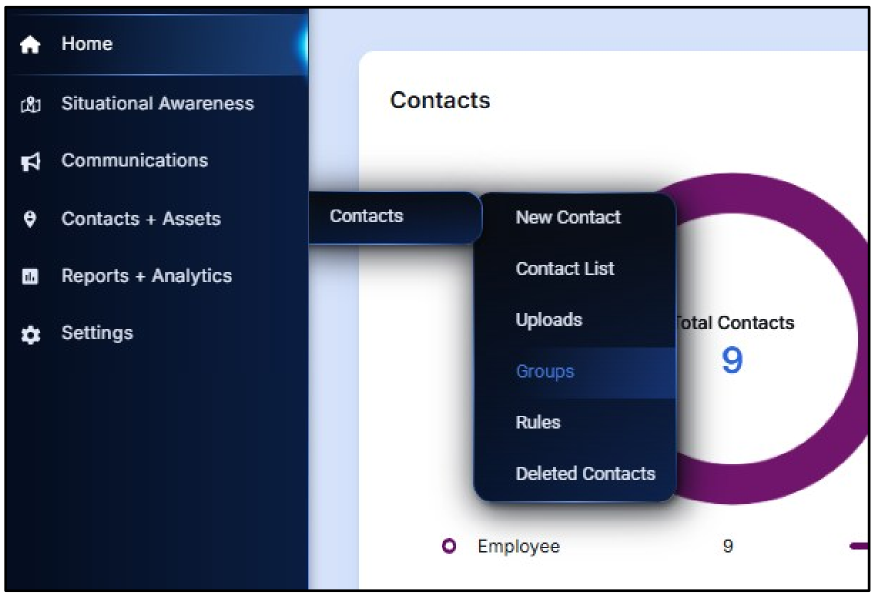
Creating Groups and Contacts

Creating Contacts

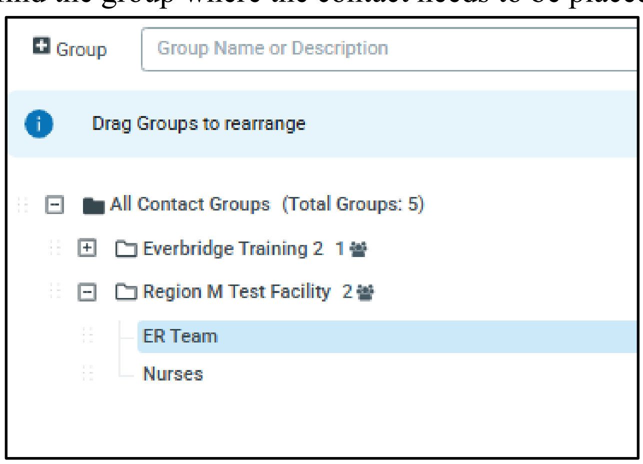
There are two different ways to create contacts in Everbridge. One method is manual (longer approach if entering more than 5 contacts) and the other is by using the upload template (much quicker especially if there are large number of contacts that need to be entered).

Manual Method

a) From the Organization's Dashboard, hover over the **Contacts + Assets** menu, then **Contacts** and select **Groups**

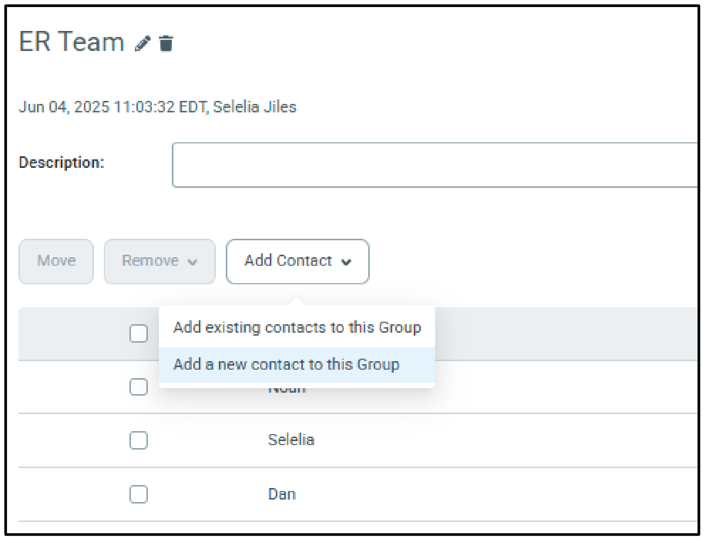


a) On the Groups page, find the group where the contact needs to be placed and select it.



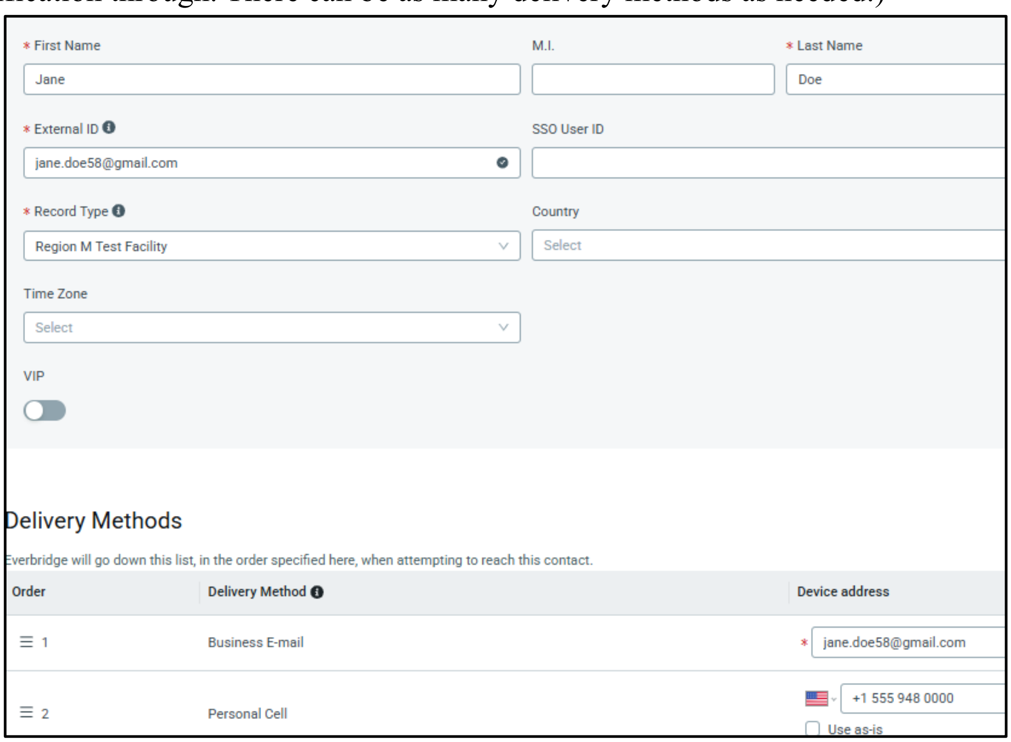
b) Once the group has been selected, the section to the right changes to indicate the group where the contacts will be added. Click on the **Add Contacts** button and select **Add a New Contact to this Group.**

Creating Groups and Contacts



c) Enter the required information on the Add Contact page that populates.

1. **First Name**
2. **Last Name**
3. **External ID** (This should be unique to the person such as email address or employee ID)
4. **Record Type** (Typically listed as the facilities name and should automatically populate depending on the user.)
5. **Delivery Methods** (The mode of contact that the recipient will receive your notification through. There can be as many delivery methods as needed.)



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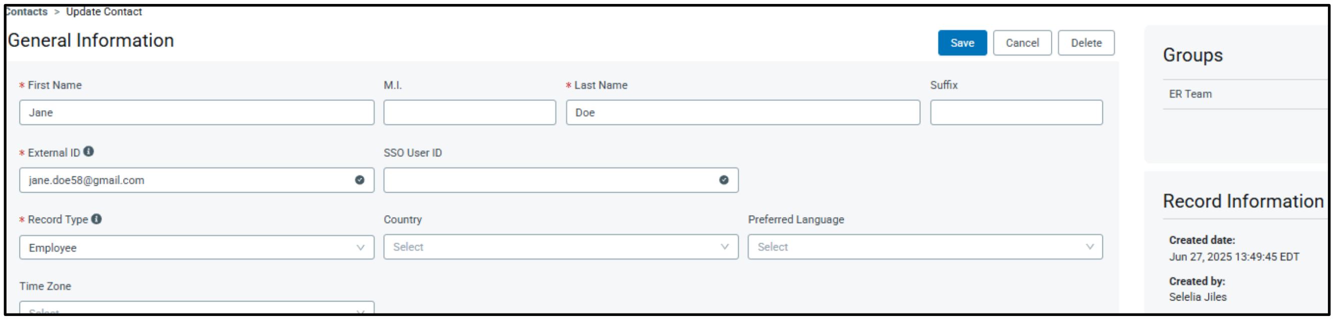
d) Click **Save.** The page will update, now showing the Group the contact has been added to.



Creating Contacts Using the Contact Upload Template

a) To create contacts using the Contact Upload Template, input all required information for each contact.

1. **First Name**
2. **Last Name**
3. **External ID**
4. **Record Type**
5. **Group(s)**
6. **Delivery method(s)**

<table>
<tr><th>A</th><th>B</th><th>C</th><th>D</th><th>E</th><th>F</th><th>G</th><th>H</th></tr>
<tr><td>First Name</td><td>M.I.</td><td>Last Name</td><td>Suffix</td><td>External ID</td><td>Country</td><td>Record Type</td><td>Groups</td></tr>
<tr><td>REQUIRED</td><td></td><td>REQUIRED</td><td></td><td>REQUIRED</td><td></td><td>REQUIRED</td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td>use all lower-case email</td><td></td><td>Provided for you</td><td>separate multiple groups with pipe delimiter</td></tr>
<tr><td>Jane</td><td>Q</td><td>Doe</td><td></td><td>jane.doe@acmehospital.org</td><td>US</td><td>Acme Hospital</td><td>*|AH Administration|AH Command Staff|AH Operations</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>Example</td></tr>
<tr><td></td><td></td><td></td><td></td><td>If your contact does not have</td><td></td><td></td><td>*|SBHS Nursing|SBHS All Staff</td></tr>
<tr><td></td><td></td><td></td><td></td><td>an email use this format:</td><td></td><td></td><td>*|SBHS Nursing</td></tr>
<tr><td></td><td></td><td></td><td></td><td>janedoe@SBHS</td><td></td><td>Serenity Behavioral Health Systems</td><td>please follow the example above for creating groups</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>the asterisk and pipe symbol (shift and back slash keys) are</td></tr>
<tr><td></td><td></td><td></td><td></td><td>do not include .com etc...</td><td></td><td></td><td>required</td></tr>
</table>

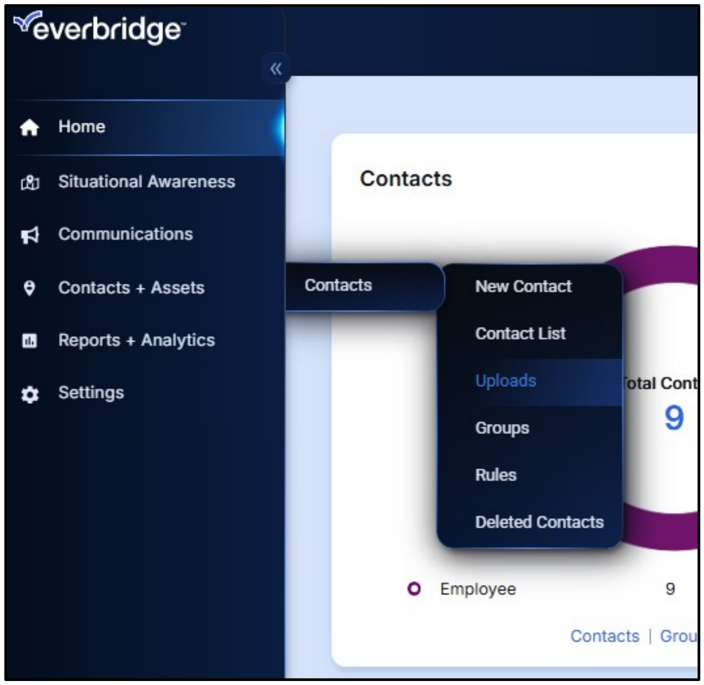
I	J	K	L	M	N	O	P	Q
Extension Phone 1	Extension 1	Phone 1	Phone 2	Phone 3	Email Address 1	Email Address 2	SMS 1	SMS 2
Office Phone	extension, if needed	Business Cell	Personal Cell	Home Phone (non cell)	Business Email	Personal Email	Business Cell Text	Personal Cell Text
10 digit number		10 digit number	10 digit number	10 digit number			same value as Phone 1	same value as Phone 2
					jane.doe@acmehospital.org			

b) After inputting all required information, ensure that the word **END** is entered at the end of each row containing contact information and save the file as a CSV file.

Creating Groups and Contacts

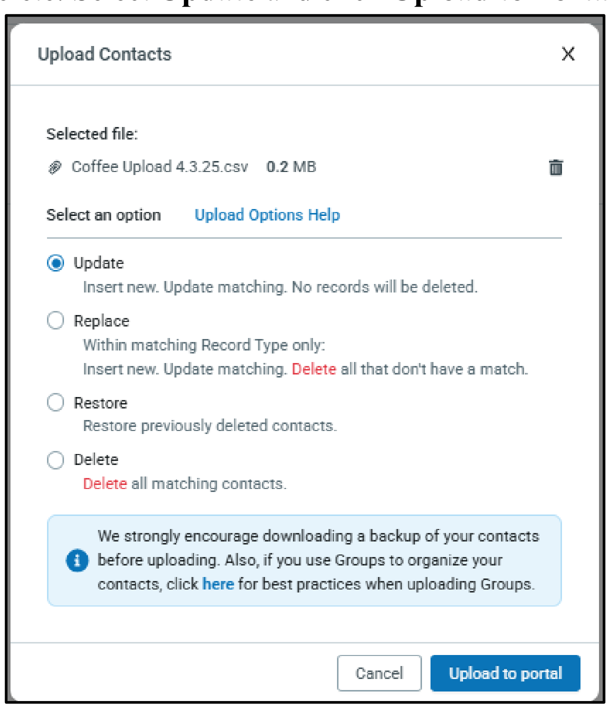
Uploading the Template

a) From the Organization's Dashboard, hover over the **Contacts + Assets** menu, then **Contacts** and select **Uploads**



a) From the Upload screen, select **Upload to Portal** and follow the prompts for adding the upload template.

b) After the document has been added, a new box will populate giving the option to Update, Replace, Restore, or Delete. Select **Update** and click **Upload to Portal**.



Creating Groups and Contacts

c) Upload will begin and your new contacts will be added to the system. A few helpful tips:

1. Review the upload report on the upload screen to ensure that all contacts were uploaded successfully. If any numbers show in the **Records Loaded with Error** or **Records Not Loaded** columns, click on the binoculars on that row to review the errors in the upload.
2. Review the Groups page to ensure that any new groups were created correctly. If user has access to multiple facilities within one organization, ensure that the groups are placed under the intended facility.