User Group Filtering

ⓘ **Want this feature?**

You'll need the feature '**Additional Layer Filters**' enabled for your site. Contact Commerce Vision to switch this on.

Overview

Layers are a powerful way to target your website content based on role, customer code, or marketing flag, to name a few. But did you know you can now apply layers based specifically on a **Group of Users**?

That's right - you can have content on your website that displays only to a pre-defined group of users. And these groups *don't have to be related* by role, region, or account code. You can create groups made up of **any** users you choose.

Use case

Got a special promotion on accounting software? Create a User Group consisting of all your Finance users, and show them a promotional banner or campaign slider!

They can all be from different customer accounts, with different web roles - it doesn't matter with User Groups.

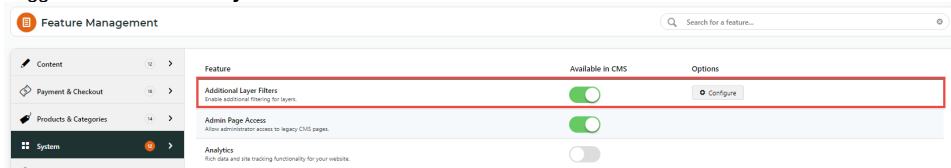It's another tool in your personalisation kit. Read on to find out how to use it.

In this guide

Configure Group Filtering

With the Additional Layer Filters feature enabled, you just need to make sure the setting to enable '**User Group Filtering**' is on.

1. In the CMS, go to **Settings Feature Management System**.

2. Toggle ON *Additional Layer Filters*.

3. Click *Configure*.

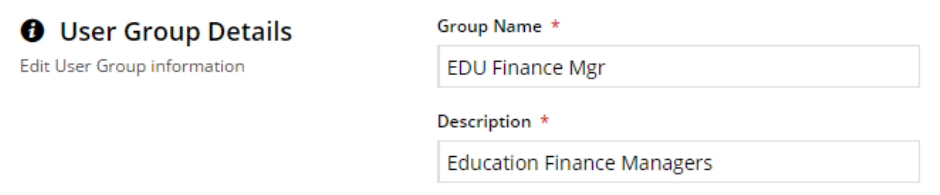4. Toggle ON *User Group Filtering*.

5. Click *Save & Exit*.

Create a User Group

Now that your feature is up and running, it's time to create a user group.
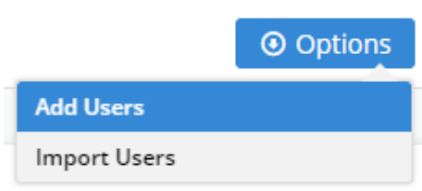
1. In the CMS, go to **Users User Groups**.

2. Click **Add New User Group**.

3. Give your group a **Name** and **Description** and click **Save**.

4. An **Options** button should now appear near the Save button. Hover over it and select **Add Users** (we'll talk about importing later in this guide).

5. In the **Add User** input box, start typing a user **email address**. Suggestions will be offered.
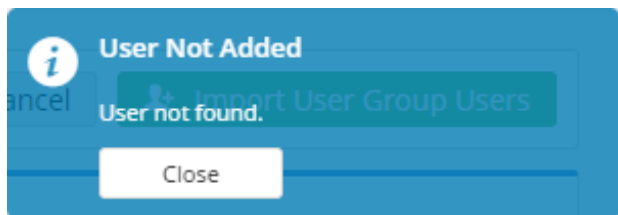

6. Either select from suggestions, or finish typing the address. When you hit **Enter**, the user will be added (you can also use the '**Add**' button).

7. If the email address does not match a user, a 'User not added' message will be returned.

8. Repeat for remaining users to be added.

9. If you make a mistake, remove the user with the **Delete** option.

Add a User Group to a Layer

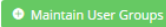Now let's assign our User Group to a Layer.

1. Go to **Advanced Content Layers**.

2. **Edit** an existing Layer, or **Add New Layer**.

3. Scroll to the **User Groups** section.

4. Click **Add User Group** (or if you haven't yet created your group, click '**Maintain User Groups**' and follow the steps above for "Creating a User Group").

⚓ User Groups
Select the user groups that this layer will apply to

User Group

⊕ Add User Group   ⊕ Maintain User Groups

☐ Layer active for all user groups *excluding* the ones listed above

5. *A dropdown list will appear, containing all existing Groups. Select the one you require.*

6. *Consider the setting "**Layer active for all user groups excluding the ones listed above**" - tick this if you want the group(s) you just added to act as an* exclude *(rather than include).*

7. *Click **Save & Exit** (if you were creating a brand new layer, first scroll back up and enter required Layer info such as Name, Description, Authentication Status).*

Now all you need to do is decide what content you're displaying to these users. Add a new widget (Campaign slider? Banner?) or edit an existing one, and apply the Layer associated with your User Group.

ONLY the people in your User Group (or Groups, if you added multiple) will see the widget with this layer applied. Neat!

Import Users to a Group (Optional)

If you've got a lot of users to add to a group, it's probably way easier to import them from a spreadsheet, rather than add them one by one. Here's how.

1. *Go to **Users User Groups**.*

2. *Find your group in the list and click **Users**. (We're assuming you've already created your Group; if you haven't, follow the steps above for "Creating a User Group").*

3. *Click '**Import User Group Users**'.*

4. *Click the **Download Example Template** button to get a pre-formatted CSV file.*
   (Admittedly, the format is pretty simple - 1 column with a header, consisting of the user's email address or numeric User ID)
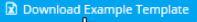

☁ Import Users to Group: EDU Finance Mgr

ℹ To import a large number of users to this Group, simply browse to your .csv file and select the import method you wish to use:

- Append - this method will add the users on the import file to any existing users in the Group
- Override - this method will replace the existing users in the Group with the users on the import file

If errors are encountered in the data (i.e. invalid User ID or duplicate users), the import will not proceed and errors will be identified in the Import Log.

For convenience, we've created a sample import template you can use – simply paste your own data into the sheet and save in .csv format.

📄 Download Example Template

5. *Copy and Paste your own data into the spreadsheet and save it somewhere you can access it.*
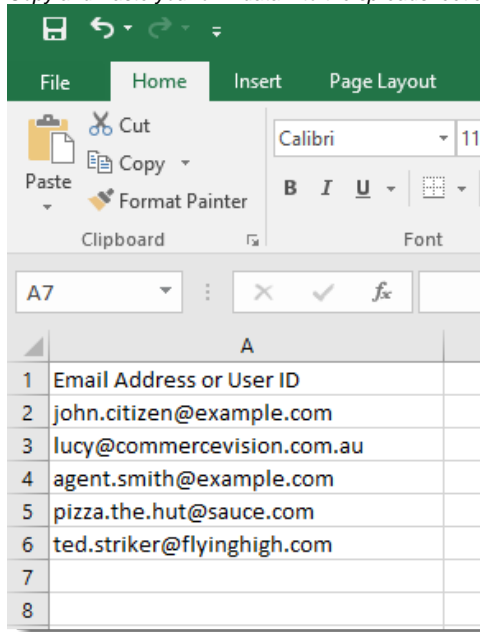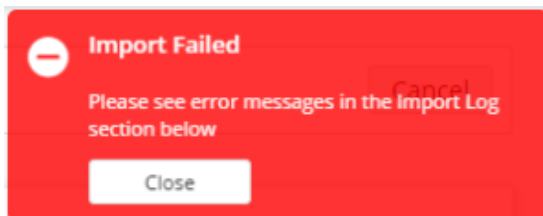

6. *Now, decide whether you want to **add** these users to any existing members of the group (**Append**), or **replace** any existing members with the ones on your list (**Override**).*

7. *Click '**Select files**' and browse to your saved CSV.*

8. *The import will start automatically once your file is selected. Failure or Success messages will be returned, along with feedback in the Import Log.*

Import Successful

The Users have been added to the group

Close
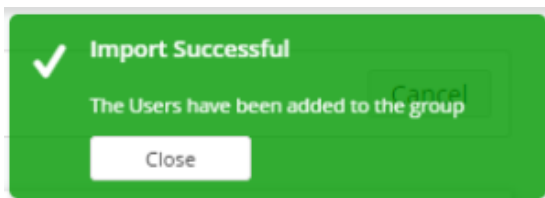
:≡ **Import Log**

| Import Successful |

Import Failed

Please see error messages in the Import Log section below

Close

:≡ **Import Log**

Line 2 specifies a User Email: 'john.citizen@example.com' which was not found.
Line 3 specifies a User Email: 'lucy@commercevision.com.au' which was not found.
Line 4 specifies a User Email: 'agent.smith@example.com' which was not found.
Line 5 specifies a User Email: 'pizza.the.hut@sauce.com' which was not found.
Line 6 specifies a User Email: 'ted.striker@flyinghigh.com' which was not found.

⚠ *If your import fails, correct your data (errors are noted in the log) and try again.*

Related help

- Layers
- Layer Group Filtering