

Create and Manage Groups

27 Steps [View most recent version](#) 

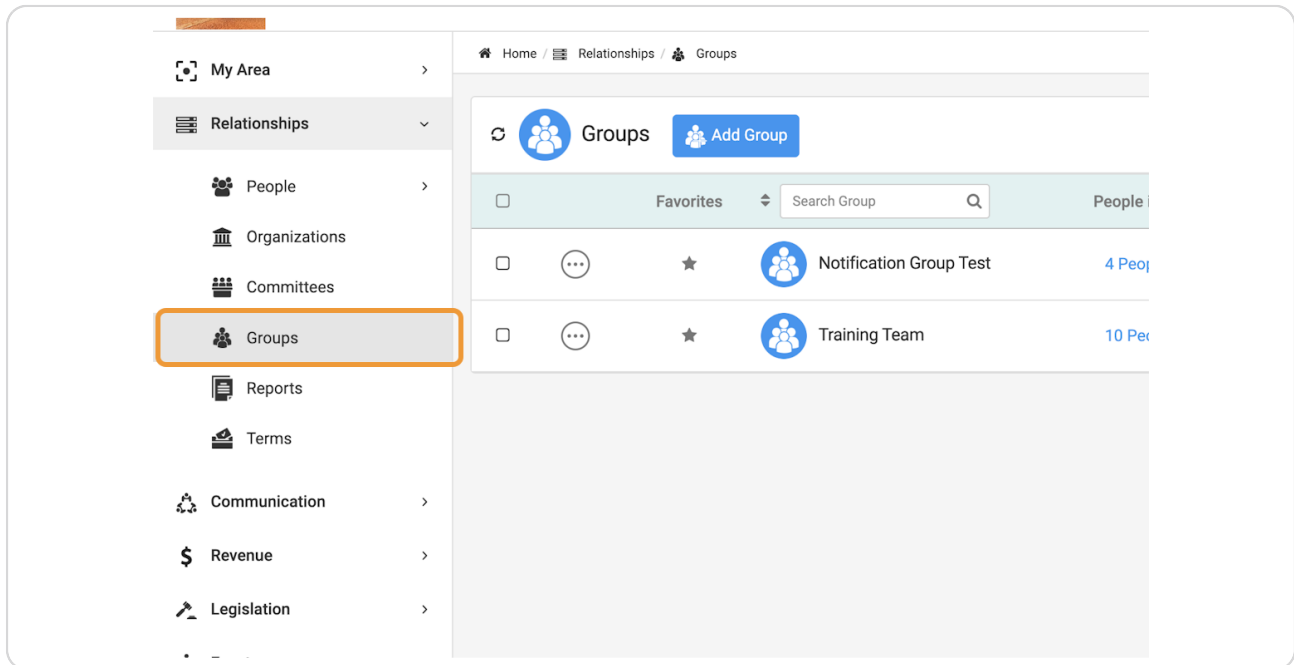
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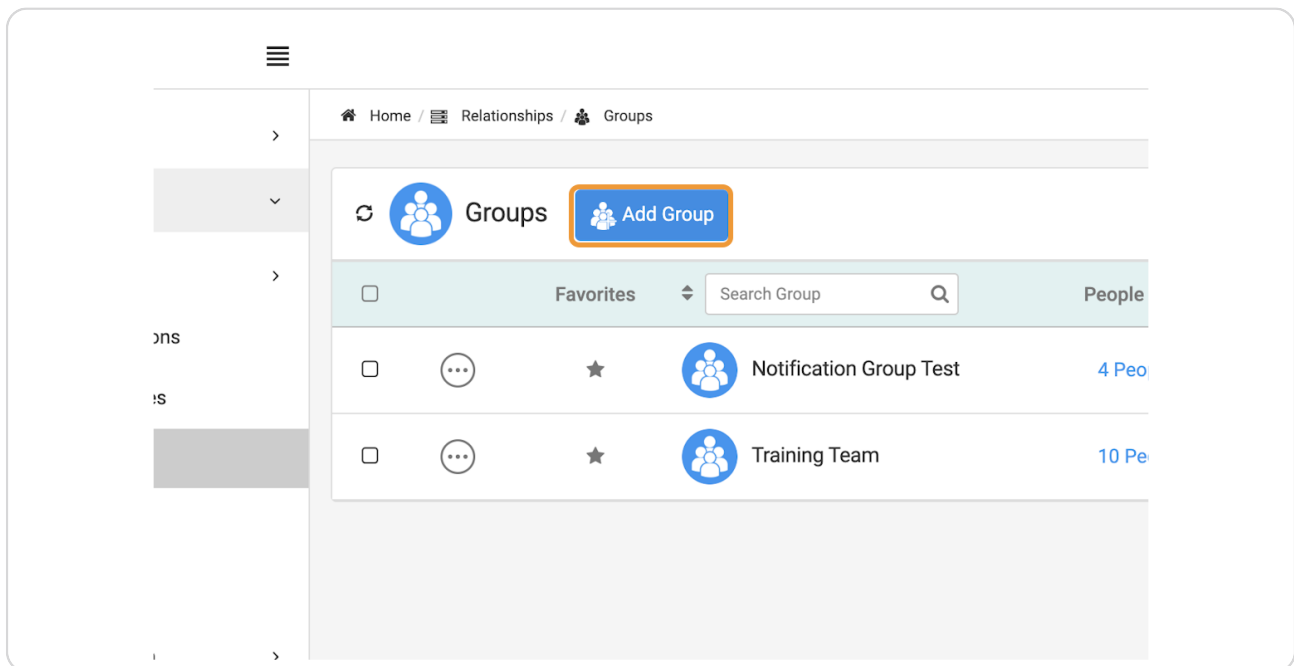
STEP 1

Click on Relationships and then Groups



STEP 2

Click on Add Group to create a new group



STEP 3

Type in the new group name

The screenshot shows the 'Groups' management page. At the top, there is a breadcrumb trail 'Relationships > Groups' and a user profile 'Crescance Admin'. Below this, the page title is 'Groups' with a sub-header 'Page [1/1] 10 of 2 Records'. The main form area has a 'Group Name' field containing 'Test Group', which is highlighted with an orange border. Below the name field is a 'Group Description' field with a rich text editor toolbar. At the bottom of the form are 'Cancel' and 'Save & Configure' buttons. Below the form is a table with columns: Favorites, Search Group, People in Group, Last Updated, Created, Action, and Associated Organization(s). The table contains two rows: 'Notification Group Test' (4 People, Admin, Crescance Aug 14, 2024) and 'Training Team' (10 People, Admin, Crescance Aug 14, 2024). Each row has a 'Send a Message' button.

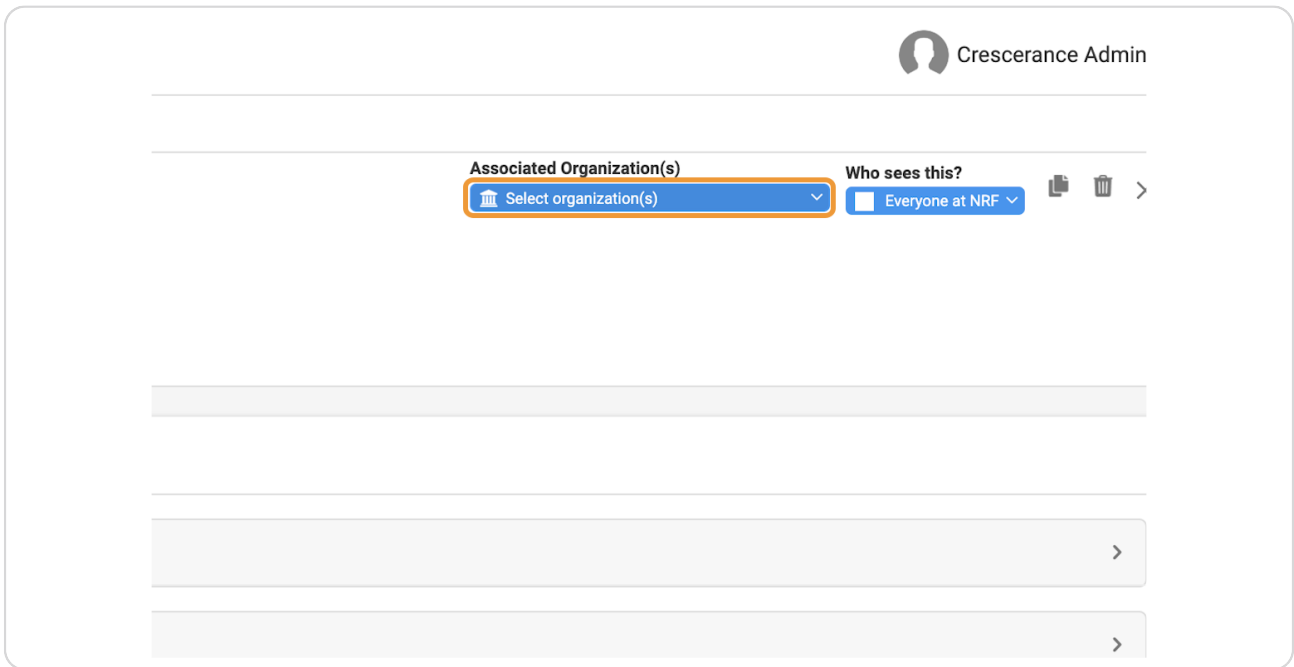
STEP 4

Click on Save & Configure

This is a close-up view of the bottom part of the form from the previous screenshot. It shows the 'Group Description' field with a rich text editor toolbar. Below the field are the 'Cancel' and 'Save & Configure' buttons. The 'Save & Configure' button is highlighted with an orange border. Below the buttons is the top part of the table, showing the 'Action' and 'Associated Organization(s)' columns. The table contains two rows: 'Admin, Crescance Feb 8, 2023' and 'Admin, Crescance Aug 22, 2022', each with a 'Send a Message' button.

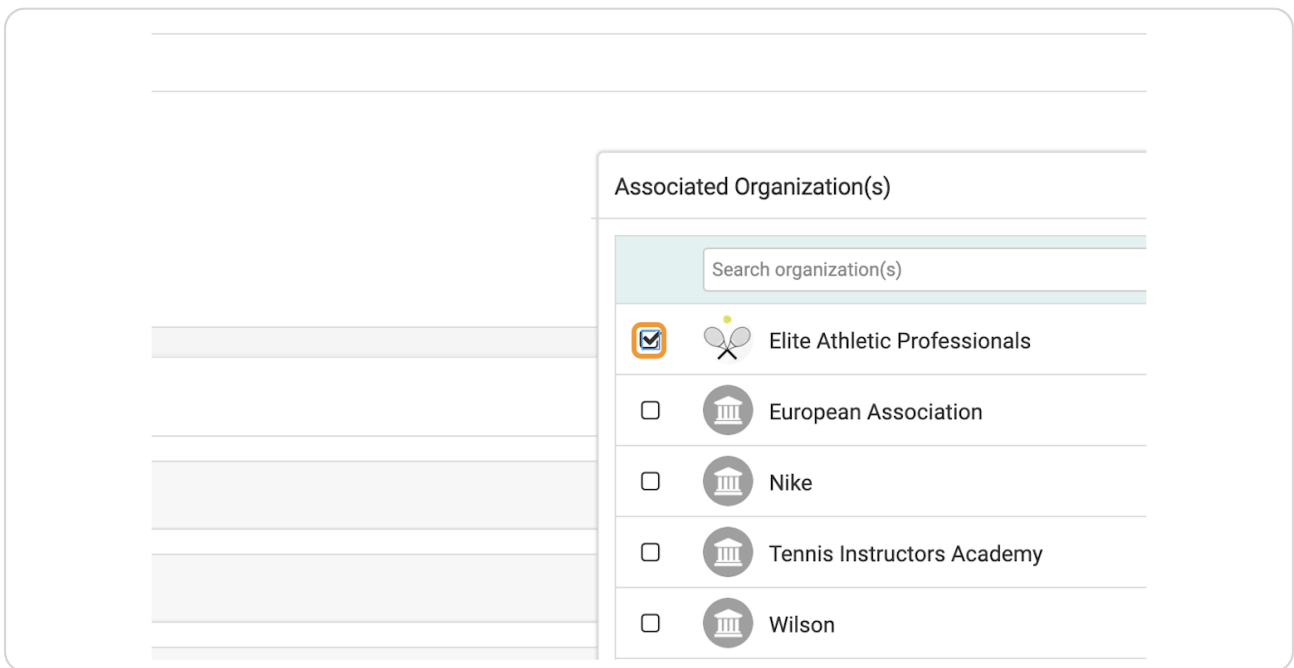
STEP 5

You can select an organization to link to the group if applicable



STEP 6

Check and pick which organization you wish to be associated with the group



STEP 7

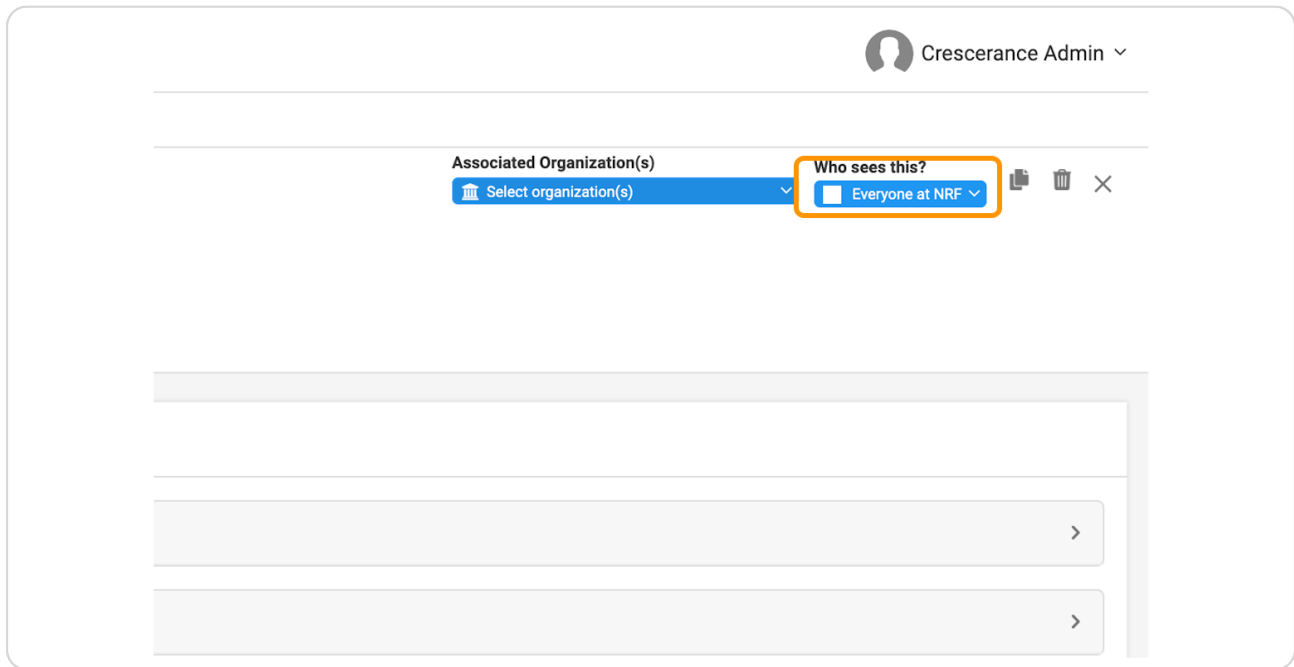
Click on Yes/No to determine if all the people within the organization can see the group and Save when finished.

The screenshot displays the 'Associated Organization(s)' dialog box within the Crescance Admin interface. The dialog features a search bar and a table of organizations. The 'Elite Athletic Professionals' organization is selected, and its dropdown menu is set to 'No'. The 'Save' button is highlighted with an orange box, indicating the next step in the process.

Organization	Can all people in the organization see this group?
<input checked="" type="checkbox"/> Elite Athletic Professionals	No
<input type="checkbox"/> European Association	Select
<input type="checkbox"/> Nike	Select
<input type="checkbox"/> Tennis Instructors Academy	Select
<input type="checkbox"/> Wilson	Select
<input type="checkbox"/> World Tennis Association	Select

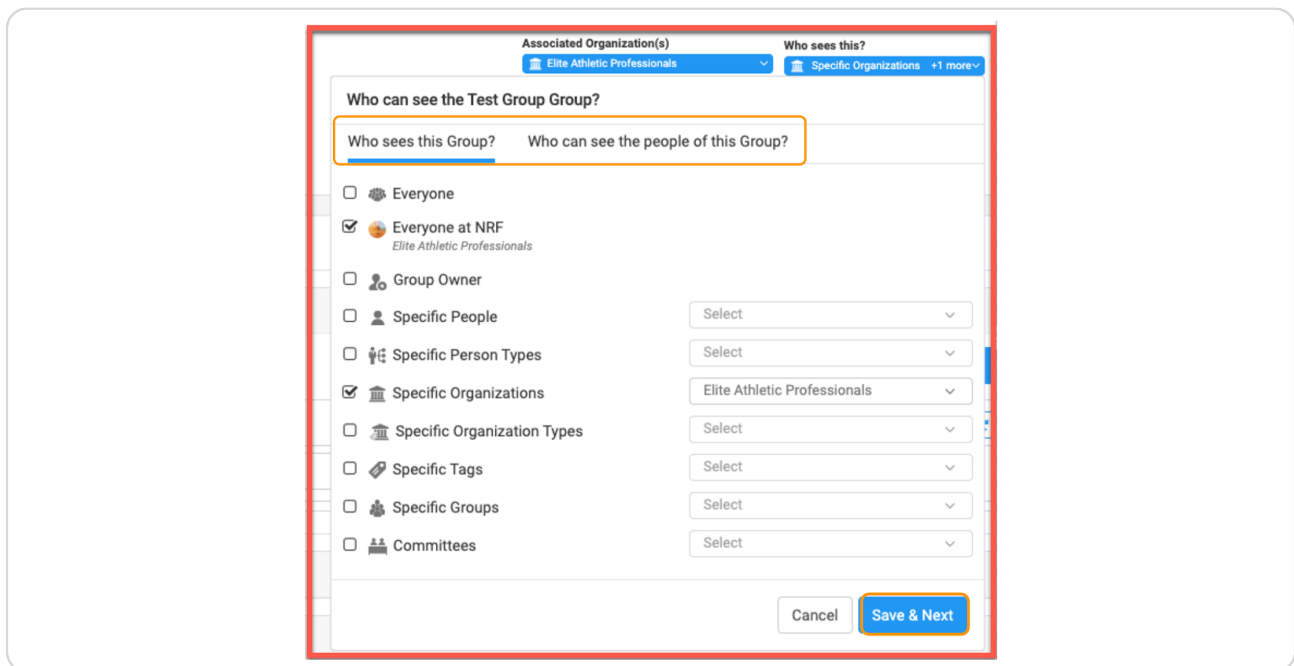
STEP 8

To set the group visibility, select 'Who sees this?'



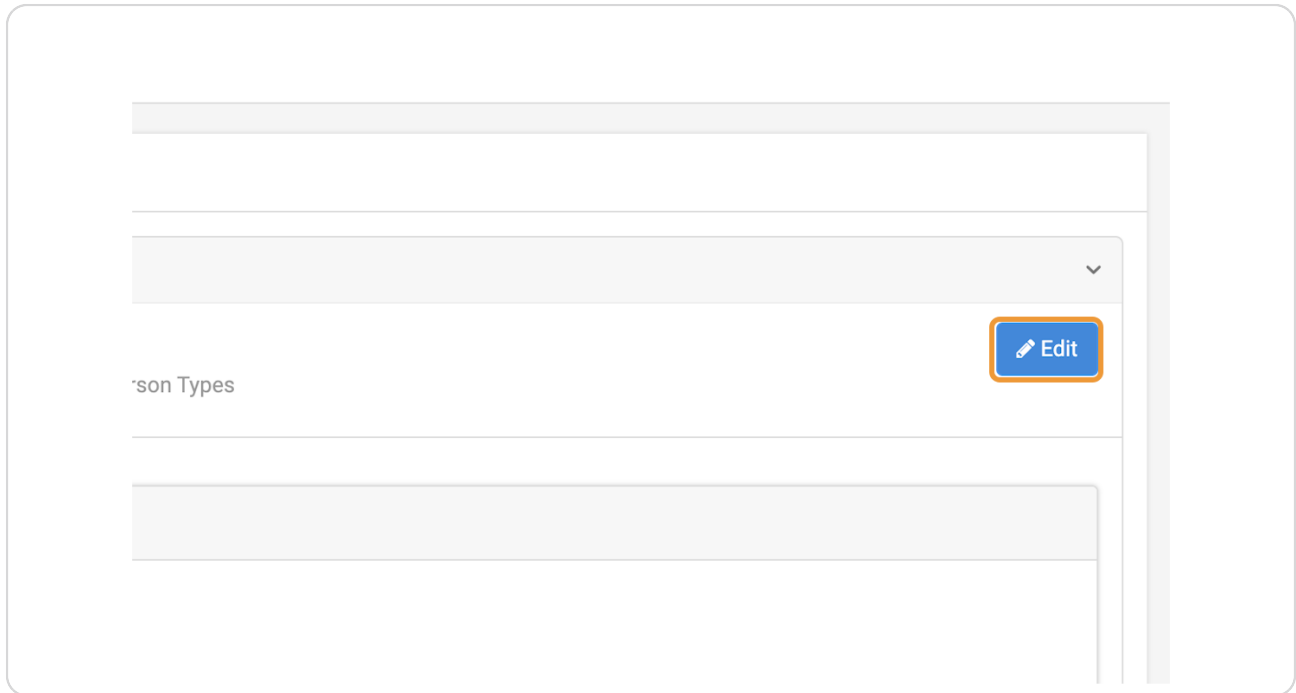
STEP 9

Select Group and People of the Group visibility settings and then save



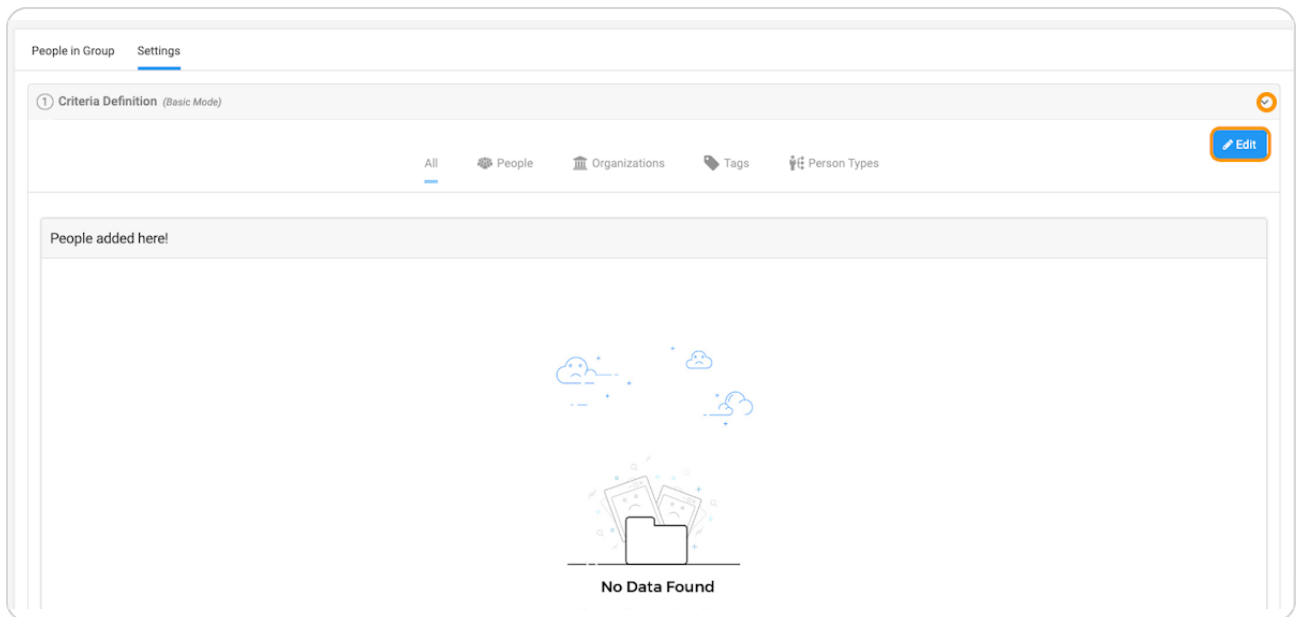
STEP 10

Click on Edit



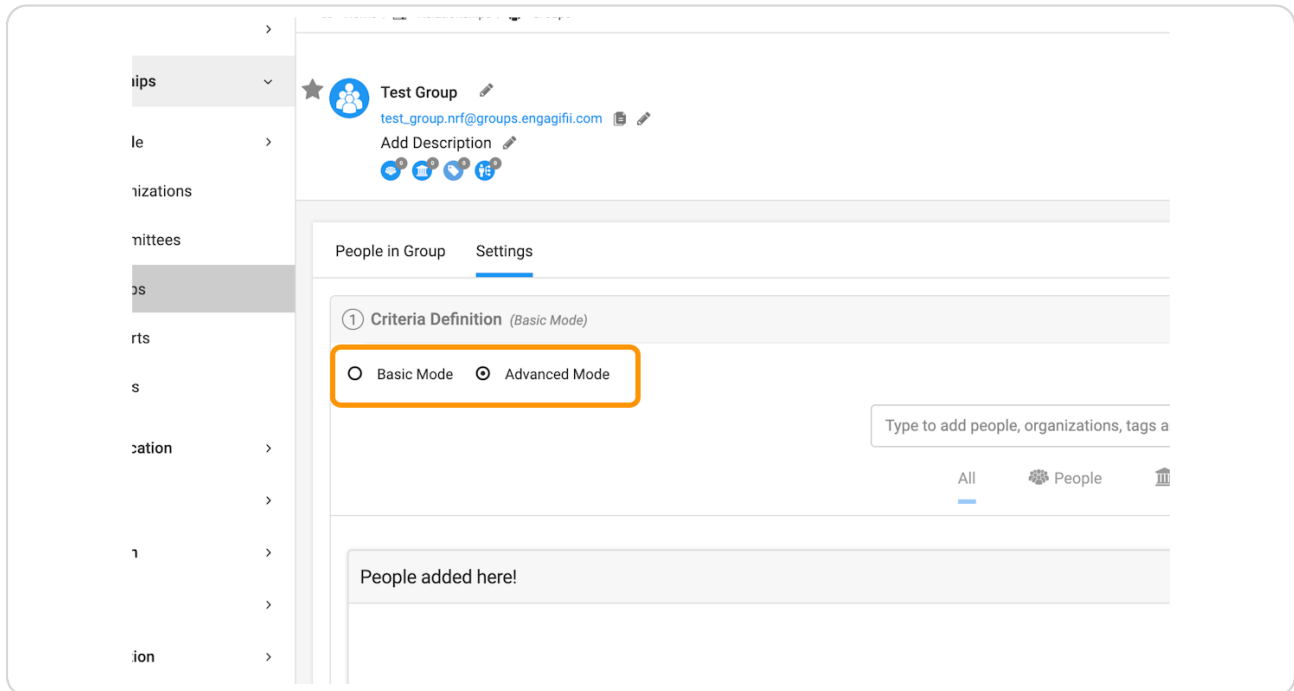
STEP 11

Expand the section and click on Edit



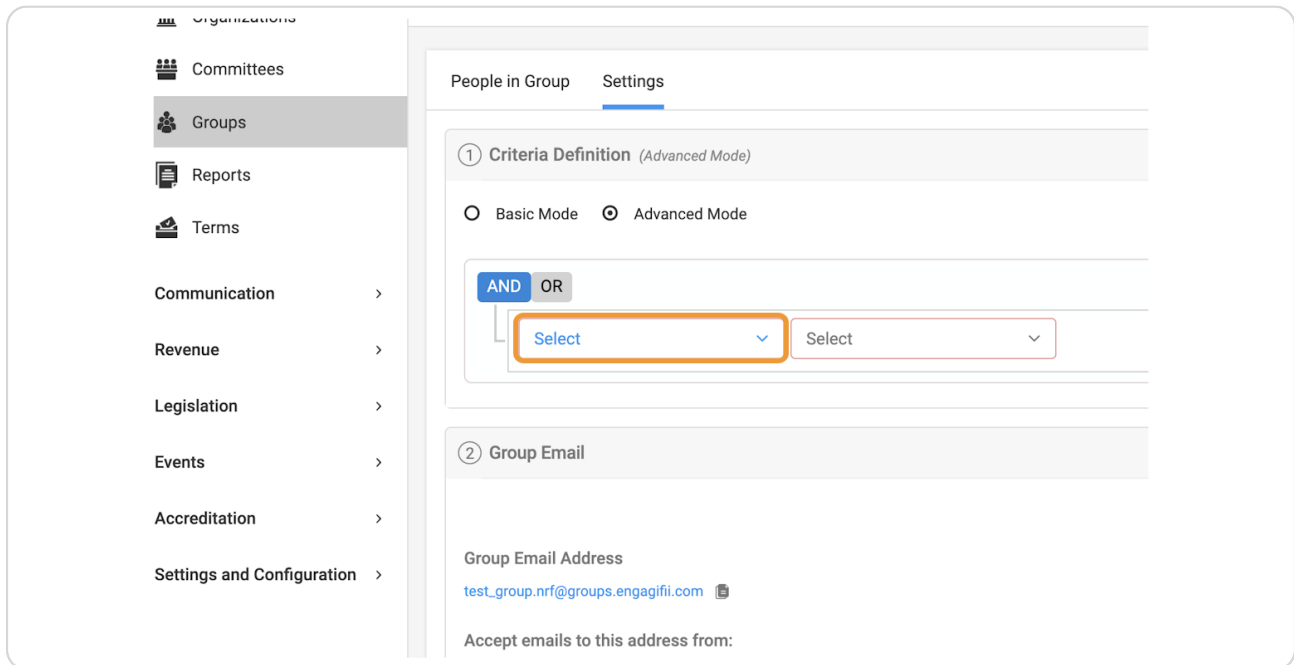
STEP 12

To create a Dynamic Group, chose Advanced Mode to select your group criteria rules.



STEP 13

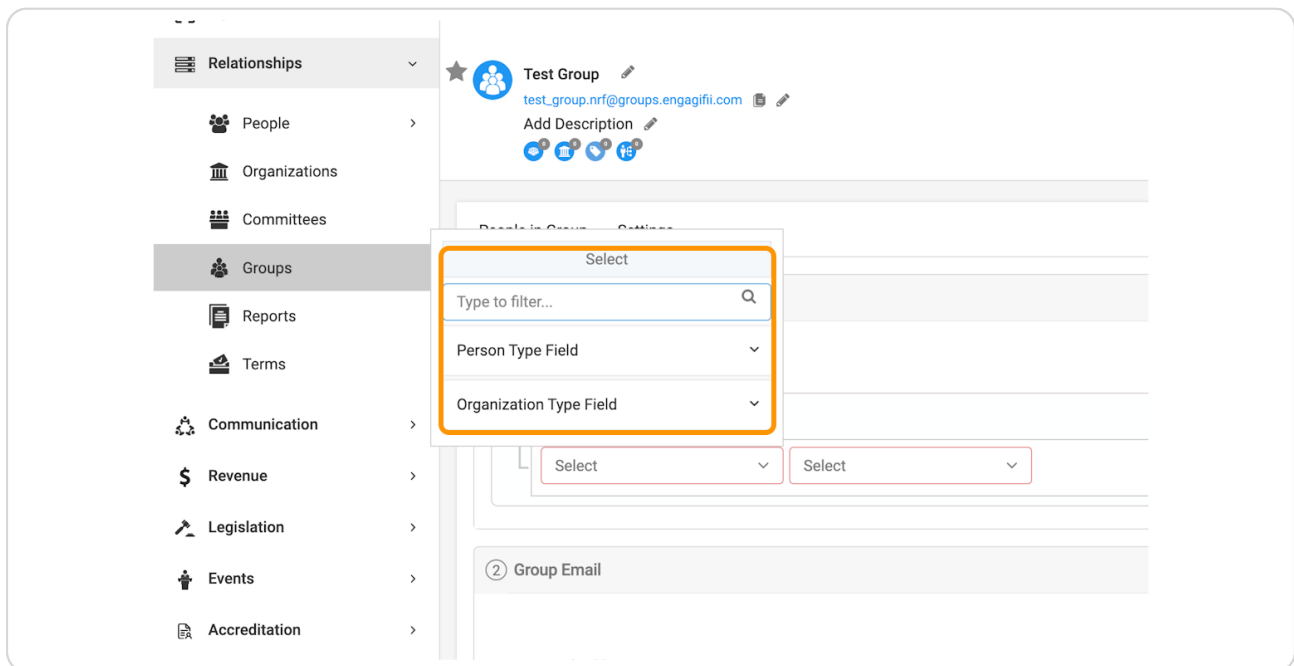
Begin creating your criteria rules to build your group



The screenshot shows the 'Settings' page for a group. The left sidebar contains a navigation menu with items: Organizations, Committees, Groups (highlighted), Reports, Terms, Communication, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The main content area has two tabs: 'People in Group' and 'Settings'. Under 'Settings', there are two sections: 1. 'Criteria Definition (Advanced Mode)' with radio buttons for 'Basic Mode' and 'Advanced Mode' (selected). Below this are two dropdown menus, the first of which is highlighted with an orange box and shows 'Select' as the current selection. 2. 'Group Email' section with the label 'Group Email Address' and the email address 'test_group.nrf@groups.engagifii.com'.

STEP 14

Type your criteria and chose whether its a person or organization type field



The screenshot shows the 'Test Group' page. The left sidebar contains a navigation menu with items: Relationships, People, Organizations, Committees, Groups (highlighted), Reports, Terms, Communication, Revenue, Legislation, Events, and Accreditation. The main content area shows the group profile for 'Test Group' with the email 'test_group.nrf@groups.engagifii.com'. Below the profile, there are two tabs: 'People in Group' and 'Settings'. Under 'Settings', there are two sections: 1. 'Criteria Definition (Advanced Mode)' with radio buttons for 'Basic Mode' and 'Advanced Mode' (selected). Below this are two dropdown menus, the first of which is highlighted with an orange box and shows a search bar 'Type to filter...' and two options: 'Person Type Field' and 'Organization Type Field'. 2. 'Group Email' section with the label 'Group Email Address' and the email address 'test_group.nrf@groups.engagifii.com'.

STEP 15

Click on inclusivity (include/exclude)

People in Group Settings

① Criteria Definition (Advanced Mode)

Basic Mode Advanced Mode

AND OR

All Positions

② Group Email

Group Email Address
test_group.nrf@groups.engagifii.com

Accept emails to this address from:

STEP 16

Click on specific values for the criteria

Advanced Mode

Advanced Mode

AND OR

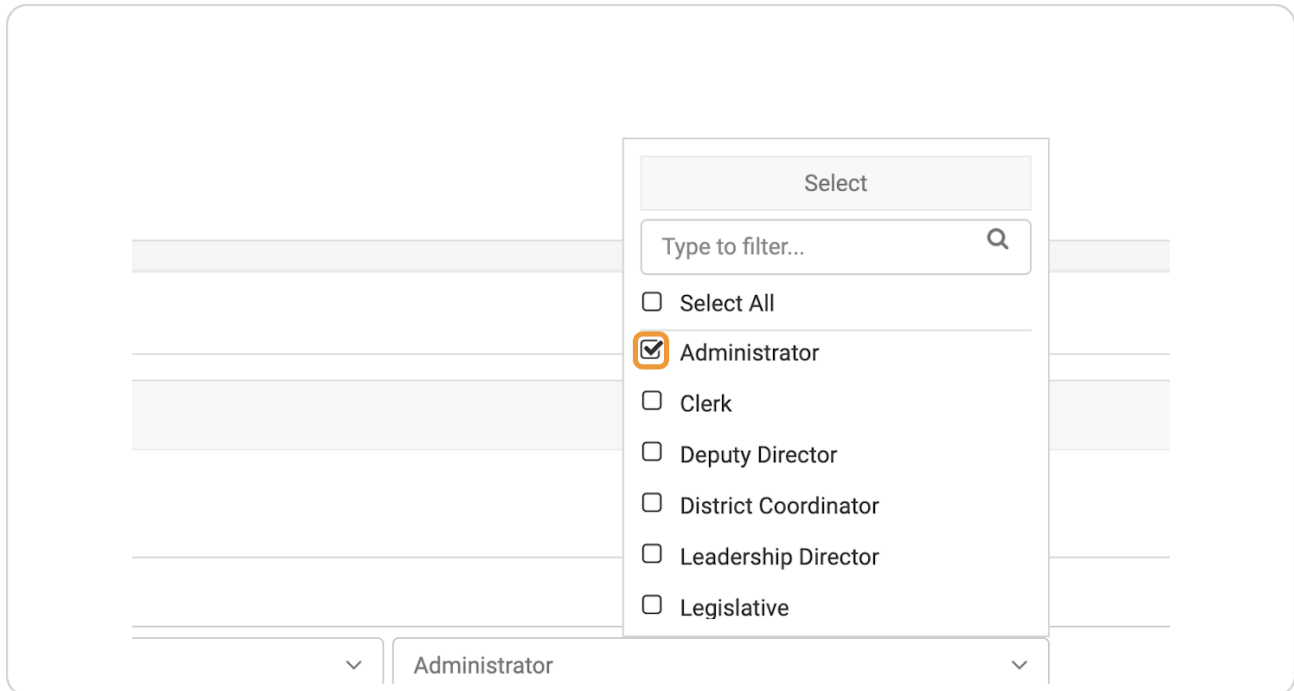
Group Email Address
test_group.nrf@groups.engagifii.com

Accept emails to this address from:

Email Address

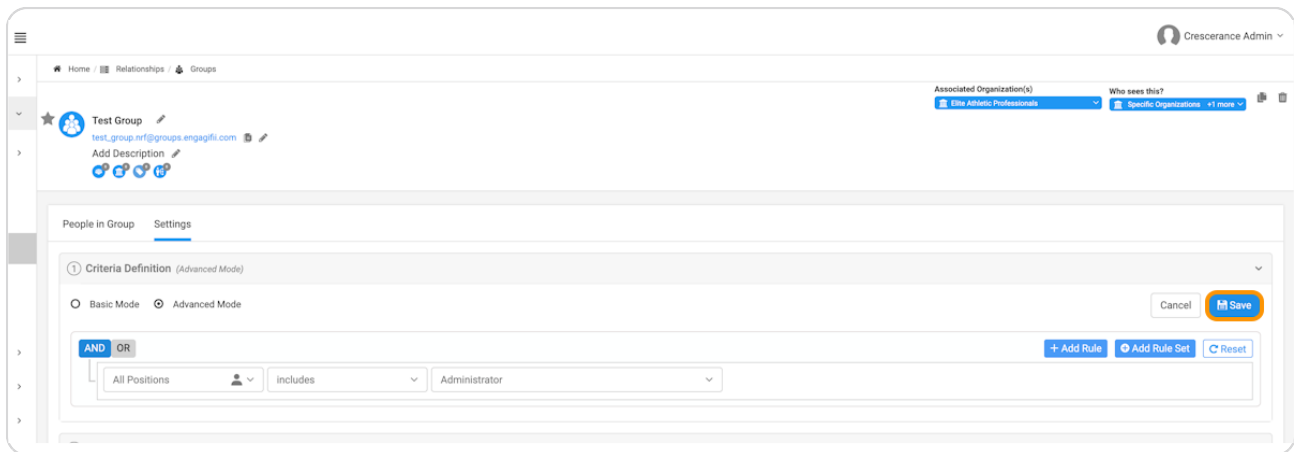
STEP 17

Check Administrator



STEP 18

Click on Save once you have created your criteria rule.



STEP 19

Click on People in Group to see the overview of the group created with the criteria rule.

The screenshot shows the 'Test Group' overview page. At the top, there are navigation links for Home, Relationships, and Groups. The group name 'Test Group' and its email 'test_group.nrf@groups.engagifii.com' are displayed. Below this, there are tabs for 'People in Group' (highlighted with an orange box) and 'Settings'. The 'People in Group' tab shows a table with 3 records. The table has columns for Favorites, Search People, Search Email, Search Phone, Current Department, Current Position, Term, and Region. The records are:

Favorites	Search People	Search Email	Search Phone	Current Department	Current Position	Term	Region
<input type="checkbox"/>	★	Admin, Crescerance	admin@crescerance.com <i>Email Address</i>	(404) 913-2737 <i>Phone Number</i>	Operations Department	Administrator	
<input type="checkbox"/>	★	McEnroe, John	MacMac01@yopmail.com <i>Email Address</i>	(123) 456-7890 <i>Phone Number</i>	2 Departments	2 Positions	
<input type="checkbox"/>	★	Sillyman, Ben	bensillyman23@yopmail.com <i>Email Address</i>	(404) 555-1212 <i>Phone Number</i>	Sales Department	Administrator	

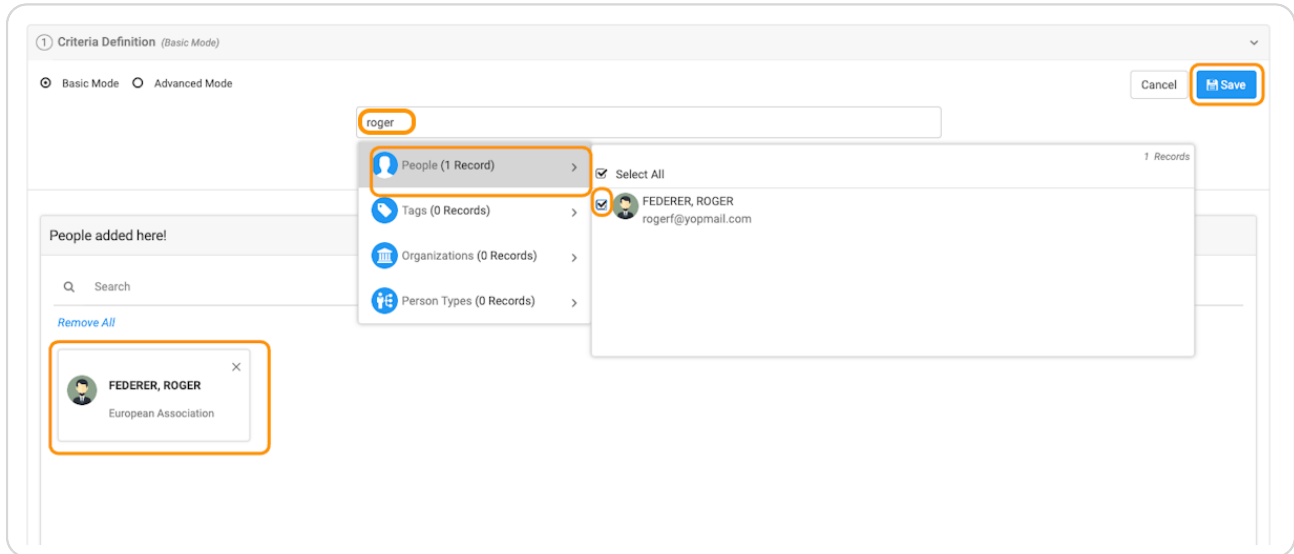
STEP 20

To create a Static Group, chose Basic Mode to manually add people to your group.

The screenshot shows the 'Criteria Definition' settings for the 'Test Group'. The 'Basic Mode' radio button is selected and highlighted with an orange box. Below the mode selection, there is a search bar with the placeholder text 'Type to add people, organizations, tags a'. Below the search bar, there are tabs for 'All', 'People', and 'Organizations'. Below the tabs, there is a section titled 'People added here!'.

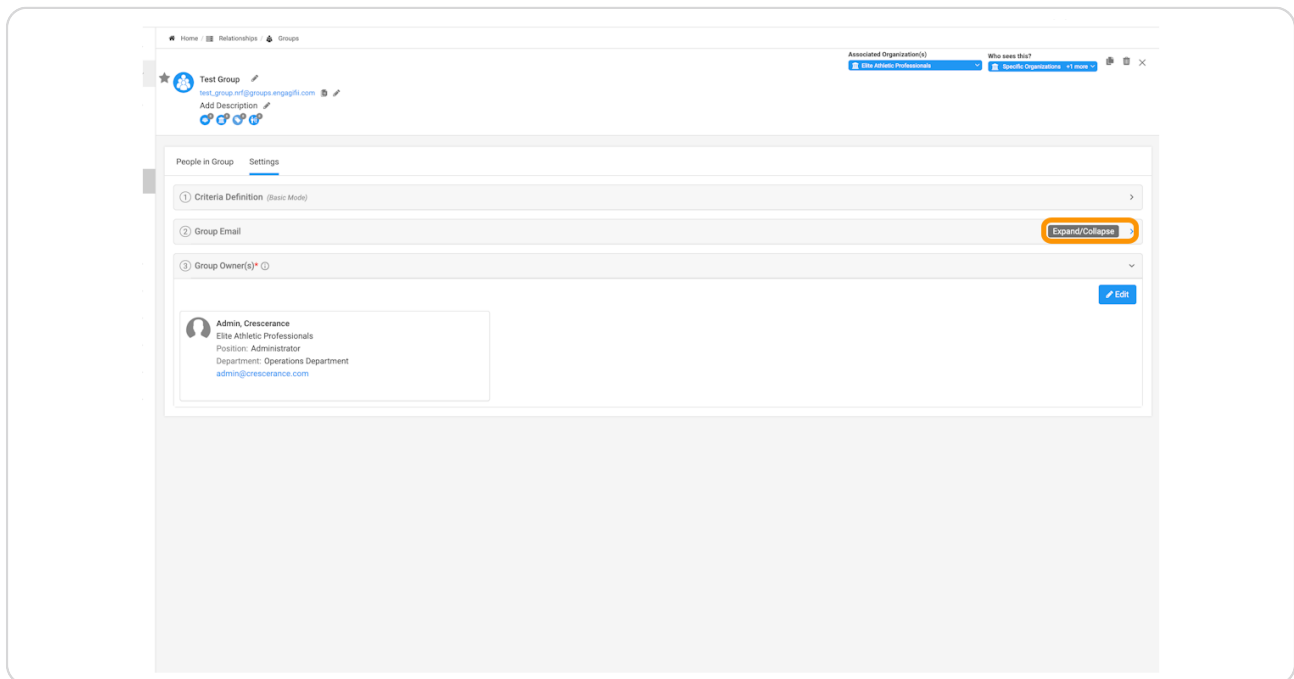
STEP 21

Create the group with either Person Name, Tags, Organization Name or Person Type. Type in the first few letters & make your choice. Once selected, it will appear in the People Added Here section. Click Save when finished.



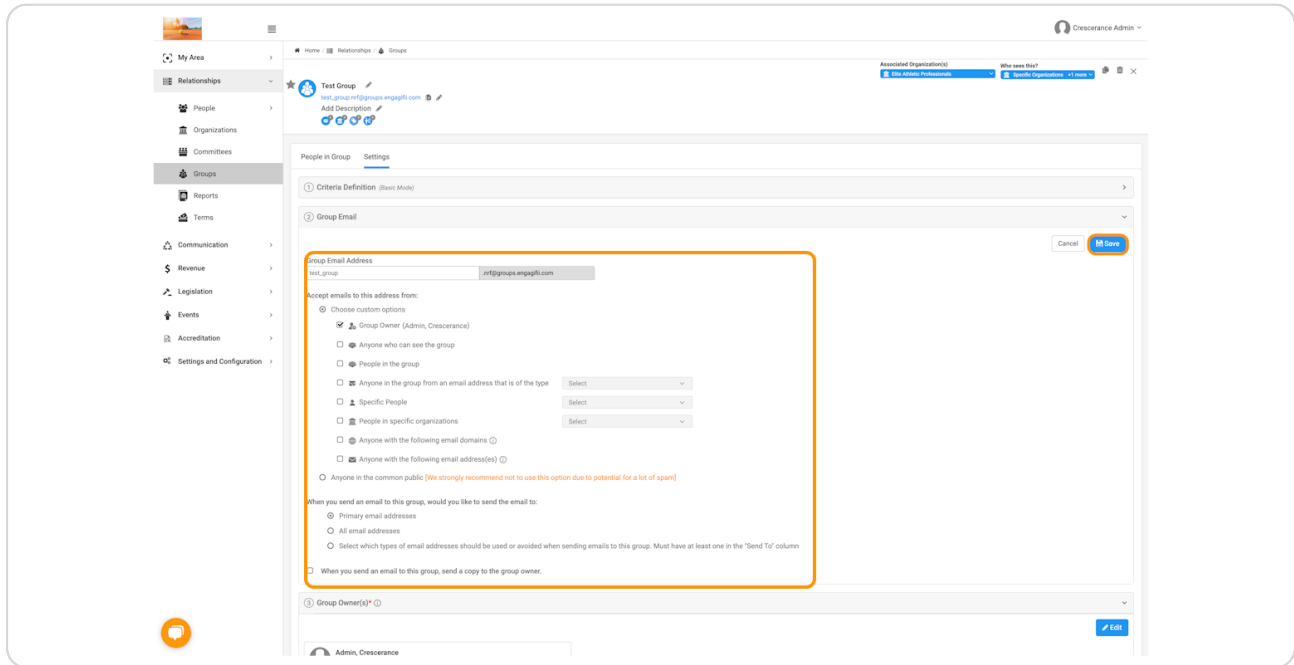
STEP 22

Click on Expand/Collapse to continue modifying the next sections



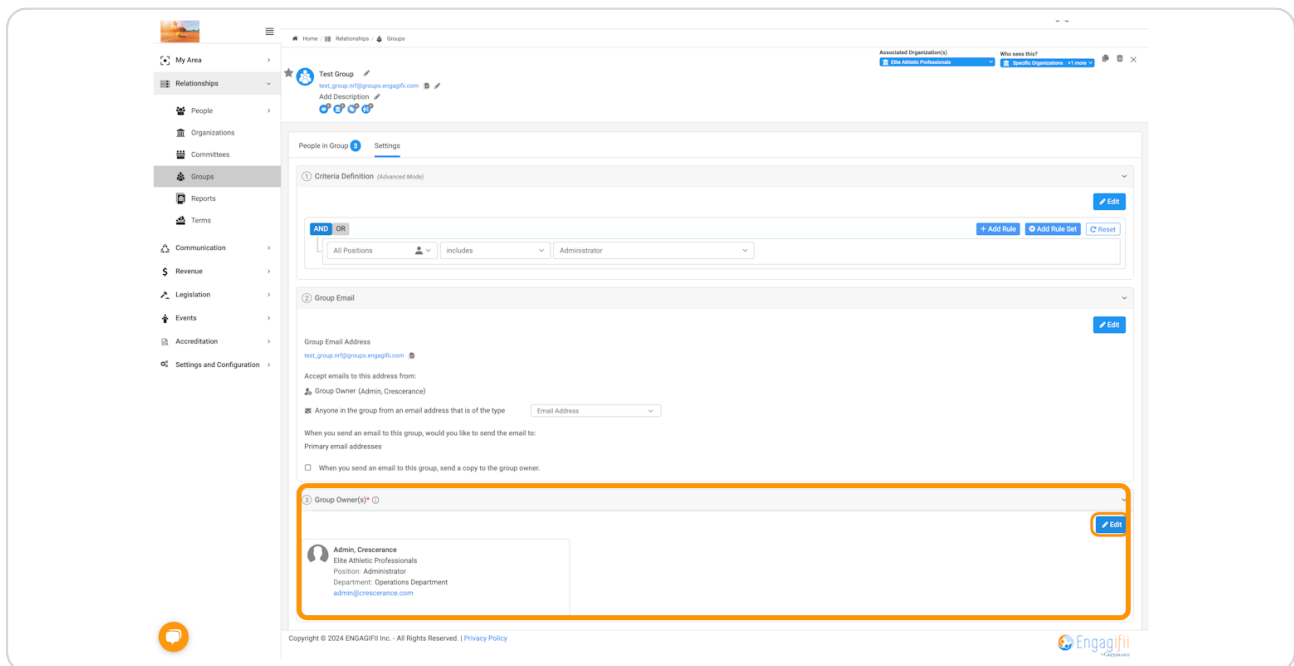
STEP 23

Make your email setting selections and select Save when finished



STEP 24

Click on Edit to select the group owner(s)



STEP 25

Click on Select Group Owner(s)

Group Owner (Admin, Crescerance)

Anyone in the group from an email address that is of the type

When you send an email to this group, would you like to send the email to:
Primary email addresses

When you send an email to this group, send a copy to the group owner.

③ Group Owner(s)* ⓘ **Select Group Owner(s)**

Admin, Crescerance
Elite Athletic Professionals
Position: Administrator
Department: Operations Department
admin@crescerance.com

STEP 26

Check the person you wish to nominate as group owner

When you send an email to this group, send a copy to the group owner.

③ Group Owner(s)* ⓘ **Select Group Owner(s)**

Admin, Crescerance
Elite Athletic Professionals
Position: Administrator
Department: Operations Department
admin@crescerance.com

Select Group Owner(s)

Search

Select All

- Admin, Crescerance
- Federer, Roger
- Johnson, De'na
- Kyrigios, Nick
- McEnroe, John

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STEP 27

Click on Save

