

Creating a group (static or dynamic)

17 Steps [View most recent version](#) 

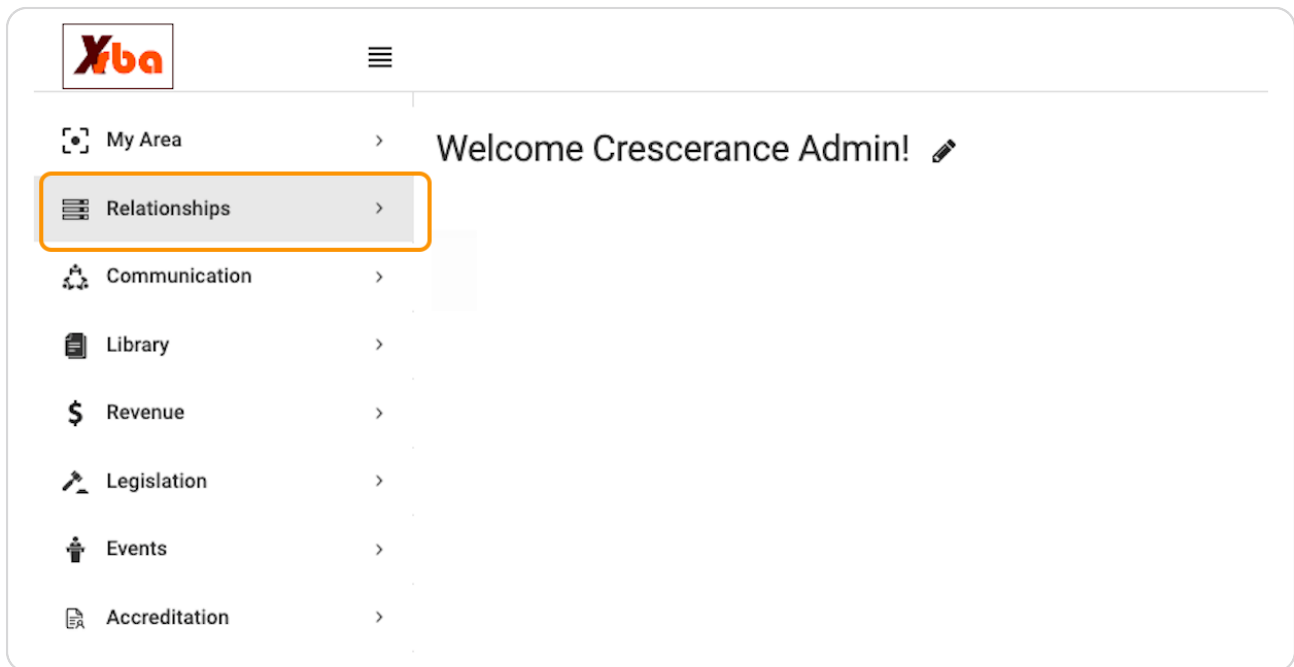
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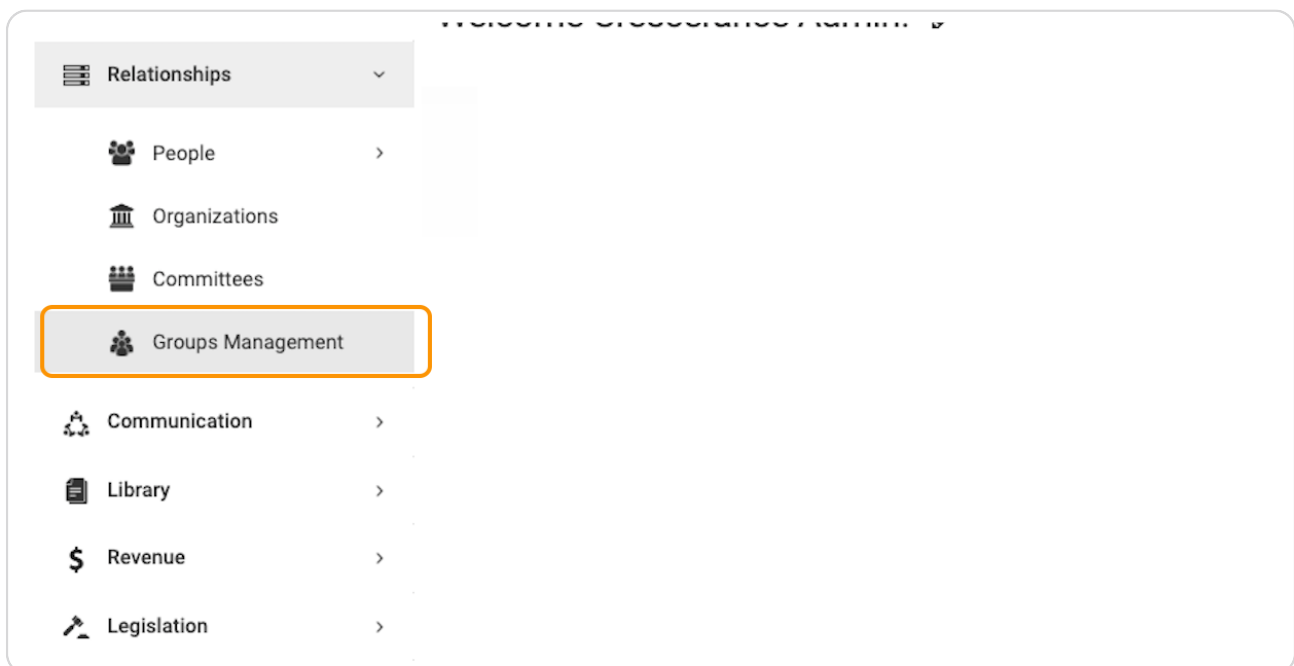
STEP 1

Click on Relationships



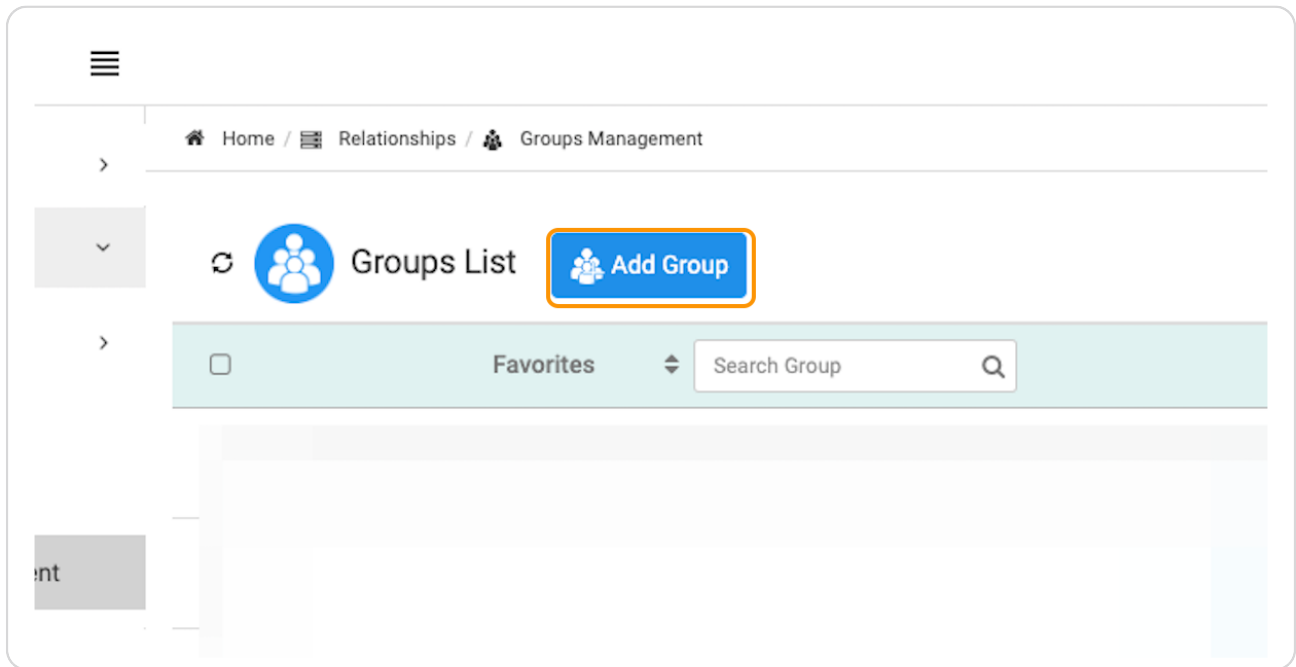
STEP 2

Click on Groups Management



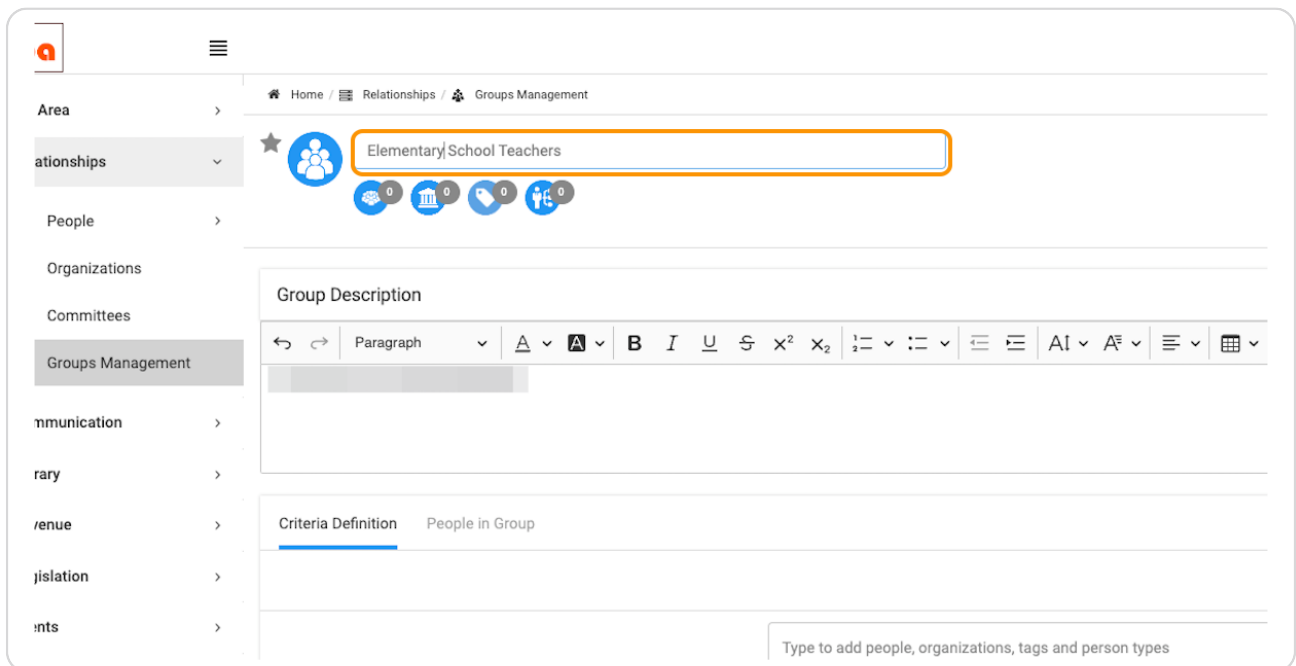
STEP 3

Click on Add Group



STEP 4

Type a name for the new group



STEP 5

Give a description of the group (if needed)

The screenshot shows the 'Elementary School Teachers' group management interface. At the top, there's a breadcrumb trail: Home > Relationships > Groups Management. Below that, the group name 'Elementary School Teachers' is displayed with a star icon and a 'Save' button. The main section is titled 'Group Description' and features a rich text editor. The text 'Group of elementary school teachers' is entered in the editor, which is highlighted with an orange border. Below the editor, there are tabs for 'Criteria Definition' and 'People in Group'. A search bar prompts the user to 'Type to add people, organizations, tags and person types'. Below the search bar, there are filters for 'All', 'People', 'Organizations', 'Tags', and 'Person Types'. The 'People' filter is currently selected. The bottom of the page shows a 'People added here!' section with a decorative footer.

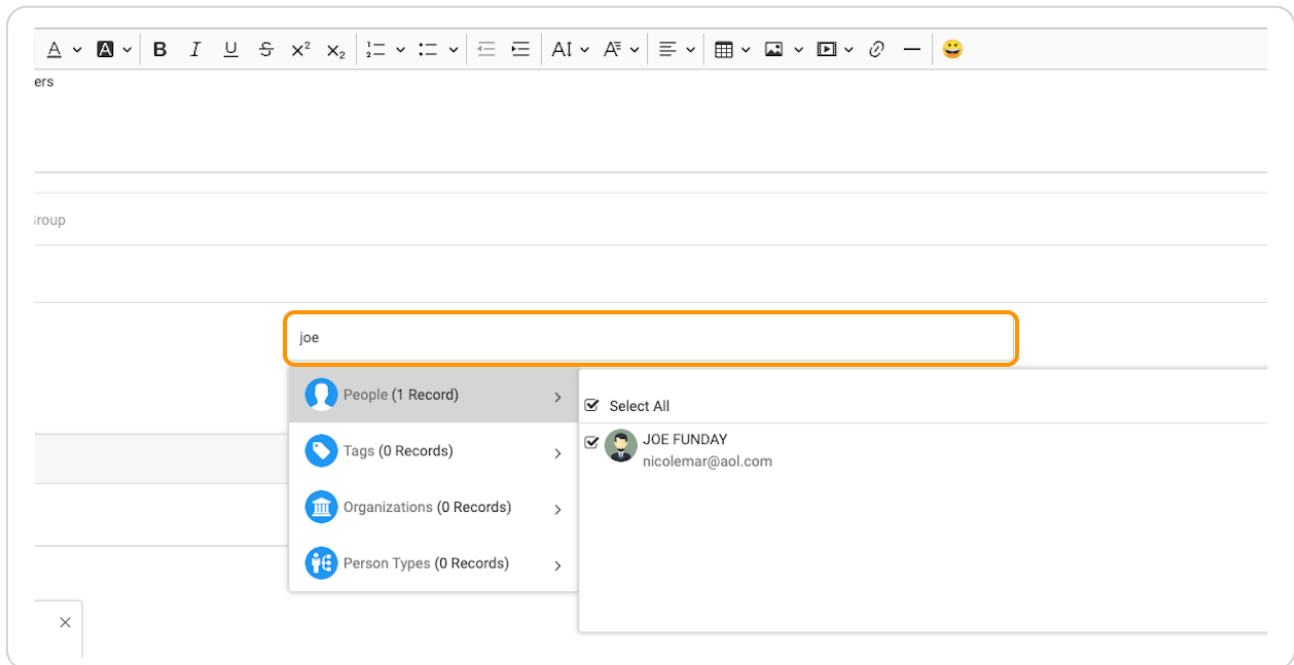
STEP 6

To create a static group you manage, type the person name or organization that you want to add.

The screenshot shows the 'People in Group' tab of the group management interface. The search bar is highlighted with an orange border and contains the text 'joe'. Below the search bar, there are filters for 'All', 'People', 'Organizations', 'Tags', and 'Person Types'. The 'All' filter is currently selected. The search results area is empty, showing a 'People added here!' section with a decorative footer.

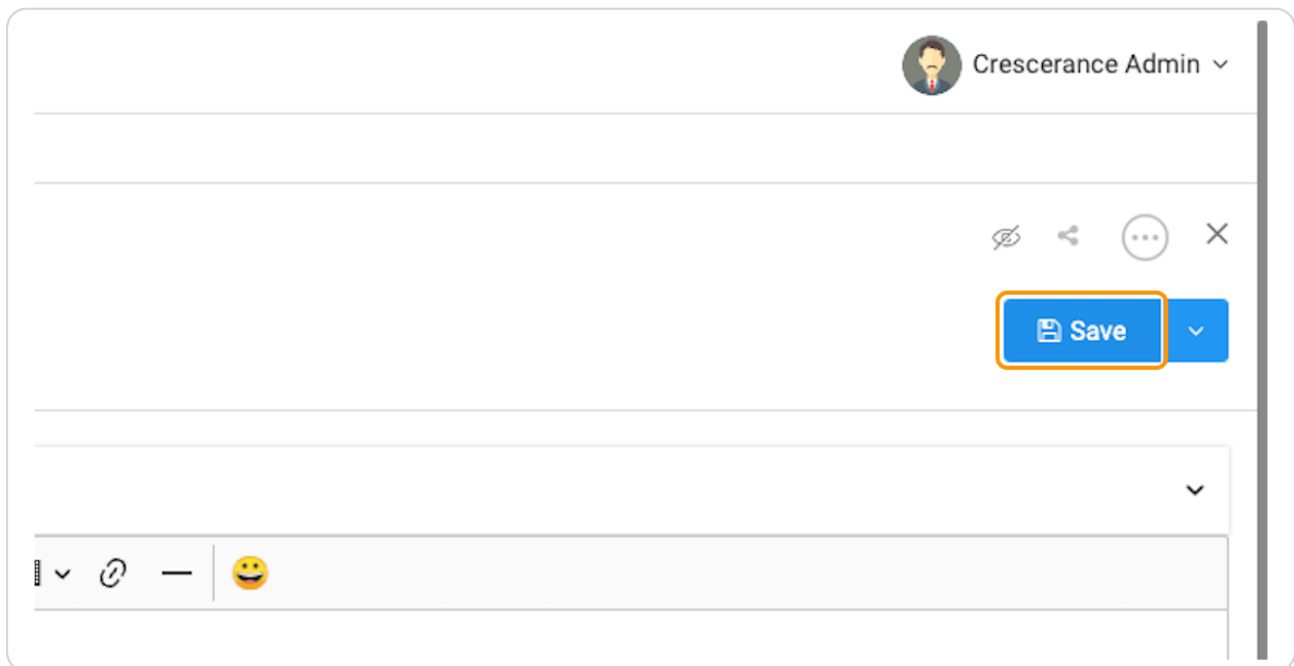
STEP 7

Click on Type to add people, organizations, tags and person types



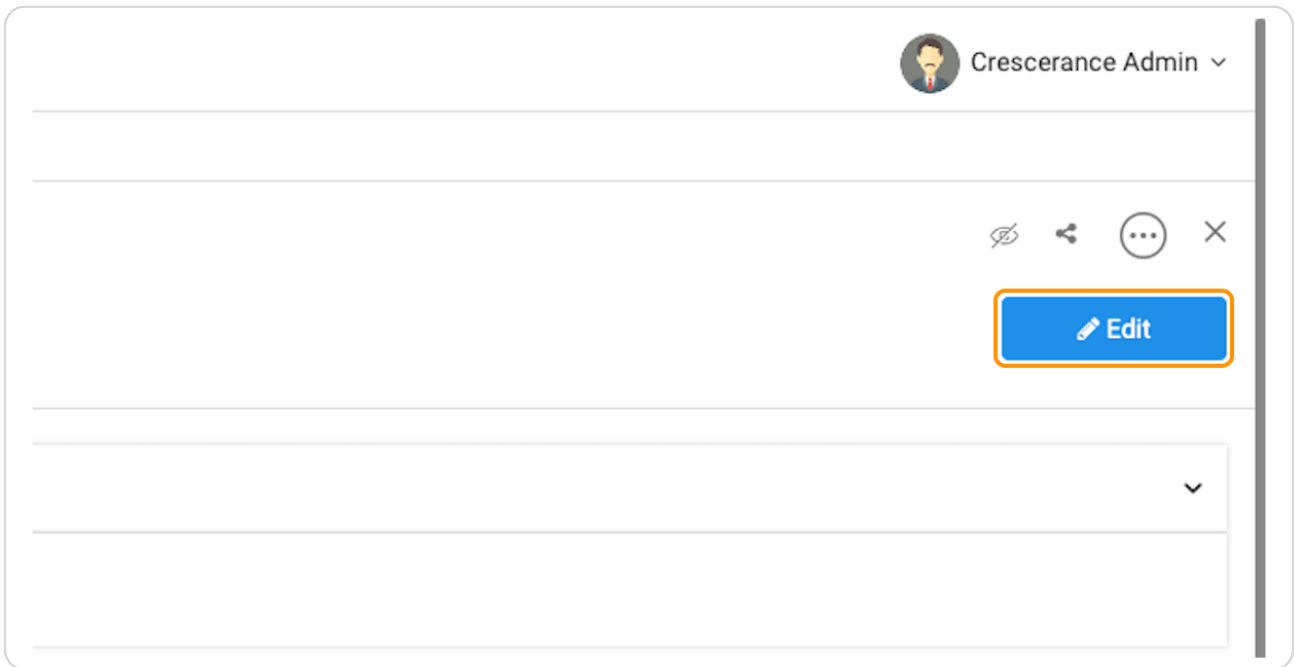
STEP 8

Click on Save



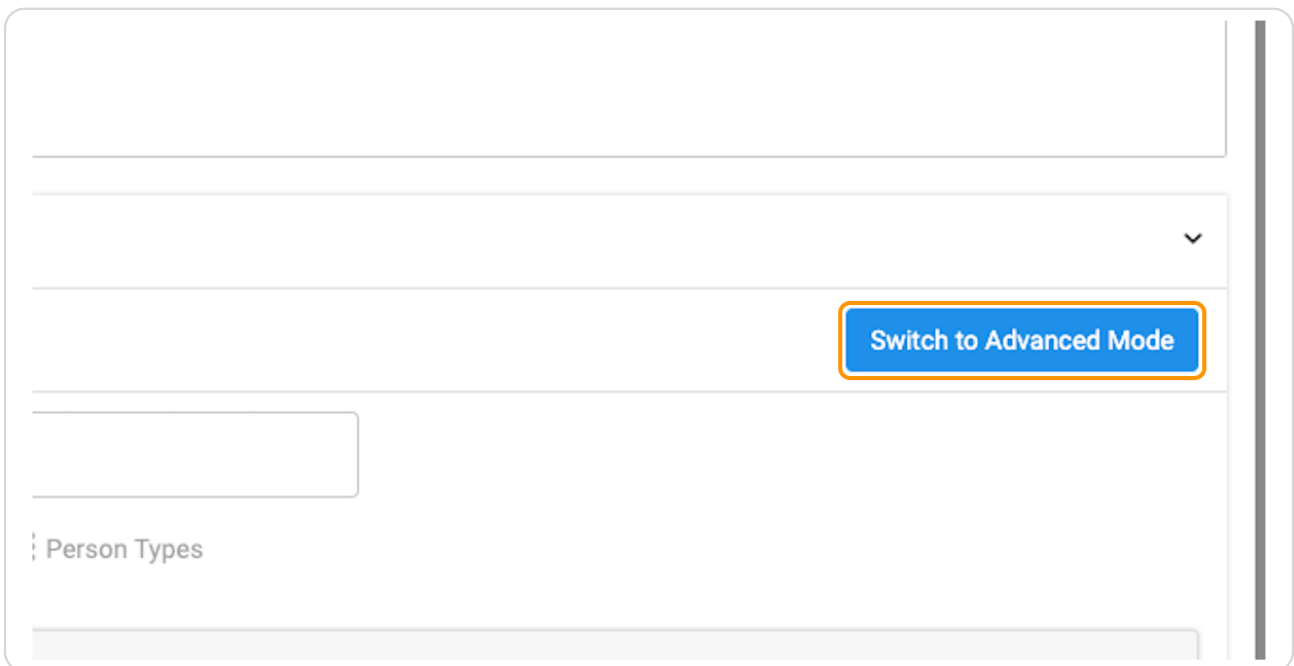
STEP 9

To create a dynamic group, click on **Edit**



STEP 10

Click on **Switch to Advanced Mode**



STEP 11

Create group rules by selecting And / Or and then selecting the group criteria

Library >
Revenue >
Legislation >
Events >
Accreditation >
Settings and Configuration >

Criteria Definition People in Group (1)

AND OR

Select Select

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STEP 12

Click on Person Type Field to chose criteria from drop down list for Person or Organization

Communication >
Library >
Revenue >
Legislation >
Events >
Accreditation >
Settings and Configuration >

Criteria Definition People in Group (1)

Select

|Type to filter... Q

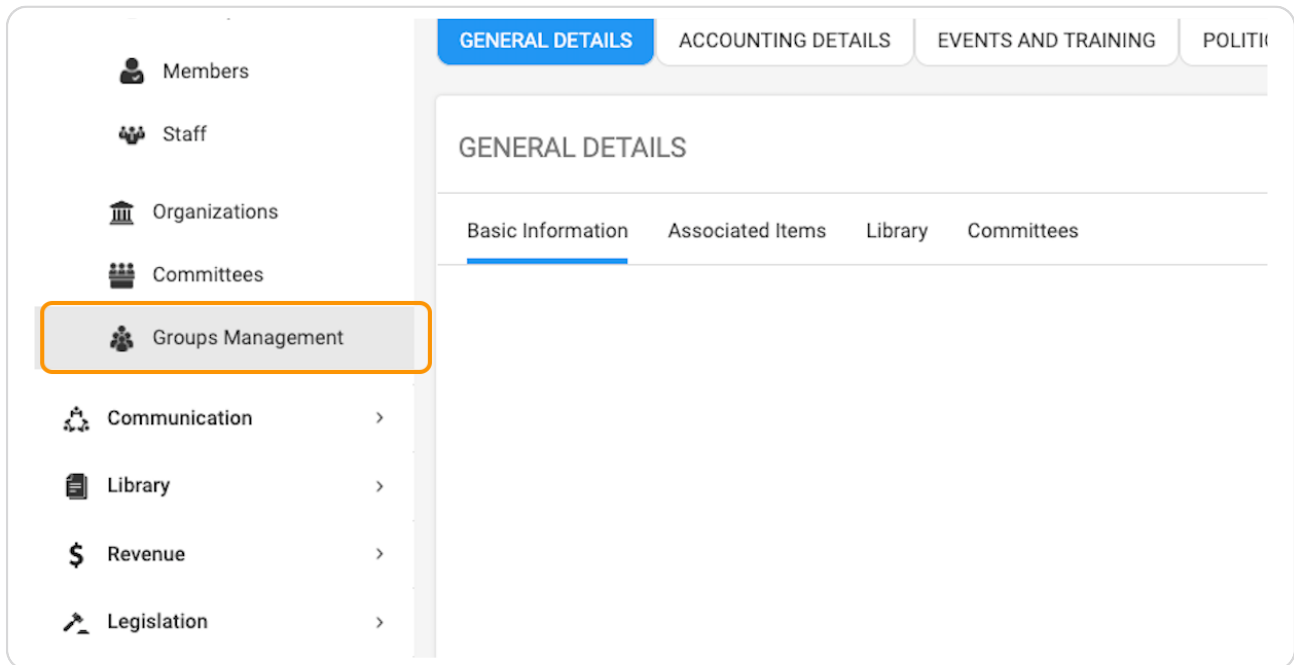
Person Type Field

Organization Type Field

Select Select

STEP 15

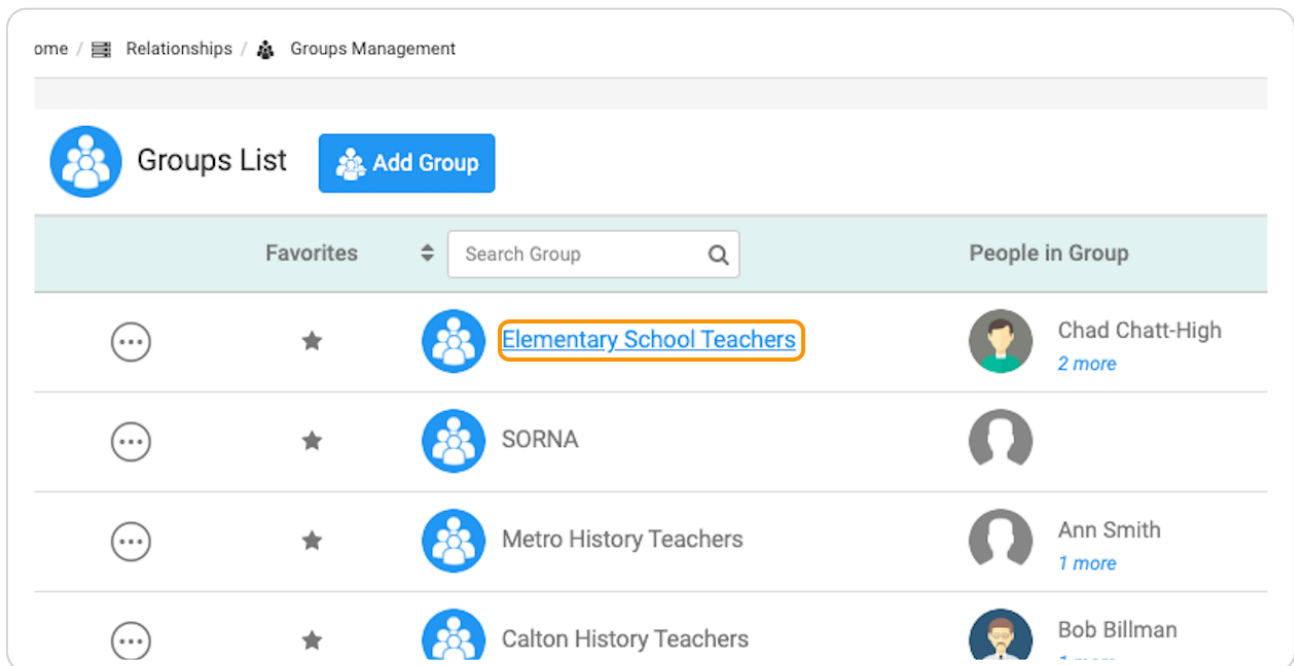
Click on Groups Management to view members in Dynamic Group



The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains several menu items: Members, Staff, Organizations, Committees, Groups Management (highlighted with an orange border), Communication, Library, Revenue, and Legislation. The main content area has a top navigation bar with tabs: GENERAL DETAILS (selected), ACCOUNTING DETAILS, EVENTS AND TRAINING, and POLITICAL. Below the tabs, the 'GENERAL DETAILS' section is active, showing sub-tabs: Basic Information (selected), Associated Items, Library, and Committees.

STEP 16

Click on Elementary School Teachers



The screenshot shows the 'Groups List' page in a software interface. The breadcrumb trail at the top reads 'Home / Relationships / Groups Management'. The page title is 'Groups List' with an 'Add Group' button. Below the title is a search bar labeled 'Search Group' and a 'Favorites' section. The main content area displays a list of groups with columns for 'Favorites', 'Group Name', and 'People in Group'. The 'Elementary School Teachers' group is highlighted with an orange border.

	Favorites	Search Group	People in Group
...	★	Elementary School Teachers	Chad Chatt-High 2 more
...	★	SORNA	
...	★	Metro History Teachers	Ann Smith 1 more
...	★	Calton History Teachers	Bob Billman 1 more

STEP 17

Click on People in Group (3)

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar has several menu items: 'itions', 'ees', 'Management' (highlighted in grey), and 'on'. The main content area is divided into sections. The top section is titled 'Group Description' and contains the text 'Group of elementary school teachers'. Below this is a section titled 'Criteria Definition' with a blue underline. Inside this section, the text 'People in Group (3)' is highlighted with an orange border. At the bottom of the main content area, there are two buttons: 'AND' (in blue) and 'OR' (in grey).

