

How to Add a Member to an Existing Group

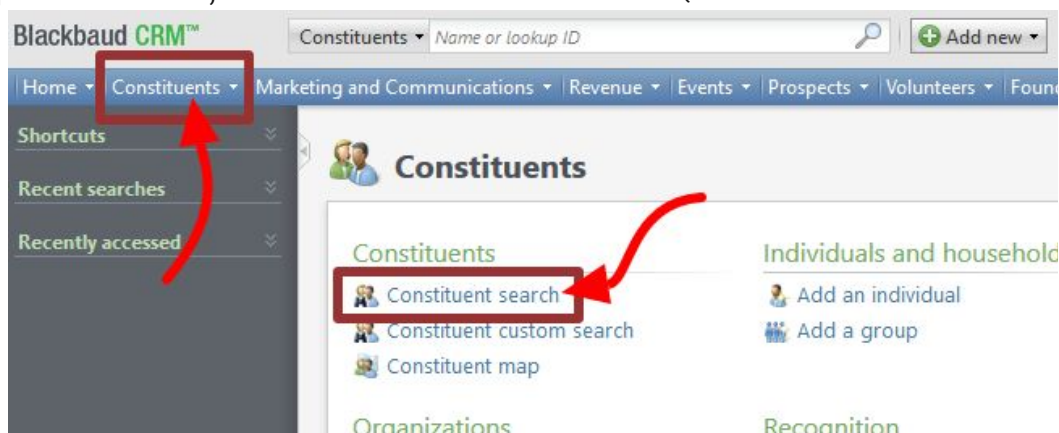
This guide will provide written instructions on how to **add a new member** to an existing group. If you need create a new group please see our documentation: *How to Create a Group*.

To **add a member** to an existing group:

Step 1

First you need to find your existing group by performing a search for it.

From the GAIL home screen, click on the **constituents** tab on the blue functional area bar near the top of the screen, then select **constituent search** (under the **constituents** section).



Type the name of your group in the **last/org/group name** field and make sure the **groups/households checkbox** is selected (this is found under **advanced search options**).

- **Remember:** group names will start with a **naming convention** followed by a hyphen then the name of the group (ex. TCOB - Alumni Advisory Board).

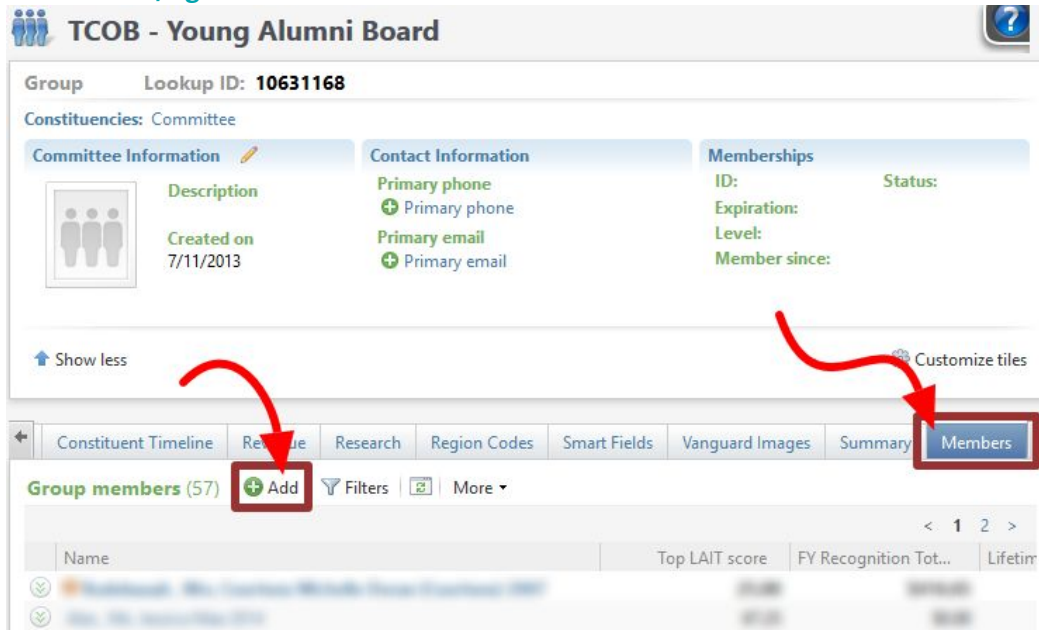
A screenshot of the 'Constituent Search by Name or Lookup ID' dialog box. The dialog has a title bar with a close button. It contains several input fields: 'Name/Lookup ID:', 'Last/Org/Group name:' (highlighted with a red box and a red arrow), 'First name:', 'Middle name:', 'Suffix:', 'Lookup ID:', 'Sites:', 'Email address:', 'Constituency:', 'Country:', 'Address:', 'City:', 'State:', 'ZIP:', 'Primary class year:', 'Phone number:', and 'Prospect manager:'. There are 'Search' and 'Clear' buttons on the right. Below the input fields is a section titled 'Advanced search options' with several checkboxes: 'Search in:' (Individuals, Organizations, Groups/Households - checked), 'Check nickname', 'Check aliases', 'Check alternate lookup IDs', 'Check merged constituents', 'Only search primary addresses' (checked), 'Include deceased', 'Include inactive', and 'Include fuzzy search on name'. There is a 'Match all criteria exactly' checkbox. At the bottom, there is a 'Help' button and 'Select' and 'Cancel' buttons.

Click **search**, find the name of group you're looking for in the results box and click into it.

Step 2

Next navigate to the **members tab** on the group's page and click the **add** button.

- Depending on the size of your browser window or the resolution of your computer screen, you may need to **click the left/right arrows** on the row of tabs to scroll to the members tab.



Step 3

The *add a group member* dialog box will open.

The 'Add a group member' dialog box is shown. It has a title bar with a close button. Below the title bar are two radio buttons: 'Member' (selected) and 'Member selection'. There is a 'Member:' text input field with a search icon on the right, highlighted with a red box. Below this are 'Start date:' and 'End date:' fields, each with a date picker icon. At the bottom, there is a 'Comments:' text area, a 'Help' button, and 'Save' and 'Cancel' buttons.

In the **member** field, type the name of the new person you wish to add to the group.

- If more than one person shares the name of the new group member, a **constituent search** box will pop up where you can select the specific person you're interested in adding.
- You can also add **other groups** and **organizations** as members of your group.

The 'Add a group member' dialog box is shown again. The 'Start date:' field is highlighted with a red box. A red arrow points from the 'Start date:' field to the 'Save' button at the bottom of the dialog box.

Then add a **start date**. This is when the individual started being a member of the group (if you're unsure, put today's date).

You can also add a comment about this person's membership if you need to.

Then click **save** and this person will be added to the group. You will be taken back to the group page.