How to Change a Group’s Primary Contact

This guide will provide written instructions on how to change a group’s primary contact.

To change a **primary contact** for a 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).

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.

➢ 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.

![Image of group members tab](image1.png)

The person listed in **bold** with an **orange checkmark** next to it is the group's **primary contact**.

![Group members table](image2.png)

To designate another person as a primary contact, find the name of the group member new primary contact and click the **two downward chevrons** to the left of the name.

➢ Only 30 group members are displayed at a time, use the page numbers on the right above the table of names to navigate through the entire list. If your group contains a lot of members, click the **filters** button (next to the add button), and enter the person's **last name** in the **find member** field to search for the person.

Step 3

To choose this person as the primary contact, select **set to primary**. This will refresh the list of members and this person’s name will now be in **bold**.

![Image of set to primary button](image3.png)