

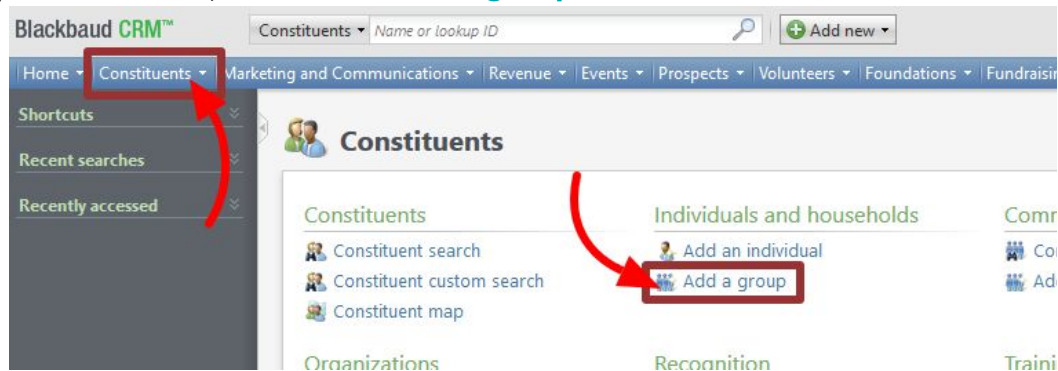
# How to Create a Constituent Group in GAIL

This guide will provide written instructions on how to create a constituent **group** in GAIL.

To create a **group**:

## Step 1

From the GAIL home screen, click on the **constituents** tab on the blue functional area bar near the top of the screen, then select **add a group** (under the **individuals and households** section).



## Step 2

In the **add a group** dialog box that pops up, you will enter the group's information.

A screenshot of the 'Add a group' dialog box. The dialog has two tabs: 'Details' and 'Members'. The 'Details' tab is active. The form contains several fields: 'Name' (text input), 'Group type' (dropdown menu), 'Description' (text area), 'Primary contact' (text input with search icon), 'Group member data' (radio buttons for 'Consolidate all member data' and 'Consolidate member data as of'), 'Address type' (dropdown), 'Country' (dropdown), 'Address' (text area), 'City' (text input), 'State' (dropdown), 'ZIP' (text input), 'Phone type' (dropdown), 'Phone number' (text input), 'Email type' (dropdown), 'Email address' (text input), 'Website' (text input), and 'Information source' (dropdown menu). There are also checkboxes for 'Group gives anonymously', 'Do not call this phone number', and 'Do not send mail to this address'. A 'Copy from primary contact' button is also present. The dialog has 'Save' and 'Cancel' buttons at the bottom right.

The following fields are necessary:

- **name** – your group's name should start with your department's  **naming convention**:
  - ✓ Ex. TCOB – Alumni Advisory Board
  - ✓ Ex. COE – Board of Visitors
- **group type** – choose what kind of group it is from the drop down
- **primary contact** – indicate who would be the best person to contact if someone needed information about this group
- **information source** – select your department from the drop-down menu

Should you happen to have more information about this new group, feel free to complete as many additional fields as you can.

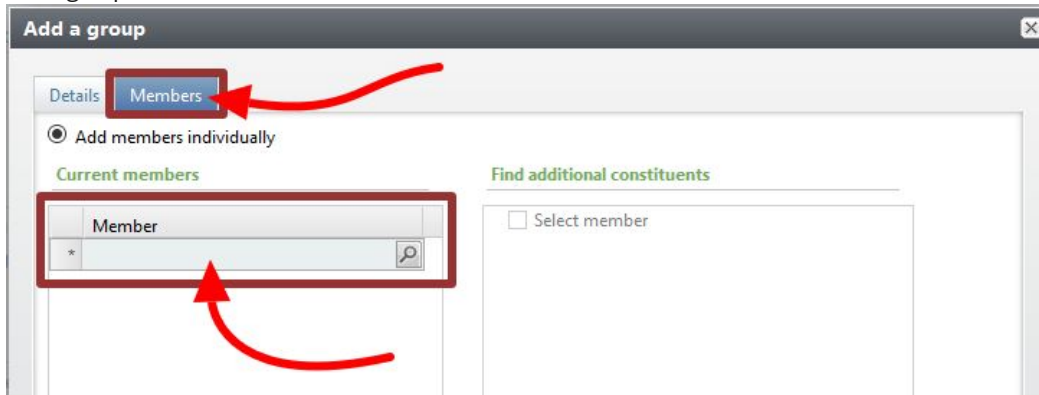
### Step 3

Next, click on the **members** tab of the *add a group* dialog box to search for and add members to this new group.

- If you added a **primary contact**, this person will automatically be added as member of the group!

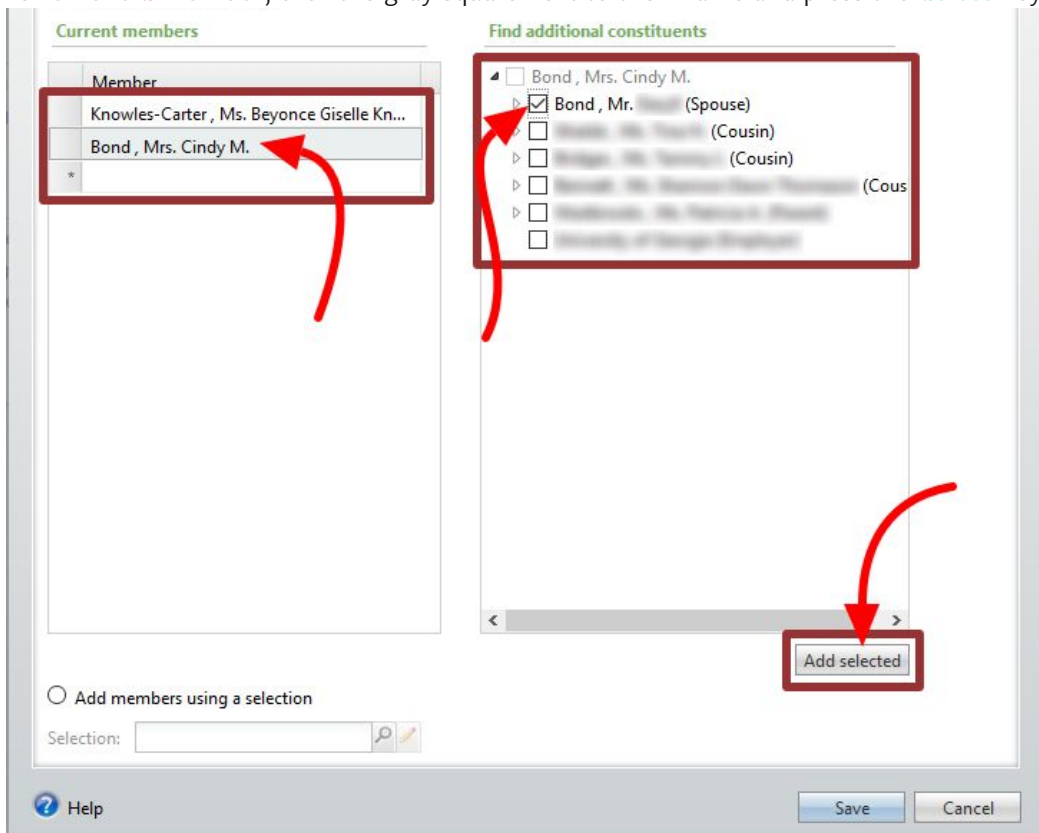
Under the word **member** (on the left-hand side), click into the gray space next to the asterisk (\*) to start typing the name of a constituent to add, then press the **enter** key.

- If there is more than one person with that name a **constituent search** box will appear where you can select the right person.



To add **additional members**, click again into the gray space that appears under the last member's name and enter the name of the next person.

- To **remove a member**, click the gray square next to their name and press the **delete** key on your keyboard.



When you add a new member, that person's relationships (as listed on their profile) will display on the right side of the *add a group* dialog box. You can easily add any of these relationships as members to your group, by **checking the box** next to their name and the clicking **add selected**.

### Step 4

When all members have been added, press the **save** button. You will be taken to the page of your new group.