How to create a new group

Ron M. - 2026-08-04 - Community Groups

Members can join groups to attend group specific events, view documents, receive group specific emails and email fellow members.

Creating a Group

1. Click **Groups** or the **People** icon on the left menu.

2. Click the **Create a Group** button on the right.

3. Enter the details for the new group on the page:

    - **Group Name** - The name of the group.
    - **Group Category** - The group category this group falls under.
    - **Short Description** - A teaser or short description of the group.
    - **Description** - The full description of the group. This is displayed when a non-group member clicks the **About Group** button.
    - **Group Membership Management** - Determines how members are added to and maintained in the group.
        - **Manual Membership** - Members can join the group themselves or be added individually by a group administrator.
        - **Automatic Membership** -Members are automatically added and removed based on the criteria defined in a Smart List. Group membership is updated automatically as members meet or no longer meet the Smart List criteria.
    - **Record Type Join Settings -** Allows you to determine which record types are able to join the group.
    - **Cover Image** - The image when a non-group member clicks the **About Group** button.
    - **Group Image** - The image on the Group List page.

1. Click **Save** to create the group.

Related Content

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- How to change or remove a group from the group categories
- How to add or remove members from a group
- How to set positions in groups
- How to update group settings
- How to delete a group
- How to manage group categories