How to update group settings

Ron M. - 2024-04-05 - Community Groups

Group Settings allows you to modify the group details as follows:

- **Group Information** - Change the group name, description, category, entity type.
- **Privacy** - Make the group open/private, hide the discussion, event, member, document, or email tabs.
- **Email Notifications** - Change the group's welcome email and farewell email.
- **Group Image** - Change the group image.
- **Group Positions** - Add/Remove group members from positions.
- **Cover Image** - Change the group's cover image.
- **About This Group** - Change the description.

Group Settings

1. Click **Groups** or the **People** icon in the left menu.
2. Click the **View** button on the group.

3. Click **Settings** near the top right. This will display the group settings page.
4. From here you can do the following:
    - Hiding Group Tabs
    - How to Edit Groups Details
    - Defining Group Email Notifications
    - Making a group private (Closed)

Hiding Group Tabs

To restrict members from using certain group features like Events, Member list, Documents, or Emails, you can hide these tabs.

Note

Tabs will always be visible for Administrators.

1. In the Privacy section click **Edit**.
2. A few fields are displayed:
    - **Group Privacy** - This allows you to change the group to a open or closed group. Open means that any member can view the activities in the group and choose to join. Closed means that non-group members can view only the group description. They will not see a Join button and can only be added by an administrator.
    - **Hide Event Tab** - This will hide the tab from group members.
    - **Hide Member Tab** - This will hide the tab from group members.
    - **Hide Document Tab** - This will hide the tab from group members.
    - **Hide Email Tab** - This will hide the tab from group members.
3. Click **Save** when done.

How to Edit Groups Details

Group details include the Group name, Description, Group Category, and Record Type Join Settings.

1. In the Basic Information section, click the **Edit** button.
2. There are a few fields you can change:
    - **Group Name** - The name of the group.
    - **Short Description** - A description of the group.
    - Group Category - The Category the group is in.
    - **Record Type Join Settings** - Choose which record type(s) can join the group. Smart lists can be used to further manage who can join based on the chosen criteria.
3. Click **Save** when done.

Defining Group Email Notifications

By default, Groups use the System Welcome and Farewell email templates, to thank members for joining or to confirm they left the group. You can create a custom Email Template to use instead to better suit your needs.

Note

To select a new email template, it first has to be created in the Email Templates library.

1. In the Email Notifications section, click the **Edit** button.

2. Change the Welcome Email Template to **Custom**. (These email templates are sent when a member joins or is added into the group.)

3. Select the template you would like to use from the dropdown box.

4. Change the Farewell Email Template to **Custom**. (These email templates are sent when a member leaves or is removed from the group.)

5. Select the template you would like to use from the dropdown box.

6. Click **Save** when done.

Making a group private (Closed)

Private groups allow admins to control who can join the group. Members would be able to see the group and read its description but are not able to see the Join button. Members can only be added by an admin. Private or closed groups can be used for committees such as the Board of Directors.

Note

The Administrator and Community Manager roles allow full access to all groups regardless of whether they are private or not.

1. Click the **Edit** button in the Privacy section.

2. Change the drop down from **Open** to **Close** in the Group Privacy field.

3. Click **Save**.

Related Content

- How to email group members
- How to set positions in groups
- How to create a new group
- How to manage group categories