

How to Remove a Member from a Group

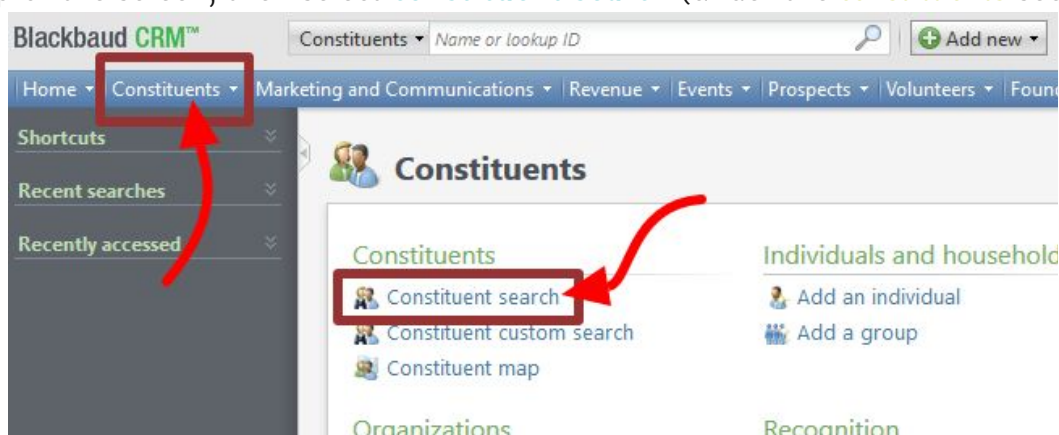
This guide will provide written instructions on how to **remove a member** from a group.

To **remove a member** from a group:

Step 1

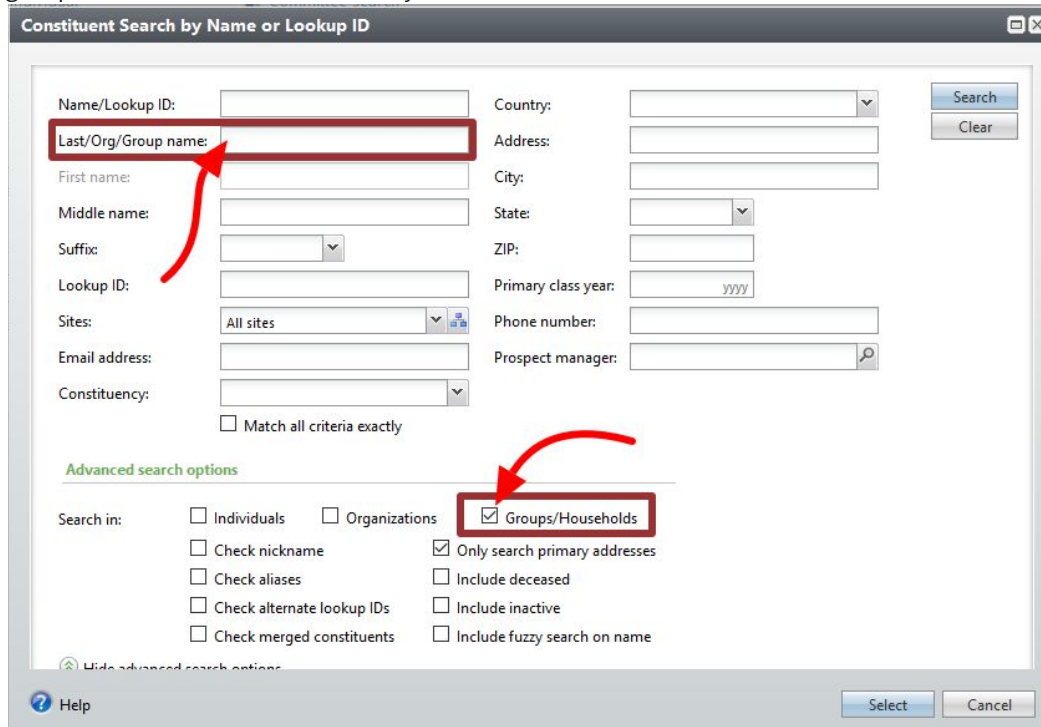
First you need to find your existing group by performing a search for it.

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).

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

- 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.

ASRV - MJ's Group

Group Lookup ID: 10954645

Group Information Description Created on 11/29/2018

Contact Information Primary phone Primary phone Primary email Primary email

Memberships ID: Status: Expiration: Level: Member since:

Constituent Timeline Revenue Research Region Codes Smart Fields Vanguard Images Summary **Members**

Group members (2) Add Filters More

Name	Top LAIT score	FY Recognition Tot...	Lifetim
Knowles-Carter, Ms. Beyonce Giselle Knowles (Beyoncé)	0.00	\$0.00	
Wayne, Mr. Bruce (Batman)	0.00	\$0.00	

Edit Edit roles Set to primary

Wayne, Mr. Bruce (Batman) Active Roles: The Bat Cave Lookup ID: 10954641 Groups:

Find the name of the group member you want to remove and click the **two downward chevrons** to the left of the name. Then click **edit**.

- 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.

Important note: Removing the primary contact

The person listed in **bold** with an **orange checkmark** next to it is the group's **primary contact**. If you need to remove this primary contact person from the group, you should first designate another group member as the primary contact.

- See our written guide [How to Change a Group's Primary Contact](#) for instructions.

Step 3

The **edit group member** dialog box will appear. To remove a member, simply enter **today's date** in to the **end date** field and click **save**. You'll be taken back to the group's page and that person will no longer be listed as a member.

Edit group member

Member: Wayne, Mr. Bruce (Batman)

Start date: 11/29/2018

End date: mm/dd/yyyy

Comments:

Help Save Cancel