How to Create and Share a Private Group

Step 1: Open and log into the Membership Manager.

Step 2: Click the [Groups Keeper] icon button on the tool bar. (See Figure 1)

This will open the Groups Keeper main window. There are 2 tabs, a tool bar and 4 sections in this window. (See Figure 2)

Figure 1: [Image of the Groups Keeper main window]

Figure 2: [Image of the Groups Keeper main window with annotations]

**Smart Groups tab:** where you add, edit, copy or delete groups, display the results of the currently selected group and print the group list.

**Display Group tab:** will display the results of the currently selected group.

**Tool bar:**
- Group by Column Header.
- Listing of all groups that have been created.

**Displays the Group Description if entered when creating the currently selected group.**

**NOTE:** Public groups are groups that any Servant Keeper user can view. Private groups are groups that are shared, when being created, with certain Servant Keeper users and only those users have the ability to view those groups. This will be explained in further detail later in this help sheet.
Step 3: Click the [Add Group] icon button on the tool bar. This will open the Add/Edit Group window. (See Figure 3) We are going to create a group of everyone in our database that is a member of the choir.

**Figure 3:**

Enter a meaningful name for the group you are creating. Select how you would like the list displayed, by individual or family. Select which fields you would like displayed in Step 1.

Build your group criteria. Here we want to get a group of everyone who is in the choir.

Once you have your group criteria entered, click the Sharing tab.

Step 4: After entering your group criteria, click the Sharing tab. In the Group Type section, click the Private radio button. (See Figure 4) Notice that you will be presented with a list of all of the currently entered Servant Keeper users. Simply tag the users that you would like to share the group with. You will notice that the user you are logged on with is listed, but is grayed out and unavailable. You do not have share groups with yourself. You will have access to any group that you create.

**NOTE:** By default, all groups created will be Public groups. If you do not want all Servant Keeper users to view your group(s), you will need to make sure you mark them Private and share them only with the Servant Keeper users you wish to view them.

**NOTE:** You may go back and change the share type and/or who you shared the group with at any time.
Figure 4:

Sharing tab.

Servant Keeper users that you can share your group with.