Creating a New Wurk Group

Last Modified on 02/01/2022 1:11 am EST

This section guides you in creating customized groups in Wurk aside from those delivered with the application or auto-created by the system.
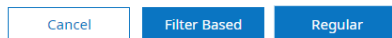
START HERE

1. Click the **NEW GROUP** button from the list of your Wurk Groups.

NEW GROUP

⛶ Full Screen   [Default] ⌄   ⚙ Settings ⌄   ▤ Select Columns   ⬆ Export
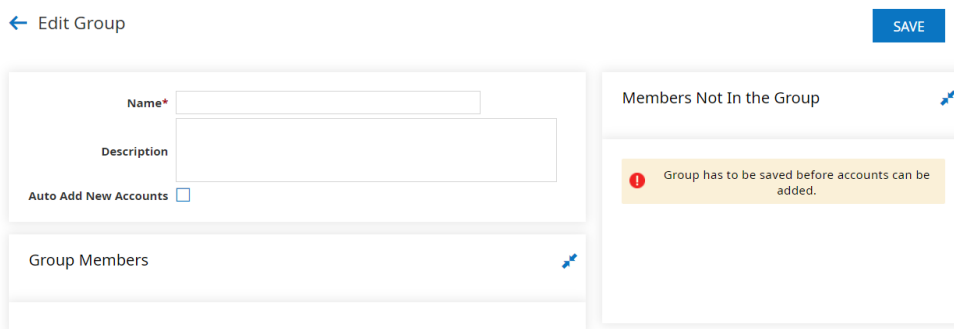
2. Choose the type of group:

Question

What type of group do you want to create? Note: Filter based groups will add and remove accounts based on selected filters.

Cancel   Filter Based   Regular

- **Filter Based:** This type of group automatically includes people by using filters, such as Job title or Department. You cannot manually add people to filtered groups.

- **Regular:** This type of group is manually maintained; you must add members to it by editing the group. If you assign a person to manage the group, this person owns the maintenance of the group itself and has access to the records of every member in the group.

3. For a **Regular** type group, first name and SAVE the group.

4. Then you can select people you want to add or remove and use the Add To Group and Remove Selected buttons as shown below.

← Edit Group   SAVE

Name*	
Description	
Auto Add New Accounts ☐	

Members Not In the Group

⚠ Group has to be saved before accounts can be added.

Group Members

5. Click **SAVE** in the upper right to finalize.