

Ministry Platform - Creating a group



When would you use groups? Use groups to Track attendance; Communicate by sending email and set up automated reminder about meetings.

- 1. Click Groups.
- 2. Click the **New Group** button to **create a new group**.
- 3. Give the group a Name (denoted below with a red star.)
- 4. Choose Group Type from the list. (Formation: choose Age or Grade). (See green star.)
- 5. Choose a **Ministry** from the list. For Religious Education choose **Faith Formation**.
- 6. Choose your **Parish** from the list.
- 7. Choose the person in charge of the group from the Primary Contact list. (Formation: choose your director.)
- 8. Click the **clock** button to automatically populates both the date and times fields in the Start Date section. The date and time fields have no connection to the when the group meets.
- 9. Leave the End Date empty. (Formation you can end date at the end of the school year.)
- Optional:
 - **Target Size:** If you want to see some metrics about how full this group is, enter a figure and a percentage will show. It will **NOT** cut off registrations when target is reached!
 - **Send Attendance Notification**: If you want the primary contact to receive an email reminding them to add attendance, you can select this to be Yes.
 - Send Service Notification: If you want the system to send the primary contact an email reminding them of the next class, you can select this to be Yes.
 - If you want the system to send the primary contact an email reminding them of the next class, you can select this to be Yes.

10. Click the **Save** button.

GENERAL Group Name * Pre-school		Group Type *	- Q x
Ministry •	- 0 ×	Congregation *	- 0 ×
Primary Contact *	~ Q X		~ ~ ~
Description			
Start Date *	\frown	End Date	
02/18/2022	0 4		0 4 4

Ministry Platform

Revised 3/21/2025 If you are building several groups, you can use Copy to save time.

	Group #10463 Sunday 10 am Kinc A Main Congregation	dergarden Main Class *Youth	Congregation Formation Group C	apacity: 0%			
General	Members	Sub Groups	Opportunities	Programs	Events	Events & Rooms	Attributes
Edit Record	Insights					Actions Tools (5)	Reports (26)
GENERAL Group Nam Sunday 10 / Ministry * *Youth Forr Primary Co Herzing, Ka	e m Kindergarden mation ₽ ntact tie kherzing@dol-in.or	rg Ø		Group Type * Class 𝒞 Parish * Main Congregation 𝒞		 Message Copy Delete Secure Attach File(s) Notification 	
Start Date 04/18/2024	4 10:41 AM ET			End Date			

Click on Actions. Select Copy and click the Copy Record.

en	Copy Record		×
	Copy Sub Page Data:	Click or search to select	
		Copy Attached Files	
dol-			Cancel Copy Record

Click Edit Record and change the Group Name.

Gr	oup #10464					
	Sunday 10 am Kindergarden Main Congregation					
Main Congregation Class Youth Formation Group Capacity: 0%						
General	Members	Sub Groups	Opportunities	Programs	Events	
Edit Record	t Record					
GENERAL						

Be sure to check class dates/times and primary contacts.

If you want to set the Catechist as the Primary Contact, you will need to change it for each class when you copy.

Repeat for as many groups as you want to create.