



Ministry Platform - Creating a group

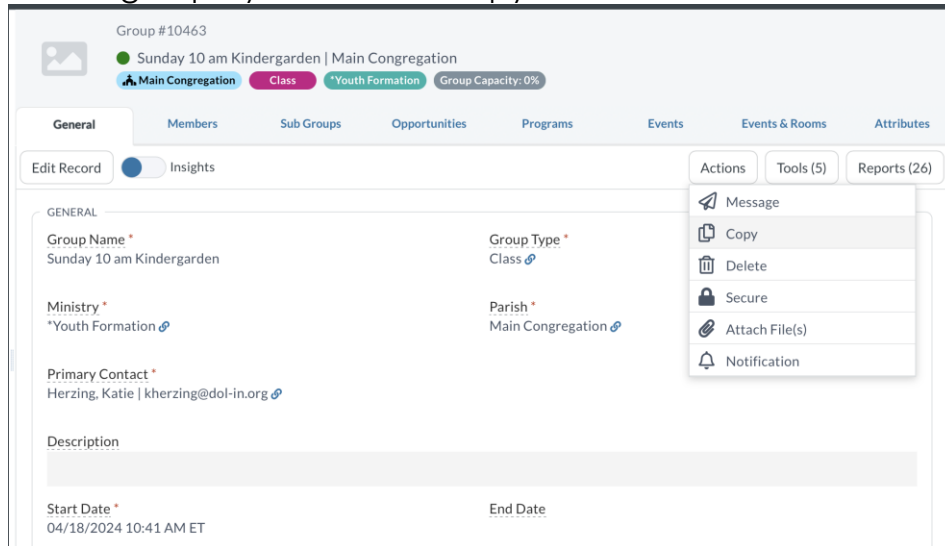


What are groups? Groups members are people who are doing ministry together or are being ministered to together. **Examples:** Religious education classes, altar servers, bereavement ministry. You would create at least one group per grade. If you have multi-age classrooms you may wish to create a separate group per age. If you have multiple classes for a particular age you should create separate groups for each class.

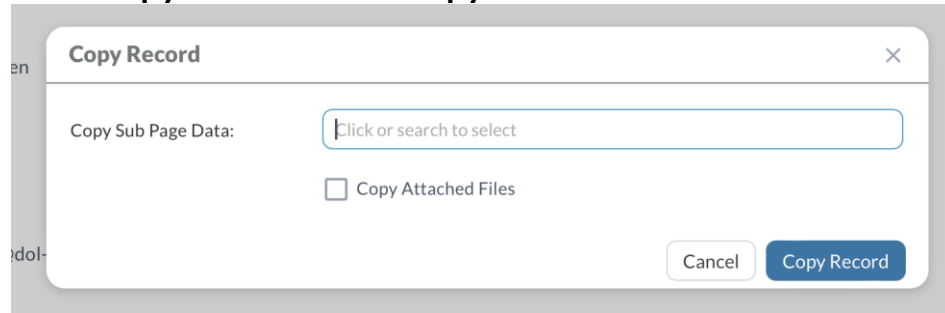
When would you use groups? Use groups to Track attendance; Communicate with members or member's parents and set up automated reminder about meetings.

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.) For grade groups, if you include the zero then the groups will alphabetize correctly. Grade 01 will appear before Grade 11.
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 **lock** 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 use date of last class.)
10. **Available Online**=Yes (Group will appear online and in group connect.)
11. **Available on App**=Yes. (Group will appear in you parish app)
- 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 record 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.
12. Click the **Save** button.

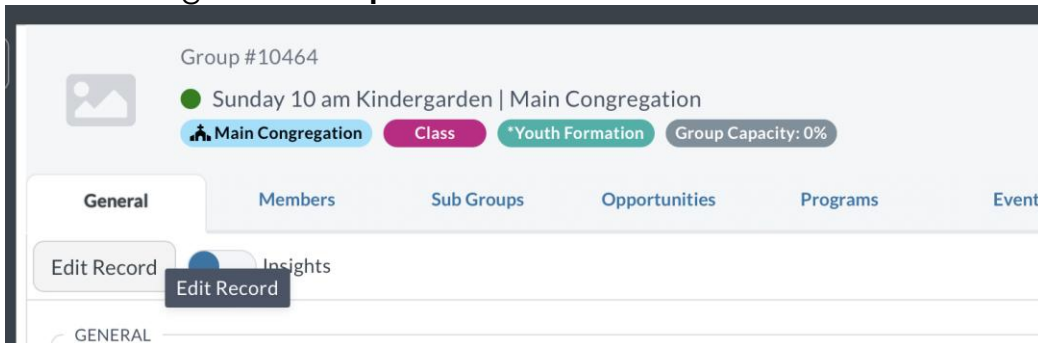
If you are building several groups, you can use Copy to save time.



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



Click **Edit Record** and change the **Group Name**.



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.