



Launching Small Groups

Session Handout

This handout is a supplement to the workshop. It provides more detailed instructions on how to create many of elements discussed. A recording of this class is available for Regional Roadshow 2022 participants. Videos are also available in ChMS help if you would like additional resources.

HOW TO ADD A GROUP

One of the first steps to getting Group Finder set up is to create Groups. Groups are used to contain lists of people for: membership status, grades, classes, choirs, services, outreach teams, etc.

1. Navigate to Groups in the left sidebar.
2. Click the Add tab at the top.

A screenshot of a web application interface titled "Add Groups". At the top, there are three tabs: "List", "Add", and "Finder". The "Add" tab is currently selected, indicated by a blue underline and a mouse cursor icon pointing at it. Below the tabs is a light gray rectangular area containing a text input field. The label "Name" is positioned to the left of the input field.


3. Give the group a name. For example: Small Group – Women of Faith

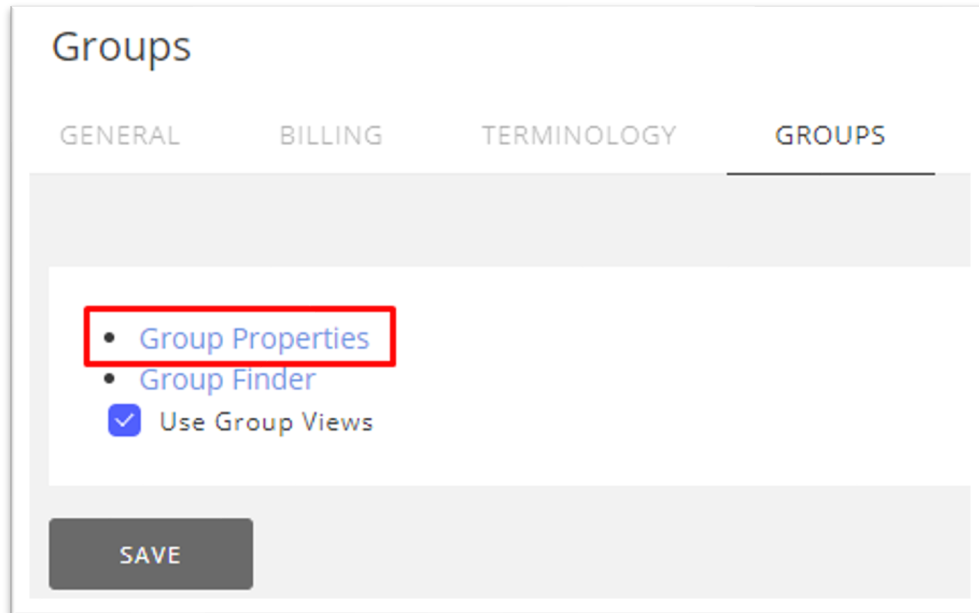
Spend a little bit of time with your team creating and planning a naming scheme for these groups. This name is what appears in Group Finder and will be seen by the individual.

*The remaining options in group setup for Group Finder is discussed in this handout.

4. Click Save to complete the group creation process.

GROUP PROPERTIES

1. To manage your Group Properties go to General Settings  → Groups.
2. Click on Group Properties.



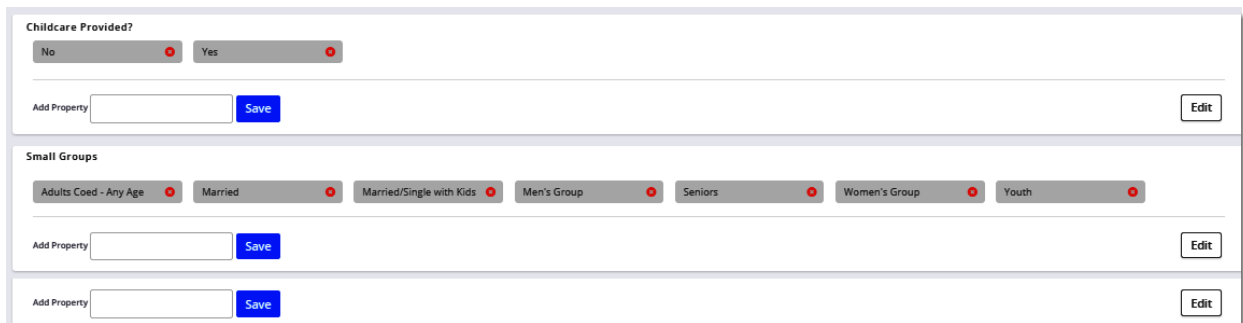
Groups

GENERAL BILLING TERMINOLOGY **GROUPS**

- Group Properties
- Group Finder
- ☒ Use Group Views

SAVE

In this management area, you can now start to define the Properties that you want for Your Groups. The setup is simple in that you can define first a Category where the rest of the Properties to be added under.



Childcare Provided?

No Yes

Add Property Save Edit

Small Groups

Adults Coed - Any Age Married Married/Single with Kids Men's Group Seniors Women's Group Youth

Add Property Save Edit

Add Property Save Edit

By default, Your ChMS has some already set up. These are suggestions and can be edited or deleted to meet your needs. There is no limit on how many can be added.

1. Click on the Edit option to the right of the Property Types to change.

2. To Delete, click on the X.
3. To Add a New Category or Property, enter the description in the field.

APPLYING PROPERTIES TO EXISTING GROUPS

There are two ways you can apply properties:

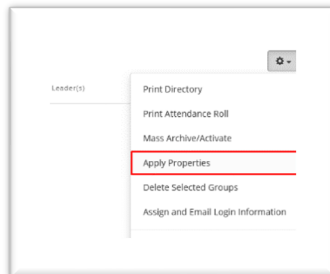
- By selecting multiple Groups from the list
- On a Group-by-Group basis

Multiple

1. To Add properties to several groups at the same time, go to Groups → List.
2. Then Select all the groups which will receive the property(ies) you want to add.



3. Then, use the Action Gear at the top and select Apply Properties.



4. Check the properties that apply to the Groups.
5. Scroll to the bottom and click GO to Save.

By Group

1. Go to Groups → List.
2. Search for the group.
3. Click on the Edit link on the right side.
4. Scroll down to Properties and click the Edit link.
5. Select the Properties.
6. Scroll down and click Save.

GROUP FINDER

CONFIGURE GROUPS TO UTILIZE THE GROUP FINDER

Use the slides in the presentation as a guide.


1. Click on Groups.
2. Click the Edit link on the right side.
3. Enter the following:
 - Name of Group
 - Description
 - Leader – Required to send email notifications
 - Address where the group meets – Will be used to search by individual
 - Meeting Day & Time
 - Properties

NOTE: For your group to display in group finder, enable one of these two options:

- Allow people to request to join the group
When people try to join this group, they will not be added automatically. Instead, the Group Leader will be emailed so he/she can either approve or decline.
- Allow people to add themselves
Check this if you want to let people add themselves to a group.
The designated Group Leader will receive an email when a person joins
- Do you want Members to see they are a member of the group and have a Group Directory in MinistryOne app? If so, check both boxes.
- If you are taking attendance on this group, remember to choose the appropriate setting.

4. Click Save.

CONFIGURING THE GROUP FINDER

1. Select General Settings  → Groups.
2. Click on the Group Finder link.
3. Be sure to Enable, and then set your other properties as desired. These will be used as search filters.
4. Click Save.

Group Finder

☒ Enable

Show Group Leader Pictures

☒ Yes

Choose The Categories People Can Find Groups By

☒ Campus

☒ Childcare Provided?

☒ Small Groups

☐ Volunteer Opportunities

Default View

☒ List ☐ Map


Website Embed Code

```
<iframe style="width:98%;border:0;min-height:800px" id="groupFinderFrame" src="https://mpower20.learnchms.com/groupfinder?defaultView=list">
</iframe>
<script src="https://mpower20.learnchms.com/media/js/groupFinderFrame.js"></script>
```

After enabling the group finder, make sure to setup your groups to allow people to join them by editing the group and setting the appropriate options.

Save

EMBEDDING GROUP FINDER INTO YOUR WEBSITE

1. Select General Settings  → Groups.
2. Click on the Group Finder link.
3. Copy the "Website Embed Code" from the bottom of the page and paste it into your website.

Note: This embed code cannot be pasted into the body of your website like normal text. You will need to use the "View Source" option in your website's WYSIWYG editor and then paste this embed code.

```
<iframe style="width:98%;border:0;min-height:800px" id="groupFinderFrame"
```

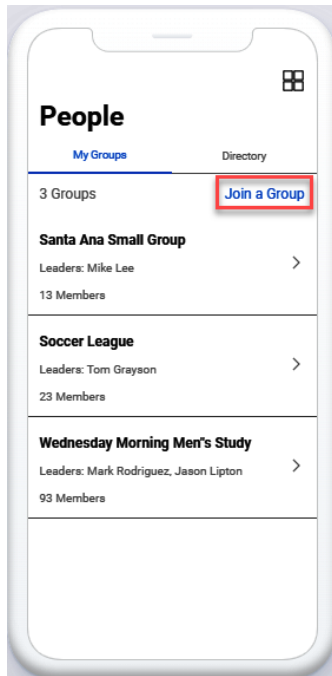
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SAVE

MINISTRYONE APP FOR GROUP FINDER

Here is a link to the MinistryOne help file which includes how to turn on Group Finder.

<https://help.ministrybrands.com/en/articles/4589086-ministryone-creating-your-church-app>



FORM FROM WORKSHOP

1. Click on Forms.
2. Click Add New Form.
3. Choose Event Registration.
4. Name Your Form.

CREATE A FORM

What would you like to create?

Giving Form

Contact Form

Event Registration

Children's Event

Subscribe Form

Prayer Request Form

Online Attendance

Start From Scratch

Form Preview

Give Now

[Give Now](#) [Sign in](#)

My Donation

Give Now

Recurring

Fund

Amount

Add Donation

Recurrence

You can set your recurring gift options:

Frequency

How Many Gifts (optional)

Start Date

Search

Name your form


Start Building Form

5. Click on Properties gear (use link at bottom of page) and begin setup. Use the screenshots in the presentation as a guide.
 - Graphic (Header Image)
 - General Tab
 - Description
 - Field Validation (suggest Required)
 - Time zone, Date Range if needed
 - Submission Tab
 - Payment Tab
 - Email – Registrant and Group Leader
 - Click Done
6. Drag Field Set "Person" from right menu to page.
7. Drag Contact info fields: Email and Address. Make sure to keep the fields within the person field set area!
8. Drag Base Amount to page and set Amount and Fund.
9. Save as a Draft and Preview

10. Save and Publish when ready use.

WORKFLOW FROM WORKSHOP

Use the screenshots in the presentation as a guide.

1. General Settings  → Workflows
2. Enter a Name and Description
3. Add a Trigger "Form Submission"
4. Map Registrant Field Set to Full Name
5. Match individuals based on Name and Email Address (suggested)
6. Create people who do not match (optional)
7. Do not replace data in matched fields with form data (suggested)
8. Add the Action Group.
9. Choose Add the person to and then enter the Small Group from ChMS.
10. Click Save.

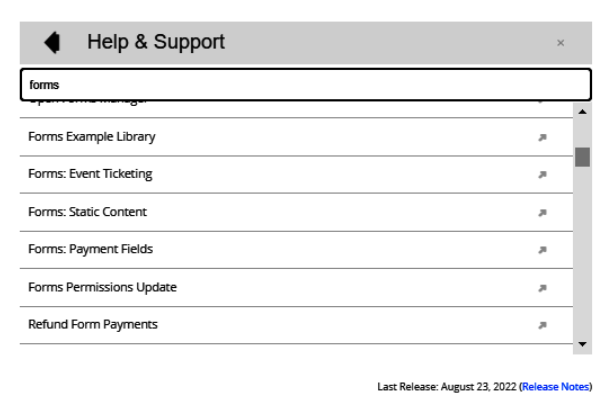
HELP OPTIONS FOR CREATING A NEW FORM

Here are a number of resources for form help and video options available in the ChMS and Online Giving Training menu from beginner to advanced. Begin with the video options if you are new to working with forms. For Small Groups, use the slides in this presentation to setup.

ChMS Help



1. Click on the Help Icon
2. Enter "forms" to find many articles and videos – from basic to advanced – on creating forms.



Online Giving Training Webinars

Dashboard

Reports

Donors

Fund Management


Forms

Engagement

Training

COLLAPSE

Training




New to digital giving?

We're glad you are here, and we are looking forward to serving you! Here are a few links to get you started.

Setup Checklist

Downloadable Launch Packet




Discover powerful tools: Forms

Add and customize forms for Event Registrations, Contact Forms, Sign-ups and more!

Forms 101

Forms Training Video Course



Miss our last webinar?

From Product Trainings to Roadmap Webinars, learn from our product experts here.

Forms Summit

Get the Most out of Your Account

Other Helpful Product Training Webinars