MINISTRY PLATFORM INSTRUCTIONS

MANAGING GROUPS FROM THE MY GROUPS PAGE

HTTPS://MY.CROSSPOINT.TV/PORTAL/MY_GROUPS.ASPX

1. Follow the link above and either Log In* or Create Account.

    *If you have logged in and given through the new giving site (since February 2017), you don't need to create an account -- you can log in with those credentials.

2. Once you are logged in, you will see the list of all groups that you are associated with as a member or leader. Click on the name of the group you want to view.

3. On the group's detail page*, you will see all the info on your group as well as a group calendar.

    *On the group detail page, you also have the option to email the whole group (Click Send Group Email), as well as set up events (meetings that will show up on your group calendar) and mark attendance (instructions below for setting up events and marking attendance).

- To look at your inquiries and add people to the group, click on View All Members (under the Group Leader section).
- Click Pending Group Inquiries to view and add your inquiries.
- Click on the blue date of the inquiry to open a particular person's record.
- To add a person to the group, click Search**

    **If you have an inquiry/person that does not end up joining the group, you can click Ignore Inquiry. Only do this if you are NOT adding that person to the group.

- If the person already has a record, their name and contact info will show up. Click Select next to the record of the person whose info matches.
- Choose Group Member in the drop down for their group role and hit Save (your inquiry will now show up in the list of current members).

SET UP AN EVENT AND MARK ATTENDANCE

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1. Log into My Groups > choose desired group > click Create New Meeting.

2. Fill in the required information and click Save Meeting. Meeting Dates are limited to two years in the future and one year in the past. Recurring meetings can be created using the Repeat dropdown. Once created, recurring meetings are managed individually.

SENDING MEETING INVITATION

1. Log into My Groups > choose desired group > click desired group meeting on the event calendar.

2. Choose which type of message to send:
   - Invitation Message: This type of message contains links for each group member to quickly RSVP as Yes, No or Maybe. You can also include a customized message.
   - Simple Message: This type of message does not contain RSVP links; it is meant to be an informational message related to the event.

3. Select the email recipients. If you do not select any recipients, the email will not be sent to anyone. Only current group participants can be emailed.

4. Group participants receive an invitation.

POSTING ATTENDANCE

Group Leaders and Primary Contacts can post attendance to group-specific events as follows:

1. Log into My Groups > choose desired event from the Group Calendar.

2. Select the individuals in attendance.

3. Select an action (typically Checked In or Confirmed As Attended).

4. Select a time.

5. Click Submit.

EDITING A CUSTOM VIEW

1. From any page in MP (here, the Group Inquiries Page) click on the funnel in the center of the page (next the drop-down box for views).

2. Click the dropdown box next to 'View' to select the view you want to edit.

3. Find the parameter you're looking to change (Inquiry date) & click on the date > select the new date.

   *The default Comparison is equal to or after the date you have selected. To change the Comparison for a specific date range (e.g. from Jan-Aug.), click the dropdown box and select your new comparison operation.

4. Once all the parameters have been selected, click 'Save Query.' Your new results will load.

PULLING GROUP INQUIRIES & TRIMMING OUT GROUP MEMBERS

This will show you what steps to take to find who has made a group inquiry over a period of time, but who haven't joined a group. This will filter out anyone is who currently in a small group – even at another campus.

1. From Group Inquiries Page, find & go to your view titled 'My Group Inquiries – [Campus]'

   •To edit the dates of your inquiries, see "Editing a Custom View."

2. Click the box above the list of names to select names of people.

Don't forget, selections are sticky! If you've made a selection on this page before and haven't cleared it, those selections will be included. If prompted, select the option to 'start a new selection' for a blank list.

3. Use the 'Transfer Selection' Tool to transfer your list to the Participants Page. Go to Tools > Transfer Selection.
   a. Click 'Transfer to Another Page.'
   b. Choose 'Participants' Page.
   c. Name your selection (can be anything you choose to make easy to recognize – no two selections on the same page can be named the same).
   d. Click 'Go.'

4. Go to the Participants Page and filter the Selection column to select the list you just created.

5. To trim the list to not include the people who have joined a group – Go to Tools > Trim Selection.

6. From the Group Type option, select 'Small Group.'

7. You'll see a number pop up in the middle column, click 'Remove.'

8. Confirm removal by clicking OK.

   **If you want to create a separate selection of the people who you are trimming out, select 'Create New Selection' and then name it before you click OK.

9. You'll see the number in the middle column change to Zero. Once you're done, click Close.

10. When you close out, you should see the number of people you just removed at the bottom left of the page. You now have your list of people who have inquired about a group, but haven't joined. From here you can email, text, write a letter, etc., with your list.