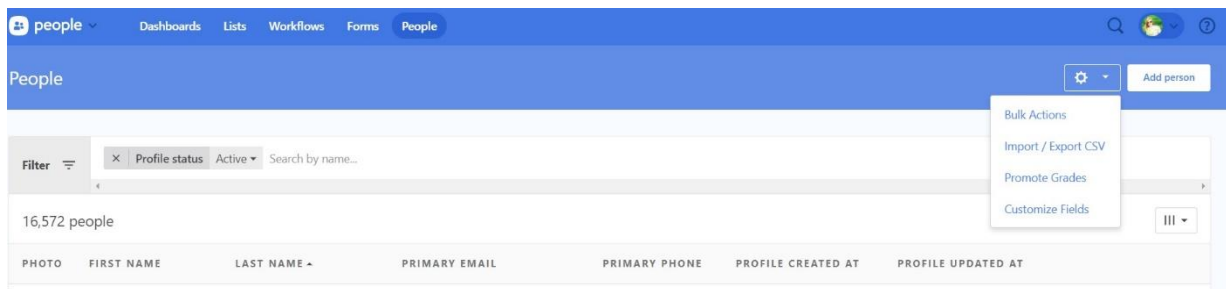


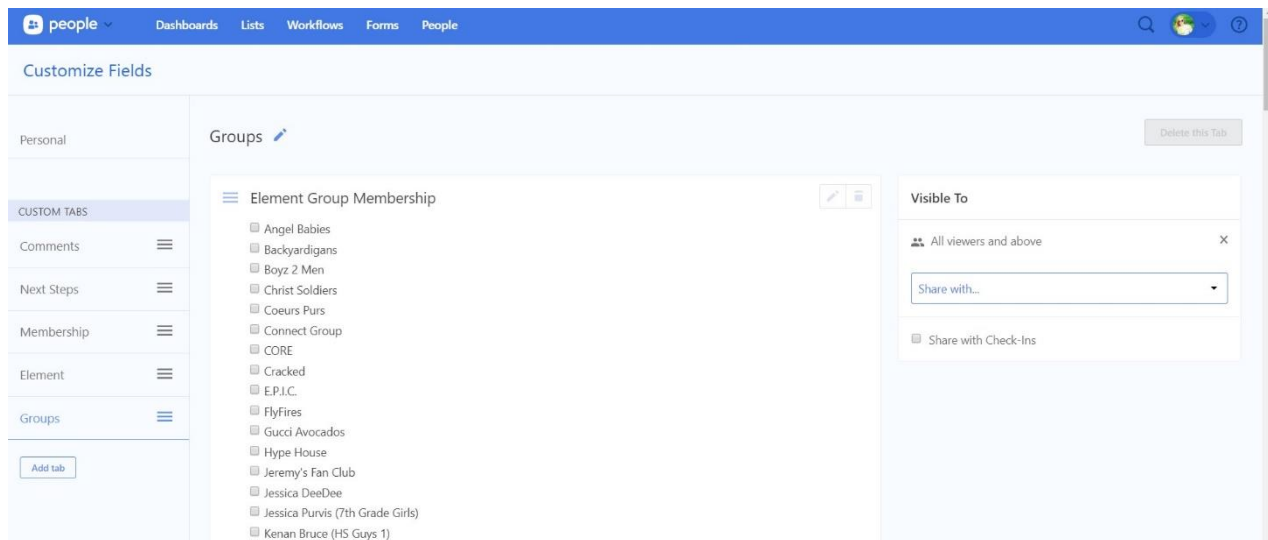
# Creating Groups in PCO People

## Step 1: Create Custom Fields for Group Names

1. Log into PCO – People App – People tab
2. Click on the Gear icon, select “Customize Fields”



3. From the menu on the left-hand side, select “Add Tab” (ex: Groups)
4. Create a New Field (ex: Element Group Membership)
  - a. Type: Checkbox
  - b. Add: list each small group by name
  - c. SAVE



5. Create a New Field and Options for every group you are exporting. For some churches, this may include small groups from the Groups app, volunteer teams from the Services app, and check-ins (both kids and volunteers) from the Check-Ins app. It's desirable to make sure every team/group is accounted for in its original context. Merging/re-organizing can be done in Churchteams. More examples on the following page:

## Creating Groups in PCO People

Name:

Check-Ins: TrueKidz - Sunday

Type:

Checkboxes

1 - INFANTS (0-6MTHS)

2 - CRAWLERS (7-12MTHS)

3 - TINY TOTS (13-18MTHS)

4 - TODDLERS (19-23MTHS)

5 - TWOS (24-29MTHS)

6 - TWO PLUS (30-44MTH AFTER DECEMBER 1st)

7 - LITTLE THREES (36 MTHS BEFORE DECEMBER 1st)

3 K

4 K

5 K

1ST GRADE BOYS

Volunteers: Worship & Production

TNC-NA Speakers

TNC-NA Production

TNC-NA Band

Volunteers: Underground | TrueKidz

UG Behind-the-Scenes

UG Cast

UG Audio/Visual

UG Games

UG Band

Volunteers: BabyWorks

BW Guest Services

BW Safety Team

BabyWorks

Volunteers: KidWorks

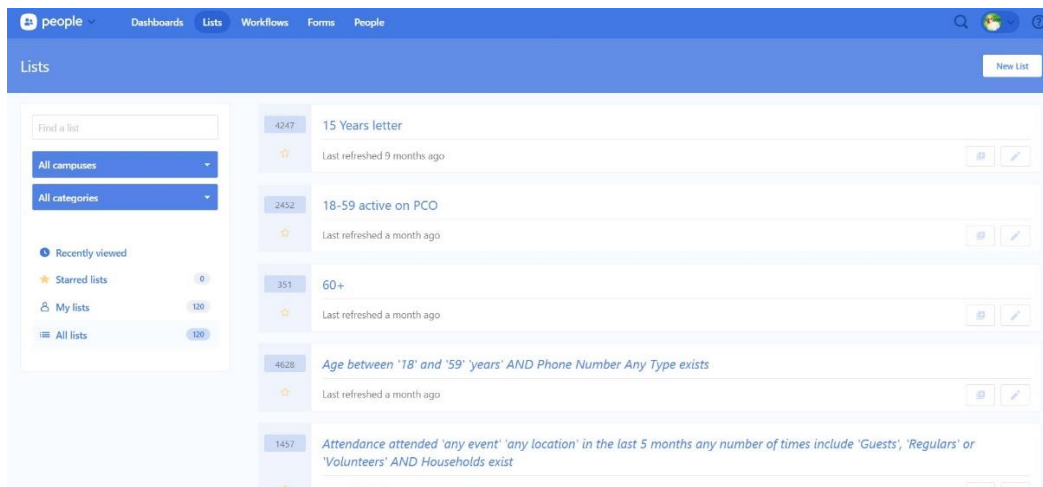
KidWorks - 3s -4's - 5's

New field

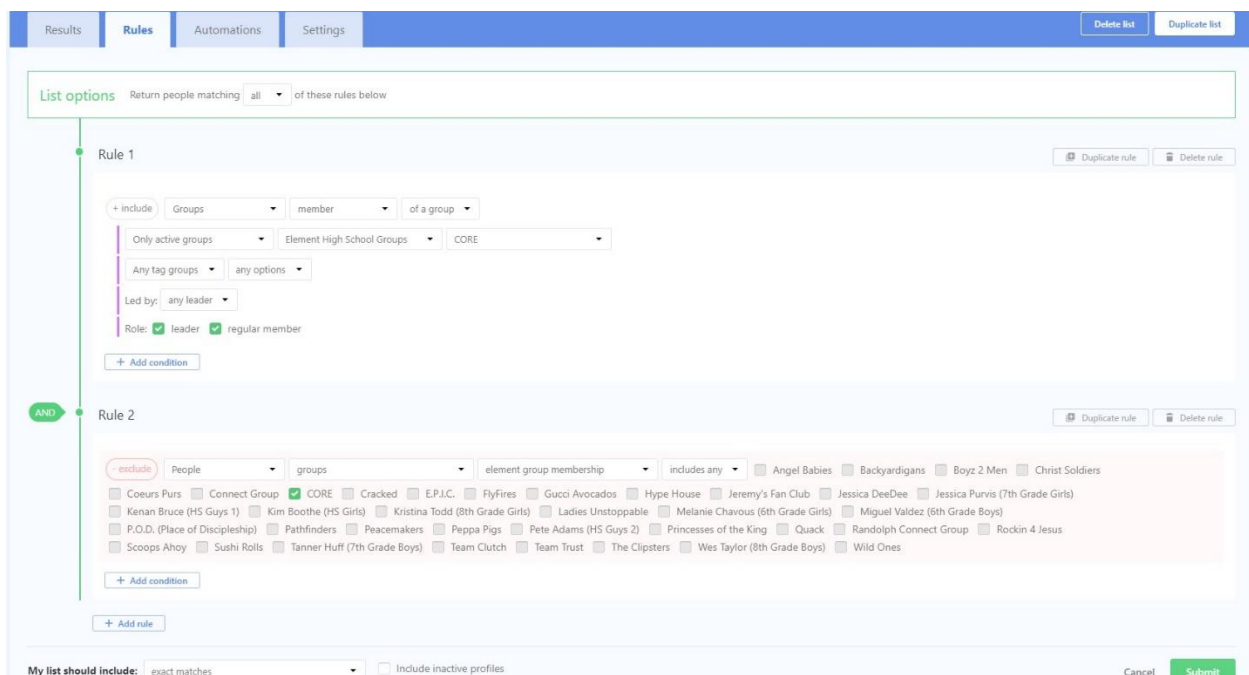
# Creating Groups in PCO People

## Step 2: Create a List for Each Group

1. People App – Lists tab
2. Select “New List”



3. Create the following Rules:
  - a. List Name: You will create a lot of lists (one for each group, so make sure you know what it is!) You might go with the PCO app then individual group Name (Examples include: Element Groups – CORE, Check-Ins: Element + Wednesday HS Girls, Volunteers: Element Production Team).
  - b. List Options: “Return people matching ALL of these”
  - c. GROUPS
    - i. Rule 1: **include** GROUPS – member - of a group - active – *specific group type – specific group name* – any tag groups – any options – led by any leader – role: check both leader and regular member
    - ii. Rule 2: **exclude** PEOPLE – *specific custom field tag – specific field* – includes any – *specific group name* - SUBMIT



## Creating Groups in PCO People

### d. CHECK-INS

- i. Rule 1: **include** CHECK-INS – attendance – attended – *specific Check-In event – specific classroom/group* – anytime – after *date you last promoted* – any number of times (or your preference of attendance) – include (check guests, regulars, and volunteers)
- ii. Rule 2: **exclude** PEOPLE – *specific custom field tag – specific field* – includes any – *specific group name* - SUBMIT

Check-Ins: TrueKidz - Sunday 3k

Results Rules Automations Settings

List options Return people matching all of these rules below

Rule 1

+ include Check-ins attendance attended TRUEKIDZ - Sunday 3 K any time

after 09/01/2019 any number of times include ☒ Guests ☒ Regulars ☒ Volunteers

+ Add condition

AND

Rule 2

- exclude People groups check-ins: truekidz - sunday includes any

☐ 1 - INFANTS (0-6MTHS) ☐ 2 - CRAWLERS (7-12MTHS)

☐ 3 - TINY TOTS (13-18MTHS) ☐ 4 - TODDLERS (19-23MTHS) ☐ 5 - TWOS (24-29MTHS) ☐ 6 - TWO PLUS (30-44MTH AFTER DECEMBER 1st) ☐ 7 - LITTLE THREES (36 MTHS BEFORE DECEMBER 1st) ☒ 3 K

☐ 4 K ☐ 5 K ☐ 1ST GRADE BOYS ☐ 2ND GRADE BOYS ☐ 3RD GRADE BOYS ☐ 1ST GRADE GIRLS ☐ 2ND GRADE GIRLS ☐ 3RD GRADE GIRLS ☐ 4TH GRADE BOYS ☐ 5TH GRADE BOYS

☐ 4TH GRADE GIRLS ☐ 5TH GRADE GIRLS ☐ SUPERKIDZ ☐ INFANT - 5K - VOLUNTEERS ☐ 1ST/5TH GRADE - VOLUNTEERS

+ Add condition

+ Add rule

My list should include: exact matches ☐ Include inactive profiles

Cancel Submit

### e. VOLUNTEERS

- i. Rule 1: **include** SERVICES – scheduled – to – *specific team name – specific team subset* or “any team” – *specific time frame* or “anytime” – check: unconfirmed, confirmed, declined.
- ii. Rule 2: **exclude** PEOPLE – *specific custom field tag – specific field* – includes any – *specific group name* - SUBMIT

Volunteers: Warehouse | TrueKidz Cast

Results Rules Automations Settings

List options Return people matching all of these rules below

Rule 1

+ include Services scheduled to Warehouse | TrueKidz Cast

any time ☒ Unconfirmed ☒ Confirmed ☒ Declined

+ Add condition

AND

Rule 2

- exclude People groups volunteers: warehouse | truekidz includes any

☐ WH Behind-the-Scenes ☒ WH Cast ☐ WH 1st Impressions (TrueKidz)

☐ WH Band

+ Add condition

+ Add rule

My list should include: exact matches ☐ Include inactive profiles

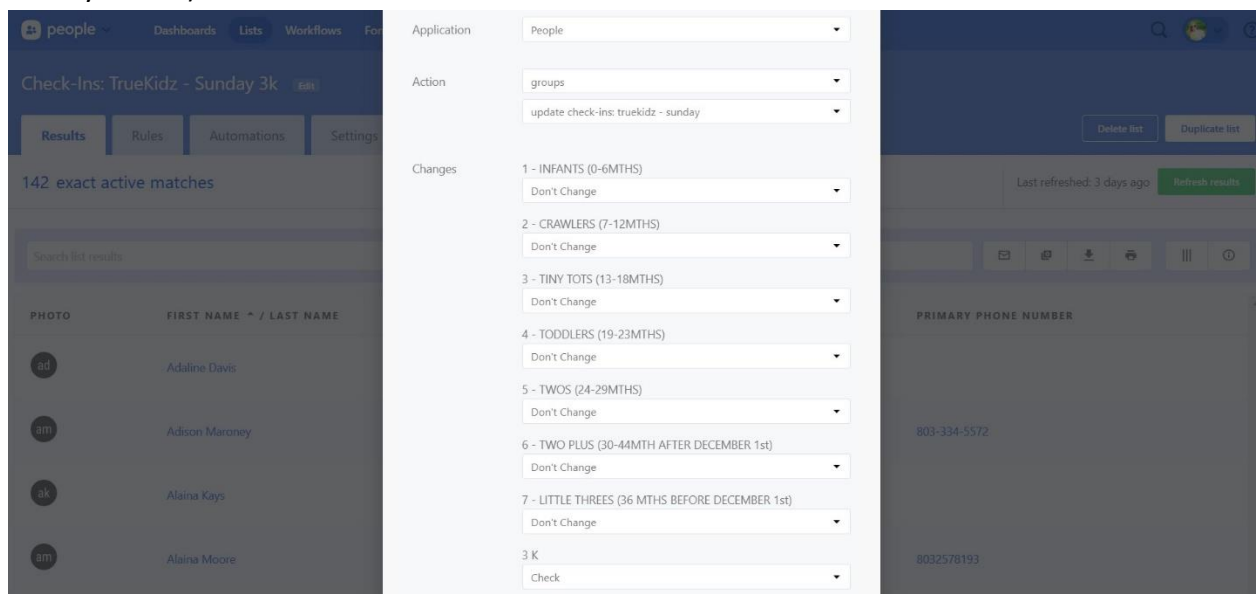
Cancel Submit

## Creating Groups in PCO People

- f. Duplicate and repeat as needed. Remember that you will need one list for each group and think about the time parameters you want to set. For example, you might run all groups as the last two years, except for child and student check-in groups. Those could be run from a date after your last classroom/grade promotion.

### Step 3: Mass Update

1. Once you submit each list, you will be moved over to the Results tab. From there, select the Bulk Actions icon (dark box with a gear in it).
2. Application – People
3. Action – Select the name of your custom tab under the bold “Update Field” list, then the specific field you wish to change (ex: Groups – Update Check-Ins: TrueKidz – Sunday).
4. Find the specific subset group to wish to update and select “Check” in the drop-down menu (ex: 3K). You will ONLY select “Check” for that specific group.
5. Click “Perform Action” and then “Confirm”. (You can always refresh results on the list if you need to double check that you updated its members. Results should come back as “0” if you did.)



6. Repeat for every group you want to export.

**Pro-tip:** Consider creating an org chart of all the PCO apps with your groups, teams, subgroups, etc. Then cross each one off in a different color as you created that custom field, then list, then run the bulk update. Each field will create a new column in your main PCO export file, with each appropriate group listed in that column. If you have a large number of groups, with a large number of people, this will be much easier than starting from scratch in Churchteams.