

Create a group and invite members

Configure the group, choose useful modules and invite people from the guided workflow.

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Before you begin

- ✓ Define the group name, purpose and coordinators.
- ✓ Check the active workspace.

1 STEP 1 OF 7 · 2 MIN

Open Groups

From the dashboard open Groups and select New group.

New group opens a separate flow from the existing list.

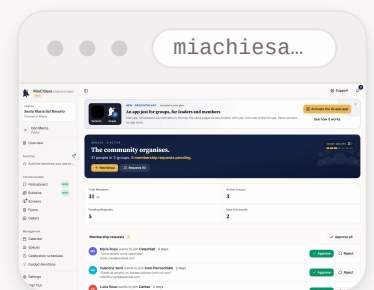


Fig. 1 From the dashboard open Groups and select New group.

2 STEP 2 OF 7 · 2 MIN

Choose the type

In Create a new group choose a preset template or Configure from scratch.

A template pre-fills name, category, icon and access; Configure from scratch leaves every choice manual.

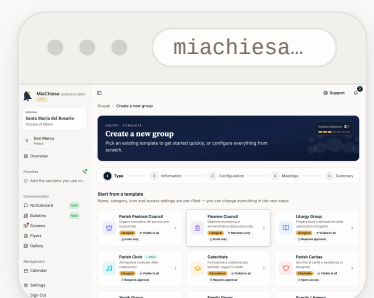


Fig. 2 Create a new group with preset templates and Configure from scratch.

3**STEP 3 OF 7 · 2 MIN**

Enter information

Fill in Group Name, Short description, Category, Icon and any requested contact details.

Name identifies the record; category and icon make it easier to find.

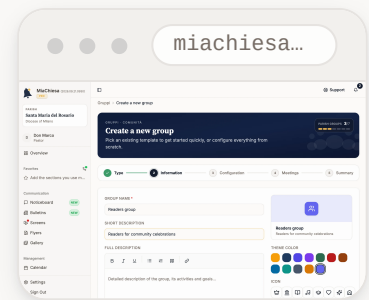


Fig. 3 The name and short description are filled in before visibility and joining options.

4**STEP 4 OF 7 · 2 MIN**

Configure visibility and membership

Choose who can see the group and its Membership mode; enable only the modules that will be used.

Visibility and Membership mode determine who can find the group and how they can join.

5**STEP 5 OF 7 · 2 MIN**

Set the leader and meetings

Select the group leader. When needed, complete Regular meeting day, Start time, End time, Frequency (Weekly, Every two weeks or Monthly) and the regular meeting location.

When a day and time are set, MiaChiesa adds the meeting to the group calendar as a recurring appointment on creation. It counts toward the group's monthly allowance, which has its own counters and does not use the community's.

Meeting details are optional and can be configured later.

6

STEP 6 OF 7 · 2 MIN

Confirm creation

In Group summary review category, membership, meeting, location and contacts, then select Create Group.

Create Group saves the record; invitations start from the created group.

7

STEP 7 OF 7 · 2 MIN

Invite members

From the created group open Members: search followers, send an email invitation or generate an invitation link.

Choose one channel per person and use the detail page to check whether the invitation was sent or accepted.

What you have achieved

✓ The group appears under All groups.

✓ Members and invitations can be checked from its detail page.

Troubleshooting

New group is missing



Check Manage groups access in the selected scope.

An invitation is not accepted



Generate a new link and check that the person uses the intended account.

The group was created but the meeting is not in the calendar



A warning reports this after creation, for example when the group has reached the month's event limit. The group is still created, so do not repeat the wizard. Open the group, go to Settings, check the meeting and select Save changes to add it to the calendar once there is room.