

Guidance about the basics of the Groop Platform - for Group and District officers (May 2021)

Summary

This guidance is about the basics of how the *Groop Platform* works. It doesn't cover everything that the *Groop Platform* can do but we've tried to cover the most important functionality.

This guidance is for Group and District officers (ie. District Contact; Treasurer; Volunteer Coordinator; Membership Secretary; District Safeguarding Office; Group Contact; Group Admin; Group Leader; and Group Helper).

Contents

Introduction	3
What is this guidance about?	3
Understanding jargon	3
Who is this guidance aimed at?	3
What is the Groop Platform?	3
How Groups and Districts relate to each other on the Groop Platform	3
Who can do what on the Groop Platform?	4
Getting started with the Groop Platform	5
Getting access to a Group Groop or District Groop on the the Groop Platform	5
Join the Woodcraft Folk Membership Database (the first step in becoming a member of the national organisation)	5
What you will see when you login	5
Change which Groop you're accessing	6
Mobile app for the Groop Platform	6
Where can I get help and support?	7
Finding and amending information about a Groop	8
Amend information about a Group Groop	8
See a list of Groups in a District	8
Managing people on the Groop Platform (NB: used for child registration)	9
View information about a person	9
Amend information about a person	9
Tip: amending information on the Woodcraft Folk Membership Database	9
Add/invite a person to a Group Groop or District Groop	10
Add multiple people at the same time to a Group Groop or District Groop	10
Archive a person	10
Add a guardian for a person	11
Send data request form	11
(As a guardian) log in on behalf of a dependant	11
Manage events	12
Create an event	12
Make an event repeat weekly (for up to four weeks)	12
Clone an event	12
Edit an event (used for taking a register)	12
Tip: workaround for canceling an event	13

Participate in an event	13
Finance	14
Create an invoice/donation request	14
View/edit or clone a sent invoice/donation request	14
Manually mark an invoice/donation request as paid (for bank transfer, cheque or cash payments)	14
Receive payments/donations using a Stripe account (ie. online credit/debit card payments)	15
View and pay an invoice/donation request online with a credit/debit card (eg. pay membership fees for the national organisation)	15
Emails/mailings	17
Send an email/ mailing	17
View/edit, clone or delete a sent email/ mailing	17
Document (resources) store	18
Upload documents	18
View documents	18
Working with information	19
Customise the information you collect	19
Customising labels to make it easier to find information	19
Annex 1: jargon buster	20
Annex 2: data security and data protection	21
Annex 3: future developments to the Groop Platform	22

Introduction

What is this guidance about?

This guidance is about the basics of how the *Groop Platform* works. It doesn't cover everything that the *Groop Platform* can do but we've tried to cover the most important functionality.

For information on how to carry out specific Group/District admin tasks, please see guidance on the following subjects (all available at www.woodcraft.org.uk/groop):

- Group Registration
- Child Registration
- Gift Aid

For information on new functionality we expect to be added to the *Groop Platform* in due course, [see Annex 3 of this guidance](#).

Understanding jargon

The meaning of any word highlighted in green in this document is explained in the 'jargon buster' in [Annex 1 of this guidance](#).

Who is this guidance aimed at?

This guidance is aimed at Group and District **officers**:

- District Contact
- Treasurer
- Volunteer Coordinator
- Membership Secretary
- District Safeguarding Officer
- Group Contact
- Group Admin
- Group Leader
- Group Helper

Parents/carers and volunteers should read the guidance aimed at them, which is available at <https://woodcraft.org.uk/groop>.

What is the *Groop Platform*?

The *Groop Platform* is an online system to which Woodcraft Folk subscribes to help Groups and Districts with their admin.

The system is structured around "**Groops**", which can be understood as online profiles. Each Woodcraft Folk Group has its own **Group** (referred to in this guidance as a **Group Group**). Each Woodcraft Folk District also has its own **Group** (referred to in this guidance as a **District Group**).

How Groups and Districts relate to each other on the *Groop Platform*

As mentioned above, each Group and District is associated with a different **Group** on the *Groop Platform*. Most significantly, this means that a person with access to a **District Group** doesn't have access to information about its **Sub Groups** (there are a couple of exceptions to this, which are mentioned where relevant below), and, similarly, a person with access to a **Group Group** doesn't have access to information about the related **District Group**.

This leads to some limitations in the system. For example, if you are organising a District-wide event, the participants (eg. parents/carers and young people) associated with each **Group Group** will have to be invited separately via their **Groops**.

There is also a **Group** for members of the national organisation - this is called the **Woodcraft Folk Membership Database**.

Who can do what on the *Groop Platform*?

Depending on your role in a Group or District you will be able to do different things on the *Groop Platform*. Here is a brief summary of who can do what:

Finding and amending info about a Group		Managing people	
Amend information about a Group Groop: Group Contact Group Admin	See a list of Groups in a District (only when accessing a District Groop): District Contact Treasurer Safeguarding Officer Membership Secretary Group Leader	View information about a person: Group Contact Group Admin District Contact Treasurer Safeguarding Officer Volunteer Co-ordinator Membership Secretary Group Leader Group Helper	Amend information about a person: Group Contact Group Admin Membership Secretary
Managing people cont....			
Add/invite a person or multiple people (used for child registration): Group Contact Group Admin Membership Secretary	Archive a person: Group Contact Group Admin Membership Secretary	Add a guardian for a person: Group Contact Group Admin Membership Secretary	Send data request form: Group Contact Group Admin Membership Secretary
Managing events			
Create an event Group Contact Group Admin District Contact Volunteer Co-ordinator Group Leader Group Helper	Make an event repeat weekly: Group Contact Group Admin District Contact Group Leader Group Helper	Clone an event: Group Contact Group Admin District Contact Group Leader Group Helper	Edit an event (used for taking a register): Group Contact Group Admin District Contact Group Leader Group Helper
Managing events cont....	Finance		
Cancel an event (workaround): Group Contact Group Admin District Contact Group Leader Group Helper	Create an invoice / donation request: Group Contact Group Admin Treasurer	View/edit or clone a sent invoice/donation request: Group Contact Group Admin District contact (view only) Treasurer	Manually mark an invoice/donation request as paid (for bank transfer, cheque or cash payments): Group Contact Group Admin Treasurer
Finance cont....	Emails/mailings		Documents
Receive payments/donations using a Stripe account (ie. online credit/debit card payments): Group Contact Group Admin District Contact Treasurer Safeguarding Officer Volunteer Co-ordinator Membership Secretary Any person with login details for a Stripe account can manage the account.	Send an email/ mailing: Group Contact Group Admin District Contact Treasurer Safeguarding Officer Volunteer Co-ordinator Membership Secretary	View/edit, clone or delete a sent email/ mailing: Group Contact Group Admin District Contact	Upload documents: Group Contact Group Admin District Contact Treasurer Safeguarding Officer Volunteer Co-ordinator Membership Secretary Group Leader
Information			
Customise the information you collect: Group Contact Group Admin District Contact	Customise information labels: Group Contact Group Admin District Contact Treasurer Safeguarding Officer Volunteer Co-ordinator Membership Secretary		

Getting started with the *Group Platform*

Getting access to a **Group Group** or **District Group** on the the *Group Platform*

To get access to a **Group Group** on the *Group Platform* you need to receive an invitation from the relevant Group Contact or Group Admin.

To get access to a **District Group** on the *Group Platform* you need to receive an invitation from the relevant Membership Secretary.

Join the **Woodcraft Folk Membership Database** (the first step in becoming a member of the national organisation)

To join the **Woodcraft Folk Membership Database** (which is the first step in becoming a member of the national organisation) you need to click [here](#) and complete the form.

The hyperlink will take you to a form on the *Group Platform*, which you'll need to complete.

As part of completing the form, you'll need to provide an email address and set a password. If the email address you provide is already registered with another **Group** (eg. you used the same email address to register your child with a **Group Group**), the password that you set must be the same as the password you use for the other **Group** (otherwise you'll get an error message saying "Password Incorrect").

For the avoidance of doubt, even if you already have access to a **Group** on the *Group Platform*, if you want to become a member of the national organisation, you must first join the **Woodcraft Folk Membership Database** by clicking [this hyperlink](#).

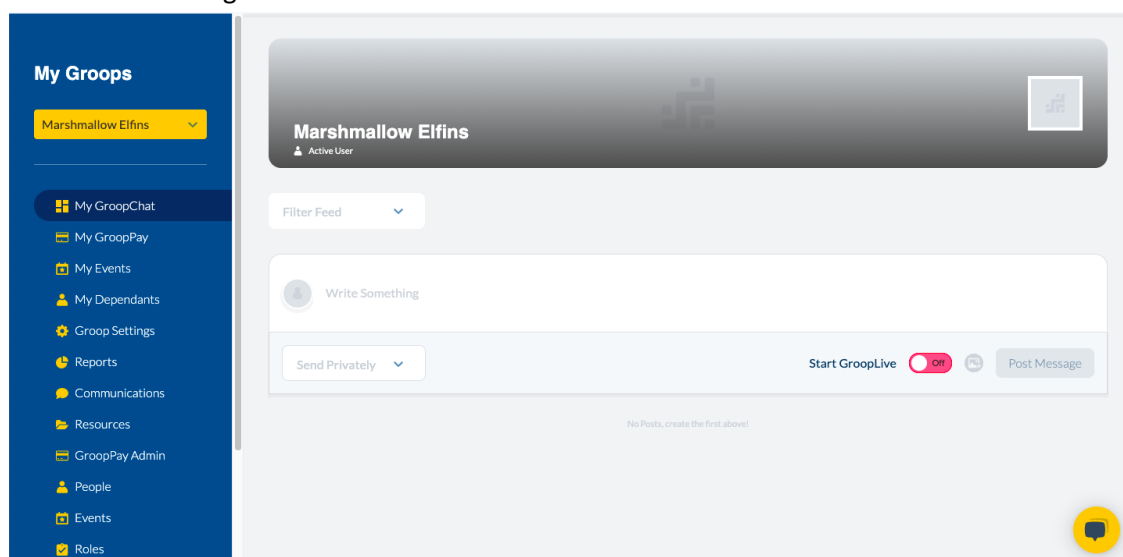
For more information on membership of the national organisation, go to <https://woodcraft.org.uk/how-become-member-woodcraft-folk>.

Logging into the *Group Platform*

To log into the *Group Platform*, go to www.groop.com or click on the link at www.woodcraft.org.uk/groop.

What you will see when you login

When you log in you will see your dashboard, which provides an overview of the **Group** you're accessing. The dashboard will look something like this:



In this guidance, we refer to the dark-blue section on the left of the image as the "side panel". The side panel is where you can access most of the *Group Platform's* functionality.

Change which **Groop** you're accessing

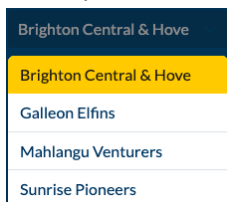
Some users have access to more than one **Groop**. This is the case, for example, when a parent has a child in an Elfin Group and a child in a Pioneer Group, so they have access to two different **Group Groops**. Another example is where a volunteer has access to the **Woodcraft Folk Membership Database** and a **Group Groop** for which they volunteer.

To change the **Groop** you're accessing at any one time:

- Click on the yellow dropdown menu at the top of the **side panel**. It'll look something like this:



- When you click the yellow button, the menu will open and it'll look something like this:



More info on changing the **Groop** you're accessing: <https://knowledge.groop.com/how-do-i-change-my-groop>

Mobile app for the **Groop Platform**

The *Groop Platform* has an app available for mobile devices (IOS and Android). The app only provides limited functionality aimed at participants (ie. parents/carers and children/young people)

More info: <https://knowledge.groop.com/how-do-i-download-and-login-to-groops-mobile-app>

Where can I get help and support?

To get help with technical issues (eg. if the *Groop Platform's* website doesn't seem to be working and you're not able to login):

- Use the *Groop Platform's* Live Chat facility
- Submit a question to the *Groop Platform's* user support team at <https://knowledge.groop.com/en/kb-tickets/new> or request training at <https://groop.com/contact-product-support/>
- Take a look at the Groop Platform's knowledge base at <https://knowledge.groop.com/en>

If you need help with using the *Groop Platform* for Group/District admin tasks (eg. you need help with cancelling an event or changing your District Safeguarding Officer), please contact groop@woodcraft.org.uk. Please also use this mailbox if you have any comments about this guidance (eg. if something is missing/inaccurate).

For anything else, please contact membership@woodcraft.org.uk.

Finding and amending information about a Group

Amend information about a Group

To amend information about a **Group** (eg. amend the meeting place and contact information for a Group)

- Click 'Group settings' in the **side panel**
- Make any amendments
- Click 'Update Group Details'

Who can do it?

Group Contact
Group Admin

Tip: information you can change includes name, location and session timings.

See a list of Groups in a District

To see a list of Groups currently registered as open in a District:

- Whilst accessing a **District**, click 'Groups' in the **side panel**

Who can do it?

District Contact
Treasurer
Safeguarding Officer
Membership Secretary
Group Leader

Tip: this option is only available when you're accessing a **District**.

Managing people on the Groop Platform (NB: used for child registration)

Tip: the functionality described below underpins child registration and membership administration.

Tip: if you need membership information that can't be obtained using the functionality described below, please contact membership@woodcraft.org.uk.

More info: on child registration can be found at www.woodcraft.org.uk/groop.

View information about a person

To view information about a person:

- Click 'People' in the **side panel**
- Left click on a person's name
- Click 'View'

Who can do it?

Group Contact
Group Admin
District Contact
Treasurer
Safeguarding Officer
Volunteer Co-ordinator
Membership Secretary
Group Leader
Group Helper

Tip: from a **District Groop**, you can view information about people in each **Sub Groop**. To do this click the blue button that says "Groops ([x no.] selected)" and select any relevant **Sub Groops**. It'll look something like this:

Groops (1 selected)

Amend information about a person

To amend information about a person:

- Click 'People' in the **side panel**
- Left click on a person's name
- Click 'Edit'
- Make any changes wanted
- Scroll to the bottom of the page and click 'Update User'

Who can do it?

Group Contact
Group Admin
Membership Secretary

Tip: this can include changing a person's role (eg. changing someone from Treasurer to District Safeguarding Officer).

Tip: amending a person in one **Groop** will not alter information about them in another **Groop**.

Tip: from a **District Groop**, you can amend information about people in each **Sub Groop** (ie. each **Group Groop** related to the District). To do this click the blue button that says "Groops ([x no.] selected)" and select any relevant **Sub Groops**. It'll look something like this:

Groops (1 selected)

Tip: amending information on the Woodcraft Folk Membership Database

To amend information on the **Woodcraft Folk Membership Database**, send an email to membership@woodcraft.org.uk. In the email you send you'll need to either:

- set out the changes you want made; or
- ask for a 'data request form' to be sent to you and use that form to submit the updated information - you'll receive an email that looks something like this:

More info: <https://knowledge.groop.com/add-or-edit-a-person>

Add/invite a person to a **Group Group** or **District Group**

To add a person:

- Click 'People' in the **side panel**
- Click 'Create Person'
- Select the role type (eg. District contact, District Treasurer, child/young person etc)
- Enter the person's name in the first and last name fields
- Enter email address (there's no need to do this, if you're planning to add a **guardian** for this person)
- Scroll to the bottom of the screen and slide the 'Add Email to Invite User' button to the right so that it turns green (this will send the person an invitation, when you create the person)
- Click 'Create User'

To send an additional invitation:

- Click 'People' in the **side panel**
- Left click on a person's name
- Click 'Invite'

Tip: a person's status will remain inactive until they respond to your invite.

More info: <https://knowledge.groop.com/add-or-edit-a-person>; child registration at www.woodcraft.org.uk/groop.

Who can do it?
Group Contact
Group Admin
Membership Secretary

Add multiple people at the same time to a **Group Group** or **District Group**

To add multiple people:

- Create your spreadsheet - find instructions at:
<https://knowledge.groop.com/how-do-i-import-my-csv-file-into-groop>
- Click 'People' in the **side panel**
- Click 'upload CSV'
- Find and select your spreadsheet
- In the 'Map CSV fields' box which appears, match the headings of the columns on your spreadsheet with the correct fields
- Click 'confirm changes'

More info: <https://knowledge.groop.com/how-do-i-import-my-csv-file-into-groop>

Who can do it?
Group Contact
Group Admin
Membership Secretary

Archive a person

To archive a person

- Click 'People' in the **side panel**
- Left click on a person's name
- Click 'archive'

Who can do it?
Group Contact
Group Admin
Membership Secretary

Tip: this is instead of removing a user from the system - Folk Office removes archived people from the system periodically, in accordance with recordkeeping requirements.

Add a guardian for a person

To add a **guardian** to a person:

- Click 'People' in the **side panel**
- Left click on the name of the person for whom you want to create a **guardian**
- Click 'Edit'
- Scroll to the 'Guardians' section
- Select 'Yes' in the dropdown labelled 'Allow guardians to login on behalf'
- Select the **guardian** or **guardians** from the list of people
- Scroll to the bottom of the page and click 'Update User'

Who can do it?

Group Contact
Group Admin
Membership Secretary

Tip: this is how to provide for a parent/guardian to operate the *Group Platform* on behalf of a child/young person.

Send data request form

To send a data request form to one person

- Click 'People' in the **side panel**
- Left click on the name of the person to whom you want to send a form
- Click 'Edit'
- Click the 'submit sections to user' button
- Select all relevant fields
- Click 'submit data'

Who can do it?

Group Contact
Group Admin
Membership Secretary

To send a data request form to multiple people

- Click 'People' in the **side panel**
- Filter the people on screen so that only those you want to receive the form are showing
- Click the 'submit sections' button
- Select all relevant fields

Tip: data requests remain live for 12 days (you'll need to resend a request if someone fails to respond in that time).

(As a guardian) log in on behalf of a dependant

If you are a **guardian**, you can log in on behalf of your **dependant** by taking the following steps:

- Click 'My Dependants' in the **side panel**
- Left click the **dependant's** name
- Click 'login as user'

Who can do it?

Any user set up as a **guardian**.

Tip: this functionality will allow you to, for example, respond to an **event** invitation or make a payment on behalf of your **dependant**.

Tip: if you're a **guardian** for more than one child in relation to more than one **Group** (eg. you have a child in an Elfin Group and a child in a Pioneer Group, each related to a different **Group Group**) you'll need to [switch to the relevant Group](#) before selecting 'My Dependants'.

More info: <https://knowledge.groop.com/my-dependants>

Manage events

Tip: the functionality described below can be used for organising weekly Group night sessions.

Create an event

To create an **event**:

- Click 'Events' (not 'My Events') in the **side panel**
- Click the 'Create Event' button
- There are five steps to complete or skip, including:
 - Adding detail of the event
 - Attaching your event/activity risk assessment
 - sending invites; and
 - creating an invoice/donation request
- Click the 'Create Event' button

Who can do it?

Group Contact
Group Admin
District Contact
Volunteer Co-ordinator
Group Leader
Group Helper

More info: <https://knowledge.groop.com/create-activity> and, in relation to invoices, see section on [creating an invoice/donation request](#) below.

Make an event repeat weekly (for up to four weeks)

To make an **event** repeat weekly for up to four weeks:

- Click 'Events' (not 'My Events') in the **side panel**
- Left click the **event** name
- On the menu which appears, select how many times you want to repeat the **event**

Who can do it?

Group Contact
Group Admin
District Contact
Group Leader
Group Helper

Tip: this is a good way to keep Group nights booked in regularly (see also **clone** function below).

Clone an event

To **clone** an **event**:

- Click 'Events' (not 'My Events') in the **side panel**
- Left click the **event** name
- On the menu which appears, click 'Clone' (you may need to refresh your screen to see the **clone** of the **event**)

Who can do it?

Group Contact
Group Admin
District Contact
Group Leader
Group Helper

Tip: the **clone** function, along with the repeat function above, is a good way to keep your Group nights booked in regularly.

Edit an event (used for taking a register)

To edit an **event**:

- Click 'Events' (not 'My Events') in the **side panel**
- Left click the **event** name
- On the menu which appears, click 'Edit'
- There are seven options to click on towards the top of the page, including:
 - 'Invite people'

Who can do it?

Group Contact
Group Admin
District Contact
Group Leader
Group Helper

- 'Registration'
- 'RSVP'

Tip: to see a list of people who have responded to their invitation, click 'RSVP'.

Tip: to take a register of who attends an **event**, click on 'Registration' - this takes you to a list of all the people in the relevant Groop, so that you can tick off (ie. switch the button from 'Off' to 'On') as if you are taking a register.

Tip: workaround for canceling an event

The *Groop Platform* doesn't provide a mechanism to cancel **events** (although see below re. deleting **events**).

We therefore recommend the following workaround:

- Change the **event** name
 - Click 'Events' (not 'My Events') in the **side panel**
 - Left click the **event** name
 - On the menu which appears, select 'Edit'
 - Add the word "CANCELLED" to the **event** name (this will mean if someone sees the **event** in their 'My Events' section, they will see that the **event** has been cancelled) and we recommend adding a reason for cancellation in 'Event Description' box
 - When you're done, click the 'Overview' step and then click 'Update Event'
- Once you've made the above changes, [send an email](#) to anyone who may have been aware of the **event** (this will help make sure everyone knows the **event** has been cancelled)

Who can do it?

Group Contact
Group Admin
District Contact
Group Leader
Group Helper

NB: To delete an **event**: left click the **event** name and click 'Delete'. (Group Contact; Group Admin District Contact only.)

Participate in an event

To book onto an **event** that you've been invited to:

- Click 'My Events' in the **side panel**

Who can do it?

Any invitee

More info: <https://knowledge.groop.com/en/my-events>

Finance

More info: <https://knowledge.groop.com/en/grooppay-admin> and, in relation to invoices for events, see also the [section on managing events](#) above.

Create an invoice/donation request

To create an invoice/donation request:

- Click 'GroopPay Admin' (not 'My GroopPay') in the **side panel**
- Click 'Create'
- Click one-off or recurring payment
- Select invoice or donation
- Complete the relevant fields
- Select recipients
- Send the invoice/donation request or save it to send later

Who can do it?

Group Contact
Group Admin
Treasurer

Tip - in order to claim Gift Aid on a donation, either:

1. the person will need to [pay the donation request online using a credit/debit card](#) and tick the Gift Aid box; or
2. if you receive a donation by bank transfer/cheque/cash, when manually marking the donation request as paid, state in the notes section that Gift Aid should be claimed on the amount (you will also need to confirm that you or Folk Office has proof of banking and a relevant Gift Aid declaration on file).

Tip: for donations, provide more info. about your fundraising in the 'message' box - see examples/templates here - <https://woodcraft.org.uk/resources/gift-aid-guidance-district-treasurers>

Tip: make sure you include a reference number/name so that the funds received will be identifiable.

Tip: the minimum amount is set at 30 pence because, for online debit/credit card payments (more info. in [Stripe section](#) below), this is the minimum necessary to cover fees.

More info: on Gift Aid and the Groop Platform www.woodcraft.org.uk/groop; Gift Aid generally - <https://woodcraft.org.uk/resources/gift-aid-guidance-district-treasurers>.

View/edit or clone a sent invoice/donation request

To view/edit or **clone** a sent invoice/donation request:

- Click 'GroopPay Admin' (not 'My GroopPay') in the **side panel**
- Left click the invoice/donation request 'reference' and select your chosen option
- On the menu which appears, click your chosen option (if you click 'Clone', you may need to refresh your screen to see the **clone** of the invoice/donation request)

Who can do it?

Group Contact
Group Admin
District contact
(view only)
Treasurer

Manually mark an invoice/donation request as paid (for bank transfer, cheque or cash payments)

To manually mark an invoice/donation request as paid

- Click 'GroopPay Admin' (not 'My GroopPay') in the **side panel**
- Left click the invoice/donation request 'reference'
- Click 'View'
- Left click the relevant entry (ie. the recipient name or details of invoice/donation request)
- Click the 'view/edit state' button

Who can do it?

Group Contact
Group Admin
Treasurer

- Complete the details

Tip: this function is used for payments made by bank transfer, cheque or cash.

Receive payments/donations using a **Stripe account** (ie. online credit/debit card payments)

To receive online credit/debit card payments/donations you need to have a **Stripe account**.

To set up a **Stripe account**:

- Click 'Groop settings' in the **side panel**
- Scroll down to the 'GroopPay' section and click 'Connect Stripe account'
- Complete the form
 - Country: United Kingdom
 - Business website: www.woodcraft.org.uk
 - Business description: Membership organisation > Charity
 - Written description of organisation:

"Woodcraft Folk is a children's charity. We run volunteer-led co-operative youth groups around the UK in school halls, community venues and a host of other places to learn about big ideas through fun activities like singing, camping, playing and debating."

- Type of business: individual/sole trader
- Company number: *leave blank*
- VAT number: *leave blank*
- Business address: Unit 9, 83 Crampton Street, SE17 3BQ
- Business phone: *leave blank*
- Legal name: *use name of treasurer or a signatory on the account*
- Phone number: *date of birth of person named individual*
- Home address: *address of person named above*
- Statement descriptor: "Woodcraft Folk [District/Group name]"
- Bank account details: *provide District/Group bank account details*
- Follow the two-step authentication
 - Tip: use a Woodcraft Folk District/Group email address so that the account can be accessed by a future treasurer
- Complete the steps on the Stripe website

To manage your **Stripe account**:

- Log in at <https://dashboard.stripe.com/login>

More info: <https://knowledge.groop.com/connect-stripe-account>

Who can do it?

Group Contact
Group Admin
District Contact
Treasurer
Safeguarding Officer
Volunteer Co-ordinator
Membership Secretary

Any person with login details for a **Stripe account** can manage the account.

View and pay an invoice/donation request online with a credit/debit card (eg. pay membership fees for the national organisation)

To view and pay an invoice/donation request online with a credit/debit card:

- Click 'My GroopPay' in the **side panel**
- Left click the invoice/donation request

Who can do it?

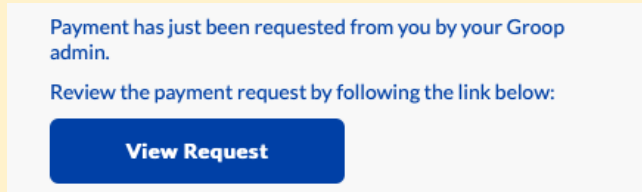
Any recipient of an invoice/donation request

Tip: if you make a payment by bank transfer, cheque or cash, the invoice/donation request will have to be [manually marked as paid](#).

Example - paying membership fees for the national organisation by credit/debit card

If someone is becoming a member or they're renewing their membership and they don't want to pay their fee by Direct Debit, they'll need to pay the fee by credit/debit card. In summary, the process will work as follows:

1. The person will receive an email payment request that looks something like this



The hyperlink remains live for 7 days

2. The person will need to click on the link and login to the **Woodcraft Folk Membership Database** on the *Groop Platform*
3. The person will then be able to pay the fee using the method described above

NB: you can choose to pay by Direct Debit as part of the process of becoming a member of the national organisation and, if you're renewing your membership, you can choose to start paying by Direct Debit by going to <https://woodcraft.org.uk/woodcraft-membership-payment>.

More info: <https://knowledge.groop.com/en/my-grooppay>

Info. on becoming a member: <https://woodcraft.org.uk/how-become-member-woodcraft-folk>

Info. on Direct Debit payments: <https://woodcraft.org.uk/woodcraft-membership-payment>

Emails/mailings

More info: <https://knowledge.groop.com/communications>

Send an email/ mailing

To send an email/ mailing:

- Click 'Communications' in the **side panel**
- Click 'Create new communication'
- Enter a subject, your message and a reply email address (by default the reply email is the email of your *Groop Platform* account)
- Select recipients
- Send your email/ mailing or save it to send later

Who can do it?

Group Contact
Group Admin
District Contact
Treasurer
Safeguarding Officer
Volunteer Co-ordinator
Membership Secretary

View/edit, **clone** or delete a sent email/ mailing

To view/edit, **clone** or delete a sent email/ mailing

- Click 'Communications' in the side panel
- Left click the email/ mailing subject and select your chosen option

Who can do it?

Group Contact
Group Admin
District Contact

Document (resources) store

More info: <https://knowledge.groop.com/resources>

Upload documents

To upload documents in relation to your Group or District (eg. policies, risk assessments, forms, publicity and notices etc):

- Click 'Resources' in the **side panel**
- Click 'My documents'
- Click 'Create folder' and/or click 'Add Files'

Who can do it?

Group Contact
Group Admin
District Contact
Treasurer
Safeguarding Officer
Volunteer Co-ordinator
Membership Secretary
Group Leader

View documents

To view documents:

- Click 'Resources' in the **side panel**
- Click your chosen folder
- Click your chosen file

Who can do it?

Any user with access to the relevant **Group**.


Tip: national Woodcraft Folk documents can be found on the website - www.woodcraft.org.uk. In particular, there is an 'A to Z' of useful documents at [www.https://woodcraft.org.uk/policies-procedures-guidance](https://woodcraft.org.uk/policies-procedures-guidance).

Working with information

Customise the information you collect

To customise the sorts of information you are able to collect using the *Groop Platform*, you can customise **fields/field areas**.

To do this:

- Click 'Customisable Fields' in the **side panel**
- Select whether you want to customise **fields/field areas** in relation to people (click 'User'), **events** (click 'Event') or **Groups** (click 'Group')
- Then:
 - to edit or delete existing **fields/field areas**, click  ;
 - to create a new **field**, click 'Create new field'; or
 - to create a new **field area**, click 'Create new custom field area'

Who can do it?

Group Contact
Group Admin
District Contact

More info: <https://knowledge.groop.com/customisable-fields>

Customising **labels** to make it easier to find information

To make information easier to find, you can customise **labels**. To do this:

- Click 'Labels' in the **side panel**
- Select whether you want to customise **labels** in relation to people (click 'User'), **events** (click 'Event') or invoices (click 'invoice')
- Then:
 - to edit or delete a **label**, left click the **label** and select 'Edit' or 'Delete'; or
 - to create a new **label**, click 'Create **Label**'

Who can do it?

Group Contact
Group Admin
District Contact
Treasurer
Safeguarding Officer
Volunteer Co-ordinator
Membership Secretary

More info: <https://knowledge.groop.com/labels>

Annex 1: jargon buster

“Clone”	To “clone” an item on the <i>Groop Platform</i> (such as an “event”, an invoice/donation request or an email/ mailing) means to make a copy of the item so that you can resend/repeat it or amend it and then resend/repeat it.
“Dependant”	A “guardian” can log into and use the <i>Groop Platform</i> on behalf of a “dependant” (eg. a parent who can log in on behalf of a child).
“District Groop”	This is a term we use in this guidance to mean a “Groop” associated with a Woodcraft Folk District
“Event”	In the context of Woodcraft Folk’s use of the <i>Groop Platform</i> , “event” may have a wider meaning than normal. It includes not only one-off activities (eg. a pee fair) but also camps/residentials, weekly Group night sessions and pretty much anything else anything else a Woodcraft Folk Group or District might do.
“Field”	A “field” is a place on the <i>Groop Platform</i> where you can capture a piece of information (eg. you could have a “field” capturing a name)
“Field area”	A “field area” is a collection of “fields” which are related to each other
“Groop”	Each “Groop” can be understood as an online profile for a particular Woodcraft Folk Group or District. There is also a “Groop” called the “Woodcraft Folk Membership Database”, which is a database of members of the national organisation.
“Group Groop”	This is a term we use in this guidance to mean a “Groop” associated with a Woodcraft Folk Group
“Guardian”	A “guardian” is a user of the <i>Groop Platform</i> who can log in and use the <i>Groop Platform</i> on behalf of another user, known as a “dependant” (eg. a parent who can log in on behalf of a child).
“Labels”	To make information easier to find, “labels” can be associated with people, “events” and invoices/donation requests on the <i>Groop Platform</i>
“Officers”	This means District Contact, Treasurer, Volunteer Coordinator, Membership Secretary, District Safeguarding Officer, Group Contact, Group Admin, Group Leader and Group Helper
“Resources”	“Resources” are useful documents like policies, risk assessments, forms, publicity and notices
“Side panel”	This means the blue panel on the left hand side of the <i>Groop Platform</i> ’s user interface from which you can access most of the <i>Groop Platform</i> ’s functionality
“Stripe account”	A Stripe account is required to transfer funds to your requested bank account when a user pays an invoice/donation request via the <i>Groop Platform</i> using a credit/debit card. Stripe is a company which provides the technical, fraud prevention and banking infrastructure required for such on-line payments.
“Sub Groop”	In this guidance we use the term “Sub Groop” to refer to a “Group Groop” associated with a “District Group”. Certain limited information related to these “Sub Groops”/“Group Groops” can be accessed by people with access to the relevant “District Groop”.
“Woodcraft Folk Membership Database”	This is a “Groop”. It is a database of members of the Woodcraft Folk national organisation. To become a member of the national organisation, the first step is to join this database.

Annex 2: data security and data protection

Data Security

The Groop platform is hosted by UKCloud - a highly secure, UK sovereign cloud storage service, accredited with all appropriate ISO accreditations, including ISO 27001. All of whom are trusted by the UK Government for HRMC, Home Office and the NHS.

Data Protection and Groop

All data held on the Groop platform is subject to the Data Protection Act 2018, which is the UK's implementation of the General Data Protection Regulation (GDPR), and any other applicable data protection legislation and regulations as implemented in all applicable territories covered by the Agreement.

Groop maintains a Privacy Policy that sets out all parties' obligations in respect of personal information held on the system. To read this policy in full go to <https://groop.com/privacy-policy/>

Staff at Groop who are data controllers are vetted and have full DBS checks.

Woodcraft Folk Data Protection & GDPR

Woodcraft Folk recognises the importance of using personal and sensitive data in an appropriate way, keeping it secure and complying with data protection law.

As part of our activities, Woodcraft Folk collects and makes use of personal information about its members. The data collected within Groop will only be used to administer a child's active and safe participation in Woodcraft Folk activities and monitor equal opportunities.

Data will be securely stored on Groop and will be managed by local volunteers and select staff officers in line with Woodcraft Folk's Data Protection Policy. It may be shared with volunteers in Woodcraft Folk's District, Region, Nation, Committee or working groups, organisers of Woodcraft Folk events, and/or our General Council (Board of Trustees).

Information will be retained whilst individuals hold membership and for a further 3 years after they've left the organisation.

Some personal data will be kept, meeting audit, legal, safeguarding or other regulatory requirements will be kept in our restricted archive, which can only be accessed by individuals authorised by General Council in line with the data protection procedures.

To read our policies on data protection and privacy in more detail go to:

- <https://woodcraft.org.uk/resources/data-protection-policy>
- <https://woodcraft.org.uk/privacy>
- <https://woodcraft.org.uk/child-protection-reporting-and-record-keeping-guidelines>

If you have questions about how we use your data that are not answered by our Privacy Policy, please email our Data Controller at data@woodcraft.org.uk.

Annex 3: future developments to the Groop Platform

- The national Woodcraft Folk membership database will be made available to Districts. Membership Secretaries will, for example, be able to view DBS information about local members.
- GroopPay Admin section to be made more user friendly. For example search functionality and a one-click way to add Gift Aid to a cash/cheque donation.
- Making it possible for an **event** created in a **District Groop** to have invitees from its **Sub Groups**.
- Ability for **Guardians** to receive notifications of their **Dependants'** invoices/donation requests and **events**.