Group Matching

STEP 1

From Qooper Admin Dashboard, select Groups. Click "create" to create a new group. The image we've used for groups is White HBA logo purple background no text.jpg 📎
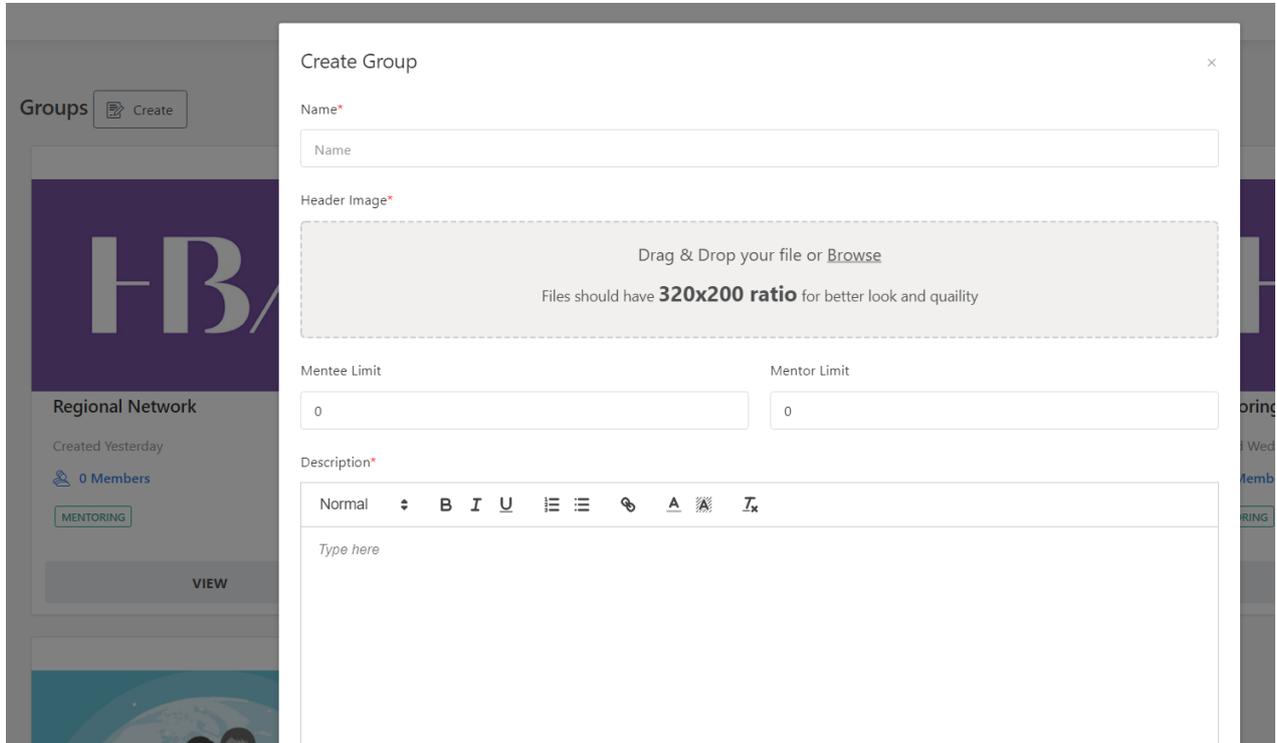
STEP 2

From Qooper Admin Dashboard, select matching
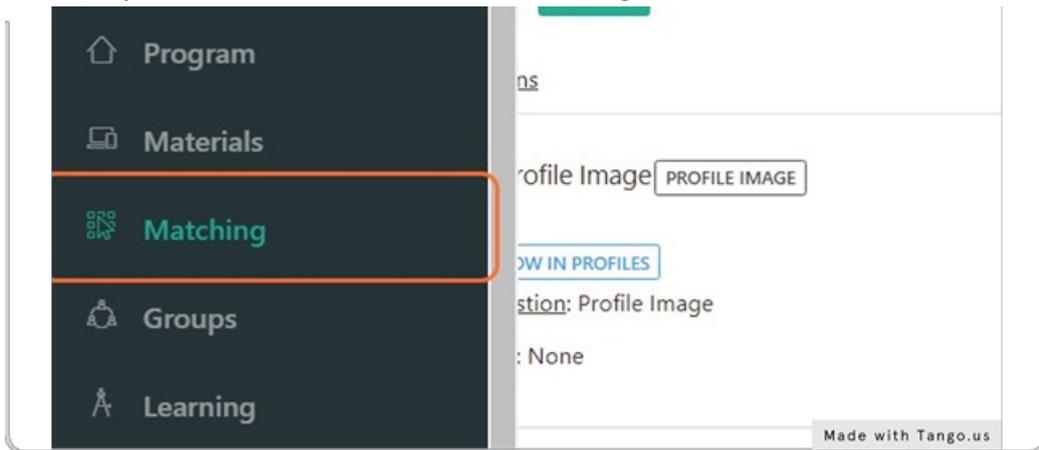
STEP 3

Click Bulk Suggest
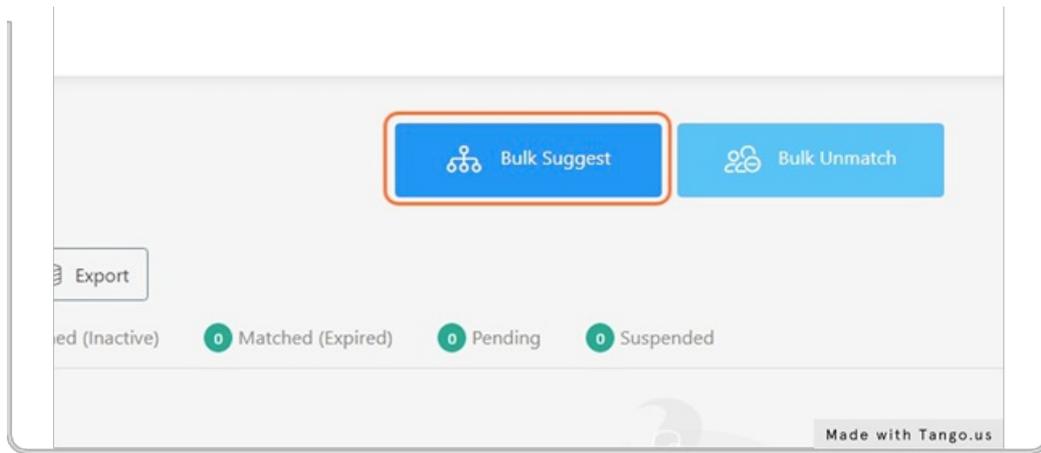
STEP 4

Select "group" and which member role you're matching (mentee or mentor)
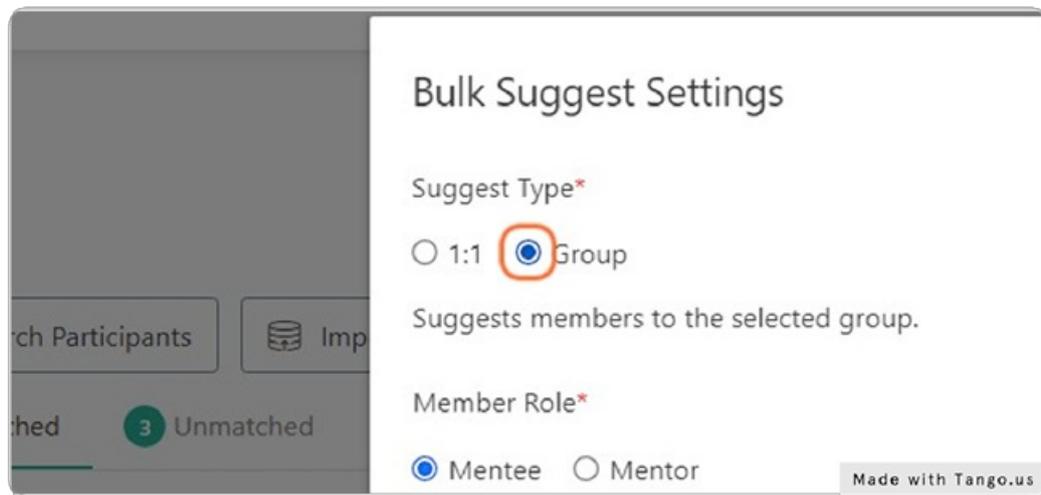
STEP 5

Select group in which you'd like to match from the Group drop-down
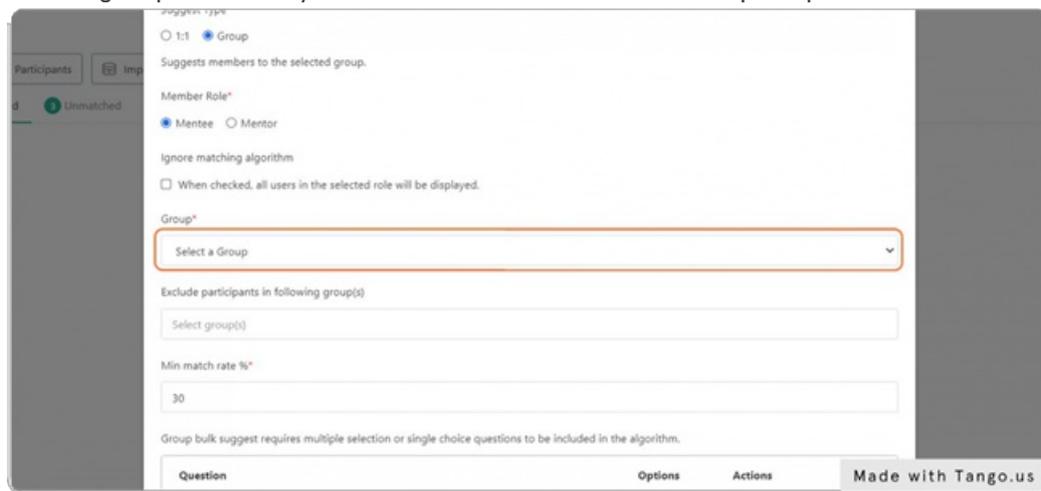
STEP 6

Select previously matched groups to exclude those that have already been placed within a group; this is a multi-select field

STEP 7

Set minimum match rate %
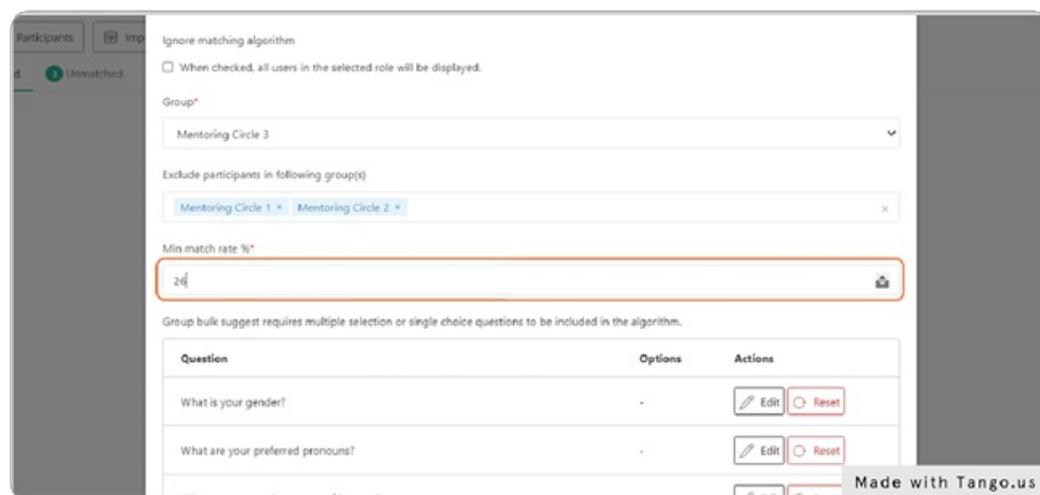
STEP 8

Edit answers on which you'd like to match
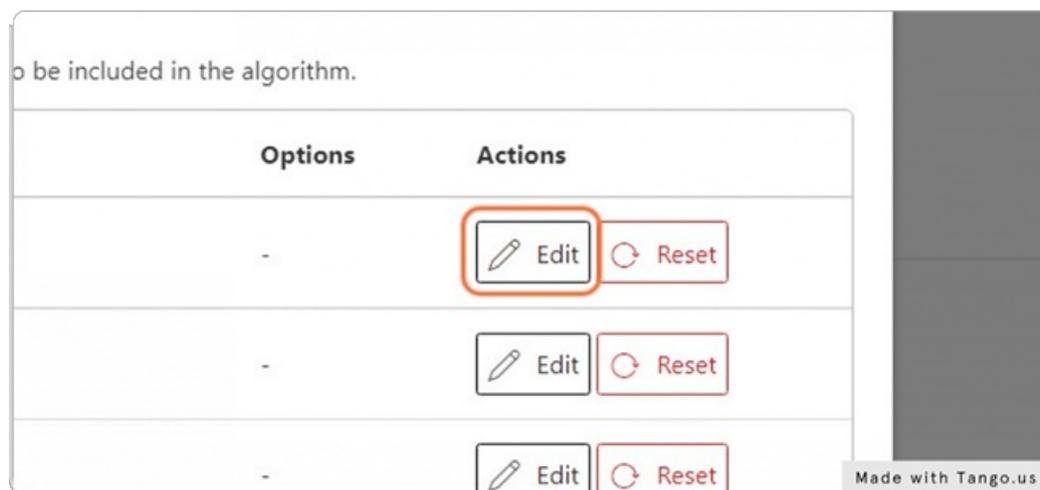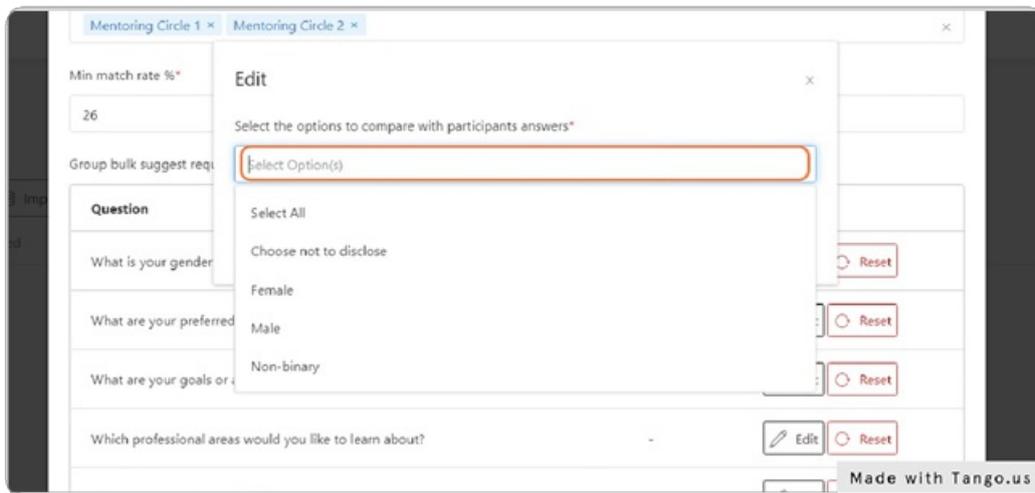
STEP 9

Click on Proceed to see bulk suggestions

STEP 10

Select "details" to see applicant's survey responses, confirm to add to group, or skip to skip the suggestion.

Note: once confirmed, the participant will be notified via email

Confirm Suggestions   ✕

<div align="center">

✓ Confirm All (2)

</div>

ⓘ EACH PARTICIPANT WILL BE NOTIFIED UPON CONFIRMATION.

SUGGESTED ⌄

Michelle Newsome Manager at Self employed Mentee	100% Match Rate	Details Confirm Skip
Michelle Morse Manager at HBA Mentee	100% Match Rate	Details Confirm Skip

Close

To match manually, from Groups on Admin Dashboard, click the three dots in the upper right corner of the group you'd like to match to and select add mentee or mentor