

# How to Create a Category and Utilize Your Resources Section

11/14/2025 1:28 pm CST

## How to Build a Category and Utilize Your Resources Section

You can now **create categories** in the Resources section to store and distribute documents, links, and files in one organized location. This helps keep materials easy to access for parishes, schools, or internal teams.

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### Creating a New Category

- Go to the **Resources** section.
- Click **Create Category** in the top-right corner.
- Enter a **category name** (for example, "Annual Appeal Materials").
- Add an optional **description** to appear at the top of the category.

### Setting Start and End Dates

- Choose a **From Date** to determine when the category becomes visible.
  - Defaults to today unless you schedule it for a future date.
- Choose an optional **To Date** to automatically archive the category.
  - Use this for time-sensitive items like events or campaigns.
  - If no end date is selected, the category will remain until deleted.

### Adding a Cover Image

1. Upload a JPEG or PNG cover image for visual identification.
2. If no cover image is uploaded:
  - a. The system will use the first image found in the category, or
  - b. Display a default icon if no images are included.
3. Click **Select Image to Upload** and choose your file.

### Uploading Files and Links

1. Upload Word documents, PDFs, PowerPoints, spreadsheets, images, and graphics.
2. Add links to videos, podcasts, webpages, or other online resources.

3. Select multiple files at once or upload individually.
  - a. Each uploaded item appears in a file list with a **display name**.
  - b. Edit the display name to clean up titles for easier navigation.

## Publishing the Category

- When finished, click **Publish** or **Save as Draft**.
- Select any **content tags** or distribution groups you want to use.
- After publishing, the category will open so you can continue organizing with subcategories if desired.

## Utilizing Subcategories

- Create subcategories to organize content within your main category.
- Use subcategories to group related materials and keep navigation clear.

## Managing the Category

- View the category in the Resources section once published.
- Parishes and schools receive in-app notifications when items are added or updated.
- As an admin, you can:
  - Edit the category
  - Add subcategories
  - Delete the category
  - Copy a direct link to share via email or message

## Best Practices

- Use clear and concise names for categories and files to improve navigation.
  - Add end dates to automatically archive outdated resources.
  - Use cover images to make categories easy to recognize at a glance.
  - Group related items into subcategories for cleaner organization.
  - Regularly review and update categories to keep your Resources section relevant.
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