



# Communications 01

Reach and Engage Your Audience



# On the Docket Today

- **Create** the Message: Template Editor Tool
  - Basic Template
  - Newsletter Template
  - Tips & Tricks
- **Send** the Message: New Message Tool
  - Launch the Tool
  - Send an Email
  - Send a Text
  - Tips & Tricks
- **But not** finding your audience, because that is covered in Communications 02!





# MinistryPlatform CONFIGURATIONS may vary



Reach out to your SPoC/database admin  
with any questions or concerns

# Communications 01

## *Friendly Reminders ....*

- **Appearance** ... Everyone's system will look different, and that's okay! If you see screenshots or demos in this webinar and aren't able to see the exact same thing in your system, that's expected.
- **Access** to Tools and email delegates is controlled by security rights.
- **After** Communications 01, be sure to check out Communications 02 to learn how to find your audience and leverage Publications and Subscriptions.



# Template Editor Tool



# Why Use it?

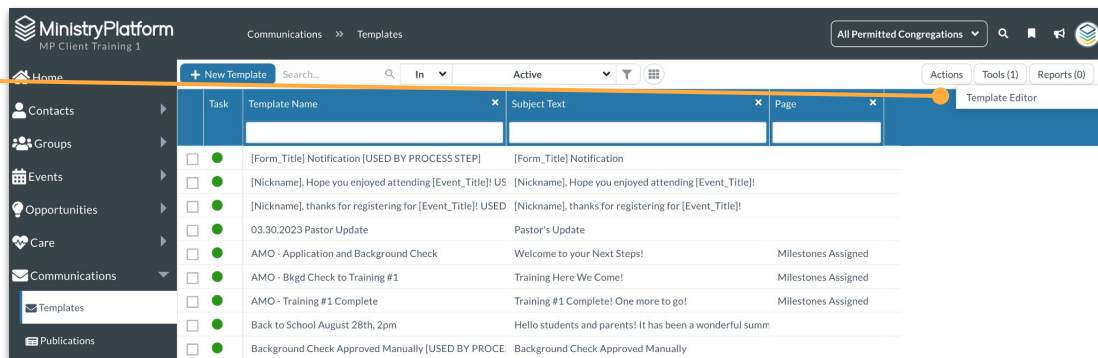
- Easily create messages once, send twice (or as many times as you want).
- Empower your communications team to create templates that staff can use and modify.
- Easily create simple templates for staff so they can quickly communicate with their people.
- Easily create advanced newsletter-type templates to communicate with images, videos, and the formatting that works for your church.
- Did I mention it's easy?

# Launch the Tool – Option 1

## SELECT TOOL

If launched from the Templates page:

- Tool will launch with a blank template so you can start from scratch
- You can always opt to search for an existing template
- **Best for:** Creating a new template.



Task	Template Name	Subject Text	Page
<input type="checkbox"/>	[Form_Title] Notification [USED BY PROCESS STEP]	[Form_Title] Notification	
<input type="checkbox"/>	[Nickname], Hope you enjoyed attending [Event_Title]! US	[Nickname], Hope you enjoyed attending [Event_Title]!	
<input type="checkbox"/>	[Nickname], thanks for registering for [Event_Title]! USED	[Nickname], thanks for registering for [Event_Title]!	
<input type="checkbox"/>	03.30.2023 Pastor Update	Pastor's Update	
<input type="checkbox"/>	AMO - Application and Background Check	Welcome to your Next Steps!	Milestones Assigned
<input type="checkbox"/>	AMO - Bkgd Check to Training #1	Training Here We Come!	Milestones Assigned
<input type="checkbox"/>	AMO - Training #1 Complete	Training #1 Complete! One more to go!	Milestones Assigned
<input type="checkbox"/>	Back to School August 28th, 2pm	Hello students and parents! It has been a wonderful summer	
<input type="checkbox"/>	Background Check Approved Manually [USED BY PROCE	Background Check Approved Manually	



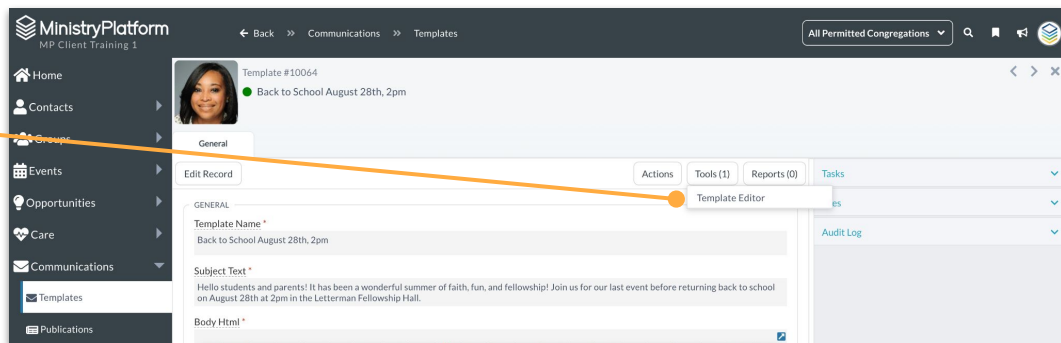
Ignore the New Template button.

# Launch the Tool – Option 2

## SELECT TOOL

If launched from an open record:

- Tool will default to opening the template so it can be edited
- You can always opt to Search for another template instead
- **Best for:** Editing an existing template



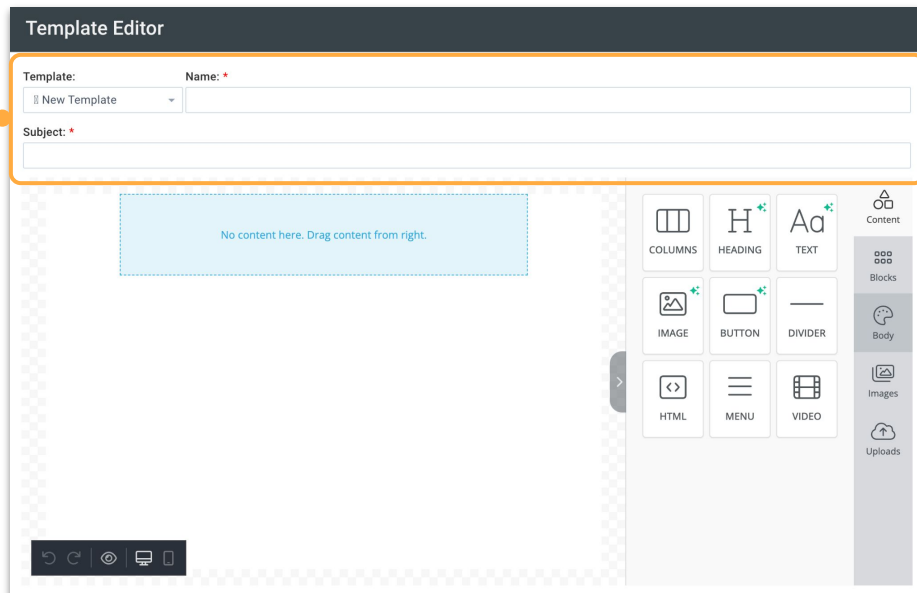
If the template was created using the Template Editor Tool, it **must** be edited using the Template Editor Tool.



# Let's Take a Tour

## TEMPLATE INFO

- **Template:** Populates from the Name field
- **Name:** Internal template name
- **Subject:** Public subject line
  - Can use merge fields
  - Will be the text message, if the template is used to create a text message template



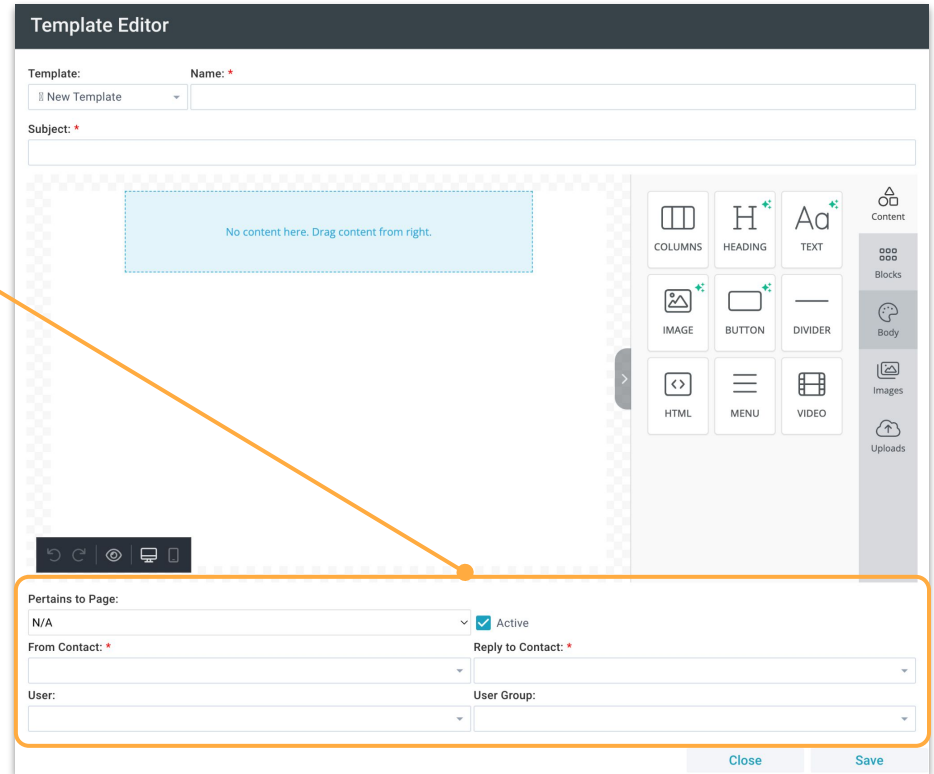
PRO  
TIP

Develop a naming convention that works for your church. Consider prepending the name with the date or a ministry code.

# Let's Take a Tour

## TEMPLATE INFO

- **Pertains to Page:** Determines available merge fields
- **Active:** Active templates will appear in dropdowns
- **From Contact:** Contact sending the message
- **Reply to Contact:** Contact who will receive replies
- **User:** Contact who can use this template
- **User Group:** User Group that will be able to use this template

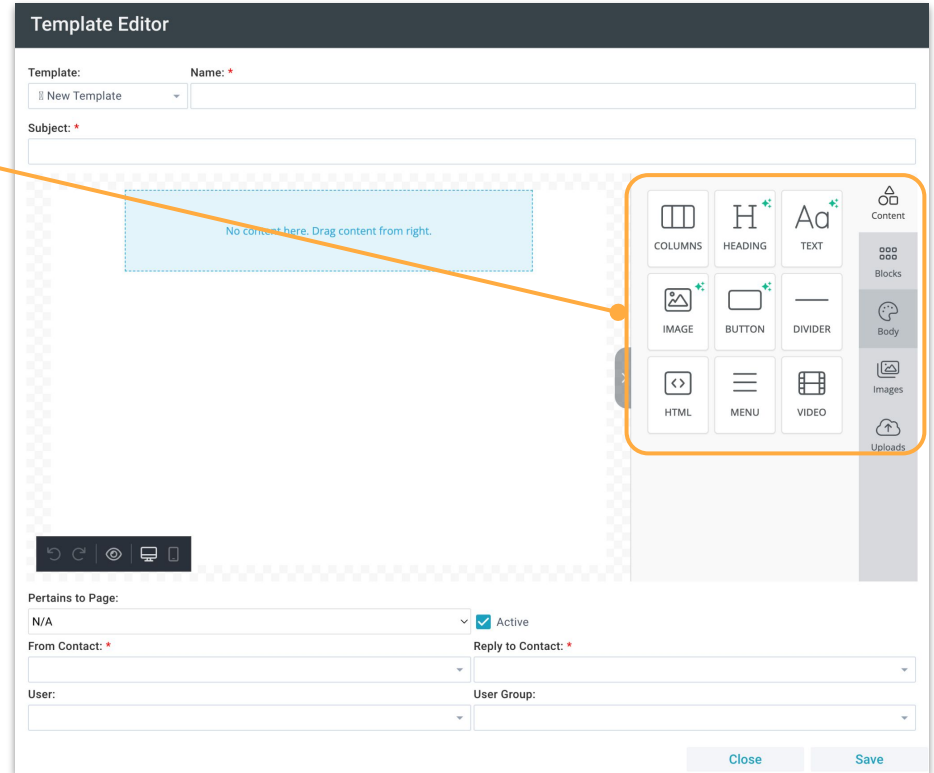


The screenshot shows the 'Template Editor' interface. At the top, there are fields for 'Template:' (with a dropdown menu showing 'New Template') and 'Name: \*'. Below that is a 'Subject: \*' field. The main area is a canvas with a dashed blue box containing the text 'No content here. Drag content from right.' To the right of the canvas is a toolbar with icons for 'COLUMNS', 'HEADING', 'TEXT', 'IMAGE', 'BUTTON', 'DIVIDER', 'HTML', 'MENU', and 'VIDEO'. On the far right, there is a vertical sidebar with icons for 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. At the bottom of the editor, there is a form with the following fields: 'Pertains to Page:' (dropdown menu with 'N/A'), 'Active:' (checkbox checked), 'From Contact: \*' (dropdown menu), 'Reply to Contact: \*' (dropdown menu), 'User:' (dropdown menu), and 'User Group:' (dropdown menu). At the bottom right of the form are 'Close' and 'Save' buttons.

# Let's Take a Tour

## CONTENT

- Drag and drop content elements
- Each element has multiple formatting options to customize your messages

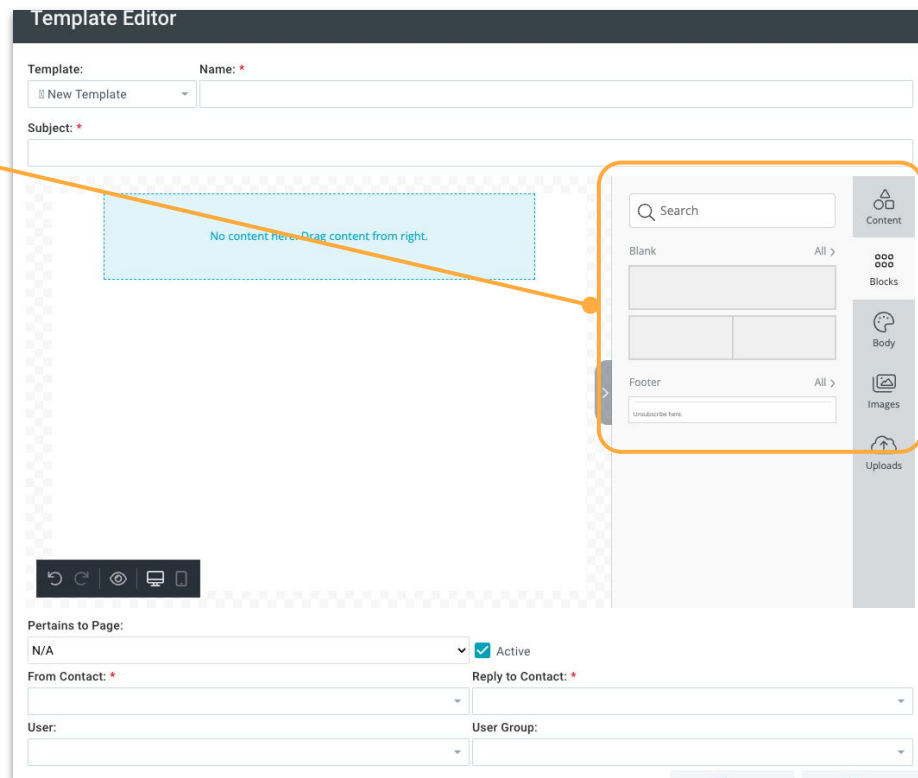


The screenshot displays the 'Template Editor' interface. At the top, there are fields for 'Template:' (set to 'New Template') and 'Name: \*'. Below these is a 'Subject: \*' field. The main workspace is a large area with a light gray checkered background, containing a blue dashed box with the text 'No content here. Drag content from right.' An orange callout box highlights a toolbar on the right side of the workspace. This toolbar contains icons for 'COLUMNS', 'HEADING', 'TEXT', 'IMAGE', 'BUTTON', 'DIVIDER', 'HTML', 'MENU', and 'VIDEO'. To the right of the toolbar is a vertical sidebar with categories: 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. At the bottom of the editor, there are several settings: 'Pertains to Page:' (set to 'N/A'), 'Active' (checked), 'From Contact: \*', 'Reply to Contact: \*', 'User:', and 'User Group:'. A 'Close' button and a 'Save' button are located at the bottom right.

# Let's Take a Tour

## BLOCKS

- Controls number of columns
- Saved blocks allow you to create and access frequently used elements (e.g., footers)
- Blocks are User specific

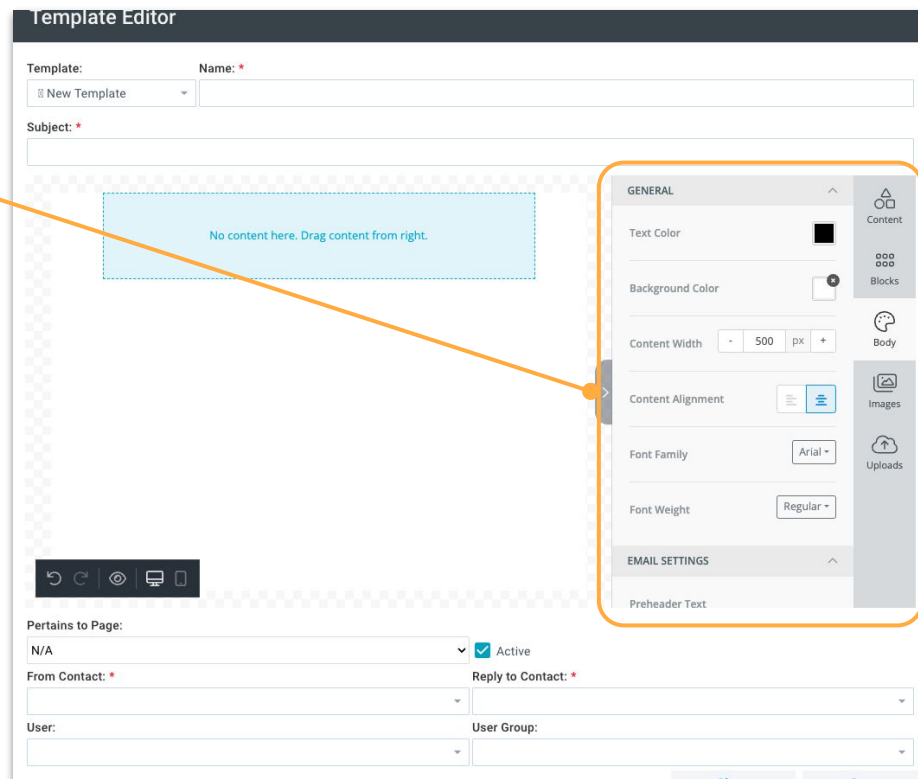


The screenshot displays the 'Template Editor' interface. At the top, there are fields for 'Template:' (with a dropdown menu showing 'New Template') and 'Name: \*'. Below these is a 'Subject: \*' field. The main workspace is a large area with a light blue dashed border and a checkered background, containing a text prompt: 'No content here. Drag content from right.' To the right of this workspace is a vertical sidebar containing a search bar and several categories of blocks: 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. Each category has a corresponding icon and a list of available blocks. An orange arrow points from the 'BLOCKS' header to the block library sidebar. At the bottom of the editor, there are several settings: 'Pertains to Page:' (set to 'N/A'), 'Active' (checked), 'From Contact: \*', 'Reply to Contact: \*', 'User:', and 'User Group:'.

# Let's Take a Tour

## BODY

- Set formatting rules that will apply to your entire template
- Great way for your communications team to create templates for staff to modify and use

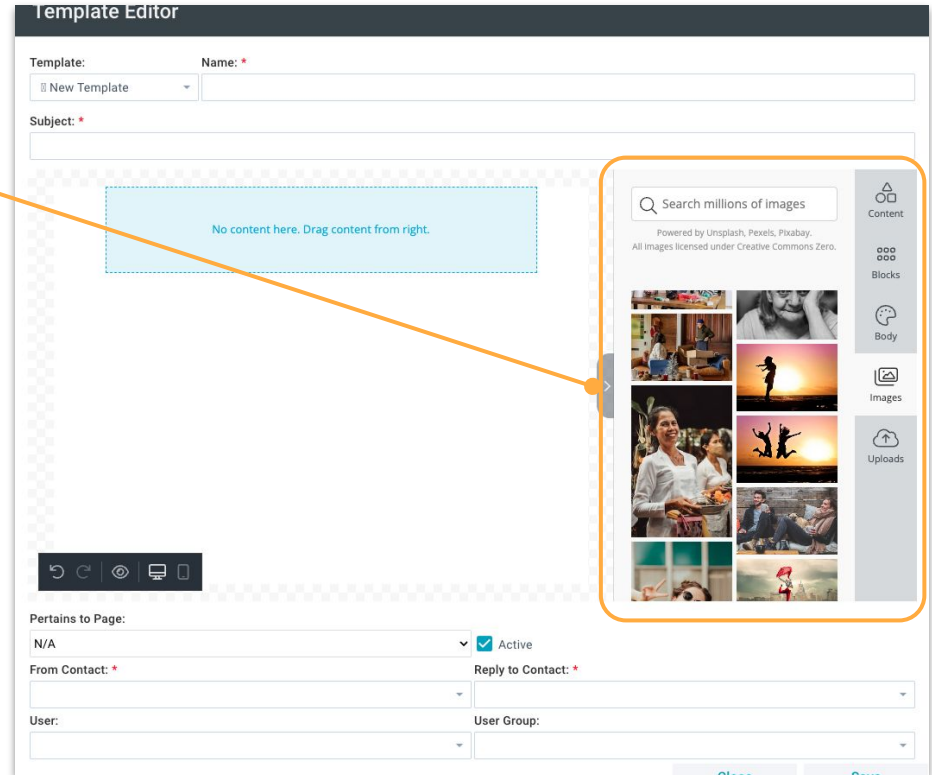


The screenshot displays the 'Template Editor' interface. At the top, there are fields for 'Template:' (with a dropdown menu set to 'New Template') and 'Name: \*'. Below this is a 'Subject: \*' field. The main workspace is a large area with a light gray checkered background, containing a light blue rectangular placeholder with the text 'No content here. Drag content from right.' An orange arrow points from the 'BODY' header to a sidebar on the right. This sidebar is titled 'GENERAL' and contains several settings: 'Text Color' (a black color swatch), 'Background Color' (a white color swatch), 'Content Width' (set to 500 px with minus and plus buttons), 'Content Alignment' (with left and right alignment icons), 'Font Family' (set to 'Arial'), and 'Font Weight' (set to 'Regular'). Below the 'GENERAL' section is the 'EMAIL SETTINGS' section, which includes a 'Preheader Text' field. On the far right of the sidebar, there are icons for 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. At the bottom of the editor, there are icons for undo, redo, eye, and mobile view. Below the main workspace, there are fields for 'Pertains to Page:' (set to 'N/A'), 'From Contact: \*', 'Reply to Contact: \*', 'User:', and 'User Group:'.

# Let's Take a Tour

## IMAGES

- Search for royalty free images that fit your message
- Not filtered by MinistryPlatform
- Must be configured by a SPoC



The screenshot displays the 'Template Editor' interface. At the top, there are fields for 'Template:' (with a dropdown menu set to 'New Template') and 'Name: \*'. Below these is a 'Subject: \*' field. The main workspace is a large area with a light gray checkered background, containing a dashed blue box with the text 'No content here. Drag content from right.' An orange arrow points from the 'IMAGES' section header to this area. On the right side, there is a vertical panel with a search bar labeled 'Search millions of images'. Below the search bar, it says 'Powered by Unsplash, Pexels, Pixabay. All Images licensed under Creative Commons Zero.' A grid of various images is displayed. To the right of the image grid are icons for 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. At the bottom of the editor, there are several fields: 'Pertains to Page:' (set to 'N/A'), 'From Contact: \*', 'User:', 'Reply to Contact: \*', and 'User Group:'. A 'Save' button is visible at the bottom right.

# Let's Take a Tour

## UPLOADS

- Images previously uploaded to the tool
- Will be available for future use by the User who uploaded the image

The screenshot displays the 'Template Editor' interface. At the top, there are fields for 'Template:' (with a dropdown menu set to 'New Template') and 'Name: \*'. Below these is a 'Subject: \*' field. The main workspace is a large area with a light blue dashed border containing the text 'No content here. Drag content from right.' To the right of this workspace is a vertical sidebar with a blue 'Upload Image' button at the top. Below the button is a dashed box with the text 'Drop a new image here, or click to select files to upload.' Underneath this are two image thumbnails: one of a person in a life jacket and another of a trophy. To the right of the thumbnails is a vertical list of icons: 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. An orange arrow points from the 'UPLOADS' header to the 'Uploads' icon in the sidebar. At the bottom of the editor, there are several dropdown menus: 'Pertains to Page:' (set to 'N/A'), 'From Contact: \*', 'User:', 'Reply to Contact: \*', and 'User Group:'. A 'Save' button is visible at the bottom right.

# Let's Take a Tour

## PREVIEW

- Undo or redo edits
- Preview template to see how it will appear on desktop, tablet, or mobile
- Create for either desktop or mobile

The screenshot shows the 'Template Editor' interface. At the top, there are fields for 'Template:' (with a dropdown menu showing 'New Template') and 'Name: \*'. Below that is a 'Subject: \*' field. The main area is a canvas with a dashed border and a placeholder box containing the text 'No content here. Drag content from right.' To the right of the canvas is a sidebar with various content blocks: 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. Each block has a corresponding icon. Below the canvas is a toolbar with icons for undo, redo, preview, desktop view, tablet view, and mobile view. The 'preview' icon is highlighted with an orange box and a line pointing to the 'PREVIEW' section of the text. At the bottom of the editor, there are fields for 'Pertains to Page:' (set to 'N/A'), 'From Contact: \*', 'User:', 'Active' (checked), 'Reply to Contact: \*', and 'User Group:'. There are 'Close' and 'Save' buttons at the bottom right.



# Let's Take a Tour

## SAVE

- **Close:** When you're finished, close the tool. But don't forget to...
- **Save:** Save early and often
- **Save As New:** Make modifications to a pre-created template and preserve that template to use again and again and again ....

Template Editor

Template: Happy Birthday! USED ... Name: \* Happy Birthday! USED BY A NOTIFICATION

Subject: \* Happy Birthday!

MinistrySmart™  
**CHURCH**

Happy Birthday, [Nickname]!

God knew each of us before we were born.  
He has a purpose for every person  
if we place our hope and trust in Him.  
Rest in His love for you today. Happy Birthday!

*Oh yes, you shaped me first inside, then out;  
you formed me in my mother's womb.  
I thank you, High God—you're breathtaking!  
Body and soul, I am marvelously made!  
I worship in adoration—what a creation!  
You know me inside and out,  
you know every bone in my body;  
You know exactly how I was made, bit by bit,  
how I was sculpted from nothing into something.  
Like an open book,  
you watched me grow from conception to birth;  
all the stages of my life were spread out before you,  
The days of my life all prepared  
before I'd even lived one day."  
Psalm 139:13-16 The Message*

Pertains to Page: N/A  Active

From Contact: \* Administrator, Church | mpsupport@acst.com Reply to Contact: \* Administrator, Church | mpsupport@acst.com

User: User Group:

Close Save Save As New

# Where Does it Land in MP?

FROM TOOL

Template: **Name:** \*  
Happy Birthday! USED ... Happy Birthday! USED BY A NOTIFICATION

**Subject:** \*  
Happy Birthday!

**MinistrySmart CHURCH**

Happy Birthday, {Nickname}!

God knew each of us before we were born.  
He has a purpose for every person  
if we place our hope and trust in Him.

Rest in His love for you today. Happy Birthday!

*"Oh yes, you shaped me first inside, then out;  
you formed me in my mother's womb.  
I thank you, High God—you're breathtaking!  
Body and soul, I am marvelously made!  
I worship in adoration—what a creation!  
You know me inside and out,  
you know every bone in my body.  
You know exactly how I was made, bit by bit,  
how I was sculpted from nothing into something.  
Like an open book,  
you watched me grow from conception to birth;  
all the stages of my life were agreed out before you,  
the days of my life all prepared  
before I'd even lived one day!"  
Psalm 139:13-16 The Message*

**Content**  
Columns, Heading, Text, Image, Button, Divider, HTML, Menu, Video, Body, Images, Uploads

**Pertains to Page:** N/A  Active

**From Contact:** \* Administrator, Church | mpsupport@acst.com **Reply to Contact:** \* Administrator, Church | mpsupport@acst.com

**User:** Administrator, Church | mpsupport@acst.com **User Group:** Administrator, Church | mpsupport@acst.com

TO RECORD

Ministry Platform  
MP Client Training 1

Back » Communications » Templates

Template #1001  
Happy Birthday! USED BY A NOTIFICATION

General

Edit Record Actions Tools (1) Reports (0)

**GENERAL**

Template Name \*  
Happy Birthday! USED BY A NOTIFICATION

Subject Text \*  
Happy Birthday!

Body HTML \*

**MinistrySmart CHURCH**

Pertains To Page	Template User
Template User Group	Active * Yes
From Contact *	Reply to Contact * Administrator, Church @
Communication Type *	Email

Basic Menu Advanced Menu



# Questions



# New Message Tool



# Why Use it?

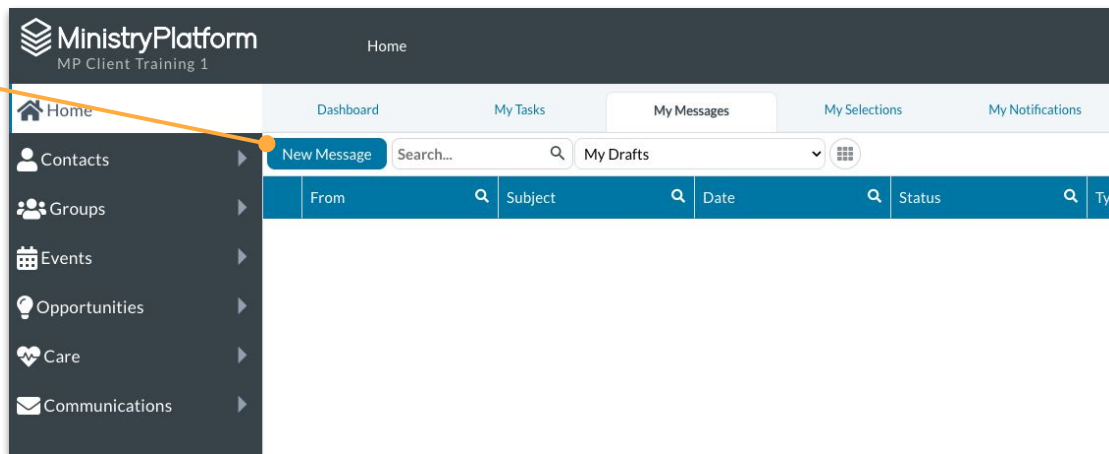
- Easily send emails and text messages to one Contact or a selection of Contacts.
- Easily send messages to one or more Group Participant or Primary Contact.
- Easily send messages to Event Participants.
- Easily send messages to Publication Subscribers.
- Easily send attachments.
- Easily send emails from other Users.
- Easily schedule messages to be sent in the future.
- Easily decide whether to include Contacts who have opted out of bulk email.
- Did I mention it's easy?

# Launch the Tool – Option 1

## SELECT NEW MESSAGE

If launched from the My Messages tab on the Home page:

- Tool will launch with no recipients selected
- You'll select the relevant page
- You'll select recipient parameters inside the tool
- **Best for:** Everything!

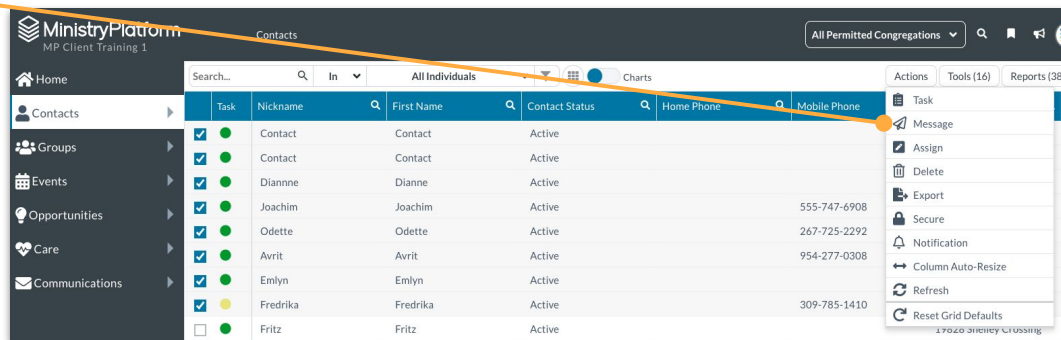


# Launch the Tool – Option 2

## SELECT MESSAGE

If launched from the Actions menu on **any** page:

- Tool *can* launch with recipients selected *if* you've selected them
- You'll be able to select additional recipient parameters inside the tool
- **Best for:** When your target audience is already associated with a group, event, or publication.



The screenshot shows the MinistryPlatform interface. The main content area displays a table of contacts with columns for Task, Nickname, First Name, Contact Status, Home Phone, and Mobile Phone. The 'Task' column has checkboxes and status indicators. The 'Actions' menu is open, showing options like Message, Assign, Delete, Export, Secure, Notification, Column Auto-Resize, Refresh, and Reset Grid Defaults. An orange arrow points from the 'SELECT MESSAGE' header to the 'Message' option in the actions menu.

Task	Nickname	First Name	Contact Status	Home Phone	Mobile Phone
<input checked="" type="checkbox"/>	Contact	Contact	Active		
<input checked="" type="checkbox"/>	Contact	Contact	Active		
<input checked="" type="checkbox"/>	Dianne	Dianne	Active		
<input checked="" type="checkbox"/>	Joachim	Joachim	Active		555-747-6908
<input checked="" type="checkbox"/>	Odette	Odette	Active		267-725-2292
<input checked="" type="checkbox"/>	Avrit	Avrit	Active		954-277-0308
<input checked="" type="checkbox"/>	Emlyn	Emlyn	Active		
<input checked="" type="checkbox"/>	Fredrika	Fredrika	Active		309-785-1410
<input type="checkbox"/>	Fritz	Fritz	Active		



Create a selection on the page before launching the tool and the relevant recipients will be selected to receive your message.

# Launch the Tool – Option 3

## SELECT MESSAGE

If launched from the Actions menu inside on open record:

- The contact associated with the record will be the default recipient
- You'll be able to select additional recipient parameters inside the tool
- **Best for:** When your target audience is already associated with a specific record.

The screenshot displays the MinistryPlatform interface for a contact record. The contact is identified as Fredrika Abbado, located at 19828 Shelley Crossing in Peoria. The interface includes a navigation sidebar on the left with options like Home, Contacts, Groups, Events, Opportunities, Care, and Communications. The main content area shows the contact's details under the 'GENERAL' tab, including fields for Company Name, Display Name, First Name, Last Name, Nickname, Middle Name, Suffix, and Date of Birth. An 'Actions' menu is open, showing options: Message, Delete, Secure, Attach File(s), and Notification. An orange arrow points from the 'SELECT MESSAGE' button in the text above to the 'Message' option in the Actions menu.



# Let's Take a Tour

## MESSAGE TYPE

- Email
- Text Message

New Message

Message Type:  Email  Text Message

Contacts

Recipients: Selected Contacts  Send to Parents

Subject Line: Type a subject..

Message Attachments Advanced

Insert B I U S [List Icons] [Link Icon] [Unlink Icon] [Email Icon] [Print Icon] [Code Icon]



The text message option will appear if you have a security role with rights to send text messages.

# Let's Take a Tour

## RECIPIENT INFO

- **Pertains to Page:** Determines the page the recipients will be selected from and available merge fields
- **Recipients:** Who will get this message
- **Send to Parents:** Check the box to send to the Heads of Household

New Message

Message Type:  Email  Text Message

Contacts

Recipients: Selected Contacts  Send to Parents

Subject Line: Type a subject...

Message Attachments Advanced

Insert B I U



Available pages are determined by your SPoC. The recipients options change based on the selected page.

# Let's Take a Tour

## MESSAGE

- **Subject Line:** Required
- **Body:** Required

New Message

Message Type:  Email  Text Message

Contacts

Recipients: Selected Contacts  Send to Parents

Subject Line: Type a subject..

Message Attachments Advanced

Insert B I U ABC



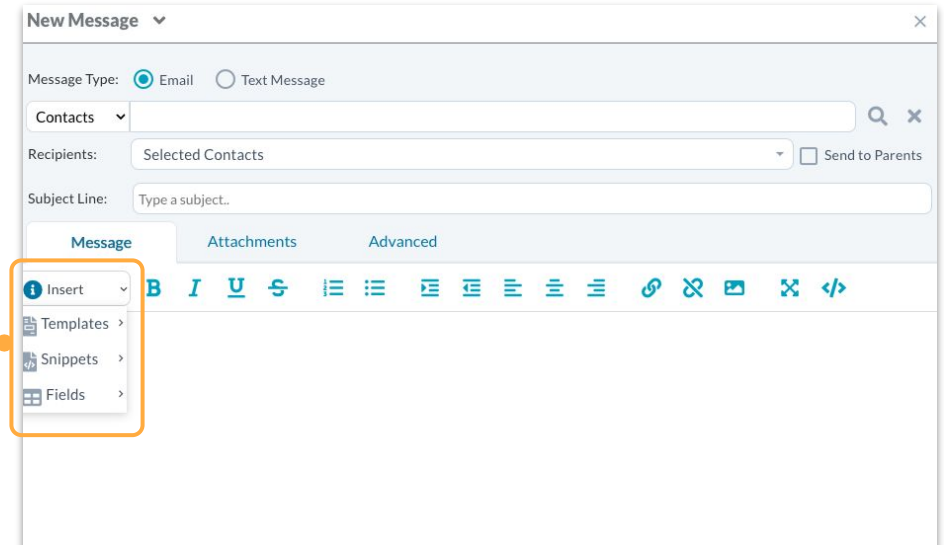
PRO  
TIP

Send button will not activate without recipients, a subject line, and message body.

# Let's Take a Tour

## INSERT OPTIONS

- **Templates:** Determined by Template Editor Tool fields
- **Snippets:** Pre-written content or links that can be reused.
- **Fields:** Merge fields to create a personalized message

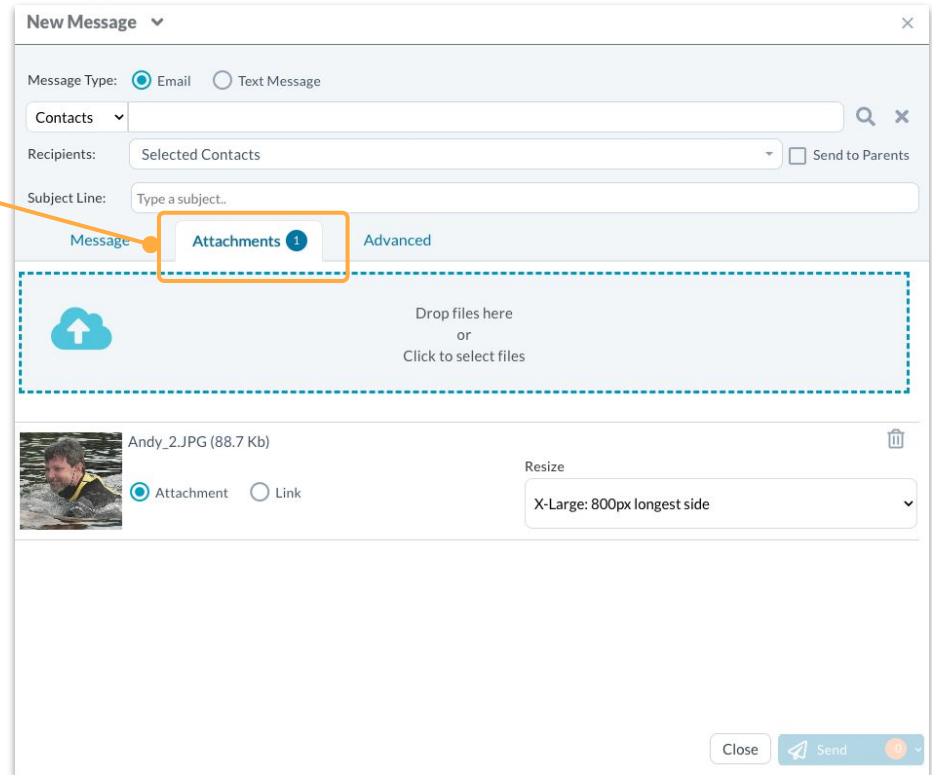


Fields related to the recipient and sender are always available. Data merge fields depend on the Pertains To page.

# Let's Take a Tour

## ATTACHMENTS

- Drag and drop files
- Click to select files
- Selecting Link instead of Attachment will add a bulleted list of links at the bottom of the message
- Badge will display the number of attachments or links



# Let's Take a Tour

## ADVANCED

- **From:** Logged in User or Delegate
- **Reply to:** Logged in user or Delegate
- **Schedule Send:** Set it and forget it
- **Bulk Email:** Check to include people who have opted out of receiving bulk email

New Message

Message Type:  Email  Text Message

Contacts

Recipients: Selected Contacts  Send to Parents

Subject Line: Type a subject..

Message Attachments **Advanced**

From: Administrator, MinistryPlatform

Reply To: Administrator, MinistryPlatform

Schedule Send: 06/18/2023 07:11 PM

Time Zone:

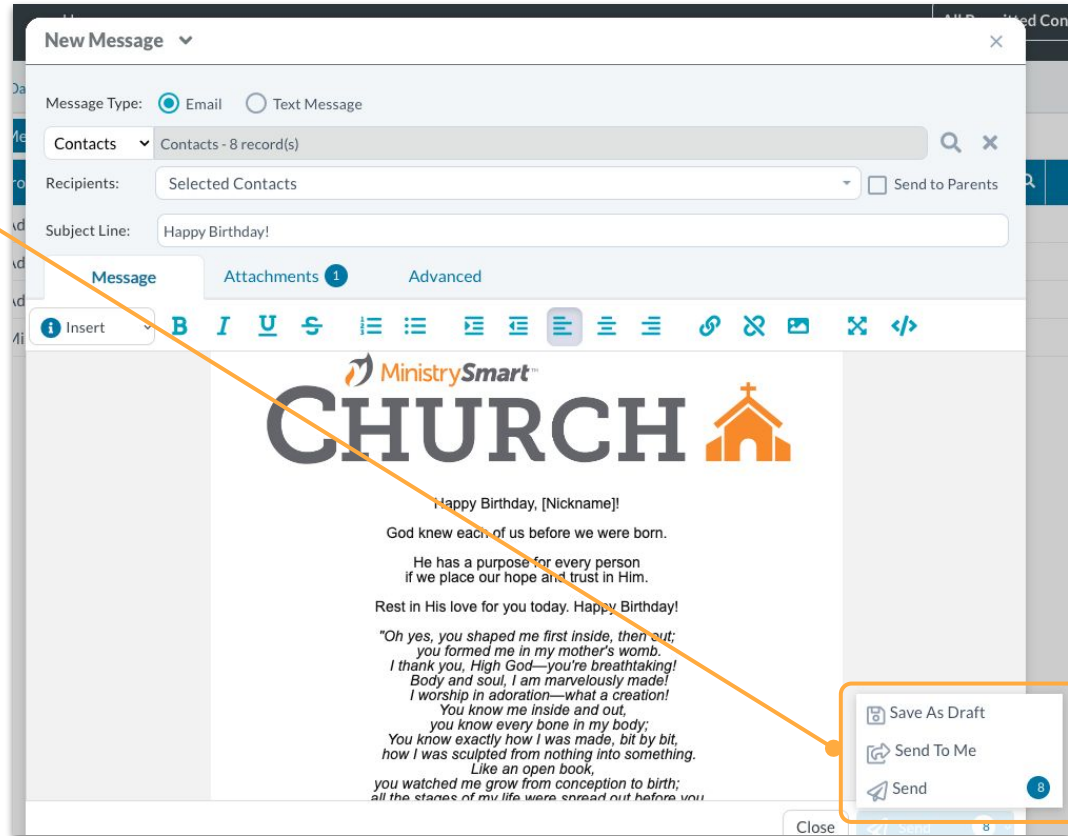


The ability to delegate the sender and reply to User is determined by your security rights.

# Let's Take a Tour

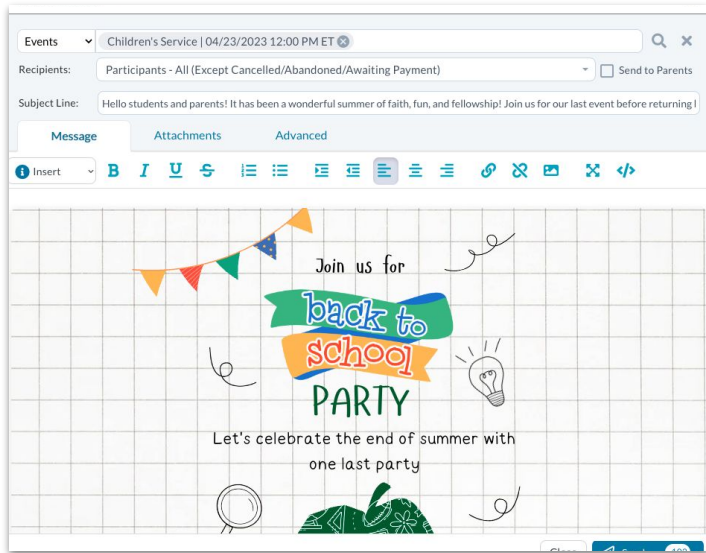
## SEND

- **Save As Draft:** Save your email to send it later
- **Send to Me:** Send yourself a copy of the email so you can preview it
- **Send:** A badge of the number of people receiving the email before duplicates are removed

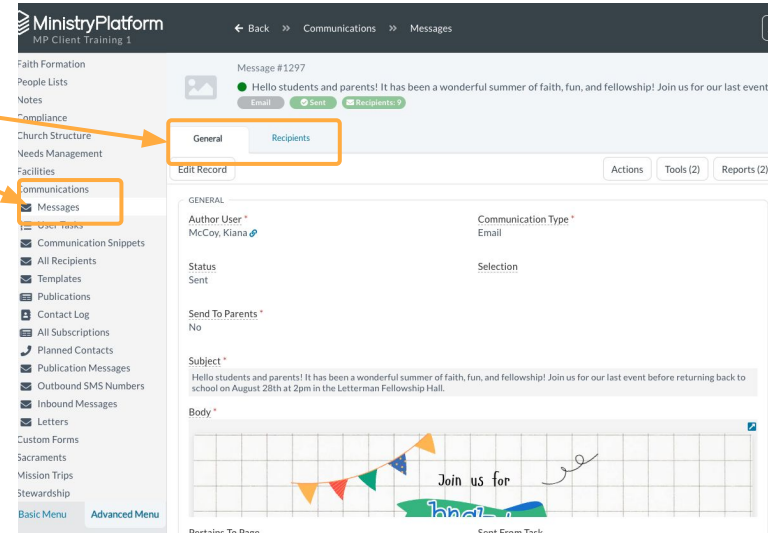


# Where Does it Land in MP?

FROM TOOL



TO RECORD





# Tips & Tricks

- The number of messages Users are allowed to send to is determined by their Security Roles. **Pro Tip:** *SPoCs can implement an approval process to approve sending over email quotas.*
- Individual messages are created as soon as the message is sent. **Pro Tip:** *Need to cancel a message? Switch the message status from “Ready to Send” to “Draft.” But act quickly, once the message status is “Sent,” it cannot be unsent.*
- Messages can take 1 to 5 minutes to send.



# Questions



*I am about to show you how it's done.*



# MinistryPlatform CONFIGURATIONS may vary



Reach out to your SPoC/database admin  
with any questions or concerns



# Questions