

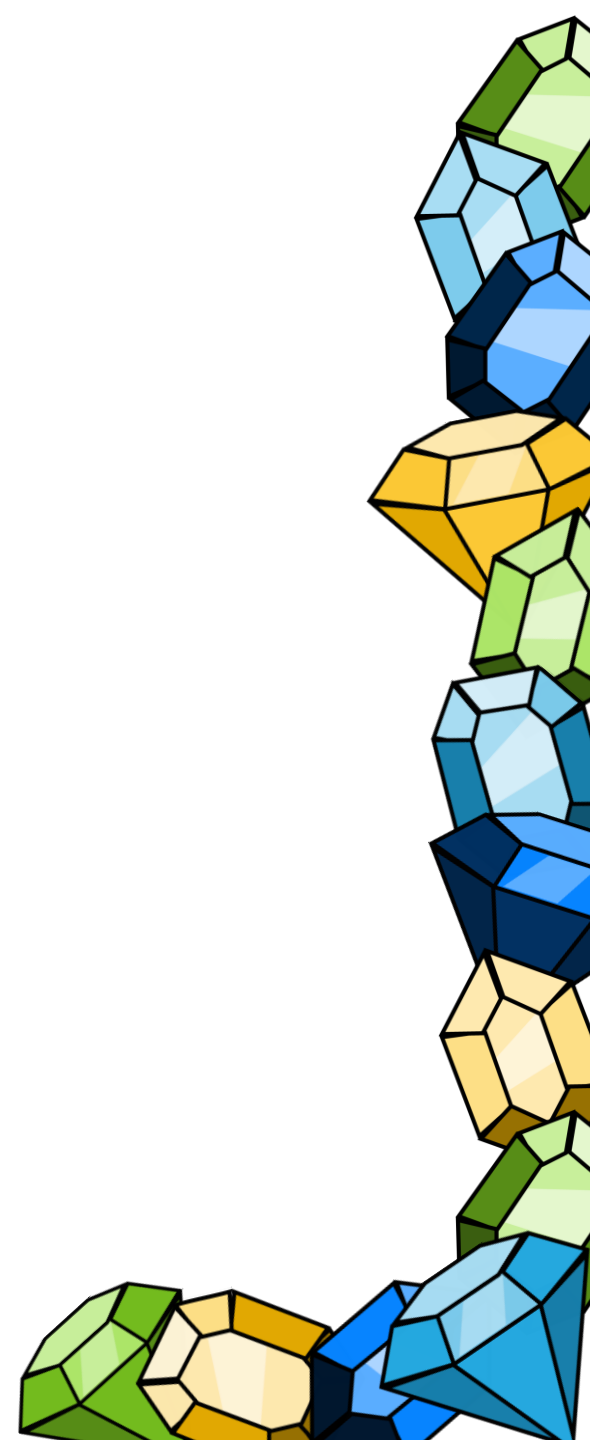
Hidden Gems

Tap into amazing MP features that not only set MP apart from other ChMS on the market, but can also set your ministry apart!



Overview

- Tools
- Shortcuts everyone should know
- Reports, Views & Notifications
- Milestones
- Opportunities
- SPoC Fun

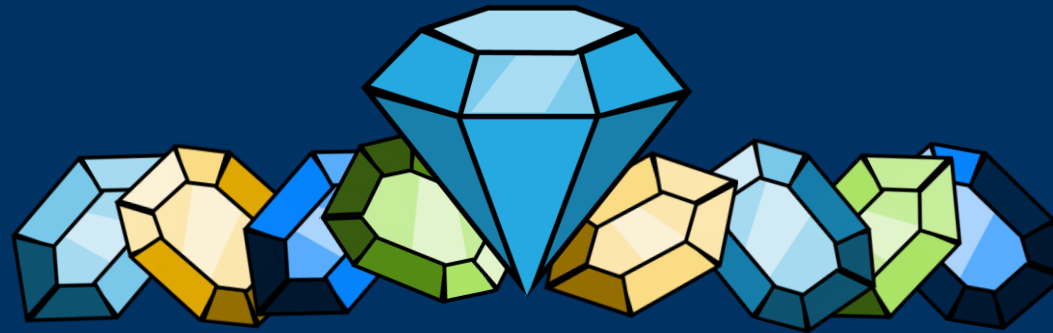


Advanced Search Tips & Tricks

Transfer Selection

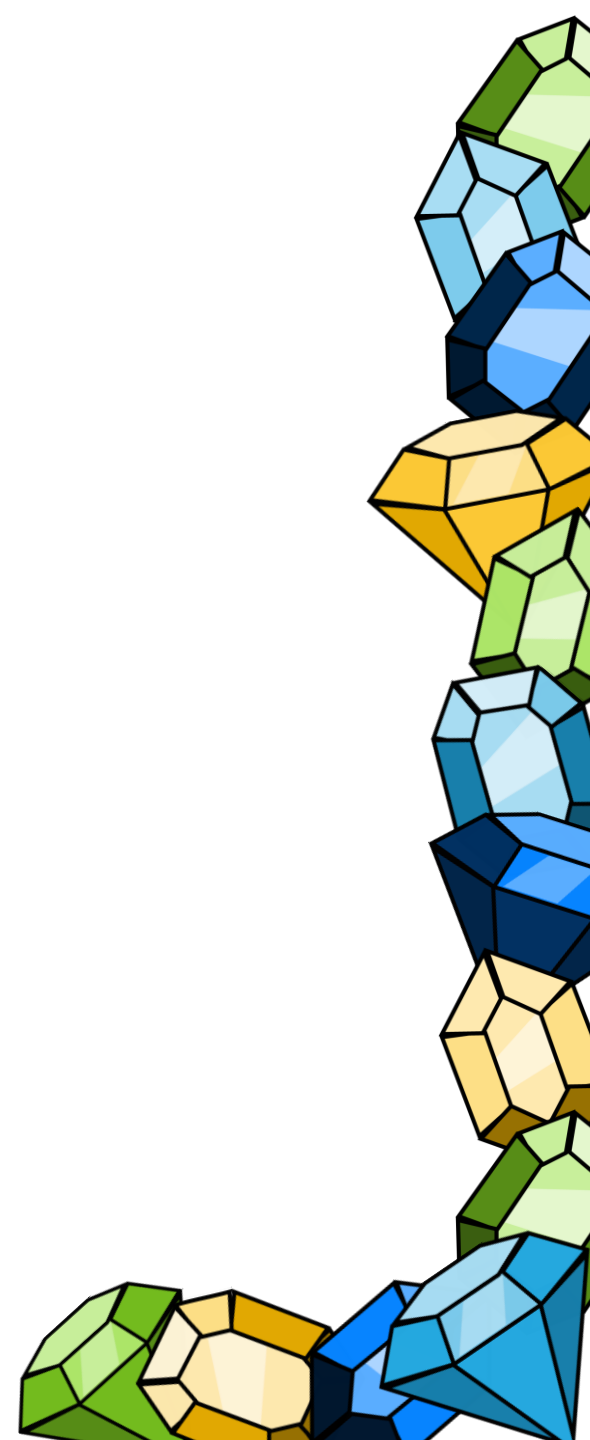
Trim Selection

Tools



Advanced Search Tips & Tricks

- Full Field Name
- Rename Fields
- Remove Fields
- Default Field List
- Drag & Drop Reorder
- ID Fields



Advanced Search

- Need ID
- Requester Contact
- Postal Code
- Campaign
- Need Type
- Other Need
- Target Date
- Complete
- Provider
- Date Assigned
- Notes
- Need Guid

View:

Title: User Group:

Description:

Form Layout

SQL Layout

	Column Name	Comparison	Search Term
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Display Name	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Need Type	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Target Date	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered

Form Layout

SQL Layout

	Column Name	Comparison	Search Term
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Requester	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Need Type	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Target Date	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered
<input type="button" value="trash"/> <input type="button" value="up"/> <input type="button" value="down"/> <input type="button" value="info"/>	Provider	<input type="button" value="v"/> N/A <input type="button" value="v"/>	Not Filtered

Full name:
Requester_Contact_Table.[Display_Name]

Full name:
Need_Provider_ID_Table_Contact_ID_Table.[Display_Name]

Advanced Search

Contact Status

Contact Status ID

Contact Status

Description

Household

Household Position

Household Position ID

Household Position

Description

Maiden Name

Participant Record

Donor Record

Contact Methods

Email Address

Mobile Phone

Company Phone

Pager Phone

Fax Phone

View: New View Delete

Title: Active Contacts User Group: ...

Description:

Form Layout **SQL Layout**

Field List:

Contacts.[Display Name] AS [Display Name]
Contact_Status_ID_Table.[Contact_Status_ID] AS [Contact Status ID] **REMOVE**
Contacts.[Date_of_Birth] AS [Date of Birth]
Gender_ID_Table.[Gender] AS [Gender]
Household_Position_ID_Table.[Household_Position] AS [Household Position]

Filter Clause:







Contact_Status_ID_Table.[Contact_Status_ID] = 1 **KEEP**

Sort Clause:

Save Query

Close

Form Layout SQL Layout

Column Name	Comparison	Search Term
    Contact Status ID	 = 	1

Form Layout SQL Layout

Field List:

Filter Clause:

Contact_Status_ID_Table.[Contact_Status_ID] = 1

Transfer Selection

What would you like to do with the 1 of records in your current selection?

Copy to another page ▼

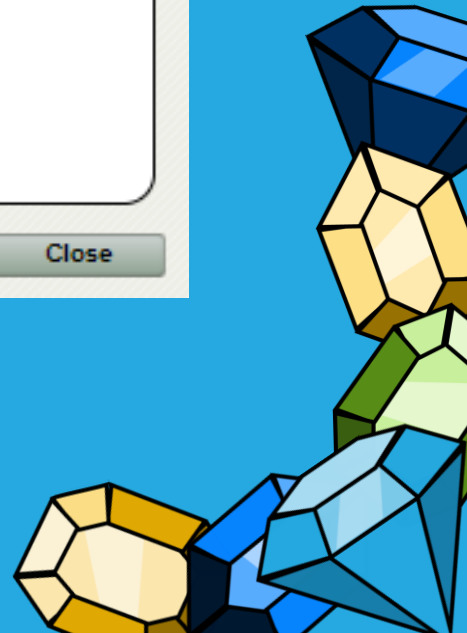
Target Page: Contacts ▼

New Selection Name:

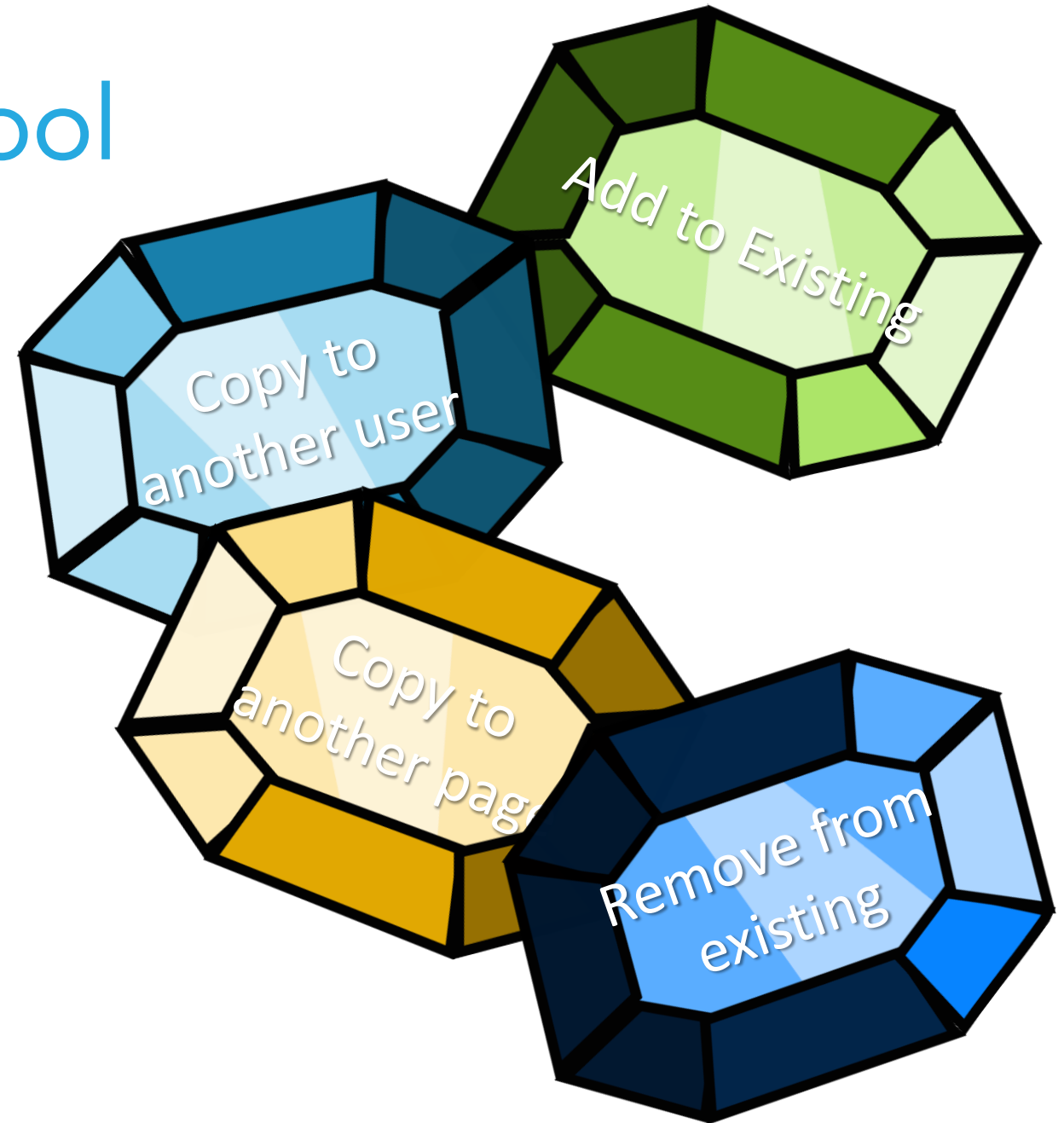
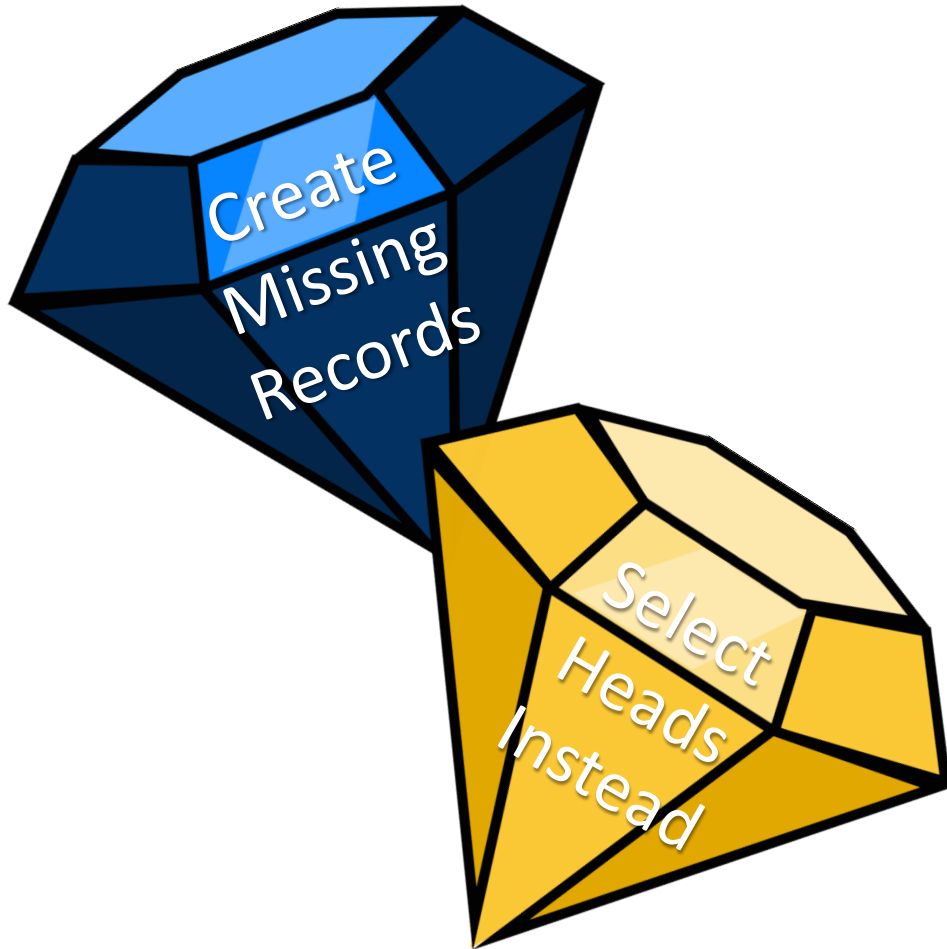
Select Heads Instead: ☐ Yes ☒ No

Go

Close




Transfer Selection Tool



Trim Selection Tool

- Spot Check Selections
- Create Selections

Confirm Remove From Selection 

Are you sure you want to remove 11 records from your selection?

☐ Create New Selection from Removed Records

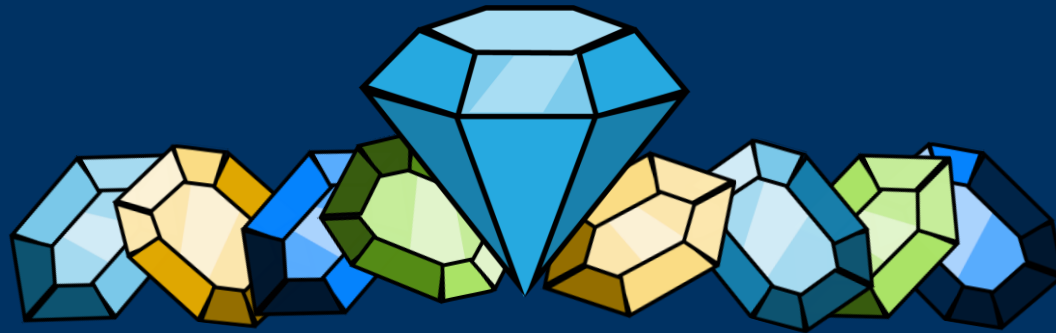
Selection Name:

75 Selected Records

Selection Analysis

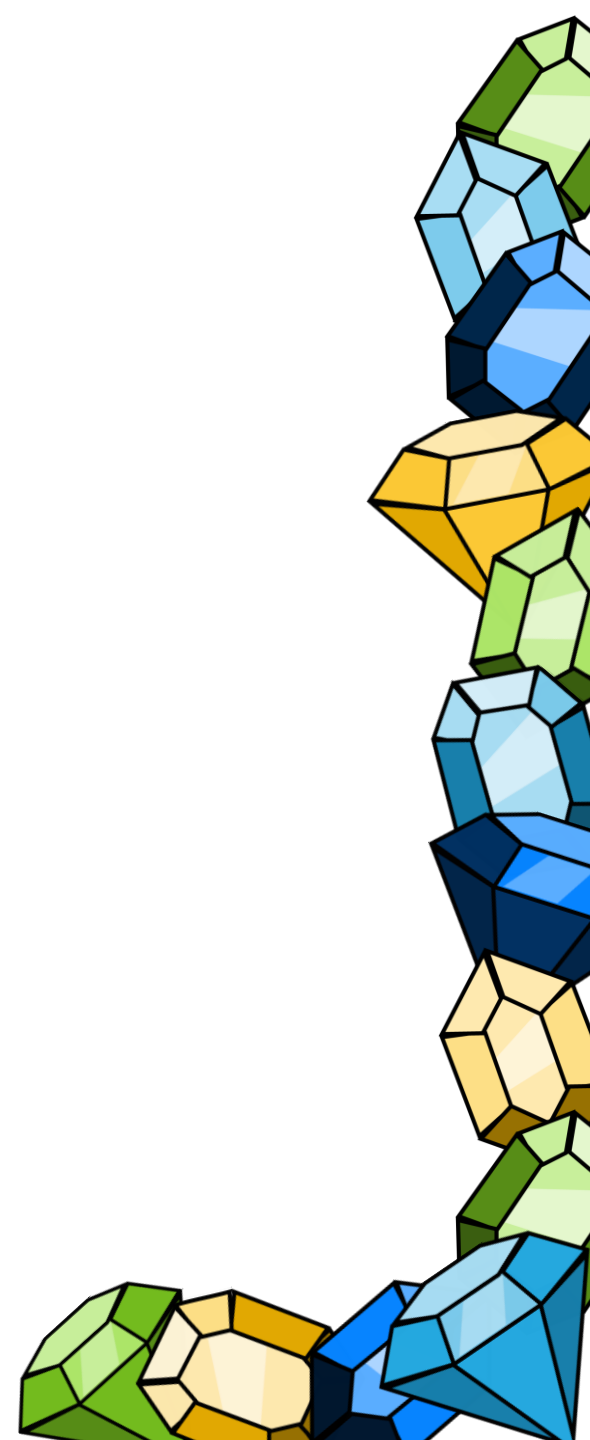
Parameter/Metric	Count	
-- Contact Status --	-	<input type="button" value="Remove"/>
-- Marital Status --	-	<input type="button" value="Remove"/>
-- Gender --	-	<input type="button" value="Remove"/>
Bulk Email Opt Out	4	<input type="button" value="Remove"/>
Do Not Text	1	<input type="button" value="Remove"/>
Missing Email Address	5	<input type="button" value="Remove"/>
Missing Mobile Phone	67	<input type="button" value="Remove"/>
Age From: 0 Age To: 125	8	<input type="button" value="Remove"/>
-- Household Position --	-	<input type="button" value="Remove"/>
Missing Home Phone	11	<input type="button" value="Remove"/>
Missing Household Address	4	<input type="button" value="Remove"/>
HH Bulk Mail Opt Out	0	<input type="button" value="Remove"/>
-- Congregation --	-	<input type="button" value="Remove"/>
-- Participant Type --	-	<input type="button" value="Remove"/>
-- Ministry --	-	<input type="button" value="Remove"/>
-- Group Type --	-	<input type="button" value="Remove"/>
-- Group --	-	<input type="button" value="Remove"/>
-- Group Role Type --	-	<input type="button" value="Remove"/>
-- Group Role --	-	<input type="button" value="Remove"/>
-- Current Publication --	-	<input type="button" value="Remove"/>
-- Previous Publication --	-	<input type="button" value="Remove"/>

Shortcuts!



Data Grid

- Drag & drop columns
- Sort multiple columns
- Shift & Select records
- Layout



Wildcards



[Knowledge Base](#) > [MinistryPlatform](#) > [The Basics](#) > [Searches](#) > [By Wildcard](#)

By Wildcard

video

You can narrow your search using wildcards. To do so, input the desired wildcard into the Search field along with your search criteria. There are several wildcards possible to search for NULL values using wildcards; this can only be done using [views](#).

*** or % (asterisk or percent)** - Returns any string of zero or more characters. For example, searching for M*ord will return Mulford.

_ (underscore) - Returns any single character. In some cases, this works better than using an asterisk (*) because it only returns one character (or however many characters that matches the number of underscores used). For example, _heryl returns heryl.

[n] - Where n is any number of characters that are possibilities you want returned. For example, searching for zip 0 and 30093.

[n-n] - Where n-n is a range of number or letters that are possibilities you want returned. For example, searching for 30092, 30093, and 30094.

[^] (caret) - Returns any single character **not** within the specified range ([^aeiou]). For example, searching for 30092. If you use it as shown - [^] - with no other characters specified with either your comma search or column search, there **is data** in the field and will **filter out** all the records where there is **no data** in the field.

Platform URLs

Diagram illustrating the structure of Platform URLs and the corresponding interface elements:

URL: `support.ministryplatform.com/ministryplatform/#/292/8113/265-35`

URL Components:

- Page** (292)
- Record** (8113)
- Subpage** (265)
- View** (35)

Interface Elements:

- MP Support Instance** (All Permitted Congregations)
- Quick Add** (Dropdown)
- Contacts** (Selected)
- Home** (Home)
- Households** (Households)
- My User Tasks** (My User Tasks)
- Companies** (Companies)
- Participants** (Participants)
- Feedback Entries- N** (Feedback Entries- N)
- Groups** (Groups)
- Online Groups** (Online Groups)
- Active Groups** (Active Groups)
- Events** (Events)
- Milestones** (Milestones)

Record Details:

- Halpert, Jim | angie.eames@gm** (Contact #8113)
- Contact Type:** Individual
- Individual** (Prefix: First Name: James)
- Primary Family** (Group Inquiries Relationships)
- New** (+ Add Delete Grid Refresh)
- in View** (Current Relationships)
- Notify**

System Settings:

- Quick Add** (Dropdown)
- System Set** (Domains/ Reports Page Sect Page View Sub Page Pages Sub Page Tools/Acti)
- Contacts** (Page #292)
- Display Name ***: Contacts
- Singular Name ***: Contact
- Image Name**: fa-user
- Description**: The master list of I
- View Order ***: 1
- Table Name ***: Contacts
- Primary Key**: Contact_ID
- Default Field List ***: Contacts.Display_Nam

Relationship N...	Display Name	Start Date	End Date
Married to	Halpert, Pam	2/12/2006 3:00...	

Stat Views

Helpful Reports

Letters

Notifications

Reports, Views & Notifications



Stats Views

- [Participant Stats](#)
- [Group Stats](#)
- [Pledge Stats](#)

View Title	View Clause	Page Name
Contact Statistics	Contacts.Compan...	Contacts
Participant Stats	1=1	Participants
Location Stats	1=1	Locations
Building Stats	1=1	Buildings
Congregation Stats	Congregations.En...	Congregations
Milestone Stats	1=1	Milestones
Journey Stats	1=1	Journeys
Priority Stats	1=1	Priorities
Group Stats	1=1	Groups
Group Type Stats	1=1	Group Types
Role Stats	1=1	Group Roles
Security Role Stats	1=1	Security Roles
Page Stats	1=1	Pages
Address Stats	1=1	Addresses
Attribute Stats: Active	1=1	Attributes
Attribute Stats: All	1=1	Attributes
Pledge Stats	1=1	Pledges
Campaign Stats	1=1	Pledge Campaig...
Program Donation Stats	1=1	Programs
Pledge Stats: Active	Pledges.Pledge_S...	Pledges
Care Case Type Stats	1=1	Care Case Types
Care Type Stats	1=1	Care Types
Campaign Stats	1=1	Mission Trips
Pledge Stats	1=1	Mission Trip Pled...
Pledge Stats: Active	Pledges.Ple...	Pledges
Message Stats (50 or More Recipients)	EXISTS	

Reports

Find Donors

- Time Period
- Statement Headers
- Programs
- Amount
- Number of Gifts
- First time givers
 - Ever
 - To Program

Accounting Company: First Demo Church

Statement Header: *Any Statement Header, Tithes & Offe

Period Start: 5/13/2020

Min Period Giving \$: ☒ NULL

Donors To List: 1st Household Donation

Last HH Gift Before: ☒ NULL

Congregation: *All Congregations

Program Filter: * Any Program

Period End: 5/13/2021

Min Period Gift #: ☒ NULL

Optional Title: ☒ NULL

1 of 1 Find | Next

Donor Search: 1st Household Donation

1st Household Donation 5/13/2020 to 5/13/2021 Limited to *All Congregations: *Any Statement Header | Tithes & Offerings | Benevolence: * Any

[Create Donors Page Selection](#)

Donor Name (DonorID)	Period Amount	Period Donations	1st Period Donation	Last Period Donation	Household Congregation
Adams, Donna #149	\$0.00	1	12/1/2020	12/1/2020	Central Campus
Asparagus, Junior #5457	\$23.00	1	5/10/2021	5/10/2021	Central Campus
Briggs, Donna #1757	\$31.00	1	5/10/2021	5/10/2021	Churchwide @ Activities
Doe, John #5471	\$5.00	1	5/10/2021	5/10/2021	Fitchburg
Duck, Donald #5469	\$2.50	1	5/10/2021	5/10/2021	North Campus
Farmer, Sandra #1432	\$12.00	1	5/10/2021	5/10/2021	Churchwide @ Activities
Mouse, Minnie #5468	\$12.00	1	5/10/2021	5/10/2021	North Campus
Rogers, Paul #219	\$32.00	1	5/10/2021	5/10/2021	Churchwide @ Activities
Schrute, Dwight #5467	\$3,001.00	1	4/23/2021	4/23/2021	North Campus
Testor, Jim #5333	\$34.00	1	5/10/2021	5/10/2021	Central Campus
Wayne, Bruce #5470	\$123.00	1	5/10/2021	5/10/2021	Central Campus
11 Donors (11 Rows)	\$3,275.50	11			

May 13 2021 2:17PM ET

powered by MinistryPlatform

Reports

Find Donor Household Change

- Compare Giving for a Household between two time periods
- Did the Giving Series impact giving?
- Did our Capital Campaign impact our General Giving?

Accounting Company: First Demo Church
Statement Header: Tithes & Offerings
Period Start: 5/14/2019
From Date2: 5/13/2020
Amt Change From (+/-): 15
% Change From (.,1 for 10%):
Select Heads Only: ☒ True ☐ False
Add/Subtract Soft Credits: ☐ True ☒ False

Congregation: *All Congregations
Program Filter: * Any Program
Period End: 5/12/2020
To Date2: 5/12/2021
Amt Change To (+/-): 1000
% Change To (+/-):
Optional Title:

1 of 1 Find | Next

Donor Household Changes

5/14/2019 to 5/12/2020 compared with 5/13/2020 to 5/12/2021. Limited to *All Congregations: Tithes & Offerings: * Any Program

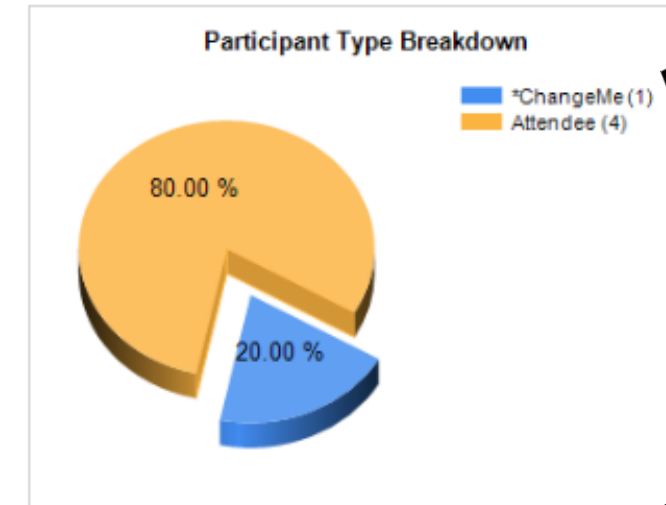
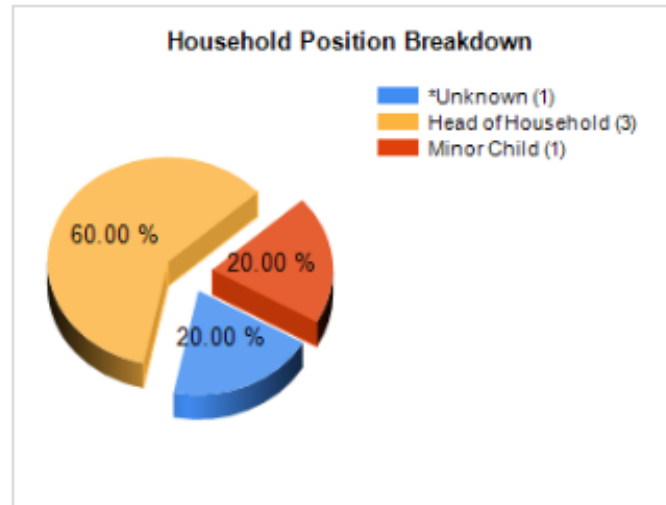
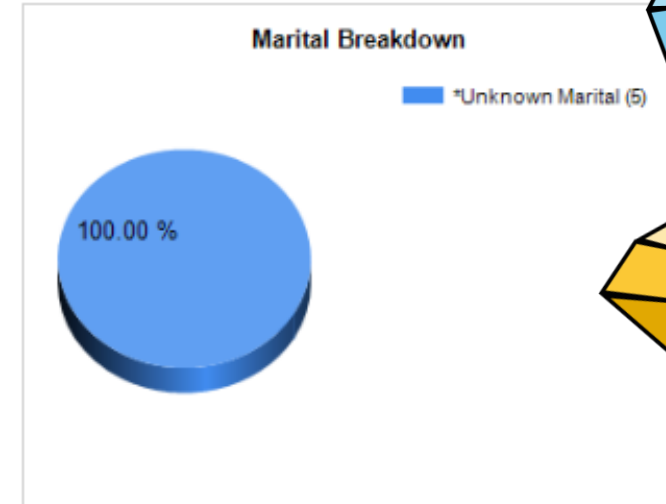
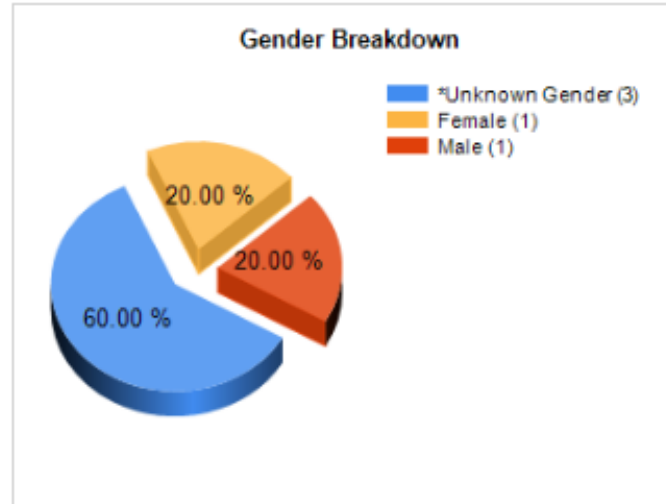
[Create Donors Page Selection](#)

Household Name	ID	Period1 \$	Period2 \$	Change \$	% Change \$	Household Con
Aardvark, George & Aardwina	1003	\$3.00	\$45.00	\$42.00	1,400.0 %	Rocky Mountain
Briggs	984	\$0.00	\$31.00	\$31.00	100.0 %	Churchwide @ A
Buck, Paul & Donna	757	\$0.00	\$20.00	\$20.00	100.0 %	Churchwide @ Ad
Carver, Paul & Donna	29	\$0.00	\$67.00	\$67.00	100.0 %	Churchwide @ Acti
Cucumber, Larry	4130	\$0.00	\$23.00	\$23.00	100.0 %	Central Campus
Gaines, Paul & Donna	908	\$0.00	\$89.00	\$89.00	100.0 %	Churchwide @ A
Glass, Paul & Donna	417	\$0.00	\$312.00	\$312.00	100.0 %	Churchwide @ Ad
Halpert, Jim & Pam	4370	\$10.00	\$105.00	\$95.00	950.0 %	Central Campus
Hamilton, Daniel & Sandra	823	\$0.00	\$320.00	\$320.00	100.0 %	Churchwide @ Activ
Jarvis, Paul & Donna	308	\$0.00	\$450.00	\$450.00	100.0 %	Churchwide @ Ad
Joyce, Daniel & Sandra	121	\$0.00	\$21.00	\$21.00	100.0 %	Central Campus
Manly, Frank & Lady	1265	\$0.00	\$35.00	\$35.00		Fitchburg
Noble, Daniel & Sandra	84	\$0.00	\$19.00	\$19.00		

Reports

Selected Contact Demographics

Selected Contact Demographics



Reports-

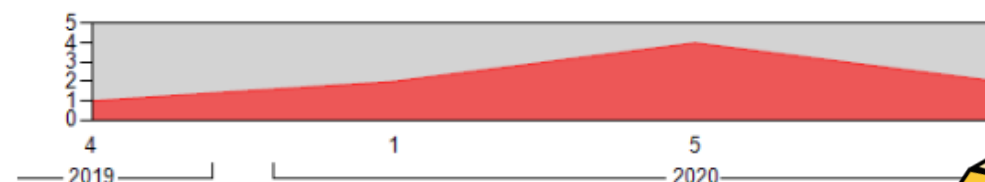
Selected Contact Facts & Selected Household Facts

Selected Contact Facts

Arthur Aardvark (#8092)

Marital Unknown | Gender Unknown | Minor Child | Participant Since 04/16/19 Current Type: Attendee | Engage Level: Partially Engaged | Last Active: 6/1/2020

Activity Instances By Month



Fact	Additional Information
Family Members	
Mr. Bob QATest Jr. (Marital Unknown/Gender Unknown/Head of Household/ID#7463)	Participant Since 04/06/15 Current Type: Guest Engage Level: Partially Engaged
Dr. Grandpa Aardvark CPA, P.A. (Widowed/Male/Head of Household/ID#4053)	Participant Since 10/09/10 Current Type: Member Engage Level: Partially Engaged
Mrs. Granny Aardvark (Married/Female/Head of Household/ID#4094)	Participant Since 05/09/51 Current Type: Member Engage Level: Partially Engaged
Miss Aardwina Ann Aardvark (Single/Female/Head of Household/ID#7434)	Participant Since 12/19/14 Current Type: Attendee Engage Level: Lapsed
Contact Information	
Home Phone: 999-555-5432	
Arthur: No Mobile On File	duplicateemail@gmail.com
123 Nocturnal Trail Ste 123b	Hahira GA 33333
Individual History	
First Event: 05/28/20	Last Event: 06/01/20
First Group: 01/15/20	Last Group: 01/15/20
Current Congregation: Churchwide @ Activities	Source: Contributions Processing Tool
First Milestone: None Listed	
First Response: None Listed	
Events Detail (5)	
06/01/2020 Angie Register into Series test	02 Registered
05/31/2020 Angie Register into Series test	02 Registered
05/30/2020 Angie Register into Series test	02 Registered
05/29/2020 Angie Register into Series test	02 Registered
05/28/2020 Angie Register into Series test	02 Registered
Current Group Detail (1)	
01/15/2020 Grade 06	Group Member

Reports Events Helpful Links

Record Review & Useful Links

Mars Mission - Test (#8916)

Approved

Date & Time: 2025-06-03 12:00AM thru 2025-07-06 12:00AM

Event Type: Special Event

Program/Ministry/Congregation: Missions & Outreach Activities/Missions & Outreach/Churchwide @ Activities

[Platform URL](#)

Visibility: 4 - Public

Web Approved

Your event will appear on the Public Portal once web approved.

Registrants will NOT get an optional registration message about this event

Registrants will NOT get an email reminder about this event

[Portal Event Detail URL](#)

Public Description: Estimated Cost \$5000 _____ This is a test - can we have two paragraphs?

Online Registration Product: Mars Mission

Registration Active

Base Price: \$5000.00

Option Group*: Yes (\$0.00), Option Group*: No (\$0.00), Option Group*: Maybe (\$0.00)

[Portal Registration URL](#)

Form Title: Mission Trip Release

Connected

If your registration is active, registrants will complete the questions on this form. Required fields have an asterisk (*).

[Custom Form Record](#)

Form Instructions:

Please complete the following information as a part of your Mission Trip Registration.

More info:

- [Mars One Application](#)
- [Preparing for Mars](#)

Form Fields: Emergency First Name* (Text Box), Emergency Last Name* (Text Box), Confirm Registration* (Checkbox), Are You Immunized (Checkbox), Emergency Phone Number* (Text Box)

Rooms Not Yet Approved

Not Yet Approved

Dates & Times: 2021-05-12 4:15PM to 5:15PM

Not Yet Approved Rooms: Kitchen (Kitchen)



Reports

Responsibilities Transfer



Next Session!



User Management & Staff Transitions

Manage Security Roles and Users for a smooth transition when a staff member is leaving or changing position.

Important! This report makes changes to many areas of MinistryPlatform. In addition to the parameters above, this report also changes Global Filters, Page Views, Primary Contacts, Message Author/From/Reply To, and more!

Set both the User to transfer records from and the User to transfer records to. These should not be the same User. If you change parameters above, click "View Reports" to refresh the list below.

Click the "Remove/Transfer Rights & Records" link if/when ready to take action to thoroughly remove or transfer a User from current records in your database.

Rights & Records Will Be:

Removed From: Haremski, Heather | heatherm


Transferred To: Eames, Angie | angie@ministryplatform.com

[Remove/Transfer Rights & Records](#)

- ☐ User Record Edit: Admin Set to False
- ☐ User Record Edit: Can Impersonate Set to False
- ☐ User Record Edit: Setup Admin Set to False
- ☐ Security Roles To Remove (23)
- ☐ Delegates To Remove (1)
- ☐ User Groups To Remove (2)
- ☐ Dashboard Charts To Remove (1)
- ☐ Page Views to Leave Alone (33)
- ☐ Page Views to Transfer (5)
- ☐ Sub Page Views to Leave Alone (1)
- ☐ Congregation Pastor to Transfer (1)
- ☐ Congregation Contact to Transfer (1)
- ☐ Process Manager to Transfer (2)
- ☐ Message Author To Transfer (2)
- ☐ Message From Contact To Transfer (1)
- ☐ Template From Contact To Transfer (6)
- ☐ Message Reply To Contact To Transfer (1)
- ☐ Template Reply To Contact To Transfer (5)
- ☐ Event Primary Contact to Transfer (1)
- ☐ Form Primary Contact to Transfer (1)
- ☐ Group Primary Contact to Transfer (4)
- ☐ Ministry Primary Contact to Transfer (1)
- ☐ Opportunity Contact Person to Transfer

Letters

- Create Letter on Communications > Letters page
- Selected Contact Letter Report

  **Non-Cash/Asset Contribution Letter (Stock/Shares)**
Letter #11

Letter Title *: Non-Cash/Asset Contribution Letter (Stock/Shares)

Page: Donations 













Letter Opening:

The donation that you have made to our organization is Precious, but the value of kindness is realized only when others generously step way in helping us to achieve our goals. Thank you for your contribution

Letter Body:

Generally, gifts from third parties are receipted separately from contribution statement. You should retain this letter separately for tax organization, your contribution of this stock to our ministry may have the fair market value of the stock as of the date of your gift, subject to certain limitations. If your gift is in excess of \$500, you must consult your personal tax advisor with respect to tax deductions, and any

Letter From: (change in Letters page of Communications section)

<input type="checkbox"/>	Letter Title	Page Name ▲	Active
<input type="checkbox"/>	 Non-Cash/Asset Contribution Letter (Stock/Shares)	Batches	True
<input type="checkbox"/>	 Sample Contacts Page Letter	Contacts	True
<input type="checkbox"/>	 Test Letter	Contacts	True
<input checked="" type="checkbox"/>	 NSF Letter	Donations	True
<input checked="" type="checkbox"/>	 Gift in Kind	Donations	True
<input checked="" type="checkbox"/>	 Non-Cash/Asset Contribution Letter (Stock/Shares)	Donations	True
<input type="checkbox"/>	 Thank you for donating	Donors	True
<input type="checkbox"/>	 Added to Envelope Mailing	Donors	True
<input type="checkbox"/>	 Special Text!	Donors	True
<input type="checkbox"/>	 Test	Households	True
<input type="checkbox"/>	 Building Fund Pledge Update/Thank You	Pledges	True
<input type="checkbox"/>	 New Pledge Letter	Pledges	True

Show All Letters No, This Page Only

Greeting Dear

Show Spouse Name True False

Letter Non-Cash/Asset Contribution Letter (Stock/Shares)

Closing

Date Format Long (Friday, May 1, 2013)

1 of 2 ?

Find | Next

Thursday, May 13, 2021

Administrator MinistryPlatform

Dear Administrator,

The donation that you have made to our organization is Precious, but the kindness in your heart is Priceless. The value of money is only realized when you don't have any, and the value of kindness is realized only when others generously step in to help in times of need. Thank you for being so kind and generous. Your support goes a long way in helping us to achieve our goals. Thank you for your contribution of:

Generally, gifts from third parties are receipted separately from the more traditional contribution statement; therefore, this gift will not be reflected in your end of year contribution statement. You should retain this letter for your purposes as receipt and confirmation of your gift. Because we are a properly qualified tax-exempt organization, your contribution of this stock to our ministry may have valuable tax benefits. If you have held this stock for less than one year, your tax deduction will be the fair market value of the stock as of the date of your gift, subject to certain limitations. If you held this stock for more than one year, your tax deduction is limited to your cost basis. If your gift is in excess of \$500, you must procure IRS form 8283. For gifts valued at more than \$5,000, you should consult your personal tax advisor with respect to tax deductions, and any limitations. Feel free to contact me if you have any questions.

Sincerely,

(change in Letters page of Communications section)



Non-Cash/Asset Contribution Letter (Stock/Shares) Letter #11

Letter Title *:

Non-Cash/Asset Contribution Letter (Stock/Shares)

Page:

Donations [Link](#)

Letter Opening:

The donation that you have made to our organization is Precious, but the kindness in your heart is Priceless. The value of money is only realized when you don't have any, and the value of kindness is realized only when others generously step in to help in times of need. Thank you for being so kind and generous. Your support goes a long way in helping us to achieve our goals. Thank you for your contribution of:

Letter Body:

Generally, gifts from third parties are receipted separately from the more traditional contribution statement; therefore, this gift will not be reflected in your end of year contribution statement. You should retain this letter separately for your purposes as receipt and confirmation of your gift. Because we are a properly qualified tax-exempt organization, your contribution of this stock to our ministry may have valuable tax benefits. If you have held this stock for less than one year, your tax deduction will be the fair market value of the stock as of the date of your gift, subject to certain limitations. If you held this stock for more than one year, your tax deduction is limited to your cost basis. If your gift is in excess of \$500, you must procure IRS form 8283. For gifts valued at more than \$5,000, you should consult your personal tax advisor with respect to tax deductions, and any limitations. Feel free to contact me if you have any questions.



Letter From:

(change in Letters page of Communications section)

<input type="checkbox"/>	Letter Title	Page Name ▲	Active
<input type="checkbox"/>	● Non-Cash/Asset Contribution Letter (Stock/Shares)	Batches	True
<input type="checkbox"/>	● Sample Contacts Page Letter	Contacts	True
<input type="checkbox"/>	● Test Letter	Contacts	True
<input checked="" type="checkbox"/>	● NSF Letter	Donations	True
<input checked="" type="checkbox"/>	● Gift in Kind	Donations	True
<input checked="" type="checkbox"/>	● Non-Cash/Asset Contribution Letter (Stock/Shares)	Donations	True
<input type="checkbox"/>	● Thank you for donating	Donors	True
<input type="checkbox"/>	● Added to Envelope Mailing	Donors	True
<input type="checkbox"/>	● Special Text!	Donors	True
<input type="checkbox"/>	● Test	Households	True
<input type="checkbox"/>	● Building Fund Pledge Update/Thank You	Pledges	True
<input type="checkbox"/>	● New Pledge Letter	Pledges	True

Letters

- Selected Milestone Letter
- Selected Response Letter





Guest Letter | Assimilation

Milestone #1

Milestone Title *: Guest Letter

Description:

Journey *: Assimilation 

Next Milestone: Orientation | Assimilation 

Follow Up Notes:

Add to Event Metrics *: True

Letter Body:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In eleifend leo a purus congue placerat. Sed at justo at nunc, [tempus interdum et at lorem](#). Nam ullamcorper semper nisl nec volutpat. Proin diam mi, vehicula in porttitor non, tempor vitae magna. Donec varius vulputate tellus sed gravida. In sit amet dui elit, quis accumsan nunc. Nulla facilisi. Proin accumsan molestie diam id condimentum. Aliquam sit amet orci commodo nulla iaculis scelerisque ac sed magna. Nulla mollis nulla a urna volutpat pharetra. Suspendisse sollicitudin interdum nulla ac vestibulum. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc lobortis fringilla libero, et condimentum nisl faucibus vitae. Phasellus vel enim sed nibh vestibulum tincidunt. Mauris iaculis est vitae arcu varius accumsan. Duis viverra purus id neque facilisis malesuada. Suspendisse ultricies ornare libero, nec commodo eros iaculis quis. Morbi eget justo non nisl aliquam luctus. Suspendisse potenti. Curabitur nec eros orci, vitae hendrerit magna. Vivamus molestie, est vitae pharetra placerat, sapien neque adipiscing ante, eget vestibulum libero dui in nisi. Fusce eu sapien diam, sed vestibulum quam. Quisque suscipit ultricies urna, vel feugiat enim eleifend at. In hac habitasse platea dictumst. Nullam eget nisl quam. Vivamus quis lorem massa, vel consectetur odio. Praesent ultrices nisl quis turpis pulvinar quis malesuada ipsum ornare. Donec blandit gravida lacus, sodales eleifend ligula vehicula varius. Phasellus a lorem nulla.

May 13 2021

Mr. Kevin McCord
47 Mill Creek Rd
Crawfordville, FL 32327-3075

Dear Kevin,

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In eleifend leo a purus congue placerat. Sed at justo at nunc, [tempus interdum et at lorem](#). Nam ullamcorper semper nisl nec volutpat. Proin diam mi, vehicula in porttitor non, tempor vitae magna. Donec varius vulputate tellus sed gravida. In sit amet dui elit, quis accumsan nunc. Nulla facilisi. Proin accumsan molestie diam id condimentum. Aliquam sit amet orci commodo nulla iaculis scelerisque ac sed magna. Nulla mollis nulla a urna volutpat pharetra. Suspendisse sollicitudin interdum nulla ac vestibulum. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc lobortis fringilla libero, et condimentum nisl faucibus vitae. Phasellus vel enim sed nibh vestibulum tincidunt. Mauris iaculis est vitae arcu varius accumsan. Duis viverra purus id neque facilisis malesuada. Suspendisse ultricies ornare libero, nec commodo eros iaculis quis. Morbi eget justo non nisl aliquam luctus. Suspendisse potenti. Curabitur nec eros orci, vitae hendrerit magna. Vivamus molestie, est vitae pharetra placerat, sapien neque adipiscing ante, eget vestibulum libero dui in nisi. Fusce eu sapien diam, sed vestibulum quam. Quisque suscipit ultricies urna, vel feugiat enim eleifend at. In hac habitasse platea dictumst. Nullam eget nisl quam. Vivamus quis lorem massa, vel consectetur odio. Praesent ultrices nisl quis turpis pulvinar quis malesuada ipsum ornare. Donec blandit gravida lacus, sodales eleifend ligula vehicula varius. Phasellus a lorem nulla.

Notifications

- Automated emails sent based on scheduled jobs in the database
- Messages are stored in MP
- Configured by Configuration Settings

Form Response

Background Check Needed

Background Check Status

Happy Birthday

Care Case

Event Registrant Message

Event Reminder

Event Attendee Message

Group Attendance

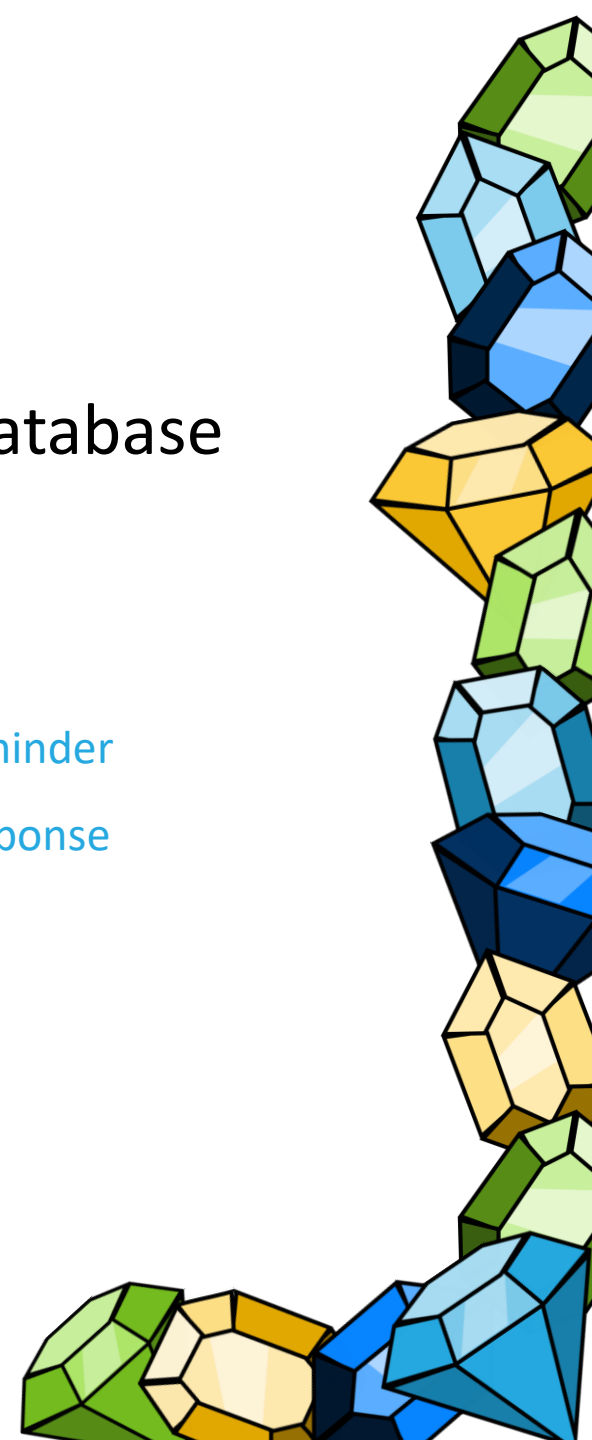
Group Servant & Leader Service

Opportunity Reminder

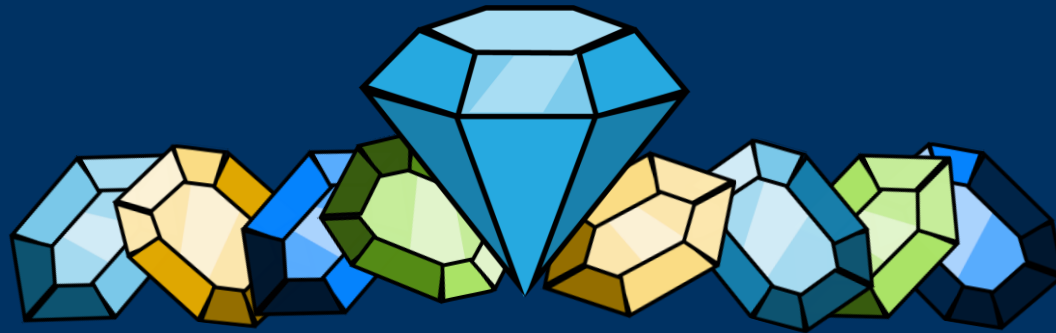
Opportunity Response

User Task

- Item Notifications



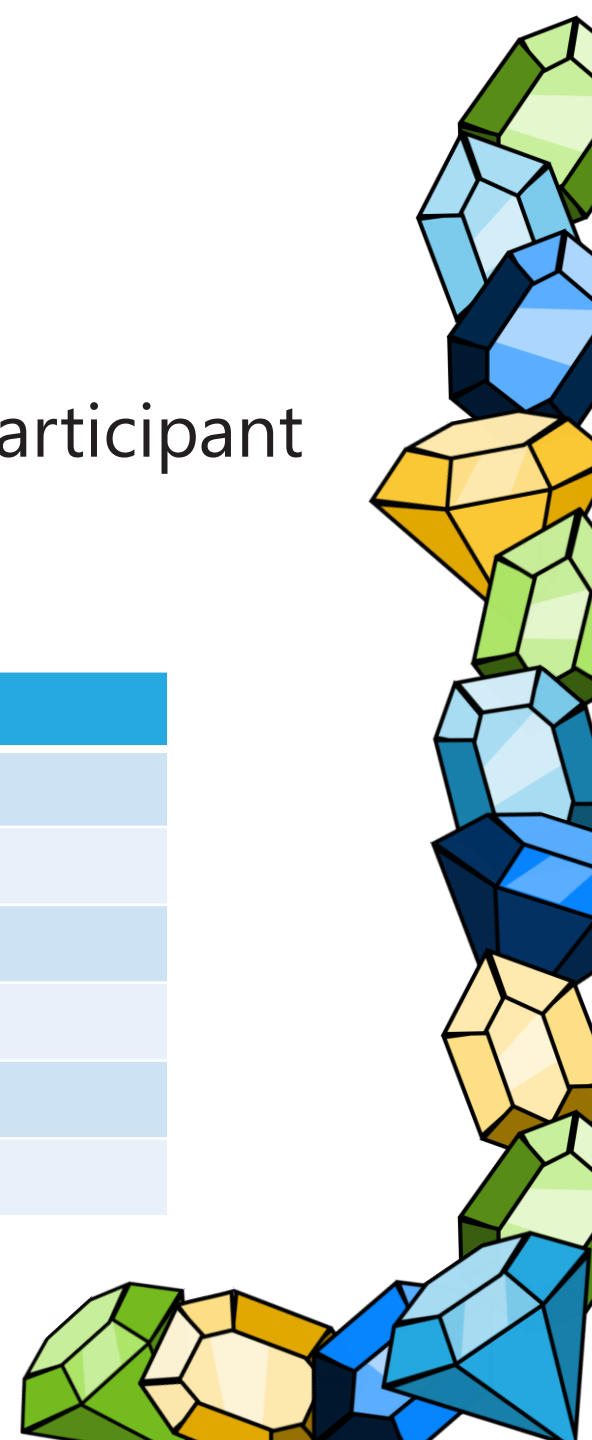
Milestones & Opportunities



Milestones

- An important date or accomplishment by a church participant
- Multiple Milestones make up a Journey

Journey	Milestone
Membership	Membership Class
	Membership Interview
	Membership Vote
Spiritual Formation	
	Salvation
	Baptism



Milestones

1. Add through Connection Card Tool
2. Process Steps for Follow-up
3. Action
4. Reporting





  **Ministry Volunteer Application**
Journey #3



Journey Name *: Ministry Volunteer Application







Description: Ministry Volunteer Application

Leadership Team:

Milestones

 New  Delete  Grid  Refresh

  in View All Rec

<input type="checkbox"/>			Sort...	Milestone Title
<input type="checkbox"/>			1	Application Received
<input type="checkbox"/>			2	Application Approved
<input type="checkbox"/>			3	Placed On Team

  **Aardvark, Aardy Jr. | Application Approved**
Milestone Assigned #114

Participant *: Aardvark, Aardy Jr. 

Milestone *: Application Approved 

Program *: Children Activities - Churchwide @ Activities 

Date Accomplished: 12/17/2011 12:00 AM ET

Selected History Since Milestone

					Donations	Group Types			Milestones		
					1st HH Donation	Age or Grade Group	Discipleship Group	Ministry Team	1New Visitor first time visit to Worship	2New Visitor Telephone Call	3New Visitor Email or Letter
Contact	Household Position	Status	Participant Type	Baptism	Weeks To Fact	Weeks To Fact	Weeks To Fact	Weeks To Fact	Weeks To Fact	Weeks To Fact	Weeks To Fact
***Default, Contact (ID 2)	Head of Household	Active	*ChangeMe	8/17/2010	-535	336					
***Unassigned, Contact (ID 4)		Active	Attendee	8/17/2010	-535		311	324	15	33	37
Aardvark, Aardwina CPA, P.A. (ID 4012)	Head of Household	Inactive	*ChangeMe	8/17/2010	72	350					
Aardvark, Aardy Jr. (ID 4011)		Deceased	Attendee								
Aardvark, Aaricia (ID 4022)		Deceased	Member	8/17/2010		350		324			
Aardvark, Aarnie (ID 4014)	Adult Child	Inactive	Member								
Aardvark, Grandpa CPA, P.A. (ID 4053)	Head of Household	Temporarily Away	Member								
Abbott, Betti (ID 7371)	Head of Household	Inactive	Non-Member b Serves								
Abbott-Fryer, Daniel (ID 1855)		Inactive	Non-Member b Serves								
Abbott-Fryer, Donna (ID 1858)		Inactive	Non-Member b Serves								

Journey Participants

Visitor Assimilation

Assigned Through 5/13/2021

[Create Participants Page Selection](#)

Individuals (First Milestone - Last Milestone)


		1New Visitor first time visit to Worship	2New Visitor Telephone Call	3New Visitor Email or Letter	4Visitor Attends Sunday Lunch	5Visitor mailed invitation to join church	6Visitor expresses wish to Join church	7New Member Class Interest	8New Member Commitment
<input type="checkbox"/> Discontinued	***Unassigned, Contact (11/28/2010 - 6/28/2014)	1	1	1	0	0	0	0	0
	Totals for 1 Individuals Discontinued	1	1	1	0	0	0	0	0
<input type="checkbox"/> Mid Journey	BachelorWithKids, Aanie (9/29/2011 - 9/29/2011)	0	0	0	0	0	0	1	0
	Bulldog, Cynthia (5/8/2019 - 5/8/2019)	1	0	0	0	0	0	0	0
	Eames, Angie (3/18/2019 - 3/18/2019)	1	0	0	0	0	0	0	0
	Gomez, Ashley INACTIVE (9/10/2018 - 9/10/2018)	1	0	0	0	0	0	0	0
	Hartung, Carrie (6/22/2018 - 6/22/2018)	1	0	0	0	0	0	0	0
	Higginbotham, Matt (7/8/2015 - 7/8/2015)	1	0	0	0	0	0	0	0
	Hoffman, Jed (12/5/2017 - 12/5/2017)	0	1	0	0	0	0	0	0
	Jones, Andy (4/2/2019 - 5/13/2019)	0	1	0	0	0	0	0	0
	Jones, George (9/17/2018 - 5/13/2019)	1	0	0	0	0	0	0	0
	Jones, Matt (4/2/2019 - 4/2/2019)	0	0	0	1	0	1	0	0

Opportunities

- Ways to be involved
- Widget Opportunity Finder
- A Response is created when someone... responds... to an Opportunity

Opportunity Finder


[Search Opportunities](#)



Greeter
West Congregation
Ongoing

Greet people as they arrive! Help visitors and long time attendees feel welcome and find what they need each service.


[See Details](#)



Week Night Childcare Volunteer
North Congregation
Ongoing

We are looking for volunteers to serve our North Campus small groups by watching kids during week night small groups. May be on campus or in a host home nearby.

[See Details](#)



Comm...
Comm...
Sat, No...

Join ...
comm...
different...
ages and...

Opportunities

- Automation:
 - Confirmation Email
 - Reminder Email
 - Add to Group
 - Add to Event
- Response Follow-up Process
- Connection Card Tool
- Follow-up
- Reporting



Serve Children at Central Campus

Opportunity #39

Opportunity Title *:

Serve Children at Central Campus

Selected Response Listing

Respondent	Email	Phone	Comments
Widows & Single Moms Car Care (McCord, Kevin) From 5/31/2019 to 7/20/2020			
Bulldog, Cynthia From Web: ,	From Web:	M:/H: From Web:	Status: O How long space wo
Eames, Angie From Web: ,	angie@ministryplatform.com From Web:	M:406-697-7320/H:406-248-7105 From Web:	Status: Clo Conne
Total Widows & Single Moms Car Care: 2			
Donate Blood (Aardvark, Aardy Jr.) From 8/23/2019 to 8/23/2019			
Eames, Angie From Web: ,	angie@ministryplatform.com From Web:	M:406-697-7320/H:406-248-7105 From Web:	Status: Clo
Total Donate Blood: 1			
Baking Christmas Cookies (Eames, Bridger) From 8/29/2019 to 8/7/2020			
***Default, Contact From Web: Testing, Test	support@ministryplatform.com From Web: melissa@thinkministry.com	M:678-404-2678/H: From Web: 714-555-5555	Status: O test
***Default, Contact From Web: Morris, Ashley	support@ministryplatform.com From Web: ashleynmorris1109@gmail.com	M:678-404-2678/H: From Web: 724-766-0100	Status: Op Hi I need t
Eames, Angie From Web: Eames, Angie	angie@ministryplatform.com From Web: angie@thinkministry.com	M:406-697-7320/H:406-248-7105 From Web: 555-888-4479	Status: O
Morris, Ashley From Web: ,	ashley@ministryplatform.com From Web:	M:724-766-0100/H: From Web:	Status: Op
Total Baking Christmas Cookies: 4			

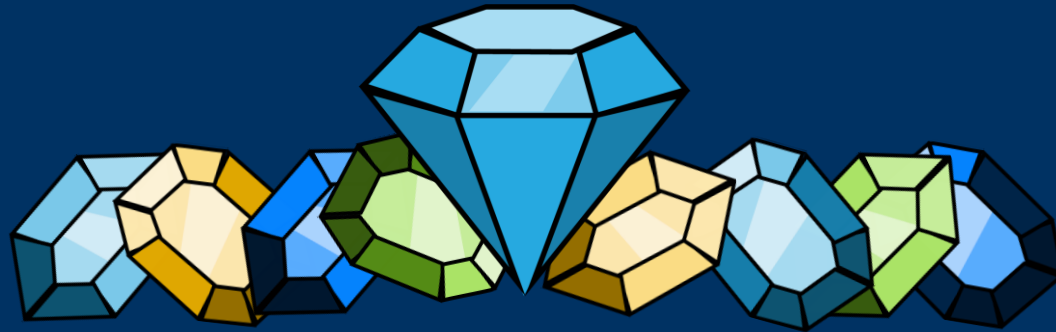
Date To Remind:

Optional Reminder
Message:

Send To Heads:

System Setup SQL
Default Field List Modifications
Snippets
User Rights & Restrictions page

SPoC Fun!



SQL from System Setup Pages

The screenshot displays a system setup interface. At the top, there's a search bar and a filter dropdown set to 'in View'. Below this is a table with columns: Household Na..., Head 1 Name, Head 2 Name, Head 1 Mobile, Head 2 Mobile, Head 1 Email, and Head 2 Email. The table lists several households, all with 'Abbott' as the household name. A sidebar on the left contains a menu with options like 'System Setup', 'Domains/Accounts', 'Reports', 'Page Section Pages', 'Page Sections', 'Page Views', 'Sub Page Views', 'Pages', 'Sub Pages', 'Tools/Actions', 'API Procedures', 'Charts', 'Application Labels', 'Tool Pages', 'Report Pages', and 'MobileApp Menu It...'. The 'Page Views' option is highlighted. The main area shows the configuration for 'Households | Head of Household Info' (View #2948). It includes fields for 'View Title *', 'Page *', and 'Description'. The 'Field List' section contains a complex SQL query that retrieves household information from a 'Contacts' table, including names, mobile phones, and email addresses, with various filters and ordering clauses.

	Household Na...	Head 1 Name	Head 2 Name	Head 1 Mobile	Head 2 Mobile	Head 1 Email	Head 2 Email
●	Abbott	Arthur					
●	Abbott	Joseph				joseph46209@w...	
●	Abbott						
●	Abbott						
●	Abbott						
●	Abbott, Ed						

Households | Head of Household Info
View #2948

View Title *: Head of Household Info

Page *: Households

Description: Shows HOH info: Names, Email, & Mobile Phone

Field List:

```
Households.[Household_Name] AS [Household Name]
,(SELECT Top 1 First_Name FROM Contacts C WHERE C.Household_ID = Households.Household_ID and
Household_Position_ID = 1 ORDER BY Gender_ID) AS Head_1_Name
,(SELECT Top 1 First_Name FROM Contacts C WHERE C.Household_ID = Households.Household_ID and
Household_Position_ID = 1 AND EXISTS (SELECT 1 FROM Contacts C2 WHERE C2.Household_Position_ID =
1 AND C2.Household_ID = C.Household_ID GROUP BY Household_ID HAVING Count(*) > 1) GROUP BY
Contact_ID, First_Name, Gender_ID ORDER BY Gender_ID Desc) AS Head_2_Name
,(SELECT Top 1 Mobile_Phone FROM Contacts C WHERE C.Household_ID = Households.Household_ID and
Household_Position_ID = 1 ORDER BY Gender_ID) AS Head_1_Mobile
,(SELECT Top 1 Mobile_Phone FROM Contacts C WHERE C.Household_ID = Households.Household_ID and
Household_Position_ID = 1 AND EXISTS (SELECT 1 FROM Contacts C2 WHERE C2.Household_Position_ID =
1 AND C2.Household_ID = C.Household_ID GROUP BY Household_ID HAVING Count(*) > 1) GROUP BY
Contact_ID, Mobile_Phone, Gender_ID ORDER BY Gender_ID Desc) AS Head_2_Mobile
,(SELECT Top 1 Email_Address FROM Contacts C WHERE C.Household_ID = Households.Household_ID and
Household_Position_ID = 1 ORDER BY Gender_ID) AS Head_1_Email
,(SELECT Top 1 Email_Address FROM Contacts C WHERE C.Household_ID = Households.Household_ID and
Household_Position_ID = 1 AND EXISTS (SELECT 1 FROM Contacts C2 WHERE C2.Household_Position_ID =
```

Default Field List – Merge Fields

- Process Messages
- Data Fields
- Snippets

Consider:

- Link to [Form Response](#)



Group Participants



Page #316

Display Name *:	Group Participants
Singular Name *:	Group Participant
Image Name:	fa-users
Description:	Participants engaged in groups and teams with specific roles.
View Order *:	7
Table Name *:	Group_Participants
Primary Key:	Group_Participant_ID
Default Field List *:	Participant_ID_Table_Contact_ID_Table.Display_Name AS GP_Display_Name ,Participant_ID_Table_Contact_ID_Table.Nickname AS GP_Nickname ,Participant_ID_Table_Contact_ID_Table.First_Name AS GP_First_Name ,Group_Role_ID_Table.Role_Title ,Group_Role_ID_Table_Group_Role_Type_ID ,Group_ID_Table_Ministry_ID_Table.Ministry_Name ,Group_ID_Table_Parent [Parent Group] ,Group_Participants.Start_Date ,Group_Participants.Notes ,Participant_ID_Table_Contact_ID_Table_Household_ID_Table.Home_Phone ,Participant_ID_Table_Contact_ID_Table.Email_Address AS GP_Email_Address ,Participant_ID_Table_Contact_ID_Table.Mobile_Phone AS GP_Mobile_Phone ,Participant_ID_Table_Contact_ID_Table_Household_ID_Table_Congregation_ID [GP Congregation] , Group_ID_Table_Congregation_ID_Table.[Congregation_N ,Group_Participants.[_Last_Attendance] AS [Last Attendance] Participant_ID_Table_Contact_ID_Table.Display_Name + ' ' + Group_ID_Table


Selected Record

Snippets


- Mini Template
- Signature with image
- Handwritten signature
- Unsubscribe text with Widget link

  **Signature & Unsubscribe**
Communication Snippet #64






Name *: Signature & Unsubscribe


Value *: 
















New Message ☒ Email ☐ TXT

Contacts: 

Recipients: ☐ Send To Parents

 - Select Template -  - Select Snippet -  - Contact Fields -  - From User - 


 Type a Subject

B **I** **U**               

Hello [First_Name]

Thank you for visiting with us today! We hope you enjoyed the service and felt welcomed.

God Bless,



Pastor Bruce Lee
Your Local Church

Bonus: GroupLife Snippet Update

- Snippet to link Group Leaders to GroupLife
- Send bulk email with link by updating the Default Field List
- GroupLife URL ends in the ID

The screenshot displays the GroupLife web interface. At the top, the URL is `support.cloudapps.ministryplatform.cloud/apps-2021.2.10.1/grouplife/401`. The navigation bar includes icons for GroupLife, Members, Meetings, and Communication. The main heading is "Heather's Group". A "New Message" dialog box is open, showing a "Group Participant..." dropdown, a "Recipients:" dropdown, and a "New Message" form. The form includes a "Subject" field and a "Body" field containing HTML code. The HTML code includes a link to "GroupLife" with a URL that ends in the ID "401". The background shows the "Heather's Group" page with a "Members" list.

GroupLife Members Meetings Communication

Heather's Group

New Message • Email • TXT

Group Participant... Selection: Current/Unsaved Selection - 1 record(s)

Recipients: Contact(s) Associated With Selected Group Participants ☐ Send To Parents

- Select Template - - Select Snippet - - Contact Fields - - From User - - Data Fields -

Type a Subject

GroupLife

```
<html>
<head></head>
<body><span> <a href="https://support.cloudapps.ministryplatform.cloud/apps/grouplife/0?login={Encrypt:TM.Tools}User_Guid=[User_GUID]&amp;Issued_At=[dp_UtcDateTime]/{Encrypt}">GroupLife</a></span>
</body>
</html>
```

Save As Draft Send to Me Send (1)

Members

Aardwina Aardy
Member Since: 2/24/2019
Class Member
Last Attended: 4/13/2020
Remove

Aardy Aardvark
Member Since: 2/24/2019
Class Member
Last Attended: 4/13/2020
Remove

Andrea McGoug
410-207-5326
andrea@ministryplatform.com
Member Since: 6/28/2019
Class Member
Remove

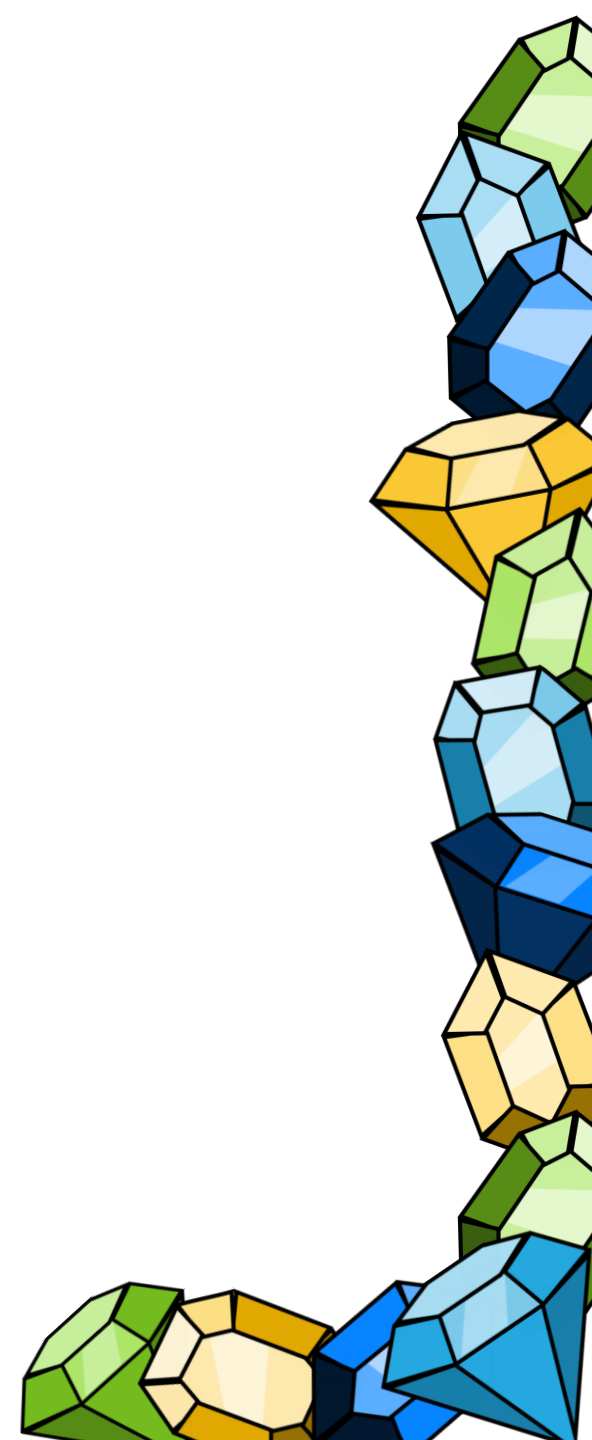
User Rights

- User Rights & Restrictions Page
- Responsibility Transfer Report



User Management & Staff Transitions

Manage Security Roles and Users for a smooth transition when a staff member is leaving or changing position.



Ready-Made Solutions



The following applications and solutions are available upon request. Contact [Support](#) to get started!

Snapshot Services

[Snapshot Services](#) will add historical data in monthly increments so the church can provide church analysis, charts, views, reports, etc. to church leaders over any reporting period (monthly, quarterly, semi-annual, annual, etc.). The monthly increments cannot be customized at this time.

Snapshot services cost \$25/month for either or both, installation includes:

- **Engagement Snapshot:** A historical log of what your Participants were doing individually by month in terms of giving, serving, group life, and more.
- **Donor Snapshot:** A historical log of a Donor's direct and soft credit giving by month, including comparison data for prior periods.

CloudServices



CloudService Applications cost \$25/month for any or all; installation is included. Future enhancements/updates and support are also included. The specific services you want can be configured upon request.

- **Contact Status Management** // Automatically will inactivate or reactivate Contacts based on custom rules for each Participant Type.
- **Front Porch Wifi Presence Integration** // Enables captive portal as entry for user onto your wifi system and data capture by Front Porch. Required in addition to an account with Front Porch.
- **Geocoding Utility** // Uses the Bing API to geocode addresses.
- **Distance and Drive Time Utility** // Uses the Bing API to calculate the number of miles and number of driving minutes from the Household Address to the Household Congregation Address.
- **ICS Event Calendar Feed** // The ICS Calendar Feed provides a calendar in an iCalendar format.
- **Background Check Consent PDF Email** // Automatically PDFs the Background Check Consent and emails it to Protect My Ministry to ensure compliance with Georgia state laws.
- **Front Porch Extensions** // Automatically adds Event Participant records to an Event the night after so they can be used in attendance.
- **Inbound Texting** // Coming soon!!!
- **Image Resizer** // Automatically resize images attached to Groups, Opportunities, and/or Events to a specified max height and/or width.

What Hidden Gems have YOU discovered?

