

Email + Text: Reach and Engage Your Audience

Tips and tricks to leverage the New Message Tool and Views to effectively reach and engage your community via email AND text!

Heather Haremski

Support Agent

Overview

- Overview of Texting & Email Capabilities
- New Message Tool Tour- Deeper Dive
- **Where do I start? Selecting Recipients**

Check out the Knowledge Base!

New Message Tool



Important! Sending text messages via the New Message Tool part of the November 2020 Platform release! For more information check out the [Texting the New Message Tool webinar!](#)

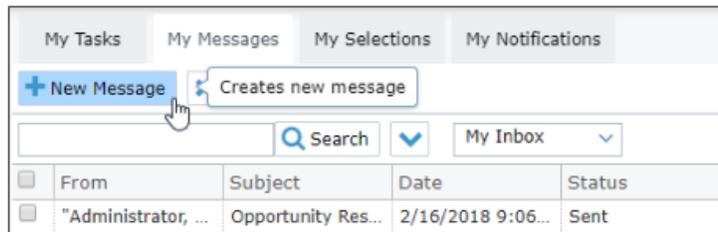
The New Message Tool is used to send Messages from MinistryPlatform. Message and Recipient records are created and recorded in the Audit Log.

Launching the New Message Tool

The New Message Tool can be launched from

- Home page > My Messages tab > New Message
- Any Page > Tools > New Message

From Home



From Contacts

SEARCH

- Knowledgebase
 - MinistryPlatform
 - Messages
 - Texting
 - Sending a Message
 - Handling Duplicates
 - ★ New Message Tool
 - New Message Tool - Sending Emails
 - New Message Tool - Sending Text Messages
 - Select Message Recipients
 - Changing From or Reply To
 - Templates
 - Snippets
 - Contact Fields
 - Data Fields
 - External Links
 - Images
 - Scheduling a Message
 - Message Drafts
 - Managing Createc

Text & Email from the Platform...

- Each contact receives a unique message
- Recipients will not see who else the message was sent to.
- Send a message to the parents of a selection
- Schedule the message to send later
- Honor bulk email opt-out requests
- Messages are logged in the Platform

...all with the New Message Tool!

+ Quick Add ▼

My Dashboard My Tasks My Messages My Selections My Notifications

+ New Message X Archive Messages

- Home
- Contacts
- Households
- My User Tasks
- Companies
- Participants
- Feedback Entries- No Comments
- Groups
- Online Groups
- Active Groups
- Events
- Milestones
- Opportunities
- Opportunity Attributes
- Group Files
- People Lists
- Church Structure
- Needs Management
- Facilities
- Communications
- Counseling
- Custom Forms
- Mission Trips

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

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

Type a Subject

B **I** U ↺ ☰ ☷ ☹ ☺ ☻ ☼ ☽ ☾ ☿ ♀ ♁ ♃ ♄ ♅ ♆ ♇ ♈ ♉ ♊ ♋ ♌ ♍ ♎ ♏ ♐ ♑ ♒ ♓ ⚡ ⚔ ⚖ ⚗ ⚙ ⚚ ⚛ ⚜ ⚝ ⚞ ⚟ ⚠ ⚡ ⚔ ⚖ ⚗ ⚙ ⚚ ⚛ ⚜ ⚝ ⚞ ⚟ ⚠

Save As Draft Send to Me Send Close

- + Quick Add
- Home
- Contacts
- Households
- My User Tasks
- Companies
- Participants
- Feedback Entries- No Comments
- Groups
- Online Groups
- Active Groups
- Events
- Milestones
- Opportunities
- Opportunity Attributes
- Group Files
- People Lists
- Church Structure
- Needs Management
- Facilities
- Communications
- Counseling
- Custom Forms

+ Quick Add

Assign Delete Export Secure Tools Reports Grid Print Refresh

in View

- New Message
- New Task
- Add / Edit Company
- Add / Edit Family Tool
- Background Check Request
- Combine Contacts Tool
- Connection Card
- Contact Log
- Database Schema
- Deceased Person
- Impersonate Portal User
- Inactivate Tool
- Map My Selection
- Query Direct
- Reset User Security
- Text Messaging Tool
- Transfer Selection
- Trim Selection

	Display Name	Nickname	Fi		Participant Typ...	Home Phone	Mobile Phone
<input type="checkbox"/>	***Default, Con...	Contact			*ChangeMe		678-404-2678
<input type="checkbox"/>	***Default Prais...	***Default Prais...	Ce		Attendee		
<input type="checkbox"/>	***Default Pray...	***Default Pray...	Ce		Attendee		
<input type="checkbox"/>	***Scholarship,...	Contact	Ce		*ChangeMe		
<input type="checkbox"/>	***Unassigned,...	Contact	Ce		Attendee		770-401-7867
<input type="checkbox"/>	08242015-327, ...	Newuser	Ne		Guest		555-555-1234
<input type="checkbox"/>	Aardvark, Aard...	Aardwina	Aa		*ChangeMe		
<input type="checkbox"/>	Aardvark, Aarici...	Aaricia A	Aa		Attendee	+33494340459	+33658905443
<input type="checkbox"/>	Aardvark, Anita	Anita	Ar		Attendee		
<input type="checkbox"/>	Aardvark, Arthur	Arthur	Ar		Attendee	999-555-5432	
<input type="checkbox"/>	Aardvark, George	George	Ge		Attendee	555-111-2222	
<input type="checkbox"/>	Abbott, Carolyn ...	Carolyn	Carolyn	Active	Non-Member bu...	555-111-2222	770-401-7867
<input type="checkbox"/>	Abbott, Christine	Christine	Christine	Active	Attendee	555-111-2222	
<input type="checkbox"/>	Abbott, Christop...	Christopher	Christopher	Active	Guest	555-111-2222	770-401-7868
<input type="checkbox"/>	Abbott, Cynthia ...	Cynthia	Cynthia	Active	Guest	555-111-2222	770-401-7867
<input type="checkbox"/>	Abbott, Dennis	Dennis	Dennis	Active	Member	555-111-2222	
<input type="checkbox"/>	Abbott, Donald	Donald	Donald	Active	Guest	555-111-2222	
<input type="checkbox"/>	Abbott, Donna Jr.	Donna	Donna	Active	Attendee	555-111-2222	
<input type="checkbox"/>	Abbott, Dorothy	Dorothy	Dorothy	Active	Attendee	555-111-2222	
<input type="checkbox"/>	Abbott, Douglas	Douglas	Douglas	Active	Attendee		
<input type="checkbox"/>	Abbott, Edward	Edward	Edward	Active	Attendee	800-234-6789	
<input type="checkbox"/>	Abbott, Elizabeth	Elizabeth	Elizabeth	Active	Attendee	555-111-2222	

New Message Tool Tour

Applicable to both Texting and Emails, unless stated otherwise

Email or Text?

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

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



 **B** *I* U              

Administration

- Users
- User Rights & Restrictions
- Security Roles**
- User Security Roles
- Role Reports
- User Groups
- User Group Users
- Record Security
- Identity Providers
- API Clients
- Delegates
- Webhooks

Heather's Security Role

Security Role #284

Role Name *: Heather's Security Role

Description:

Mass Email Quota: 5

Mass Text Quota: 5

Security Role Type:

Page/Sub-Page	None	Read	Edit	Mass Assign	Full	Quick-Add	Export	Attach Files	Secure

Send to Parents

- Household Member with **Head of Household(HOH)** Position & valid **email** & not Inactive/Deceased
- HOH via Other Household as Non-Custodial Parent

If selected recipient is a HOH, they will NOT receive the email, nor other HOHs

The screenshot shows a 'New Message' window with the 'Email' radio button selected. The 'Recipients' section includes a dropdown menu for 'Contact(s) Associated With Selected Contacts' and a checkbox labeled 'Send To Parents', which is highlighted with a green box. Below the recipients section are several dropdown menus for 'Select Template', 'Select Snippet', 'Contact Fields', 'From User', and 'Data Fields'. The main body of the form contains a subject line placeholder 'Type a Subject', a rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, insert image, insert video, and source code, and a large text area for the message content. At the bottom right, there are buttons for 'Save As Draft', 'Send to Me', 'Send', and 'Close'.

Select Template

- Templates available to you, on this page
- Efficiency and formatting

New Message Email TXT

Contacts: ⋮

Recipients: ⌵ Send To Parents

- Select Template ⌵ ⌵ ⌵ ⌵ ⌵

Type a Subject

B *I* U

Select Snippet

- pre-written HTML text
- Efficiency and formatting

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

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

Merge Fields

- Personal
- Page-specific

*Contact
From User
Data*

The screenshot shows a 'New Message' window with the following elements:

- Buttons for 'Email' (selected) and 'TXT'.
- 'Contacts:' dropdown menu.
- Empty text input field.
- 'Recipients:' dropdown menu with the text 'Contact(s) Associated With Selected Contacts'.
- 'Send To Parents' checkbox.
- A row of five dropdown menus: '- Select Template -', '- Select Snippet -', '- Contact Fields -', '- From User -', and '- Data Fields -'. The '- Contact Fields -' dropdown is highlighted with a green border.
- 'Type a Subject' text input field.
- A rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Decrease Indent, Increase Indent, Link, Unlink, Image, Video, and Code.
- Bottom buttons: 'Save As Draft', 'Send to Me', 'Send', and 'Close'.

Merge Fields

 **support.ministryplatform.com**
Domain #1

Contact Merge Fields: Contacts.Last_Name, Contacts.First_Name, Contacts.Display_Name, Contacts.Nickname, Contacts.Email_Address, Contacts.Mobile_Phone, Contacts.Contact_GUID, Contacts.Contact_ID, Household_ID_Table.Home_Phone, Household_ID_Table_Address_ID_Table.Address_Line_1, Household_ID_Table_Address_ID_Table.Address_Line_2, Household_ID_Table_Address_ID_Table.City, Household_ID_Table_Address_ID_Table.[State/Region], Household_ID_Table_Address_ID_Table.Postal_Code, Household_ID_Table_Address_ID_Table.Latitude, Household_ID_Table_Address_ID_Table.Longitude, Domain_ID_Table.Domain_GUID, Household_ID_Table_Congregation_ID_Table.Congregation_Name, Contacts.__Age, Contacts.Date_User_Account_Table.User_GUID, Contacts.Household_ID_Participant_Record_Table.Red_Flag_Notes, Contacts.Participant_Record_Participant_Record_Table_Participant_Engagement_ID_Table.Engagement_Level, Participant_Record_Table_Member_Status_ID_Table.Member_Status Congregations 

Global Filter Page:

FIELD	WHAT	CONFIGURED
Contact	Recipient Contact information If Send to Heads- <u>Child's information</u>	Domain > Contact Merge Fields field
From User	Sender Contact information Sender- currently authenticated User or selected delegate User	Domain > Contact Merge Fields field
Data	Page Specific From page or sub-page record	Default Field List of Page

 **Groups**
Page #322

Primary Key: Group_ID

Default Field List *: Groups.Group_Name ,Congregation_ID_Table.Congregation_Name ,Ministry_ID_Table.Ministry_Name ,Group_Type_ID_Table.Group_Type ,Groups.Start_Date ,Groups.End_Date ,Groups.Available_Online ,Parent_Group_Table.Group_Name AS [Parent Group] ,Primary_Contact_Table.Display_Name AS [Group Leader] ,Parent_Group_Table.Group_Name AS [Parent Group] ,(SELECT Count(*) FROM Group_Participants GP WHERE GP.Group_ID=Groups.Group_ID AND ISNULL(GP.End_Date,dp_DomainTime) >= dp_DomainTime) AS [Number of Members] Groups.Group_Name + '|' + Congregation_ID_Table.Congregation_Name

Selected Record Expression *:

New Message Email TXT

Groups: Selection: Current/Unsaved Selection - 1 record(s) x

Recipients: Contact(s) Associated With **Selected Groups** Send To Parents

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

Type a Subject

B **I** **U**

- Data Fields -

- Group_Name
- Congregation_Name
- Ministry_Name
- Group_Type
- Start_Date
- End_Date
- Available_Online
- Parent Group
- Group Leader
- Parent Group
- Number of Members

New Message Email TXT

Groups: Selection: Current/Unsaved Selection - 1 record(s) x

Recipients: Participants - **Current Participants** Send To Parents

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

Type a Subject

B **I** **U**

- Data Fields -

- Display_Name
- Role_Title
- Last_Attended
- Start_Date
- End_Date
- Notes
- Employee_Role
- Hours_Per_Week

Simple Formats

- HTML Source view
- Templates for anything else!

The screenshot shows a 'New Message' window with the following elements:

- Buttons for 'Email' (selected) and 'TXT'.
- 'Contacts:' dropdown menu.
- 'Recipients:' dropdown menu with the text 'Contact(s) Associated With Selected Contacts' and a 'Send To Parents' checkbox.
- Five dropdown menus: '- Select Template -', '- Select Snippet -', '- Contact Fields -', '- From User -', and '- Data Fields -'.
- 'Type a Subject' text input field.
- A rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Bulleted List, Numbered List, Decrease Indent, Increase Indent, Decrease Indent, Increase Indent, and a code editor icon (</>). This toolbar is highlighted with a green box.
- Other icons in the toolbar include Link, Unlink, Image, and a cross icon.
- Bottom buttons: 'Save As Draft', 'Send to Me', 'Send', and 'Close'.

Links & Images

- Images need a URL reference, or use Template

*Reuse the same image?
Use a Snippet or Template*

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

Type a Subject

B *I* U ~~ABC~~

- ☰

- ☰

- ☰

- ☰

- ☰

- ☰

    `</>`

Attachments • 20 MB File size restriction

New Message Email TXT

Contacts: ⋮

Recipients: ⌵ Send To Parents

Click to Browse or Drop file here

Description:

File Name: Resume.docx

Options Tab

New Message Email TXT x

Contacts: ⋮

Recipients: Contact(s) Associated With Selected Contacts Send To Parents

	From:	Haremski, Heather v
	Reply To:	Haremski, Heather v
	Scheduled To Send At:	5/5/2021 v  11:30 AM v
	Time Zone:	(UTC-05:00) Eastern Time (US & Canada) v
	Locale:	English (United States) v
	Bulk Email:	<input type="checkbox"/> Include recipients who opted out of bulk email

Save As Draft Send to Me Send Close

From & Reply To

- Access given by Delegate of on User record
- Any Contact, doesn't need to have Security Roles

New Message Email TXT

Contacts: [Dropdown] [Input Field] [More]

Recipients: [Dropdown: Contact(s) Associated With Selected Contacts] Send To Parents

From: Haremski, Heather

Reply To: Haremski, Heather

Scheduled To Send At: 5/5/2021 11:30 AM

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Haremski, Heather | heather@thinkministry.com
User #427

User Name*: heatherm
User Email: heather@ministryplatform.com

Roles | User Groups | Identities | Assigned Tasks | Delegate of | Time Off

New + Add Delete Grid Refresh

in View All Records Notify

	Display Name
<input type="checkbox"/>	Eames, Angie
<input type="checkbox"/>	McGough, Andrea

Save As Draft Send to Me Send Close

Schedule

- Within the next 6 months
- See KB article for Managing Created Messages

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

 From: ⌵

 Reply To: ⌵

 **Scheduled To Send At:** ⌵  ⌵

Time Zone: ⌵

Locale: ⌵

Bulk Email: Include recipients who opted out of bulk email

Bulk Email

- Default is to EXCLUDE opt-out individuals
- Check box = Send to those who opted out

The image shows a software interface for sending bulk emails. The main window is titled "New Message" and has two radio buttons: "Email" (selected) and "TXT". Below this, there are fields for "Contacts:" and "Recipients:", both containing the text "Contact(s) Associated With Selected Contacts".

The "From:" field is "Haremski, Heather". The "Reply To:" field is also "Haremski, Heather". The "Scheduled To Send At:" field is set to "5/5/2021" at "11:30 AM". The "Time Zone:" is "(UTC-05:00) Eastern Time (US & Canada)" and the "Locale:" is "English (United States)".

The "Bulk Email:" section at the bottom has a checkbox labeled "Include recipients who opted out of bulk email", which is currently unchecked. This section is highlighted with a green border.

To the right, a preview of the message is shown. It starts with "Here is a Message from MPUG!" and "Message #10682". Below this, it lists the following details:

- From SMS Number:
- From Contact *: Haremski, Heather | heather@thinkministry
- Reply to Contact *: Haremski, Heather | heather@thinkministry
- Start Date *: 5/17/2021 9:30 PM ET
- Time Zone: (UTC-05:00) Eastern Time (US & Canada)
- Locale: English (United States)
- Bulk Email *: True

At the bottom of the interface, there are buttons for "Save As Draft", "Send to Me", "Send", and "Close".

Save as Draft

New Message Email TXT

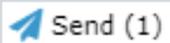
Contacts: ⋮

Recipients: Send To Parents

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



 **B** *I* U               

Send to Me

- Preview
- does not render merge fields, data fields, and snippets

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

Type a Subject

B *I* U ~~ABC~~

-

- 1

- ▶

- ◀

- ≡

- ≡

- ≡

- ≡

- ≡

[Link](#) ~~Link~~ `</>`

Send (#)

- # shows total selected records
- before duplicates removed

New Message Email TXT

Contacts: ⋮

Recipients: Send To Parents

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



 **B** *I* U               

Duplicate Emails

- “Duplicate email”- multiple Contacts with the same email address
- No merge fields- duplicate emails will be removed
- Merge fields- multiple emails sent

Handling Duplicates

Basics

- The count displayed in the New Message Tool is based on the number of selected records.
- The count displayed in the New Message Tool is updated and adjusted when "Send to Parent" or "Include" is used.
- There may be a variance between the count in the New Message Tool and the Message Recipient total. This variance is due to duplicate removal and invalid email addresses.
- Merge fields can be used to prohibit duplicate emails from being removed (if desired).

Handling Duplicate Emails

Depending on how recipients are selected, there may be a variance in the Count of an email before it is sent. This variance may occur when multiple Recipients have the same email address, or if a Recipient is included more than once in a Message. The number of Messages sent to the same email address is dependent on the Message content. If Contact Fields or Data Fields are used, each unique Message will be sent. Churches can use this to their advantage, depending on what they want to be removed or conversely, they would like multiple emails to be sent.

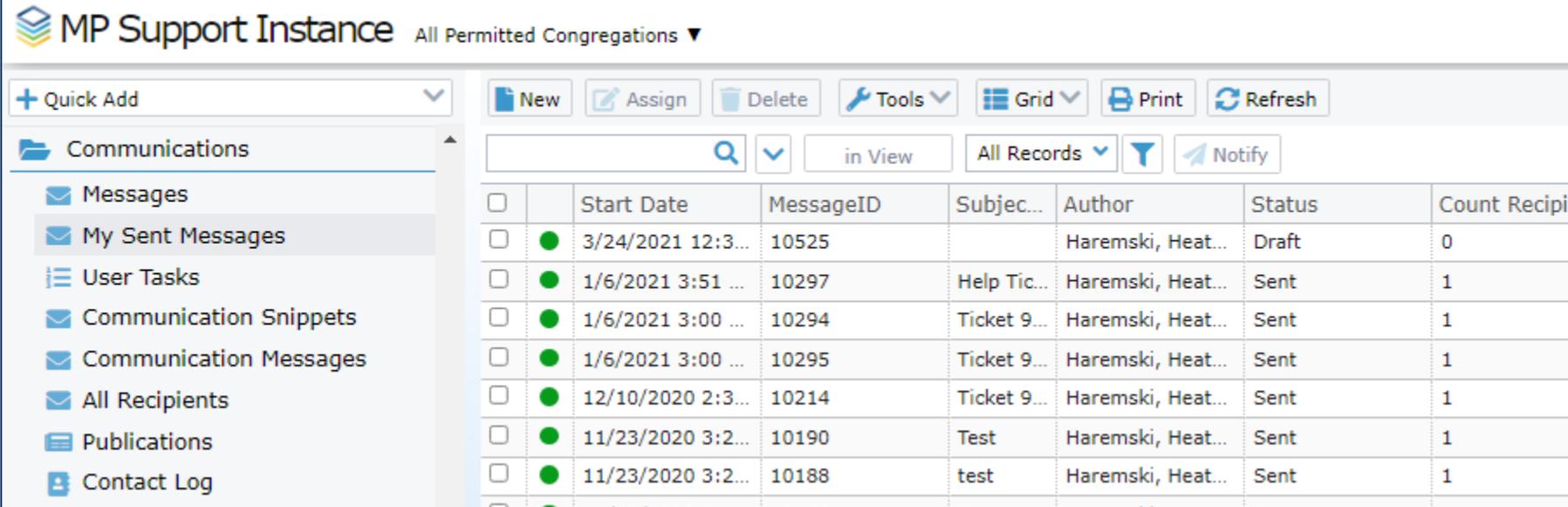
Examples

Consider the following scenarios:

1. George has been added to the Men's Leadership Group twice. A Message is composed which uses Data Fields. Both potential copies merge in the same name - making neither copy unique - one of the duplicates will be removed. Only 1 Message will be sent.
2. George is in both the Men's Leadership and Sunday Volunteer Groups. A Message is composed to the Parent Group. Merge fields are used to merge in the Group Name. When merged, the Group Name varies which makes each copy unique. Two Messages will be sent.
3. George and his wife Susie both have the same email address listed on their respective Contact records. The Message content contains no Contact Fields or Data Fields. George and Susie will receive 1 Message.

My Sent Messages

- Filtered Page for Messages
- Filter on Author User
- Allows to quickly see the Message and who it was sent to



The screenshot displays the 'MP Support Instance' interface. On the left, a navigation menu under 'Communications' includes 'Messages', 'My Sent Messages' (highlighted), 'User Tasks', 'Communication Snippets', 'Communication Messages', 'All Recipients', 'Publications', and 'Contact Log'. The main area shows a table of messages with columns for Start Date, MessageID, Subject, Author, Status, and Count Recipi. The table contains several rows of data, including messages sent on 3/24/2021, 1/6/2021, and 12/10/2020.

		Start Date	MessageID	Subjec...	Author	Status	Count Recipi
<input type="checkbox"/>	●	3/24/2021 12:3...	10525		Haremski, Heat...	Draft	0
<input type="checkbox"/>	●	1/6/2021 3:51 ...	10297	Help Tic...	Haremski, Heat...	Sent	1
<input type="checkbox"/>	●	1/6/2021 3:00 ...	10294	Ticket 9...	Haremski, Heat...	Sent	1
<input type="checkbox"/>	●	1/6/2021 3:00 ...	10295	Ticket 9...	Haremski, Heat...	Sent	1
<input type="checkbox"/>	●	12/10/2020 2:3...	10214	Ticket 9...	Haremski, Heat...	Sent	1
<input type="checkbox"/>	●	11/23/2020 3:2...	10190	Test	Haremski, Heat...	Sent	1
<input type="checkbox"/>	●	11/23/2020 3:2...	10188	test	Haremski, Heat...	Sent	1

Text Message Details

All the same as Emails except...

- 160 character limit
- Contact Fields- not recommended
- Bulk TXT
- No Reply To

New Message Email TXT

Contacts: Selection: Current/Unsaved Selection - 2 record(s) x

Recipients: Contact(s) Associated With Selected Contacts Send To Parents

From SMS Number: Twilio | 3362702467

Scheduled To Send At: 5/17/2021 3:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Locale: English (United States)

Bulk TXT: Include recipients who requested not to be texted

Save As Draft Send to Me Send (2) Close

Text Message Configuration

- Twilio Numbers
- Domain Record
- Outbound SMS Numbers

Texting

You've been using the powerful [New Message Tool](#) and its great features (Send to Parents! Messaging views! [Delay send!](#) [Quota Limit!](#) [Templa](#) send emails. And now you can use the New Message Tool (and those same features) to send text messages via [Twilio](#)! Here's what you need to leverage this exciting new communication option. Want to see it in action? Check out the [Texting in the New Message Tool webinar!](#)

Getting Started

You already have the New Message Tool, but you'll need to take four simple steps to text using the New Message Tool:

- Create (or update!) your [Twilio account](#)
 - You can use an existing Twilio number, but we recommend moving to a 1-800 number for faster sending ;)
 - Be sure to ask about Twilio's not-for-profit pricing.
- Update your Domain record in the Platform
- Add Outbound SMS Numbers to the Platform

Update Your Domain

To successfully send text messages, your Twilio account must be configured on your Domain Record (System Setup > Domains/Accounts):

- **SMS Server Username:** Twilio Account SID (Found under your Twilio's "Project Info")
- **SMS Server Password:** Twilio Auth Token (Found under your Twilio's "Project Info")
- **SMS Server Callback Secret:** Generate a new, random GUID

Pro Tip: Use a [GUID Generator](#) to quickly generate a random value.

Add Outbound SMS Numbers

One record must be created in the Platform for each active phone number on your [Twilio Account](#). Navigate to Communications > Outbound SMS Numbers and select new:

- **Number Title:** a friendly name to describe this phone number
- **SMS Number:** phone number or short code used to send the SMS message
- **Active:** indicates whether this number is current
- **Default:** indicates the primary SMS number. The number that will appear pre-selected in the New Message Tool as the "From SMS Number"

Where do I start?

Selecting Recipients

1. WHO should get this message?
2. What RECORDS dictate who get this message?
3. How are the RECIPIENTS related to those records?



Selected Message Recipient Cheat Sheet

Email + Text: Reach and Engage Your Audience
Heather Haremski
MPUG 2021

1. WHO should get this message?

In non-MP terms, who needs the message?

Ex: Email parents of all current elementary schoolers

2. What RECORDS dictate who get this message?

If you were going to review these recipients, where would you go?

Ex: Elementary Age/Grade Groups

Consider:

- How many records- can I search manually and select?
- Do I need a View to select these records?
- Can the Trim Selection Tool help?

Populate by:

- Select records then launch New Message Tool- any criteria, existing selection or large numbers
- Search in New Message Tool's "TO" field- Just a few records
- Search in New Message Tool's "TO" Picklist- any criteria, existing selection or large numbers SAME as selecting records then launching

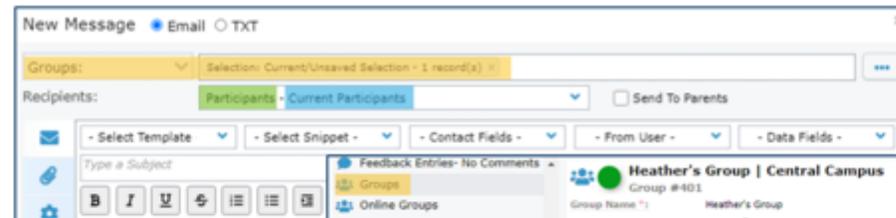
3. How are RECIPIENTS related to those RECORDS?

How do you access the recipients from the record?

Ex: Head of Households of Current Participant Group Participants

Consider: Is the recipient a field on the selected record?

- If yes, use "Contacts associated with [records]"
- If no, you will select a sub-page. Do you need a View?



WHO should get this message?

In non-MP terms, what people need the message?

Parents of elementary schoolers

All active single women 18 and over

First time donors from the last month



What RECORDS dictate who get this message?

If you were going to review these recipients, where would you go?

Parents of elementary schoolers- **Groups**

All active single women 18+ - **Contacts**

First time donors from the last month
- **Donors**



How are the RECIPIENTS related to those records?

How do you access the *recipients* from the record?

Parents of elementary schoolers- Groups
Head of Households of Group Participants

All active single women 18+ - Contacts
Contact based on filter

First time donors from the last month- Donors
Donors based on filter



Record Selection

What RECORDS dictate who get this message?

Recipient List

How are RECIPIENTS related to those RECORDS?

New Message Email TXT

Contacts:

Recipients: Send To Parents

Type a Subject

B *I* U

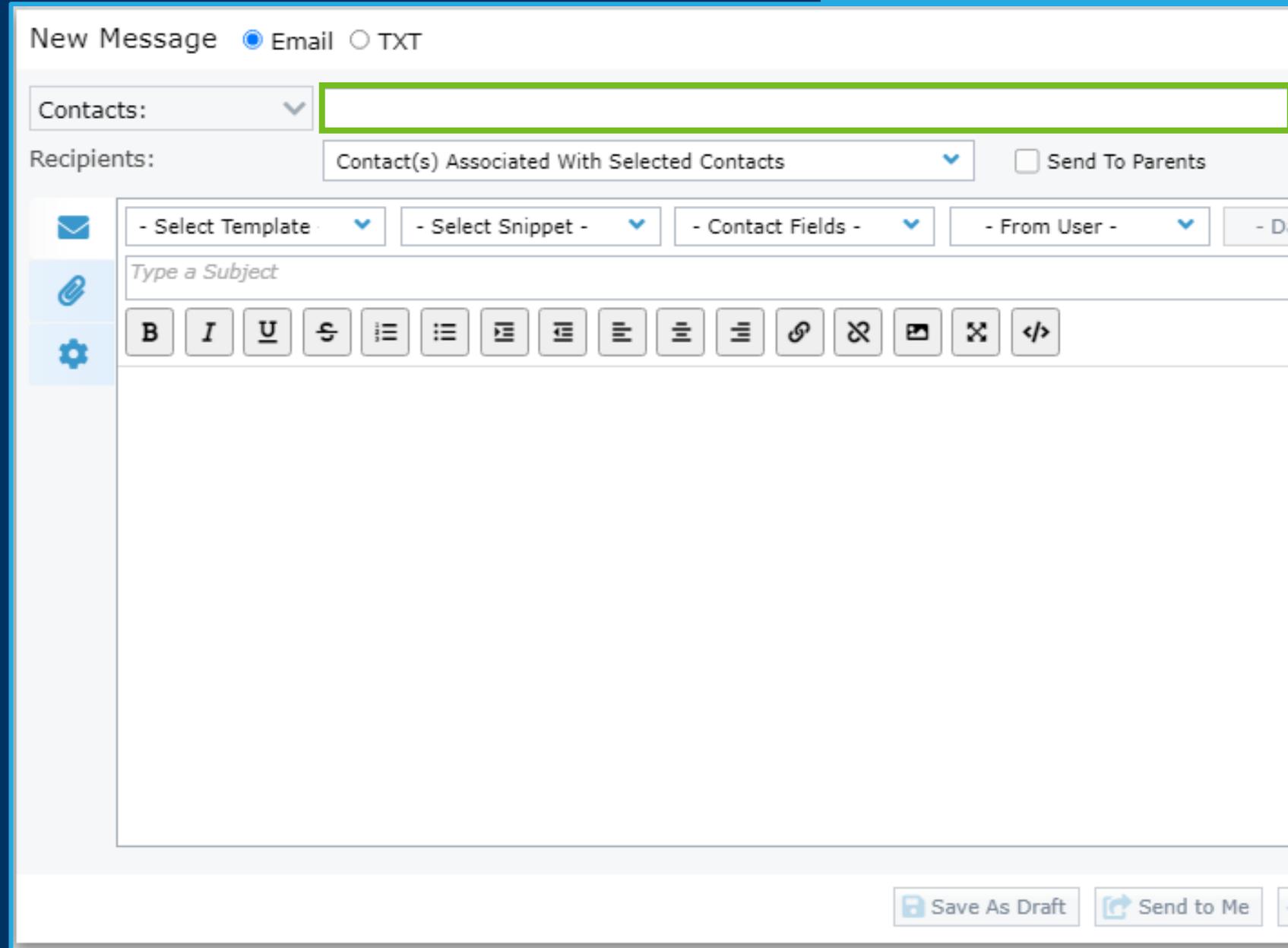
Record Selection



What RECORDS dictate who get this message?

Consider:

- How many records- can I search manually and select?
- Do I need a View to select these records?
- Can the Trim Selection Tool help?



Record Selection- What RECORDS dictate who get this message?

Select on Page then Open Tool

The screenshot shows a software interface with a toolbar at the top containing buttons for Assign, Delete, Export, Secure, Tools, Reports, Grid, Print, and Refresh. Below the toolbar is a search bar and a dropdown menu with 'New Message' selected. A table of records is displayed below, with checkboxes in the first column. The table has columns for Display Name, Nickname, First Name, Contact Status, Participant Typ..., Home Phone, Mobile Phone, Address Line 1, and City.

<input checked="" type="checkbox"/>	Display Name	Nickname	First Name	Contact Status	Participant Typ...	Home Phone	Mobile Phone	Address Line 1	City
<input checked="" type="checkbox"/>	Haremski, Heat...	Heather	Heather	Active	Attendee		989-600-1466		
<input checked="" type="checkbox"/>	Haremski, Kaleb	Kaleb	Kaleb	Active	Attendee				

Picklist

Search in Record Selection Field

The screenshot shows a 'New Message' dialog box with 'Email' selected. The 'Contacts' dropdown is set to 'Haremski'. The 'Recipients' field shows a list of contacts, with 'Haremski, Heather | heather@thinkministry.com' selected. There are buttons for 'Send', 'Select Template', 'Select Snippet', 'Contact Fields', and 'From User'. A subject line is also present.

The screenshot shows a 'Contact' picklist dialog box with a search bar and a dropdown menu set to 'in View'. A table of records is displayed below, with checkboxes in the first column. The table has columns for Display Name, Nickname, First Name, Contact Status, Congregation ..., Home Phone, Mobile Phone, and Email Address. A status bar at the bottom indicates '5231 results found in "All Individuals" view' and '0 selected'. There are buttons for 'Confirm Selection' and 'Cancel'.

<input type="checkbox"/>	Display Name	Nickname	First Name	Contact Status	Congregation ...	Home Phone	Mobile Phone	Email Address
<input type="checkbox"/>	***Default, Con...	Contact	Contact	Active	Churchwide @ A...		678-404-2678	support@mir...
<input type="checkbox"/>	***Default Prais...	***Default Prais...	Central	Active	Central Campus			
<input type="checkbox"/>	***Default Pray...	***Default Pray...	Central	Active	Central Campus			
<input type="checkbox"/>	***Scholarship,...	Contact	Contact	Active	Demo Church Fr...			
<input type="checkbox"/>	***Unassigned,...	Contact	Contact	Active	Central Campus		770-401-7867	care@cmsco...
<input type="checkbox"/>	08242015-327, ...	Newuser	Newuser	Active	Central Campus		555-555-1234	
<input type="checkbox"/>	08242015-403, ...	Newuser	Newuser	Inactive	Central Campus			musicdemo@...
<input type="checkbox"/>	08242015-420, ...	Newuser	Newuser	Deceased				
<input type="checkbox"/>	08312015-820, ...	Newuser	Newuser	Inactive	Central Campus		555-555-1234	musicdemo@...
<input type="checkbox"/>	08312015-820, ...	Newuser	Newuser	Inactive	Central Campus			musicdemo@...
<input type="checkbox"/>	08322015-332, ...	Newuser	Newuser	Inactive	Central Campus			musicdemo@...

1. WHO should get this message?

“Email parents of all current elementary schoolers”

2. What RECORDS dictate who get this message?

Elementary Age/Grade Groups



2. What RECORDS dictate who get this message?

Elementary Age/Grade Groups

How should I select my Groups?

- Select Age/Grade Groups Manually
- View on the Groups page for Current Age/Grade Groups



Recipient List



How are RECIPIENTS related to those RECORDS?

Consider: Is the recipient a contact field on the selected record?

- If yes, use Contacts associated with [records]
- If no, you will select a sub-page. Do you need a View?

New Message Email TXT

Contacts:

Recipients: **Contact(s) Associated With Selected Contacts** Send To Parents

Type a Subject

B **I** **U**

.Grade 03 | Churchwide @ Activities
Group #20

Group Name *:	.Grade 03
Group Type *:	Age or Grade Group ↗
Ministry *:	Children ↗
Congregation *:	Churchwide @ Activities ↗
Primary Contact *:	Vincent, Traci traci@ministryplatform.com ↗
Description:	
Start Date *:	7/1/2010 12:00 AM ET
End Date:	

New Message Email TXT

Groups: Selection: Current/Unsaved Selection - 1 record(s) x

Recipients: Please select recipient list Send To Parents

Please select recipient list

- Contact(s) Associated With Selected Groups
- Inquiries - Current Inquiries
- Participants - Current Participants
- Participants - Future Participants
- Participants - Past Participants

- Select Template

Type a Subject

B *I* U

- From User - - Data Fields -

Heather's Group | Central Campus
Group #401

Group Name *: Heather's Group
Group Type *: Class

Participants | Inquiries | Events | Opportunities | Programs | Sub Groups | Attributes

New + Add Delete Grid Refresh

in View Current Participants Notify

Selection: All Records

		Display Name	Role Title	Start Date	End Date
<input type="checkbox"/>	Link	Aardvark, Aard...	Class Member	24/2019 12:0...	
<input type="checkbox"/>	Link	Aardvark, Aardy...	Class Member	24/2019 12:0...	
<input type="checkbox"/>	Link	Aardvark, Grand...	Class Member	2/24/2019 12:0...	
<input type="checkbox"/>	Link	Abbott, Arthur	Class Member	2/24/2019 12:0...	
<input type="checkbox"/>	Link	Eames, Angie	Class Member	7/15/2020 10:0...	

1. WHO should get this message?

“Email parents of all current elementary schoolers”

2. What RECORDS dictate who get this message?

Elementary Age/Grade Groups

3. How are the RECIPIENTS related to those records?

Current, Group Participants’ Heads of Household



On **Sunday** afternoon please send out an email from me to anyone who made a **salvation decision** or was **baptized** this year, inviting them to the **Next Steps Seminar**.



1. WHO should get this message?

“Anyone who has made a salvation decision or been baptized this year”

2. What RECORDS dictate who get this message?

Milestones- Baptized & Salvation

3. How are the RECIPIENTS related to those records?

Participants from this Year assigned to the Milestones



New Message Email TXT

Milestones: Selection: Current/Unsaved Selection - 2 record(s) x

Recipients: Participants - This Year Send To Parents

You're Invited! Ne: - Select Snippet - - Contact Fields - - From User - - Data Fields -

You're Invited! Next Steps

B *I* U



You're Invited!

Hello [Nickname]

We are so excited about the decision you have made and would like to invite you to join us at our upcoming...

From: Lee, Pastor Bruce

Reply To: Haremski, Heather

Scheduled To Send At: 5/23/2021 2:00 PM

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Locale: English (United States)

Bulk Email: Include recipients who opted out of bulk email

Efficiency Tips

Setting Default Sub-pages and Views

Recipient List Views

  **Current Participants**
Sub Page View #10

View Title *:

Sub Page *:  

Description:

Field List:

View Clause *:

Order By:

User:  

Messaging View *: Yes No

Make sure you have access to the View!

Default Sub-Page and View

- On the Sub Page record set Messaging Default to True
- Set the Default View on the Sub Page
- Make sure the View has Messaging View set to True
- Note: Each Page can only have one default sub-page and default sub-page view. The Default View must have Messaging View set to True

Go forth and send messages!

QUESTIONS?
IDEAS?