

Selected Message Recipient Cheat Sheet

Email + Text: Reach and Engage Your Audience

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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?

The screenshot displays the 'New Message' interface with 'Email' selected. The 'Recipients' dropdown is set to 'Participants - Current Participants'. Below this, there are options for 'Send To Parents', 'Select Template', 'Select Snippet', 'Contact Fields', 'From User', and 'Data Fields'. A sidebar on the left lists various group categories like 'Online Groups', 'Active Groups', 'Events', etc. The main area shows a detailed view for 'Heather's Group | Central Campus' (Group #401), with a 'Participants' tab selected. A table lists group members with columns for 'Display Name', 'Role Title', 'Last Attended', 'Start Date', and 'End Date'.

	Display Name	Role Title	Last Attended	Start Date	End Date
<input type="checkbox"/>	Aardvark, Aard...	Class Member	4/13/2020 7:00...	2/24/2019 12:0...	
<input type="checkbox"/>	Aardvark, Aardy...	Class Member	4/13/2020 7:00...	2/24/2019 12:0...	
<input type="checkbox"/>	Aardvark, Grand...	Class Member		2/24/2019 12:0...	
<input type="checkbox"/>	Abbott, Arthur	Class Member		2/24/2019 12:0...	
<input type="checkbox"/>	Eames, Angie	Class Member		7/15/2020 10:0...	

Add My Sent Messages Filtered Page

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A My Sent Messages Filtered Pages provides your Users a quick access to messages they have sent, so they can see the status of the Recipient records.

You can add this filtered page to your system with these steps:

1. Copy the Messages Page
2. Change the Display Name to My Sent Messages
3. Set the Filter Clause to `Communication_ID_Table.Author_User_ID = dp_UserID OR Contact_ID_Table.User_Account = dp_UserID`
4. Add the Page to the Communications Page Section
5. Add the Page to a Security Role
6. Give the Security Role to your Users

See the KB for more information!

<https://www.ministryplatform.com/kb/ministryplatform/extending-the-platform/pages/filtered-pages>