Set It and Forget It Session

1. Welcome

2. Brief Overview
   a. What is a View?
   Views are, at their essence, a filtered list of records on a Page. In the Platform, views are saved as queries that run against all records. This makes the view dynamic – which means that it immediately reflects the current state of the data when either selected from the list or refreshed.

   b. What is an Item Notification?
      i. An item notification is simply a scheduled email associated with a **View**, **Selection**, or even a **single record**.
      ii. Send to yourself, impersonate another user to set one up for them, send to a user group, send to Results Using a Template
      iii. The email is a snapshot of the information at the moment in time that the notification kicked off – be aware that the reality in the Platform may (or may not) be different by the time you get to it. (10 records)

3. Potential Uses
   a. Monitor Fix Views
   b. Monitor for Default Contact
   c. Identify new Guests
   d. Discover who hasn't checked in for a while
   e. Be aware of Participant Engagement Level movement
   f. Stay aware of database changes
   g. Monitor event registrations / giving and more!

4. When should I use them?
   a. I'm guessing we can all identify with this illustration in one way or another
   b. When you observe or anticipate observing repetition or patterns
      i. Someone is coming to you with the same question every week, month, VBS season
      ii. You're visiting the same views, performing the same column search, etc. frequently
   c. When a situation exists that causes a recurring headache or has the potential to do so

5. Demo: Set up an Item Notification
   a. Overview - *We'll talk through these options:*
      i. Items to Watch
      ii. Deliver To
      iii. Send Notification
      iv. Send Empty Views
   b. Demo
      i. Individual record
      ii. Selection
      iii. View
         1. Begin with the existing views that you find most helpful (Fix views)
         2. Highlight: Results Using Template

     iv. Home screen → Notifications

6. Demo: Create a View
  a. Build your own! (Event Participant Default Contact)
    i. Identify your goal
    ii. Identify the target page and start there
    iii. Pro tip → start small and build incrementally
      1. Event Start Date >= GETDATE() or dp_domainTime
      2. Event Title
      3. Contact ID
        a. = Default Contact ID (2, probably)
        b. Can also mention IN (list, sub-query)
      4. Display Name
    iv. Tweak and add complexity and or SQL in System Setup → Advanced Views
  b. Copy and tweak a standard view
    i. Birthday Next Month → Birthday This Month, for example
      1. Month
      2. Head of Household
      3. Email Address
      4. Opt out?
  c. Contact our Support Team → **Two** free view assists per month (KB link!!)
  d. Hire our Professional Services team

7. Discussion // Q+A

8. Action Items
  a. Check out the KB for more details
    i. https://www.ministryplatform.com/kb/ministryplatform/views
    ii. https://www.ministryplatform.com/kb/ministryplatform/notifications-(views-selections-records)
    iii. Free View Assists → https://www.ministryplatform.com/kb/support-services/professional-services/services/platform-work/free-view-assists
  b. Set up Notifications for Fix Views
  c. Create Views + Notifications to monitor for Default Contacts
  d. Let us know how we can help!

9. Thank you!