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2021

Set It and Forget It

Using Views + Notifications to make automating your world easier and more effective!

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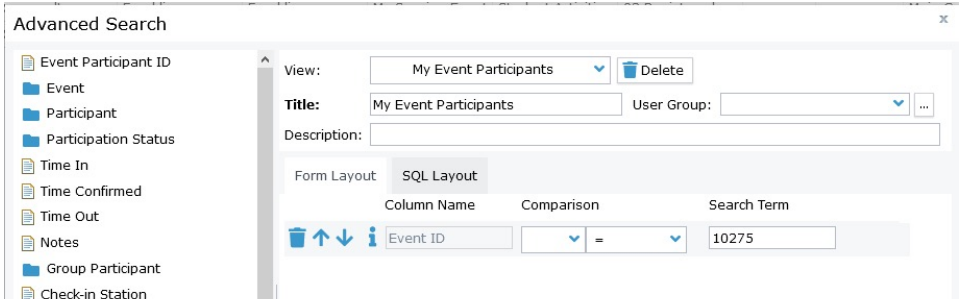
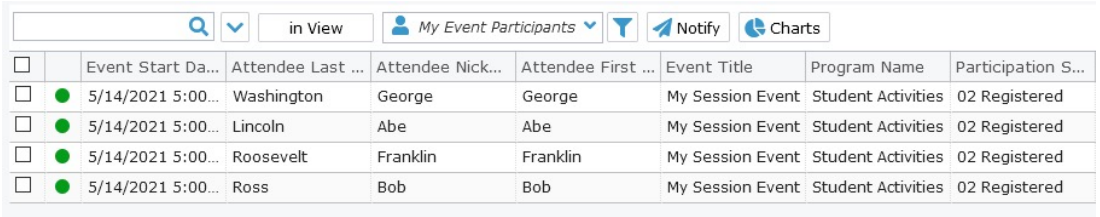
What is a View?

A View is a (sharable) filtered list of records on a Page.





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What is an Item Notification?

An Item Notification is a scheduled email associated with a View, Selection, or even a single record.

Notifications can be set to send to:

- **My User Record**
- **User Group Members**
- **Results Using Template**

[Schedule ID: 127] Platform Notifications: Every week on Monday at 5:43 PM effective 5/10/2021.

4 Results for "My Event Participants" (Event Participants Page)

Event Start Date	Attendee Last Name	Attendee Nickname	Attendee First Name	Event Title	Program Name	Participation Status	Time In	Role Title	Congregation Name	Attending Online
5/14/2021 7:00 PM MT	Washington	George	George	My Session Event	Student Activities	02 Registered			Main Campus	False
5/14/2021 7:00 PM MT	Lincoln	Abe	Abe	My Session Event	Student Activities	02 Registered			Main Campus	False
5/14/2021 7:00 PM MT	Roosevelt	Franklin	Franklin	My Session Event	Student Activities	02 Registered			Main Campus	False
5/14/2021 7:00 PM MT	Ross	Bob	Bob	My Session Event	Student Activities	02 Registered			Main Campus	False

This email was auto-generated according to the view notification schedule configured for your user account. To modify this schedule, please login to MinistryPlatform, navigate to your home page, and edit the schedule from the My Notifications tab.

Potential Uses

- **Monitor Fix Views**
- **Monitor for Default Contact**
- **Identify new Guests**
- **Discover families that haven't checked in for a while**
- **Be aware of Participant Engagement Level movement**
- **Stay aware of database changes**
- **Monitor event registrations, giving, and more!**

When Should I Use Them?

When you encounter or anticipate encountering repetition, patterns, and/or recurring headaches.

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Demo: Set Up a Notification

1. **Items to Watch**
2. **Deliver To**
3. **Send Notification**
4. **Send Empty Views**

Demo: Create a View

- **Build your own**
- **Copy + tweak a standard View**
- **Enlist our Support Team (2 Free View Assists per month)!**
- **Hire our Professional Services Team**

Discussion // Q+A

- **Chat → In your church context, where do you see Views and Notifications being most useful? How have you seen them prove useful in the past?**
- **Q+A → What questions do you have for us?**
- **Perk! Starbucks gift cards ☺**

Action Items

- **Check out the KB for more details (links in the chat)**
- **Set up Notifications for the Fix Views**
- **Create Views + Notifications to monitor for Default Contact**
- **Let us know how we can help!**

THANK YOU!

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