



Communications

Identify and Build
Your Audience



MinistryPlatform CONFIGURATIONS may vary



Reach out to your SPoC/database admin
with any questions or concerns

On the Docket Today

- **Views:** Find the people you want to communicate with
- **Selections:** Create actionable lists to transfer and share
- **Publications:** Communicate with targeted audiences
- **One Click Opt-Out Links:** Let your people say “No Thank You” to receiving messages
- **But not** creating or sending your message because that’s covered in Communications 01!





Views: Advanced Search Tool

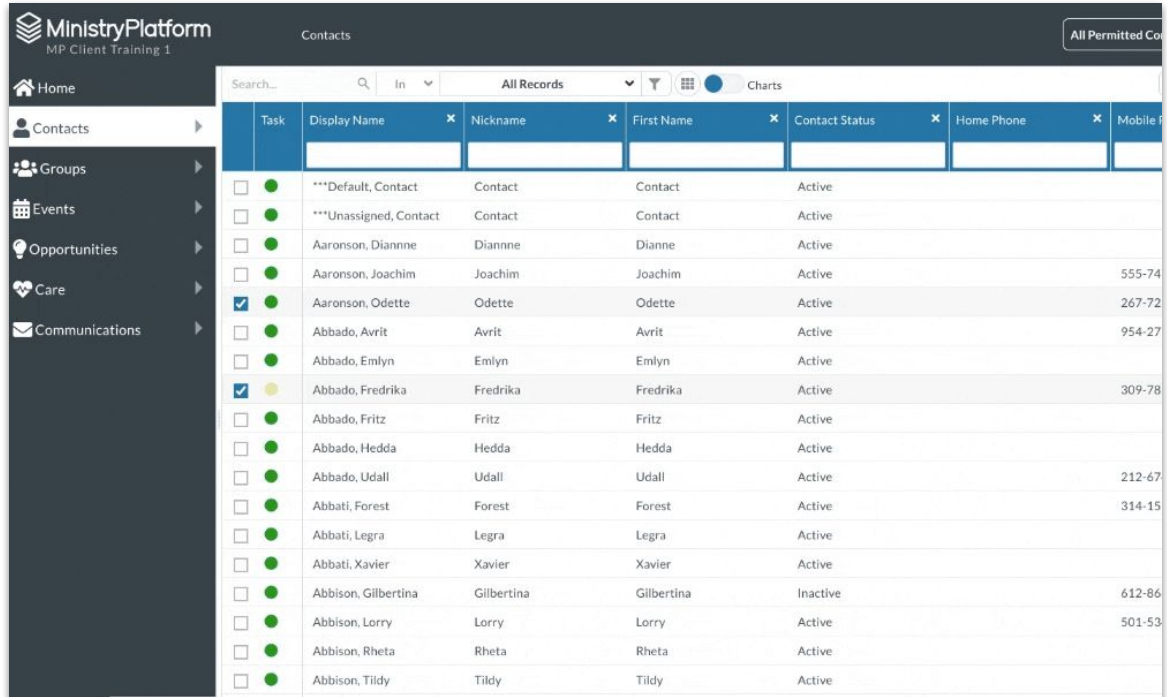


Why Use Views

- Quickly find your intended audience
- Dynamic—Views are always show you current information
- Build the view once and come back to it when you need to reach that same audience (but not necessarily the same people)
- Views can be used on any page **or** subpage
- Use views to create your selection to send your message
- Build views for ...
 - Yourself!
 - Your ministry via User Groups!
 - Your entire staff via System Views!
 - Other individual users!

Launch the Tool

- From any page
- From any subpage
- Select an existing view
- Edit an existing view
- Create a new view



MinistryPlatform
MP Client Training 1

Contacts

All Permitted Co

Home

Contacts

Groups

Events

Opportunities

Care

Communications

Search...

In

All Records

Charts

Task	Display Name	Nickname	First Name	Contact Status	Home Phone	Mobile P
<input type="checkbox"/>	***Default, Contact	Contact	Contact	Active		
<input type="checkbox"/>	***Unassigned, Contact	Contact	Contact	Active		
<input type="checkbox"/>	Aaronson, Dianne	Dianne	Dianne	Active		
<input type="checkbox"/>	Aaronson, Joachim	Joachim	Joachim	Active		555-74
<input checked="" type="checkbox"/>	Aaronson, Odette	Odette	Odette	Active		267-72
<input type="checkbox"/>	Abbado, Avrit	Avrit	Avrit	Active		954-27
<input type="checkbox"/>	Abbado, Emlyn	Emlyn	Emlyn	Active		
<input checked="" type="checkbox"/>	Abbado, Fredrika	Fredrika	Fredrika	Active		309-78
<input type="checkbox"/>	Abbado, Fritz	Fritz	Fritz	Active		
<input type="checkbox"/>	Abbado, Hedda	Hedda	Hedda	Active		
<input type="checkbox"/>	Abbado, Udall	Udall	Udall	Active		212-67
<input type="checkbox"/>	Abbate, Forest	Forest	Forest	Active		314-15
<input type="checkbox"/>	Abbate, Legra	Legra	Legra	Active		
<input type="checkbox"/>	Abbate, Xavier	Xavier	Xavier	Active		
<input type="checkbox"/>	Abbison, Gilbertina	Gilbertina	Gilbertina	Inactive		612-86
<input type="checkbox"/>	Abbison, Lorry	Lorry	Lorry	Active		501-53
<input type="checkbox"/>	Abbison, Rheta	Rheta	Rheta	Active		
<input type="checkbox"/>	Abbison, Tildy	Tildy	Tildy	Active		

Let's Take a Tour

SELECT A VIEW

- Leave as New View to create a new view
- Select an existing view to edit or copy
- Tap the copy icon to copy an existing view
- Delete a view you created

Views ▾

Select view: ▾

Title: User Group: ▾

Description: System View

Contact ID
 Company
 Company Name
 Display Name
 Prefix
 First Name
 Middle Name
 Last Name
 Suffix
 Nickname
 Date of Birth
 Gender
 Marital Status
 Contact Status
 Household
 Household Position
 Ann
 Dat
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 Mol

Form Layout | **SQL Layout**

Column Name	Comparison	Search Term
Drag & Drop fields in this space Click the field you want from the column on the left, then drop it here to define the search parameters.		

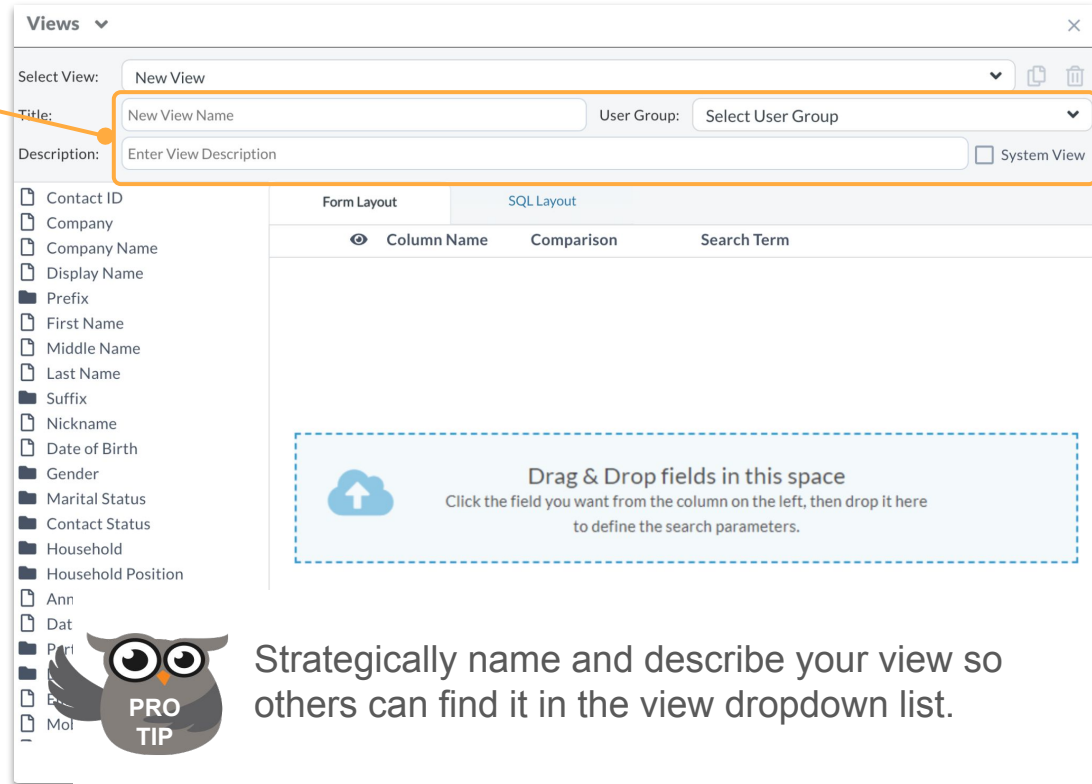
PRO TIP

You can only edit or delete views you've made using the Advanced Search Tool

Let's Take a Tour

VIEW INFO

- **Title:** Required
- **User Group:** Share your view with a group of people with a group of people
- **Description:** Shows in view dropdown list
- **System View:** Share your view with your entire staff



The screenshot shows the 'Views' configuration window. The 'Title' field is highlighted with an orange box and a line pointing to the 'VIEW INFO' header. The 'Description' field is also highlighted. Below the form is a list of fields on the left and a 'Form Layout' table on the right. A 'PRO TIP' owl icon is at the bottom left of the screenshot.

Column Name	Comparison	Search Term
Drag & Drop fields in this space Click the field you want from the column on the left, then drop it here to define the search parameters.		

Strategically name and describe your view so others can find it in the view dropdown list.

Let's Take a Tour

FIELD LIST

- Fields (columns) available on the page or subpage you launched the tool from
- Double click or drag and drop the field name to include it in your view
- Tap the folder icons to see additional available fields

The screenshot shows the 'Views' configuration window. At the top, there are fields for 'Select View: New View', 'Title: New View Name', 'User Group: Select User Group', and 'Description: Enter View Description'. Below these are tabs for 'Form Layout' and 'SQL Layout'. The 'Form Layout' tab is active, showing a table with columns 'Column Name', 'Comparison', and 'Search Term'. A dashed blue box highlights the main area of the table with the text: 'Drag & Drop fields in this space. Click the field you want from the column on the left, then drop it here to define the search parameters.'

PRO TIP

Fields (columns) are listed in the same order they appear on the page (or subpage).

Let's Take a Tour

FORM LAYOUT

- Add comparison values to filter your columns
- Comparison options depend on the field type
- Add "OR" comparisons

Column Name	Comparison	Search Term
<input checked="" type="checkbox"/> Display Name	CONTAINS	Smith
<input checked="" type="checkbox"/> Date of Birth	BETWEEN	01/01/1975 and 01/01/1994
<input checked="" type="checkbox"/> Age		
<input checked="" type="checkbox"/> Email Address	NOT NULL	
OR <input checked="" type="checkbox"/> Mobile Phone	NOT NULL	
Add 'OR' condition		
<input checked="" type="checkbox"/> Contact Status ID	IN	1, 3, 4
<input checked="" type="checkbox"/> Bulk Email Opt Out	FALSE	

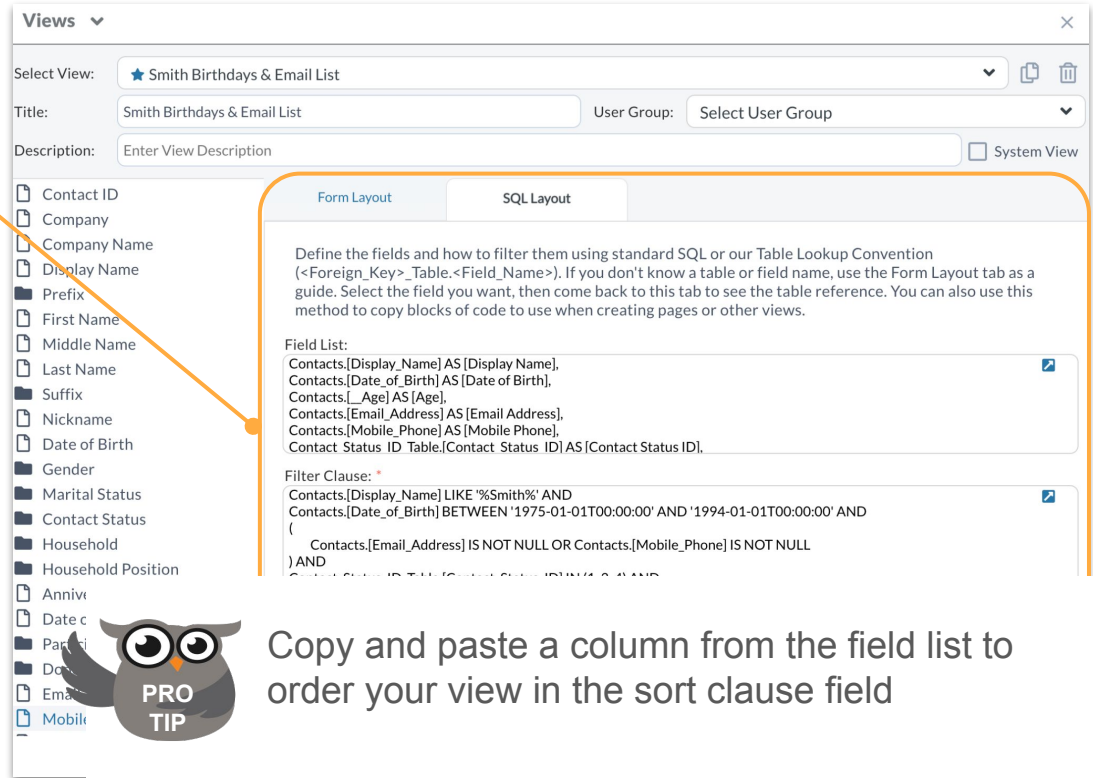
PRO TIP

Add comparison values one at a time to avoid filtering too much too quickly. You can always add more!

Let's Take a Tour

SQL LAYOUT

- Tap the SQL Layout tab to see the SQL code you're writing



Views

Select View: ★ Smith Birthdays & Email List

Title: User Group:

Description: System View

Form Layout | **SQL Layout**

Define the fields and how to filter them using standard SQL or our Table Lookup Convention (<Foreign_Key>_Table.<Field_Name>). If you don't know a table or field name, use the Form Layout tab as a guide. Select the field you want, then come back to this tab to see the table reference. You can also use this method to copy blocks of code to use when creating pages or other views.

Field List:

- `Contacts,[Display_Name] AS [Display Name],`
- `Contacts,[Date_of_Birth] AS [Date of Birth],`
- `Contacts,[_Age] AS [Age],`
- `Contacts,[Email_Address] AS [Email Address],`
- `Contacts,[Mobile_Phone] AS [Mobile Phone],`
- `Contact Status ID Table,[Contact Status ID] AS [Contact Status ID].`

Filter Clause: *

```
Contacts,[Display_Name] LIKE '%Smith%' AND
Contacts,[Date_of_Birth] BETWEEN '1975-01-01T00:00:00' AND '1994-01-01T00:00:00' AND
(
  Contacts,[Email_Address] IS NOT NULL OR Contacts,[Mobile_Phone] IS NOT NULL
) AND
Contact Status ID Table,[Contact Status ID] AS [Contact Status ID]
```

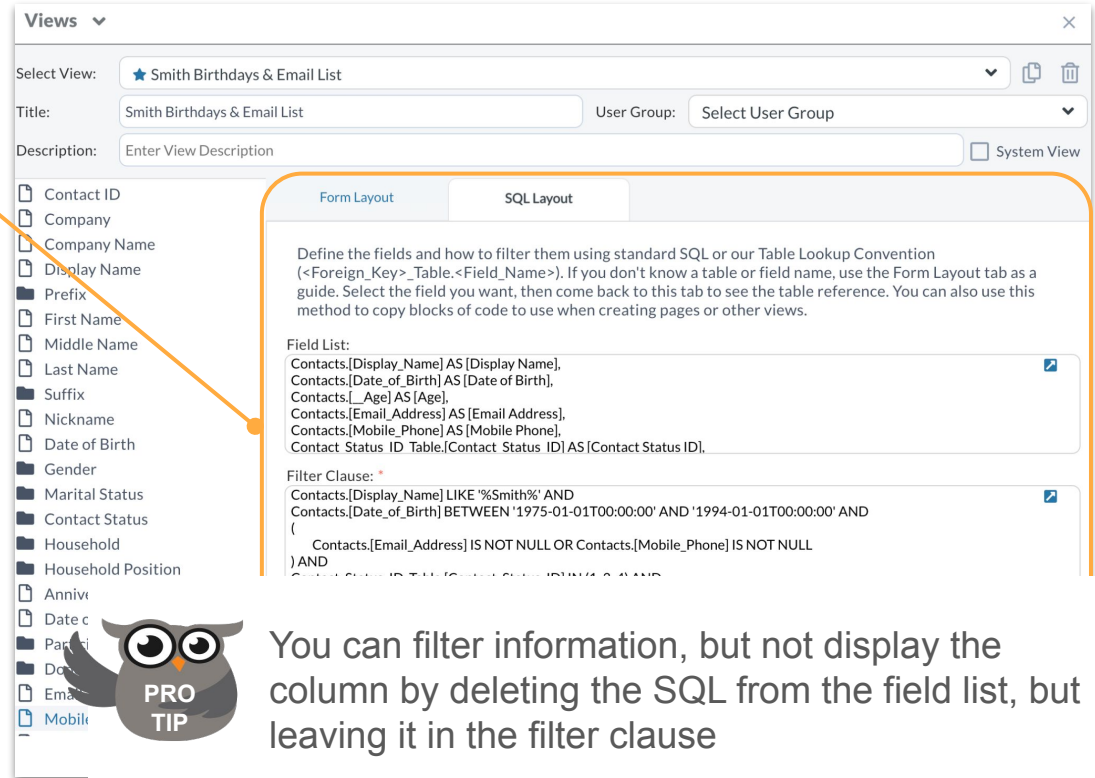
PRO TIP

Copy and paste a column from the field list to order your view in the sort clause field

Let's Take a Tour

SQL LAYOUT

- Tap the SQL Layout tab to see the SQL code you're writing



Views

Select View: **★ Smith Birthdays & Email List**

Title: Smith Birthdays & Email List User Group: Select User Group

Description: Enter View Description System View

Form Layout **SQL Layout**

Define the fields and how to filter them using standard SQL or our Table Lookup Convention (<Foreign_Key>_Table.<Field_Name>). If you don't know a table or field name, use the Form Layout tab as a guide. Select the field you want, then come back to this tab to see the table reference. You can also use this method to copy blocks of code to use when creating pages or other views.

Field List:

- Contacts,[Display_Name] AS [Display Name]
- Contacts,[Date_of_Birth] AS [Date of Birth]
- Contacts,[_Age] AS [Age]
- Contacts,[Email_Address] AS [Email Address]
- Contacts,[Mobile_Phone] AS [Mobile Phone]
- Contact Status ID Table,[Contact Status ID] AS [Contact Status ID]

Filter Clause: *

```
Contacts,[Display_Name] LIKE '%Smith%' AND
Contacts,[Date_of_Birth] BETWEEN '1975-01-01T00:00:00' AND '1994-01-01T00:00:00' AND
(
  Contacts,[Email_Address] IS NOT NULL OR Contacts,[Mobile_Phone] IS NOT NULL
) AND
```

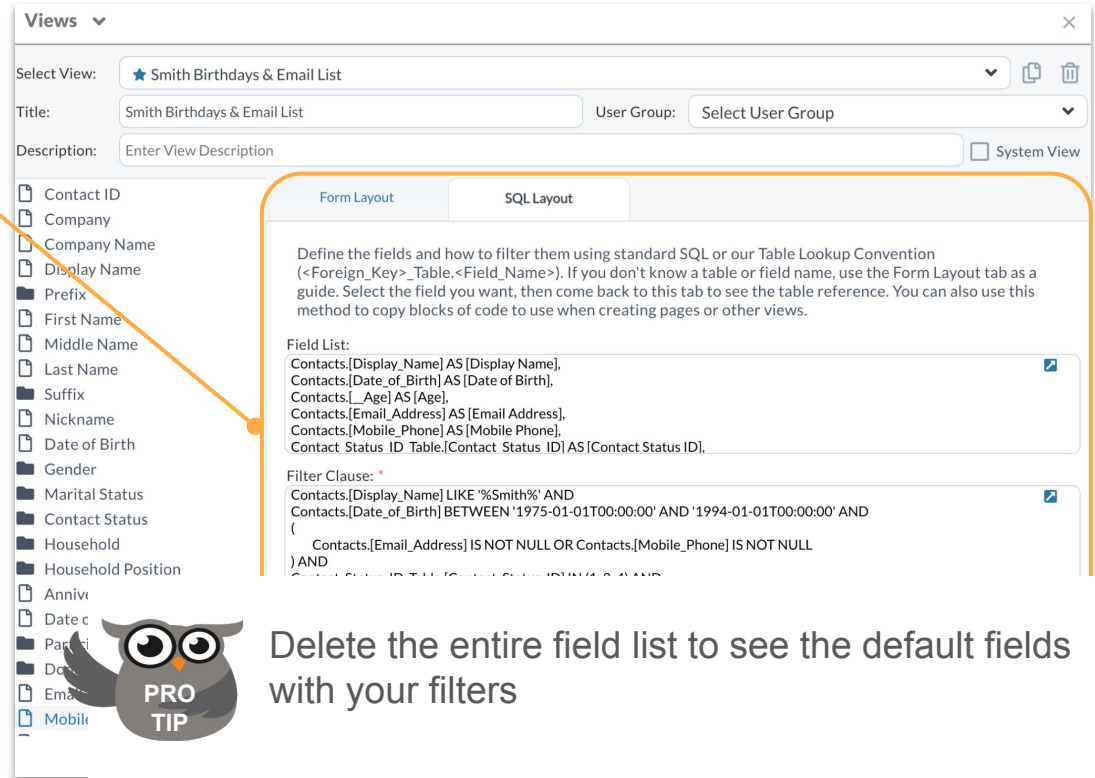
PRO TIP

You can filter information, but not display the column by deleting the SQL from the field list, but leaving it in the filter clause

Let's Take a Tour

SQL LAYOUT

- Tap the SQL Layout tab to see the SQL code you're writing



Views

Select View: **★ Smith Birthdays & Email List**

Title: Smith Birthdays & Email List User Group: Select User Group

Description: Enter View Description System View

Field List:

- Contacts,[Display_Name] AS [Display Name]
- Contacts,[Date_of_Birth] AS [Date of Birth]
- Contacts,[_Age] AS [Age]
- Contacts,[Email_Address] AS [Email Address]
- Contacts,[Mobile_Phone] AS [Mobile Phone]
- Contact Status ID Table,[Contact Status ID] AS [Contact Status ID]

Filter Clause: *

```
Contacts,[Display_Name] LIKE '%Smith%' AND
Contacts,[Date_of_Birth] BETWEEN '1975-01-01T00:00:00' AND '1994-01-01T00:00:00' AND
(
Contacts,[Email_Address] IS NOT NULL OR Contacts,[Mobile_Phone] IS NOT NULL
)AND
Contact Status ID Table,[Contact Status ID] AS [Contact Status ID]
```

PRO TIP

Delete the entire field list to see the default fields with your filters

Let's Take a Tour

SAVE QUERY

- Save the query to see your results.
- If you get an error message, that's fine! Edit your query and try again.
- Review your results
- Check the boxes next to the records to make your selection
 - You can select all
 - You can shift click

Views

Select View: ★ Smith Birthdays & Email List

Title: User Group:

Description: System View

Form Layout | SQL Layout

Define the fields and how to filter them using standard SQL or our Table Lookup Convention (<Foreign_Key>_Table.<Field_Name>). If you don't know a table or field name, use the Form Layout tab as a guide. Select the field you want, then come back to this tab to see the table reference. You can also use this method to copy blocks of code to use when creating pages or other views.

Field List:

- Contacts.[Display_Name] AS [Display Name],
- Contacts.[Date_of_Birth] AS [Date of Birth],
- Contacts.[Age] AS [Age],
- Contacts.[Email_Address] AS [Email Address],
- Contacts.[Mobile_Phone] AS [Mobile Phone],
- Contact Status ID Table.[Contact Status ID] AS [Contact Status ID].

Filter Clause: *

```
Contacts.[Display_Name] LIKE '%Smith%' AND  
Contacts.[Date_of_Birth] BETWEEN '1975-01-01T00:00:00' AND '1994-01-01T00:00:00' AND  
(  
  Contacts.[Email_Address] IS NOT NULL OR Contacts.[Mobile_Phone] IS NOT NULL  
)AND  
Contact Status ID Table.[Contact Status ID] AS [Contact Status ID]
```

Don't be afraid if you get an error message. You can't break the system with a view!

Where Does it Land in MP?

FROM TOOL

Column Name	Comparison	Search Term
Display Name	CONTAINS	Smith
Date of Birth	BETWEEN	01/01/1975 and 01/01/1994
Age		
Email Address	NOT	NULL
Mobile Phone	NOT	NULL
Contact Status ID	IN	1, 3, 4
Bulk Email Opt Out	FALSE	
Do Not Text	FALSE	

TO RECORD

```
View Clause *
Contacts[Display_Name] LIKE 'Smith%' AND
Contacts[Date_of_Birth] BETWEEN '1975-01-01T00:00:00' AND '1994-01-01T00:00:00' AND
Contacts[Email_Address] IS NOT NULL AND
Contact_Status_ID_Table[Contact_Status_ID] IN (1, 3, 4) AND
```

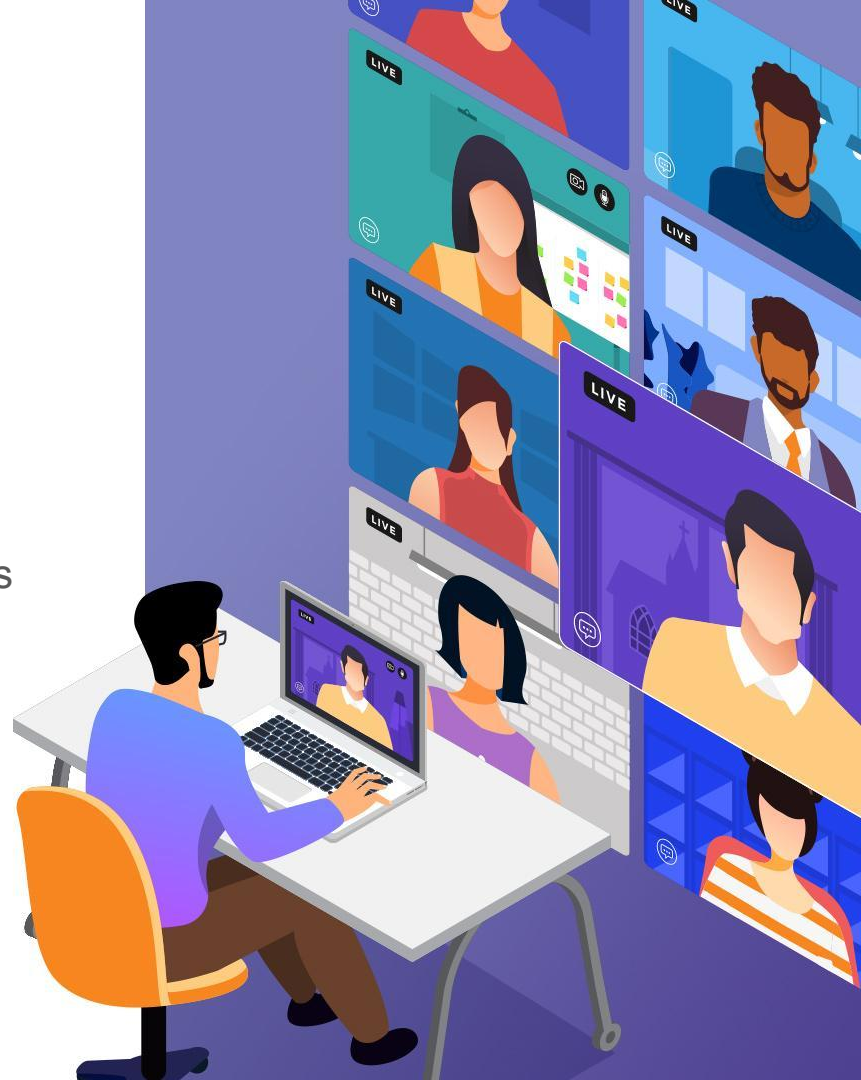


PRO
TIP

You can edit views directly in the page view record. This is a great way to add some fancy SQL parameters!

Helpful Comm Views

- **Contacts:** Birthdays Next Month
- **Households:** Current Households
- **Participants:** Added Last Month
- **Participants:** Not Present > 2 Weeks Ago
- **Groups:** Current Small Groups
 - **Participants Tab:** Current Participants
- **Events**
 - **Participants Tab:** Registered
- **Donors:** Giving this Year
- **Donors:** Major Donors Past 2 Weeks



Tips & Tricks

- Views are page specific, so consider your target audience when deciding where to start your view.
- Start small! Add one filter clause, check your view and then add another.
- Use “Or” filters to filter on two options.
- Consider a “View for Building Message Selection” view to quickly pull bulk email audiences for your entire congregation or just a segment of your congregation.
- Don't be scared of SQL. I promise it's mainly copy/paste ;).



Trim Selection Tool



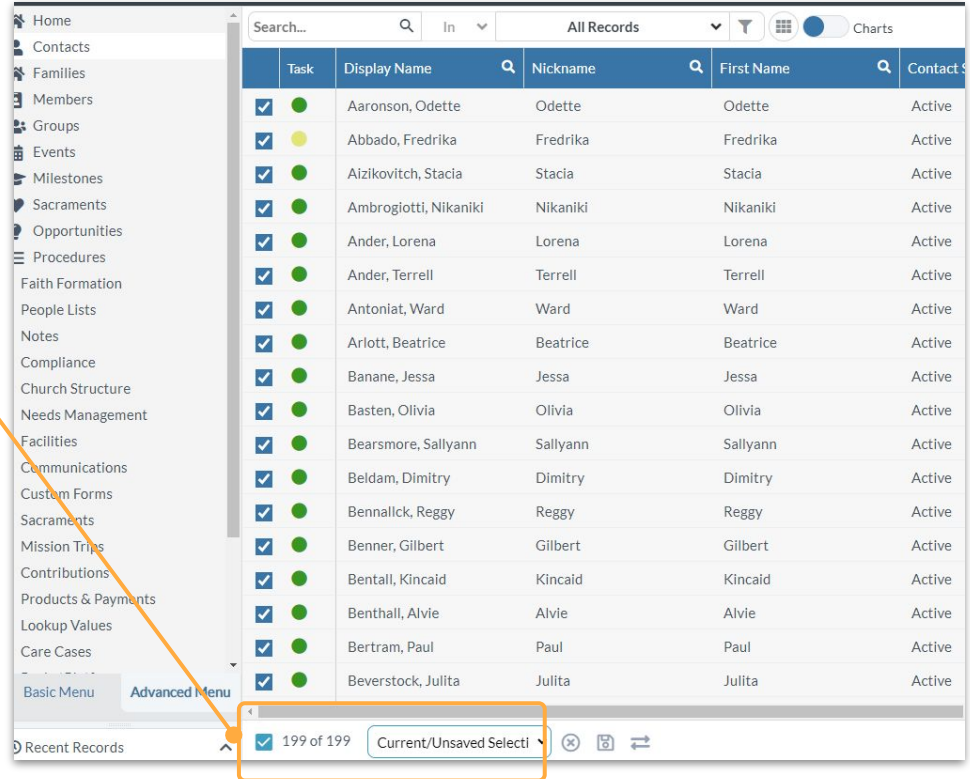
Why Use Trim Selection Tool

- Narrow your selection to your target audience
- No need to edit/create a view
- One place, many options
- It's easy

Let's Take a Tour

SELECTION

- Use views, groups, events to find your selection and mark them
- Be sure the count make sense
- In dropdown change to current/unsaved selection
- Click to save if you would like to name the selection to keep



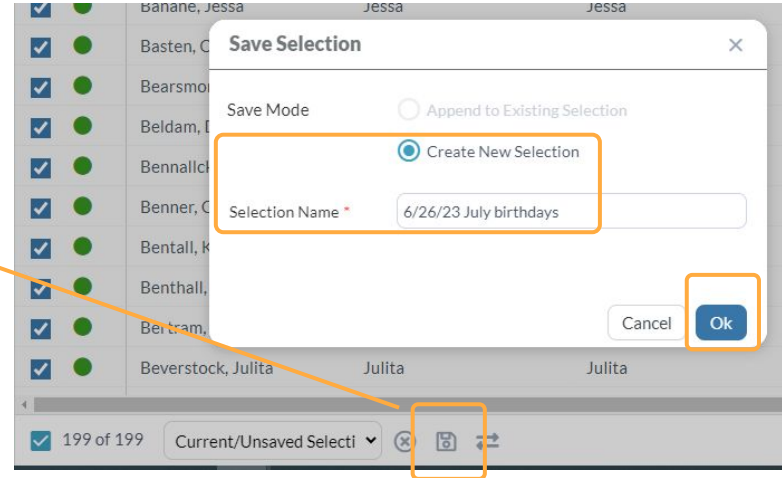
The screenshot displays the MinistrySmart interface. On the left is a navigation menu with categories like Home, Contacts, Families, Members, Groups, Events, Milestones, Sacraments, Opportunities, Procedures, Faith Formation, People Lists, Notes, Compliance, Church Structure, Needs Management, Facilities, Communications, Custom Forms, Sacraments, Mission Trips, Contributions, Products & Payments, Lookup Values, and Care Cases. The main area shows a table of records with columns: Task, Display Name, Nickname, First Name, and Contact. The table contains 19 records, each with a checked checkbox and a green status indicator. At the bottom, a dropdown menu is open, showing '199 of 199' and 'Current/Unsaved Selecti'.

Task	Display Name	Nickname	First Name	Contact
<input checked="" type="checkbox"/>	Aaronson, Odette	Odette	Odette	Active
<input checked="" type="checkbox"/>	Abbado, Fredrika	Fredrika	Fredrika	Active
<input checked="" type="checkbox"/>	Aizikovitch, Stacia	Stacia	Stacia	Active
<input checked="" type="checkbox"/>	Ambrogiotti, Nikaniki	Nikaniki	Nikaniki	Active
<input checked="" type="checkbox"/>	Ander, Lorena	Lorena	Lorena	Active
<input checked="" type="checkbox"/>	Ander, Terrell	Terrell	Terrell	Active
<input checked="" type="checkbox"/>	Antoniat, Ward	Ward	Ward	Active
<input checked="" type="checkbox"/>	Arlott, Beatrice	Beatrice	Beatrice	Active
<input checked="" type="checkbox"/>	Banane, Jessa	Jessa	Jessa	Active
<input checked="" type="checkbox"/>	Basten, Olivia	Olivia	Olivia	Active
<input checked="" type="checkbox"/>	Bearsmore, Sallyann	Sallyann	Sallyann	Active
<input checked="" type="checkbox"/>	Beldam, Dimitry	Dimitry	Dimitry	Active
<input checked="" type="checkbox"/>	Bennalck, Reggy	Reggy	Reggy	Active
<input checked="" type="checkbox"/>	Benner, Gilbert	Gilbert	Gilbert	Active
<input checked="" type="checkbox"/>	Bentall, Kincaid	Kincaid	Kincaid	Active
<input checked="" type="checkbox"/>	Benthall, Alvie	Alvie	Alvie	Active
<input checked="" type="checkbox"/>	Bertram, Paul	Paul	Paul	Active
<input checked="" type="checkbox"/>	Beverstock, Julita	Julita	Julita	Active

Let's Take a Tour

SAVE

- Create new selection
- Enter a name
- Click OK



PRO TIP

Use a naming convention that is consistent, starting with a date so you know when the selection was created. Delete selections when outdated

Launch the Tool

TRIM SELECTION

- Allows you to trim AFTER a selection is made
- Many options are available
- Provides the opportunity to save trimmed records in new selections

harts

	Actions	Tools (16)	Reports (38)
			Certifications
			Combine Contacts
			Connection Card
			Contact Log
			Create Household Care Log
			Create Pledge
			Deceased Person
			Impersonate Portal User
			Inactivate Tool
			Reset User Security
			Split Household
			Transfer Selection
			Trim Selection
			...

Q	Contact Status	Q	Home Phone	Q	Mobile Phone	Q	Address Line 1
	Active				267-725-2292		079 Fuller Street
	Active				309-785-1410		19828 Shelley Cr
	Active				704-640-6802		93679 Transport
	Active				410-336-4841		4679 Golden Leaf
	Active				973-533-9418		49 Kedzie Point
	Active				202-214-4170		49 Kedzie Point
	Active						3 Raven Road
	Active				212-918-6134		63 Hooker Road
	Active				610-252-7085		88 Summer Ridge
	Active				513-827-2134		8 Hayes Hill
	Active				330-593-4373		43 Raven Parkwa
	Active				319-669-6241		83 Karstens Plaza
	Active				570-231-6636		07 Oakridge Pa k

Let's Take a Tour

DEFAULT OPTIONS

- Default options appear darker
- Other options can be activated by selecting the dropdown arrows

The screenshot shows a 'Trim Selection' window with a 'Selected' count of 199. The list includes the following items:

Criteria	Count	Action
Missing Home Phone	197	Remove
Missing Household Address	0	Remove
HH Bulk Mail Opt Out	0	Remove
Congregation	-	Remove
Participant Type	-	Remove
Ministry	-	Remove
Group Type	-	Remove
Group	-	Remove
Group Role Type	-	Remove
Group Role	-	Remove

A 'Close' button is located at the bottom right of the window.

Let's Take a Tour

PARAMETER

- Allows you to trim AFTER a selection is made
- **Parameter-** dropdown options to pick from

Trim Selection

Selected 199

Parameter/Metric	Count	
Contact Status	-	Remove
Marital Status	-	Remove
Gender	-	Remove
Bulk Email Opt Out	0	Remove
Do Not Text	0	Remove
Missing Email Address	69	Remove
Missing Mobile Phone	57	Remove
Age Range	0 - 150	Remove
Household Position	-	Remove

Close

Let's Take a Tour

COUNT

- Allows you to trim AFTER a selection is made
- **Parameter-** dropdown options to pick from
- **Count-** number of records that apply to current selection from the dropdown menu

Trim Selection

Selected 199

Parameter/Metric	Count	
Contact Status	-	Remove
Marital Status	-	Remove
Gender	-	Remove
Bulk Email Opt Out	0	Remove
Do Not Text	0	Remove
Missing Email Address	69	Remove
Missing Mobile Phone	57	Remove
Age Range	199	Remove
Household Position	-	Remove

Close

Let's Take a Tour

REMOVE

- Allows you to trim AFTER a selection is made
- **Parameter-** dropdown options to pick from
- **Count-** number of records that apply to current selection from the dropdown menu
- **Remove-** activates actions

Trim Selection

Selected 199

Parameter/Metric	Count	
Contact Status	-	Remove
Marital Status	-	Remove
Gender	-	Remove
Bulk Email Opt Out	0	Remove
Do Not Text	0	Remove
Missing Email Address	69	Remove
Missing Mobile Phone	57	Remove
Age Range	0 - 150	Remove
Household Position	-	Remove

Close

Let's Take a Tour

REMOVE OPTIONS

- Remove from Selection
- Create Selection without this Record
- Create Selection with ONLY this Record

The screenshot shows the 'Trim Selection' interface. At the top, it indicates 'Selected 199'. Below this is a table with two columns: 'Parameter/Metric' and 'Count'. The table lists several parameters with their respective counts and a 'Remove' button for each. A modal dialog is open, titled 'Select Remove Action', asking 'What do you want to do with (69) record(s)'. The dialog offers three options: 'Remove From Selection', 'Create Selection without this Record(s)', and 'Create Selection with ONLY this Record(s)'. A 'Close' button is also present. An orange line connects the 'REMOVE OPTIONS' header to the modal dialog.

Parameter/Metric	Count	Remove
Contact Status		Remove
Marital Status		Remove
Gender		Remove
Bulk Email Opt Out		Remove
Do Not Text		Remove
Missing Email Address	69	Remove
Missing Mobile Phone	57	Remove

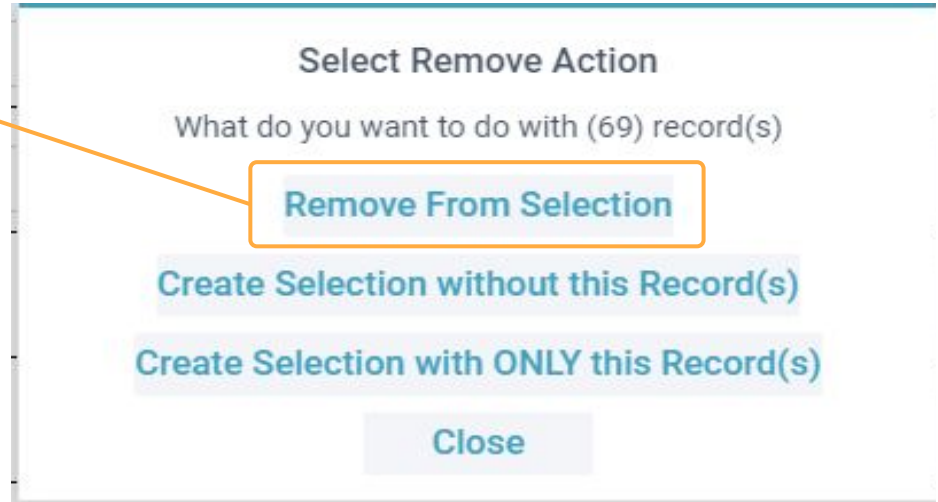


Let's Take a Tour

REMOVE ACTION #1

Remove from Selection

- Go to the parameter
- Select your option from the dropdown
- Click Remove
- Remove from Selection
- Records are removed from the selection
- Refresh in the Platform

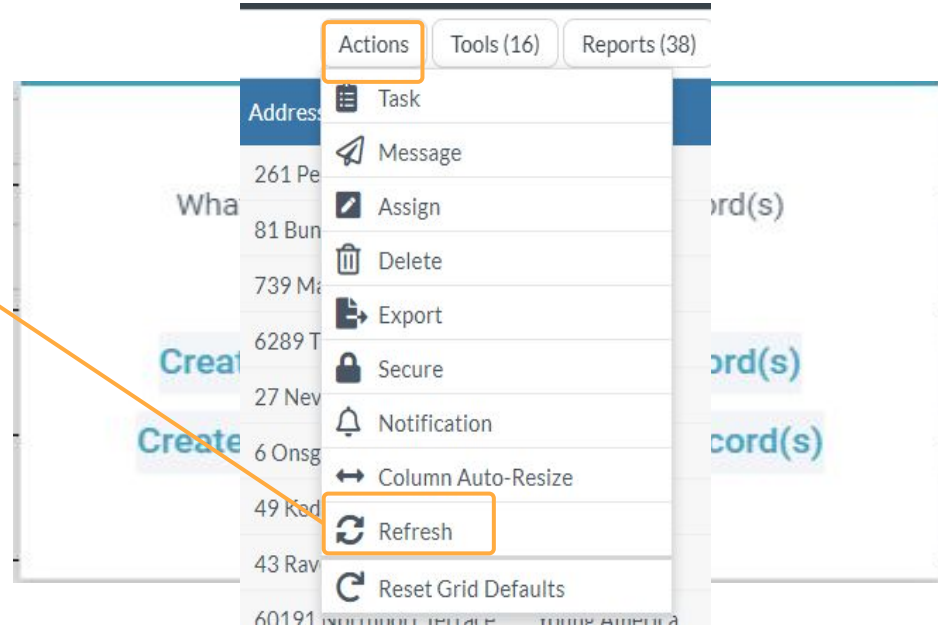


Let's Take a Tour

REFRESH

Remove from Selection

- Go to the parameter
- Select your option from the dropdown
- Click Remove
- Remove from Selection
- Records are removed from the selection
- Refresh in the Platform

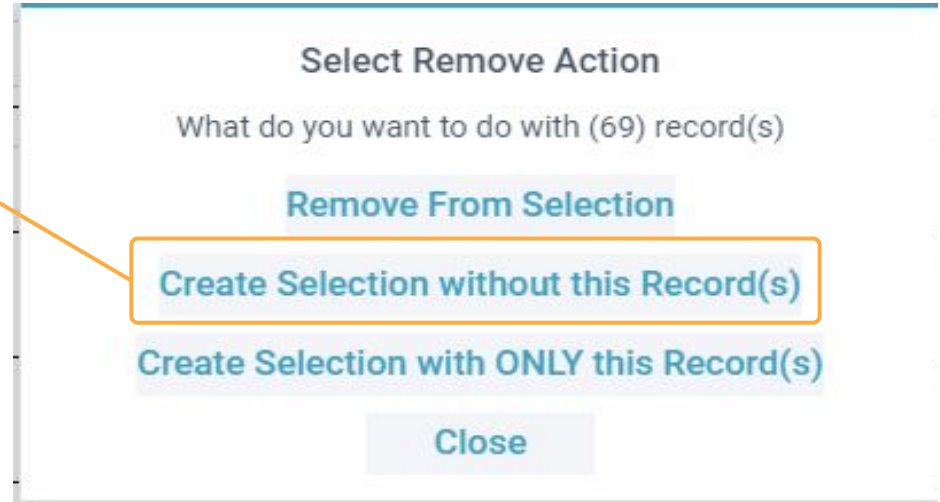


Let's Take a Tour

REMOVE ACTION #2

Create Selection without this Record(s)

- Go to the parameter
- Select your option from the dropdown
- Click Remove
- Create selection without this record(s)

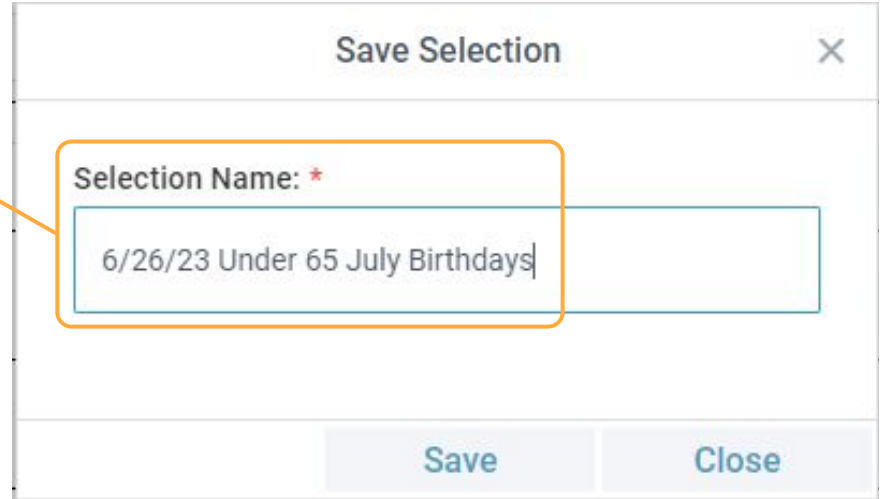


Let's Take a Tour

NAME SELECTION

Create Selection without this Record(s)

- Creates a new named selection containing the trimmed records
- Use your naming convention to identify the date and content of the selection
- Leaves original selection in tact
- Save



Save Selection

Selection Name: *

6/26/23 Under 65 July Birthdays

Save Close

Let's Take a Tour

REMOVE ACTION #3

Create Selection with ONLY this Record(s)

- Go to the parameter
- Select your option from the dropdown
- Click Remove
- Create selection with ONLY this record(s)

Select Remove Action

What do you want to do with (69) record(s)

Remove From Selection

Create Selection without this Record(s)

Create Selection with ONLY this Record(s)

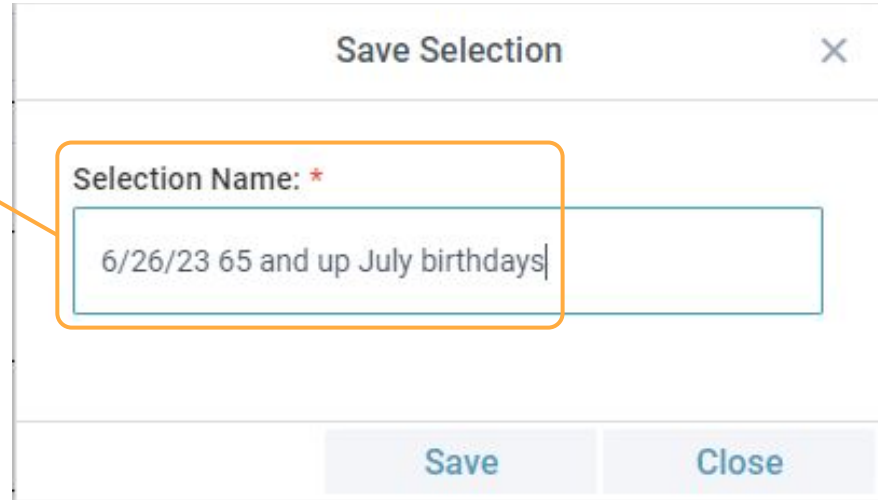
Close

Let's Take a Tour

NAME SELECTION

Create Selection with *ONLY* this Record(s)

- Creates a new named selection containing the trimmed records
- Use your naming convention to identify the date and content of the selection
- Leaves original selection in tact
- Save



Save Selection

Selection Name: *

6/26/23 65 and up July birthdays

Save Close

Pro-Tip



To better communicate with everyone:

- Trim individuals with no email address
- By using the **Create Selection with ONLY this Record** Remove Action
- Name the new selection MM/DD/YY No Email
- Run the Trim Tool again and select **Remove** before sending your email

You will end up with two selections! One to email and another to print labels for the individuals with no email address



Transfer Selection Tool



The Power of the Tool

- Move records to another page (remove duplicates)
- Add a group of records to an existing selection
- Remove a group of records from an existing selection
- Share a selection with another user

Transfer Selection

Selected **10**

[Copy Selection](#) [Append to Selection](#) [Remove from Selection](#)

Target Page * **Selection Name ***

Participants ▾ Best Selection Ever

Include Inactive Contacts

Select Heads Instead

Include Non-Custodial Parents

Create Missing Records

Target User *

Snook, Kaitlyn ✕ 🔍



Launch the Tool

TRANSFER SELECTION

- Create your selection
- Go to Tools
- Transfer Selection

harts

Contact Status	Home Phone	Mobile Phone	Address Line 1
Active		267-725-2292	079 Fuller Street
Active		309-785-1410	19828 Shelley Cr
Active		704-640-6802	93679 Transport
Active		410-336-4841	4679 Golden Leaf
Active		973-533-9418	49 Kedzie Point
Active		202-214-4170	49 Kedzie Point
Active			3 Raven Road
Active		212-918-6134	63 Hooker Road
Active		610-252-7085	88 Summer Ridge
Active		513-827-2134	9 Hayes Hill
Active		330-593-4373	43 Raven Parkva

Actions Tools (16) Reports (38)

- Certifications
- Combine Contacts
- Connection Card
- Contact Log
- Create Household Care Log
- Create Pledge
- Deceased Person
- Impersonate Portal User
- Inactivate Tool
- Reset User Security
- Split Household
- Transfer Selection



Let's Take a Tour

COPY

- Copy a selection from a page or subpage to another page
- Allows you to add additional records
- Removes duplicate records
- Share the selection with another user
- Utilize the trim selection tool

Transfer Selection

Selected **3**

[Copy Selection](#) [Append to Selection](#) [Remove from Selection](#)

Target Page * **Selection Name ***

Include Inactive Contacts

Select Heads Instead

Target User *

Let's Take a Tour

APPEND

- Create a selection and save it
- Select records that you would like added
- Launch the tool and move to the Append to Selection tab
- Pick the target page of your original selection
- Pick the Target Selection from the dropdown
- Hit Transfer

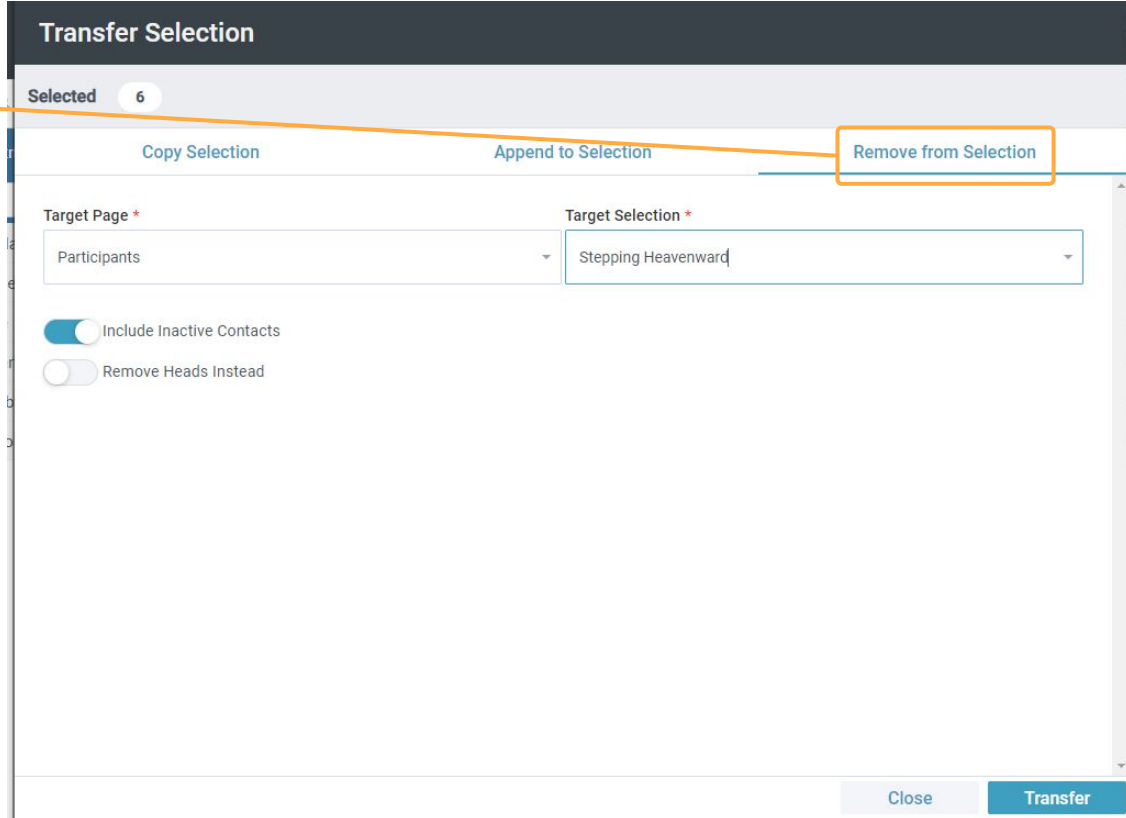


The screenshot shows the "Transfer Selection" dialog box. At the top, it says "Selected 6". Below this are three tabs: "Copy Selection", "Append to Selection" (which is highlighted with an orange box and has an orange arrow pointing from the "APPEND" header), and "Remove from Selection". Under the "Append to Selection" tab, there are two dropdown menus: "Target Page *" with "Participants" selected, and "Target Selection *" with "Stepping Heavenward" selected. Below these are three toggle switches, all of which are currently turned off: "Include Inactive Contacts", "Select Heads Instead", and "Create Missing Records". At the bottom right of the dialog are two buttons: "Close" and "Transfer".

Let's Take a Tour

REMOVE

- Create a selection and save it
- Select records that you would like removed
- Launch the tool and move to the Remove from Selection tab
- Pick the target page of your original selection
- Pick the Target Selection from the dropdown
- Hit Transfer



Transfer Selection

Selected **6**

Copy Selection Append to Selection **Remove from Selection**

Target Page * Target Selection *

Participants Stepping Heavenward

Include Inactive Contacts

Remove Heads Instead

Close Transfer

When it Works Best

- Narrow your selection to your target audience
- Save steps! Send one message to participants in a group as well as a few additional people (some inquirers perhaps?)
- Avoid duplication. Add a list of people to a group but remove those already in the group before adding OR Add a list of people to a publication but remove those already subscribed (and unsubscribed) first
- It's nice to share. :D Create a list for another user and then easily share it so that they can use the list



Publications



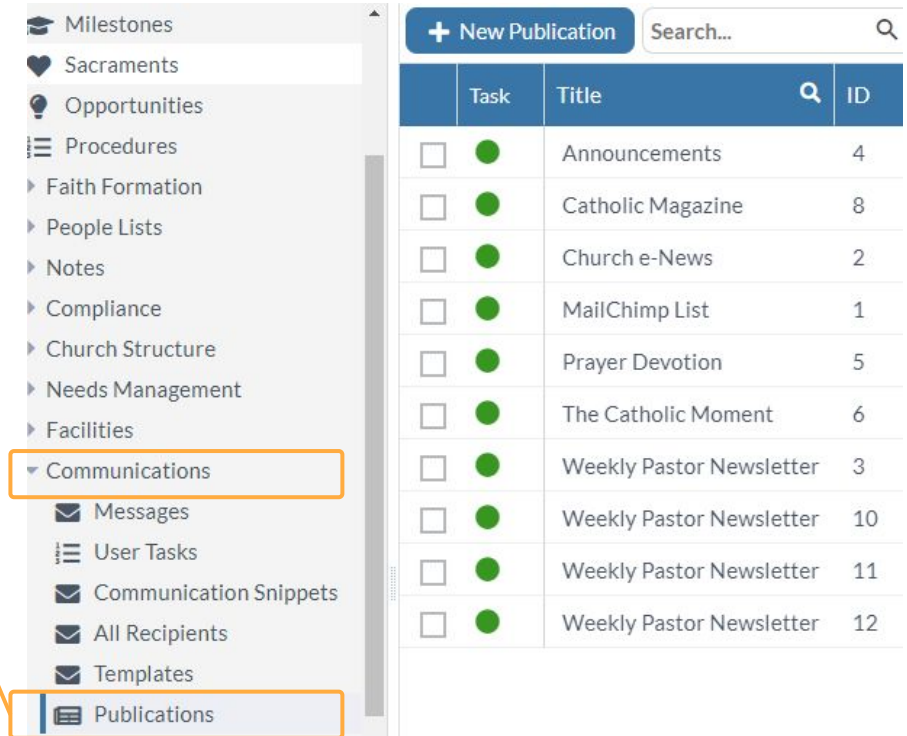
Why Use Publications

- Send emails or texts to a list on a regular basis without having to create new selections
- Use the label reports to print labels for a list of subscribers
- Publications can be visible on the My Subscriptions Widget
- Unauthenticated users can quickly subscribe to a publication using the Subscribe to Publication Widget
- Users can unsubscribe from a Publication using the One-Click Unsubscribe Widget that Erika will be discussing

Let's Take a Tour

PUBLICATIONS

- Create a variety of publications to target different audiences
- Utilize the widgets to allow your membership to subscribe and unsubscribe
- Remember to create templates for ease and consistency



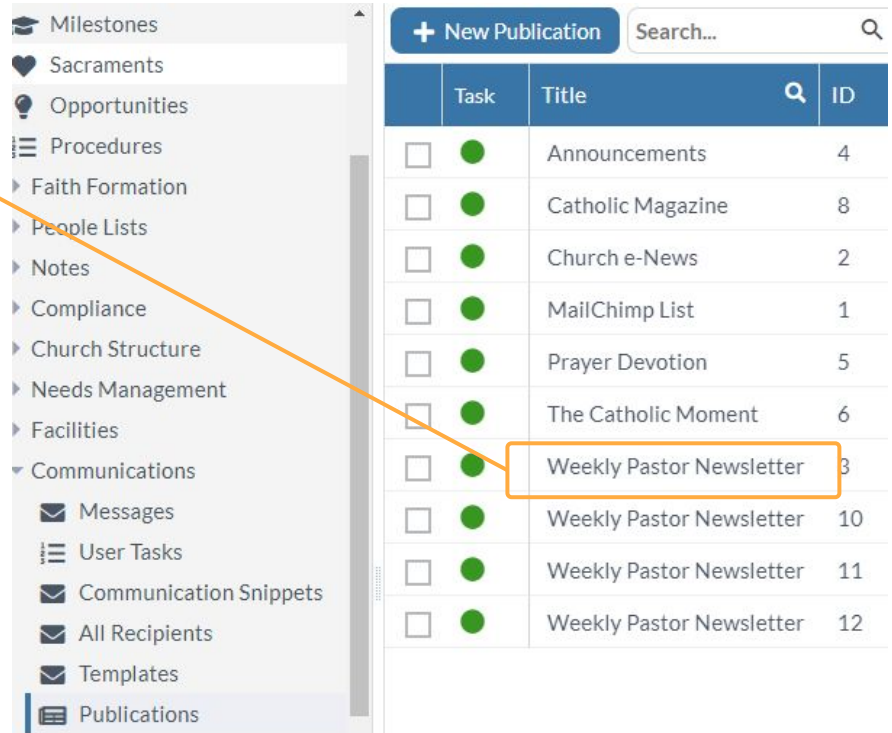
The screenshot displays the MinistrySmart interface. On the left, a navigation menu lists various categories, with 'Publications' highlighted at the bottom. An orange box highlights the 'Publications' item, and another orange box highlights the 'Communications' item above it. On the right, a table lists existing publications. The table has columns for 'Task', 'Title', and 'ID'. A '+ New Publication' button and a search bar are located at the top of the table area.

	Task	Title	ID
<input type="checkbox"/>	●	Announcements	4
<input type="checkbox"/>	●	Catholic Magazine	8
<input type="checkbox"/>	●	Church e-News	2
<input type="checkbox"/>	●	MailChimp List	1
<input type="checkbox"/>	●	Prayer Devotion	5
<input type="checkbox"/>	●	The Catholic Moment	6
<input type="checkbox"/>	●	Weekly Pastor Newsletter	3
<input type="checkbox"/>	●	Weekly Pastor Newsletter	10
<input type="checkbox"/>	●	Weekly Pastor Newsletter	11
<input type="checkbox"/>	●	Weekly Pastor Newsletter	12

Let's Take a Tour

PUBLICATIONS

- Create publications for your weekly email such as Weekly Pastor Newsletter
- These can be congregation/parish specific to target the correct audience and personalize the message from your pastor

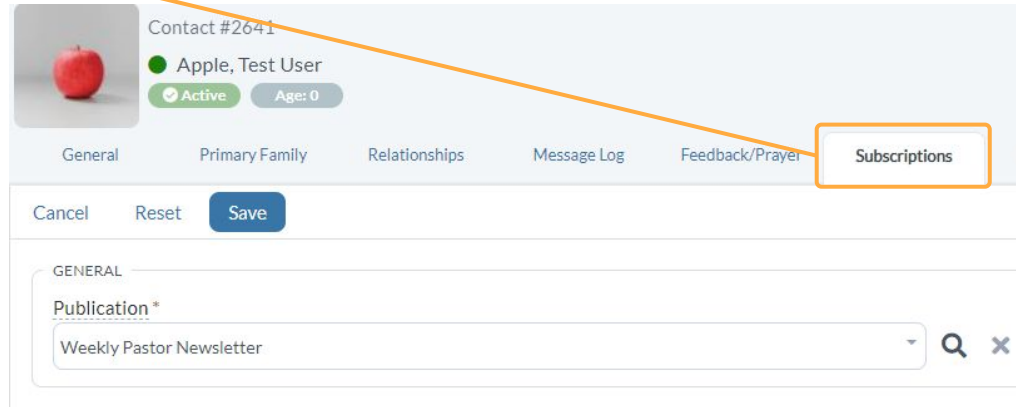


		+ New Publication		Search...	
	Task	Title	🔍	ID	
<input type="checkbox"/>	●	Announcements		4	
<input type="checkbox"/>	●	Catholic Magazine		8	
<input type="checkbox"/>	●	Church e-News		2	
<input type="checkbox"/>	●	MailChimp List		1	
<input type="checkbox"/>	●	Prayer Devotion		5	
<input type="checkbox"/>	●	The Catholic Moment		6	
<input type="checkbox"/>	●	Weekly Pastor Newsletter		3	
<input type="checkbox"/>	●	Weekly Pastor Newsletter		10	
<input type="checkbox"/>	●	Weekly Pastor Newsletter		11	
<input type="checkbox"/>	●	Weekly Pastor Newsletter		12	

Add Individual Subscribers – Option 1

CONTACT RECORD

- On a Contact record, click the Subscriptions tab
- Click the New Subscription button
- Select the desired Publication
- Don't forget to Save!

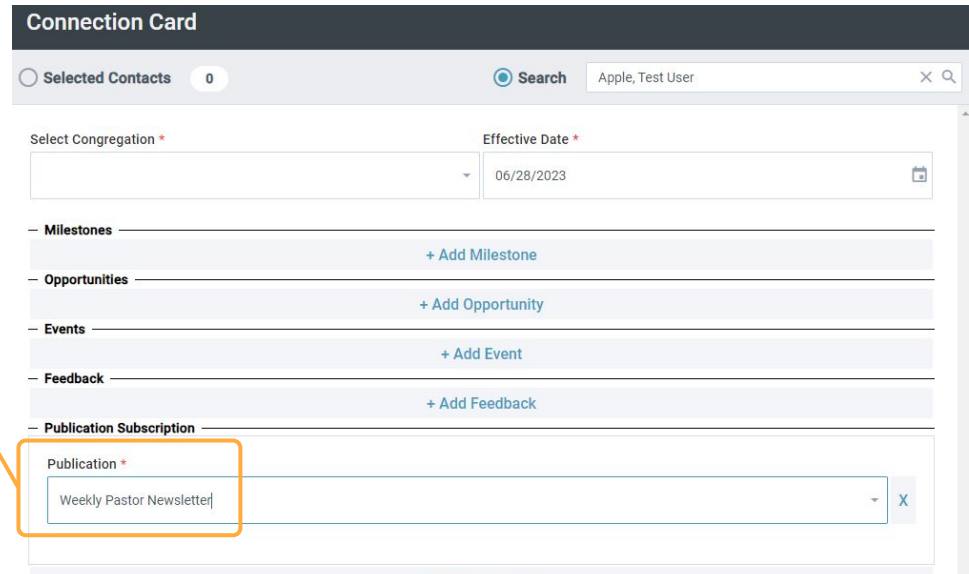


The screenshot displays the MinistrySmart interface for a contact record. At the top, there is a profile card for "Contact #2641" with a red apple profile picture, the name "Apple, Test User", and status "Active" and "Age: 0". Below the profile card are several tabs: "General", "Primary Family", "Relationships", "Message Log", "Feedback/Prayer", and "Subscriptions". The "Subscriptions" tab is highlighted with an orange box. Below the tabs, there are buttons for "Cancel", "Reset", and "Save". Underneath, there is a "GENERAL" section with a "Publication*" dropdown menu. The dropdown menu is open, showing "Weekly Pastor Newsletter" as the selected option. There are search and close icons to the right of the dropdown.

Add Individual Subscribers – Option 2

CONNECTION CARD

- On the Connection Card Tool,
- Select the desired Publication
- Don't forget to Save!



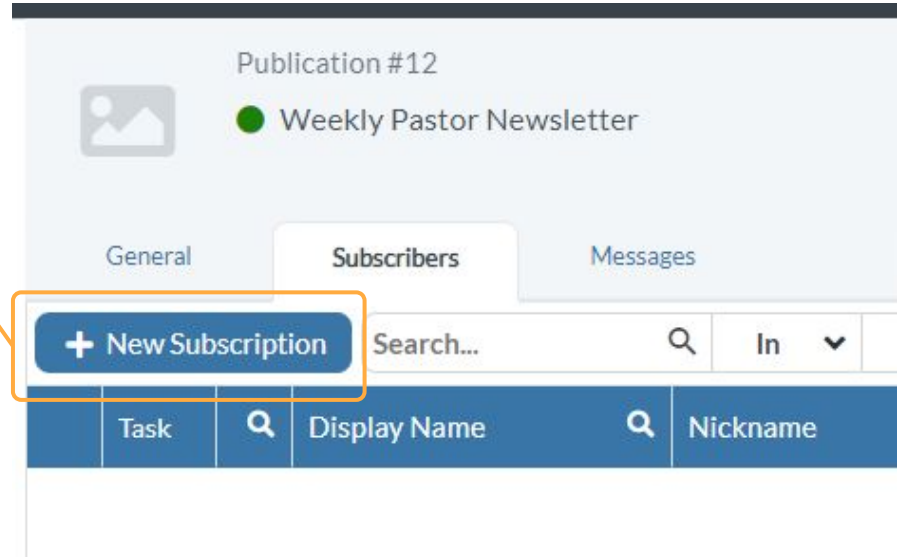
The screenshot shows the 'Connection Card' interface. At the top, there is a search bar with the text 'Apple, Test User'. Below the search bar, there are two dropdown menus: 'Select Congregation *' and 'Effective Date *' (set to 06/28/2023). The interface is divided into several sections, each with a minus sign and a plus sign to add content: 'Milestones' (+ Add Milestone), 'Opportunities' (+ Add Opportunity), 'Events' (+ Add Event), 'Feedback' (+ Add Feedback), and 'Publication Subscription'. The 'Publication Subscription' section is expanded, showing a dropdown menu for 'Publication *' with the selected option 'Weekly Pastor Newsletter' highlighted by an orange box.



Add Individual Subscribers – Option 3

PUBLICATION RECORD

- Open the publication record,
- Add a subscriber using the New Subscription button
- Don't forget to Save!



The screenshot displays the 'Subscribers' tab for 'Publication #12', which is 'Weekly Pastor Newsletter'. The interface includes a search bar, a dropdown menu, and a table with columns for 'Task', 'Display Name', and 'Nickname'. A blue button labeled '+ New Subscription' is highlighted with an orange box, and an orange line connects it to the 'PUBLICATION RECORD' header.

Add Multiple Subscribers

PUBLICATIONS PAGE

- Use a view to create a selection of the target audience on the Contacts page
- Go to the Publications page

The screenshot displays the MinistrySmart interface. On the left, a navigation menu lists various categories, with 'Publications' and 'Communications' highlighted by orange boxes. The main area shows a table of publications. At the top right, there is a '+ New Publication' button and a search bar. The table has columns for 'Task', 'Title', and 'ID'. Each row includes a checkbox in the 'Task' column, a green dot, the publication title, and its ID.

	Task	Title	ID
<input type="checkbox"/>	●	Announcements	4
<input type="checkbox"/>	●	Catholic Magazine	8
<input type="checkbox"/>	●	Church e-News	2
<input type="checkbox"/>	●	MailChimp List	1
<input type="checkbox"/>	●	Prayer Devotion	5
<input type="checkbox"/>	●	The Catholic Moment	6
<input type="checkbox"/>	●	Weekly Pastor Newsletter	3
<input type="checkbox"/>	●	Weekly Pastor Newsletter	10
<input type="checkbox"/>	●	Weekly Pastor Newsletter	11
<input type="checkbox"/>	●	Weekly Pastor Newsletter	12

Add Multiple Subscribers

PUBLICATION

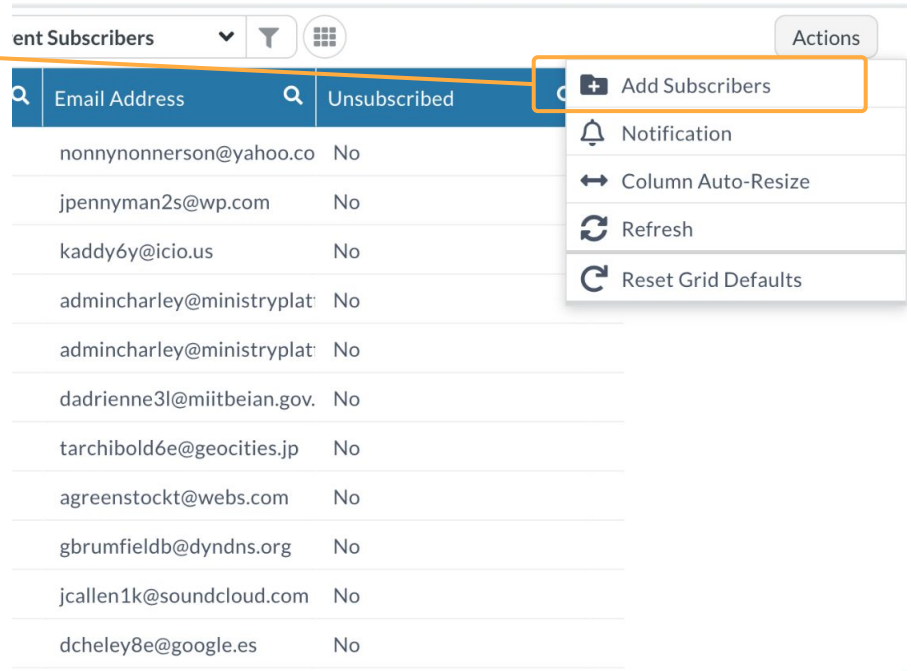
- Use a view to create a selection of the target audience on the Contacts page
- Go to the Publications page
- Open the desired Publication

	Task	Title	ID
<input type="checkbox"/>	●	Announcements	4
<input type="checkbox"/>	●	Catholic Magazine	8
<input type="checkbox"/>	●	Church e-News	2
<input type="checkbox"/>	●	MailChimp List	1
<input type="checkbox"/>	●	Prayer Devotion	5
<input type="checkbox"/>	●	The Catholic Moment	6
<input type="checkbox"/>	●	Weekly Pastor Newsletter	3
<input type="checkbox"/>	●	Weekly Pastor Newsletter	10
<input type="checkbox"/>	●	Weekly Pastor Newsletter	11
<input type="checkbox"/>	●	Weekly Pastor Newsletter	12

Add Multiple Subscribers

ADD SUBSCRIBERS

- Use a view to create a selection of the target audience on the Contacts page
- Go to the Publications page
- Open the desired Publication
- On the Subscribers Tab, click Actions and select +Add Subscribers



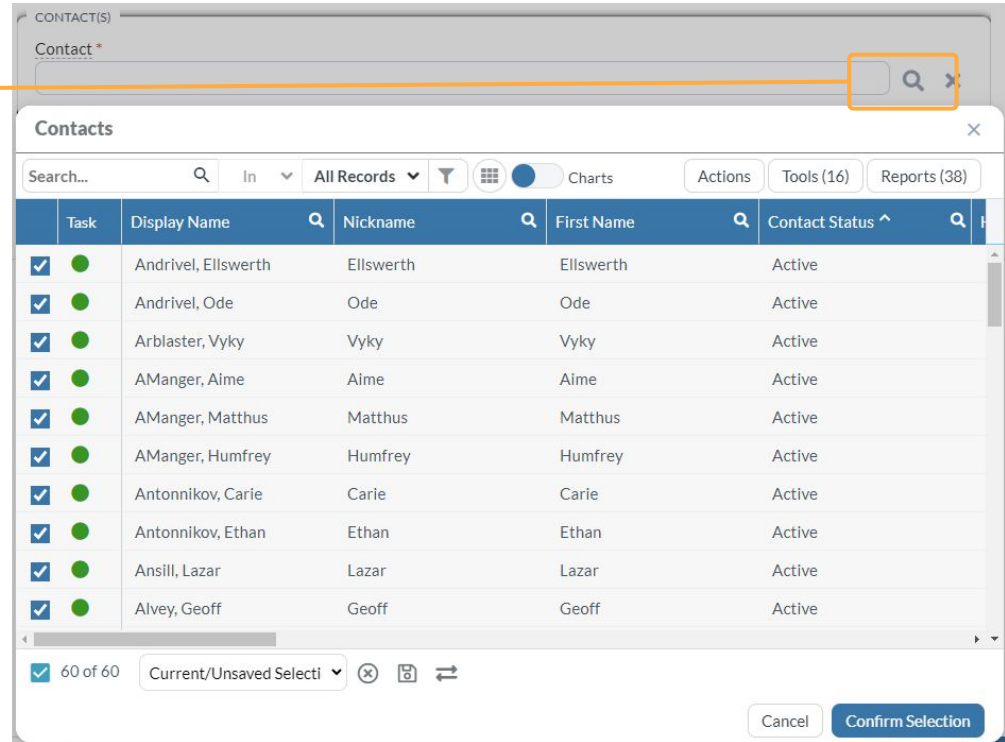
The screenshot shows a table with the following columns: 'Email Address' and 'Unsubscribed'. The table contains 11 rows of data. An 'Actions' menu is open over the table, with the '+ Add Subscribers' option highlighted by an orange box. The menu also includes 'Notification', 'Column Auto-Resize', 'Refresh', and 'Reset Grid Defaults'.

Email Address	Unsubscribed
nonnynonnerson@yahoo.co	No
jpennyman2s@wp.com	No
kaddy6y@icio.us	No
admincharley@ministryplat	No
admincharley@ministryplat	No
dadrienne3l@miitbeian.gov.	No
tarchibold6e@geocities.jp	No
agreenstockt@webs.com	No
gbrumfieldb@dyndns.org	No
jcallen1k@soundcloud.com	No
dcheley8e@google.es	No

Add Multiple Subscribers

MAGNIFYING GLASS

- In the window, click the magnifying glass



The screenshot shows the MinistrySmart Contacts window. At the top, there is a search bar with a magnifying glass icon and a close button. Below the search bar is a table of contacts. The table has columns for Task, Display Name, Nickname, First Name, and Contact Status. The contacts listed are:

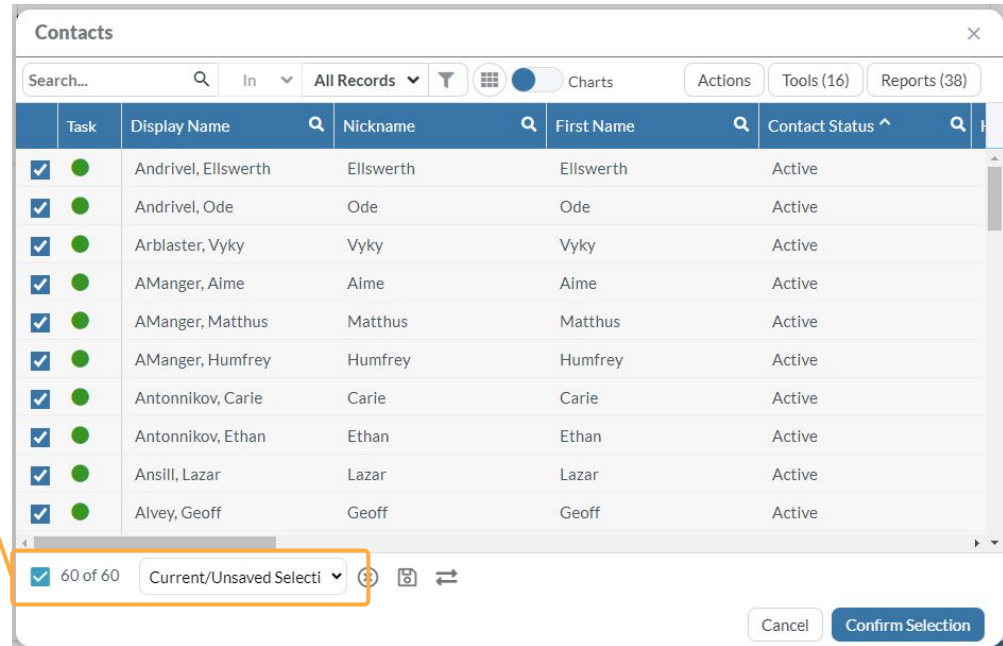
Task	Display Name	Nickname	First Name	Contact Status
<input checked="" type="checkbox"/>	Andrivel, Ellswerth	Ellswerth	Ellswerth	Active
<input checked="" type="checkbox"/>	Andrivel, Ode	Ode	Ode	Active
<input checked="" type="checkbox"/>	Arblaster, Vyky	Vyky	Vyky	Active
<input checked="" type="checkbox"/>	AManger, Aime	Aime	Aime	Active
<input checked="" type="checkbox"/>	AManger, Matthus	Matthus	Matthus	Active
<input checked="" type="checkbox"/>	AManger, Humfrey	Humfrey	Humfrey	Active
<input checked="" type="checkbox"/>	Antonnikov, Carie	Carie	Carie	Active
<input checked="" type="checkbox"/>	Antonnikov, Ethan	Ethan	Ethan	Active
<input checked="" type="checkbox"/>	Ansill, Lazar	Lazar	Lazar	Active
<input checked="" type="checkbox"/>	Alvey, Geoff	Geoff	Geoff	Active

At the bottom of the window, there is a status bar showing "60 of 60" and "Current/Unsaved Selecti". There are also buttons for "Cancel" and "Confirm Selection".

Add Multiple Subscribers

SELECTION

- In the window, click the magnifying glass
- Change your selection at the bottom left



The screenshot shows the 'Contacts' window in the MinistrySmart application. The window has a search bar at the top with a magnifying glass icon. Below the search bar is a table of contacts. The table has columns for 'Task', 'Display Name', 'Nickname', 'First Name', and 'Contact Status'. The 'Task' column has a magnifying glass icon. The 'Contact Status' column has a dropdown arrow. The table contains 10 rows of contact information. At the bottom left of the window, there is a selection summary: '60 of 60' with a magnifying glass icon and a dropdown menu labeled 'Current/Unsaved Selecti'. At the bottom right, there are 'Cancel' and 'Confirm Selection' buttons.

Task	Display Name	Nickname	First Name	Contact Status
<input checked="" type="checkbox"/>	Andrivel, Ellswerth	Ellswerth	Ellswerth	Active
<input checked="" type="checkbox"/>	Andrivel, Ode	Ode	Ode	Active
<input checked="" type="checkbox"/>	Arblaster, Vyky	Vyky	Vyky	Active
<input checked="" type="checkbox"/>	AManger, Aime	Aime	Aime	Active
<input checked="" type="checkbox"/>	AManger, Matthus	Matthus	Matthus	Active
<input checked="" type="checkbox"/>	AManger, Humfrey	Humfrey	Humfrey	Active
<input checked="" type="checkbox"/>	Antonnikov, Carie	Carie	Carie	Active
<input checked="" type="checkbox"/>	Antonnikov, Ethan	Ethan	Ethan	Active
<input checked="" type="checkbox"/>	Ansill, Lazar	Lazar	Lazar	Active
<input checked="" type="checkbox"/>	Alvey, Geoff	Geoff	Geoff	Active

Add Multiple Subscribers

SELECTION

- In the window, click the magnifying glass
- Change your selection at the bottom left
- Verify the list is the correct names and number of records

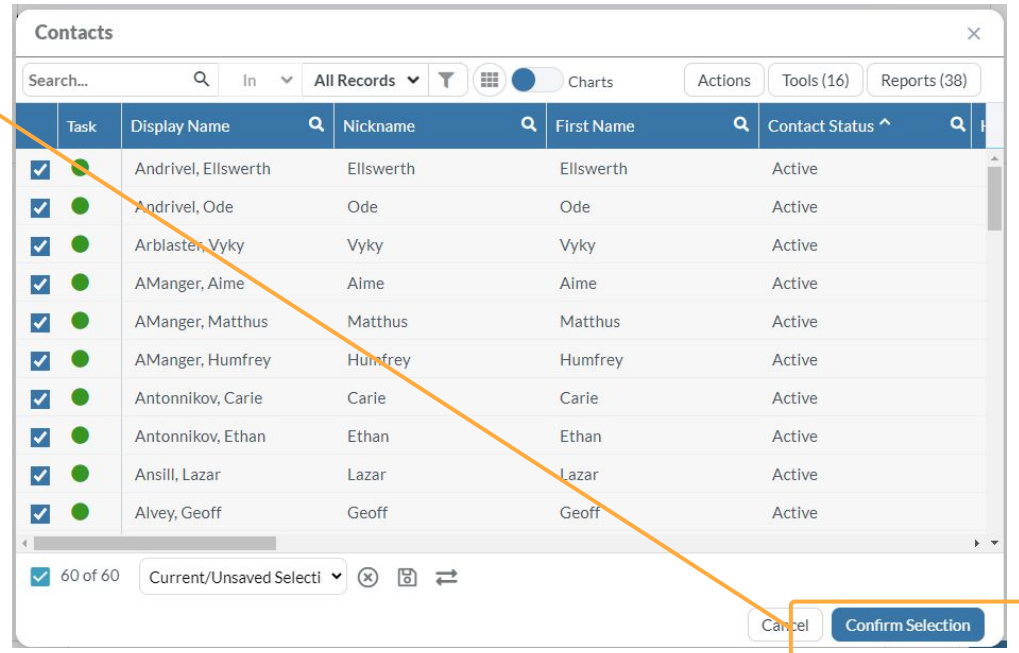
The screenshot shows the 'Contacts' window in MinistrySmart. At the top, there is a search bar and filters for 'All Records'. Below is a table with columns: Task, Display Name, Nickname, First Name, and Contact Status. The table contains 10 rows of contact data, all with 'Active' status. At the bottom left, a selection summary shows '60 of 60' and 'Current/Unsaved Selecti'. At the bottom right, there are 'Cancel' and 'Confirm Selection' buttons.

Task	Display Name	Nickname	First Name	Contact Status
<input checked="" type="checkbox"/>	Andrivel, Ellswerth	Ellswerth	Ellswerth	Active
<input checked="" type="checkbox"/>	Andrivel, Ode	Ode	Ode	Active
<input checked="" type="checkbox"/>	Arblaster, Vyky	Vyky	Vyky	Active
<input checked="" type="checkbox"/>	AManger, Aime	Aime	Aime	Active
<input checked="" type="checkbox"/>	AManger, Matthus	Matthus	Matthus	Active
<input checked="" type="checkbox"/>	AManger, Humfrey	Humfrey	Humfrey	Active
<input checked="" type="checkbox"/>	Antonnikov, Carie	Carie	Carie	Active
<input checked="" type="checkbox"/>	Antonnikov, Ethan	Ethan	Ethan	Active
<input checked="" type="checkbox"/>	Ansill, Lazar	Lazar	Lazar	Active
<input checked="" type="checkbox"/>	Alvey, Geoff	Geoff	Geoff	Active

Add Multiple Subscribers

CONFIRM SELECTION

- In the window, click the magnifying glass
- Change your selection at the bottom left
- Verify the list is the correct names and number of records
- Click Confirm Selection and then click Add



The screenshot shows the 'Contacts' window in MinistrySmart. At the top, there is a search bar and a filter dropdown set to 'All Records'. Below this is a table with columns: Task, Display Name, Nickname, First Name, and Contact Status. The table contains 10 rows of contact data, all with 'Active' status. At the bottom left, there is a status bar showing '60 of 60' records and a dropdown menu set to 'Current/Unsaved Selecti'. At the bottom right, there are two buttons: 'Cancel' and 'Confirm Selection', with the latter highlighted by an orange box. An orange arrow points from the 'CONFIRM SELECTION' header to the 'Confirm Selection' button.

Task	Display Name	Nickname	First Name	Contact Status
<input checked="" type="checkbox"/>	Andrivel, Ellswerth	Ellswerth	Ellswerth	Active
<input checked="" type="checkbox"/>	Andrivel, Ode	Ode	Ode	Active
<input checked="" type="checkbox"/>	Arblaster, Vyky	Vyky	Vyky	Active
<input checked="" type="checkbox"/>	AManger, Aime	Aime	Aime	Active
<input checked="" type="checkbox"/>	AManger, Matthus	Matthus	Matthus	Active
<input checked="" type="checkbox"/>	AManger, Humfrey	Humfrey	Humfrey	Active
<input checked="" type="checkbox"/>	Antonnikov, Carie	Carie	Carie	Active
<input checked="" type="checkbox"/>	Antonnikov, Ethan	Ethan	Ethan	Active
<input checked="" type="checkbox"/>	Ansill, Lazar	Lazar	Lazar	Active
<input checked="" type="checkbox"/>	Alvey, Geoff	Geoff	Geoff	Active



One-Click Opt Out



One-Click Unsubscribe Links

- Allows Users to unsubscribe from one publication with the click of a link
 - But can give them a chance to resubscribe in if they get unsubscribers remorse if used with the My Subscriptions Widget
- Allows Users to opt-out of receive bulk email with the click of a link
 - But can allow them to opt back in if they clicked the opt out link too soon if used with the My Subscriptions Widget
- **Must** be configured as a widget on your website
- Up and running in three easy steps

Step 1: Add the Widget

- Create a page on your website to hold the unsubscribe widget
- Add the widget code to your website
- If you want users to be able to undo their actions, make sure ...
 - You also have the My Subscriptions widget on your website
 - Include the My Subscriptions page URL as an attribute in the unsubscribe widget code



Step 2: Create Unsubscribe Link

- One-click unsubscribe link:

[https://yourchurch.com/unsubscribe?cg=\[Contact_GUID\]&pubid=\[Publication_ID\]](https://yourchurch.com/unsubscribe?cg=[Contact_GUID]&pubid=[Publication_ID])

- Bulk Email Opt Out Link:

[https://yourchurch.com/unsubscribe?cg=\[Contact_GUID\]](https://yourchurch.com/unsubscribe?cg=[Contact_GUID])

Step 3: Add Links to Messages

- Strategically add the links to message footers
 - Is it a bulk email? Add the bulk email opt out link!
 - Is it a publication? Add the unsubscribe link!
- Pro tips
 - Add the links to a footer using the Template Editor Tool so you can use them again and again
 - Save the footer Block you can drag and drop it into the right place
 - Consider font size, color, etc.
 - Set up a view (and notification!) to easily monitor opt-outs and unsubscribes

Where Does it Land in MP?

CONTACT RECORD

The screenshot displays the MinistryPlatform interface for a contact record. The left sidebar contains navigation options: Home, Contacts, Groups, Events, Opportunities, Care, and Communications. The main content area shows the contact details for Fredrika Abbado, including her name, address, and status (Active, Head of Household, Age: 31). Below the contact information are tabs for General, Primary Family, Household Care, Relationships, Message Log, Feedback/Prayer, Subscriptions, and Contact Log. The 'General' tab is selected, showing fields for Occupation, HS Graduation Year, Bulk Email Opt Out, Do Not Text, and Remove From Directory. The 'Bulk Email Opt Out' field is highlighted with an orange box, indicating its location within the contact record.

MinistryPlatform
MP Client Training 1

← Back » Contacts

Contact #1627
Abbado, Fredrika | 19828 Shelley Crossing | Peoria
Active Head of Household Age: 31

General Primary Family Household Care Relationships Message Log Feedback/Prayer Subscriptions Contact Log

Edit Record Insights Actions Tools (16) Reports (32)

Occupation HS Graduation Year

Bulk Email Opt Out *
Yes

Do Not Text *
No

Remove From Directory *
No

Communication Preferences
Email Unlisted *
No
Mobile Phone Unlisted *
No

Where Does it Land in MP?

SUBSCRIPTIONS TAB

The screenshot displays the MinistryPlatform interface for a contact named Abbado, Fredrika. The 'Subscriptions' tab is selected, showing a table of subscription records. An orange callout box highlights the 'Subscriptions' tab in the top navigation bar, and another orange callout box highlights the 'Unsubscribed' column in the table.

MinistryPlatform
MP Client Training 1

← Back » Contacts » Subscriptions

Contact #1627
Abbado, Fredrika | 19828 Shenley Crossing | Peoria
Active | Head of Household | Age: 31

General | Primary Family | Household Care | Relationships | Message Log | Feedback | **Subscriptions**

+ New Subscription Search... In All Records

Task	Publication Title	Unsubscribed
<input type="checkbox"/>	Prayer Devotion	Yes
<input type="checkbox"/>	Weekly Pastor Newsletter	No

Where Does it Land in MP?

ALL SUBSCRIPTIONS PAGE

The screenshot displays the MinistryPlatform interface for the 'All Subscriptions' page. The breadcrumb trail is 'Communications >> All Subscriptions'. The left sidebar contains a navigation menu with 'All Subscriptions' highlighted. The main content area features a table with columns: Task, Display Name, Nickname, First Name, Publication Title, Unsubscribed, and Publication ID. Two rows of data are visible, both with 'Unsubscribed' status set to 'Yes'. A dropdown menu is open over the 'Unsubscribed' column header, showing 'Unsubscribed' as the selected filter. An orange line connects the callout box on the left to the 'Unsubscribed' dropdown, and another orange line connects the callout box on the left to the 'All Subscriptions' link in the sidebar.

Task	Display Name	Nickname	First Name	Publication Title	Unsubscribed	Publication ID
<input type="checkbox"/>	Abbado, Fredrika	Fredrika	Fredrika	Prayer Devotion	Yes	5
<input type="checkbox"/>	Booth, Erika	Erika	Erika	Prayer Devotion	Yes	5