

ANOTHER

"MP"

WEBINAR

THE POWER OF VIEWS



New View Creator

Simpler Design

The OR option

Drag and drop

Rename fields

Hide fields

Will manage Advanced SQL



Advanced Search ✕

- Contact Status
- Description
- Household
- Household Position
- Anniversary Date
- Date of Death
- Participant Record
- Donor Record
- Email Address
- Mobile Phone
- Company Phone
- Pager Phone
- Fax Phone
- Facebook Account
- Twitter Account
- Web Page
- Industry
- Occupation
- Current School
- HS Graduation Year
- Bulk Email Opt Out
- Email Unlisted
- Do Not Text
- Mobile Phone Unlisted
- Remove From Directory
- User Account
- ID Card
- Contact GUID

View: Delete

Title: **User Group:**

Description:

Form Layout SQL Layout

<input type="checkbox"/>	<input type="checkbox"/>	Column Name	Comparison	Search Term	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Display Name	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Nickname	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Gender	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contact Status	<input type="text" value=""/> = <input type="text" value=""/>	<input type="text" value="Active"/>	<input type="checkbox"/>
OR <input checked="" type="checkbox"/> <input type="text" value="Contact Status"/> <input type="text" value=""/> CONTAINS <input type="text" value="home"/>					
Add 'OR' condition					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Email Address	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Bulk Email Opt Out	NOT <input type="text" value="TRUE"/>	<input type="text" value=""/>	<input type="checkbox"/>

Save Query Close



Drag & Drop

Move items around
Drag from field list
Rearrange as needed

The screenshot shows a 'Form Layout' interface. On the left is a field list with the following items: Middle Name, Last Name, Suffix, Nickname, Date of Birth, Gender, Marital Status, Contact Status, Contact Status ID, Contact Status, Description, and Household. The 'Contact Status' item is highlighted. On the right is a table configuration with the following columns: Column Name, Comparison, and Search Term. The table contains three rows:

	Column Name	Comparison	Search Term
<input checked="" type="checkbox"/>	Display Name	▼	▼
<input checked="" type="checkbox"/>	Nickname	▼	▼
<input checked="" type="checkbox"/>	Contact Status	▼	▼



Understanding OR

Click the "Down" button

Drag your "Or" into the place

Use the same field or different

	Column Name	Comparison	Search Term
<input checked="" type="checkbox"/>	Display Name	▼	▼
<input checked="" type="checkbox"/>	Nickname	▼	▼



Rename Fields

Simple way to help users
Imperative when using similar fields
(Parent group)

	Column Name	Comparison	Search Term
<input checked="" type="checkbox"/>	Group Name	Contains	



Hide Fields

Use with filters

Hides the field but keeps the filter

Form Layout				SQL Layout	
	Column Name	Comparison	Search Term		
▶	<input checked="" type="checkbox"/> Display Name	<input type="text"/>	<input type="text"/>		
▶	<input checked="" type="checkbox"/> Nickname	<input type="text"/>	<input type="text"/>		
▶	<input checked="" type="checkbox"/> Email Address	<input type="text"/>	<input type="text"/>		
▶	<input checked="" type="checkbox"/> Email Unlisted	<input type="text"/>	<input type="text"/>		



Advanced SQL

Advanced SQL = Any SQL that the tool cannot read
The tool will open in the SQL layout when detected

Form Layout SQL Layout

Field List:

```
Contact_ID_Table.[Last_Name]
,Contact_ID_Table.[Nickname]
,Contact_ID_Table.[First_Name]
,Participants.Participant_End_Date
,(SELECT Max(Activity_Date) FROM Activity_Log AL WHERE AL.Contact_ID = Participants.Contact_ID) AS
Last_Activity
(SFLECT Count(*) FROM Activity_Log AL WHERE AL.Contact_ID = Participants.Contact_ID AND AL.Activity_Date >=
```

Filter Clause: *

```
Contact_ID_Table.Contact_Status_ID IN (2,3) AND Participants.Participant_End_Date <= dp_DomainTime AND
Contact_ID_Table_Household_ID_Table.[_Last_Activity] >=dp_DomainTime - 10
```




Views + Notifications

Find the information THEN send it!

- Send results to users (individuals or user groups)
- Send templates to results in the view

***You can also be notified when records in a selection are changes



Views Notification Examples:

- Data Quality
 - Send view notifications of each data quality
 - Specifically:
 - Fix: Mismatched Records (Contacts)
 - Fix Too Many Heads (Contacts)



View Notification Examples:

- Baptism celebration
 - Make a view of everyone who was baptised 365 years ago
 - Set up a view notification to send email to everyone in the view everyday
- Deceased Family members
 - Add a Milestone for those who have lost loved ones
 - Create a View of anyone who lost someone next week/month/etc
 - Print labels and send notes



View Notification Examples:

- Baptism celebration
 - Make a view of everyone who was baptised 365 years ago
 - Set up a view notification to send email to everyone in the view everyday
- Deceased Family members
 - Add a Milestone for those who have lost loved ones
 - Create a View of anyone who lost someone next week/month/etc
 - Print labels and send notes



Views + Record Facts

- Views are the powerhouse of Record Facts
- Get the "value" to work for you
 - Show Month or Year only
 - Show Yes/No or "Expired/overdue"
 - Show a "Count"
 - Show a "percentage"



Views + Record Facts

● 05 Fifth Grade | Churchwide Campus

Age or Grade Group Children Last Attendance: 9/3/2019 12:00 PM ET Current Participants: 7 Group Capacity: 1%

Count:

```
(SELECT Count(*) FROM Group_Participants GP WHERE GP.Group_ID = Groups.Group_ID AND GP.Start_Date <= dp_DomainTime AND (GP.End_Date > dp_DomainTime OR GP.End_Date IS NULL)) AS [Current Participants]
```

Percentage***:

```
CASE WHEN Groups.[Target_Size] = 0 THEN NULL ELSE ((SELECT Count(*)*100 FROM Group_Participants GP WHERE GP.Group_ID = Groups.Group_ID AND (dp_DomainTime BETWEEN GP.[Start_Date] AND ISNULL(GP.End_Date, dp_DomainTime))) / Groups.[Target_Size]) END AS [Group Capacity]
```

***Ensure to create a Field Rule to show percentage