ANOTHER
"MP"
WEBINAR

THE POWER OF VIEWS

MinistryPlatform

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

View: New View — Delete

Title: New View Name — User Group: Select User Group

Description: Enter View Description

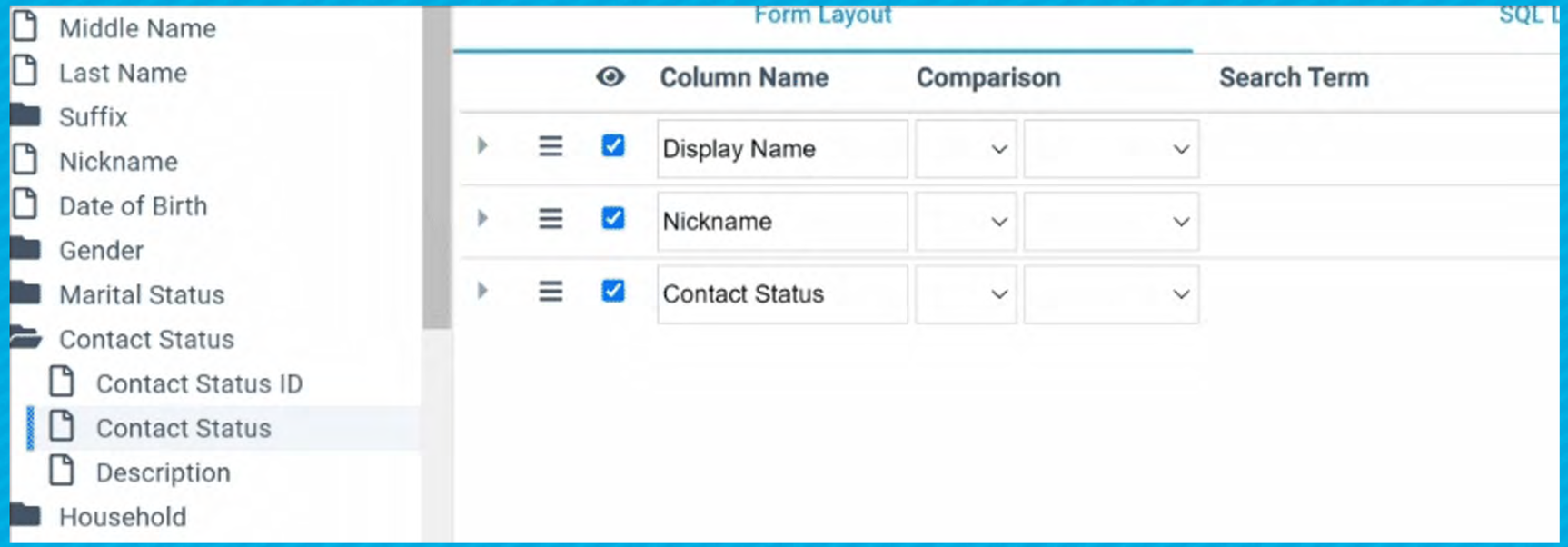
Form Layout | SQL Layout

	Column Name	Comparison		Search Term
☑	Display Name			
☑	Nickname			
☑	Gender			
☑	Contact Status		=	Active
OR ☑	Contact Status		CONTAINS	home
	Add 'OR' condition			
☑	Email Address			
☐	Bulk Email Opt Out	NOT	TRUE	

Save Query | Close

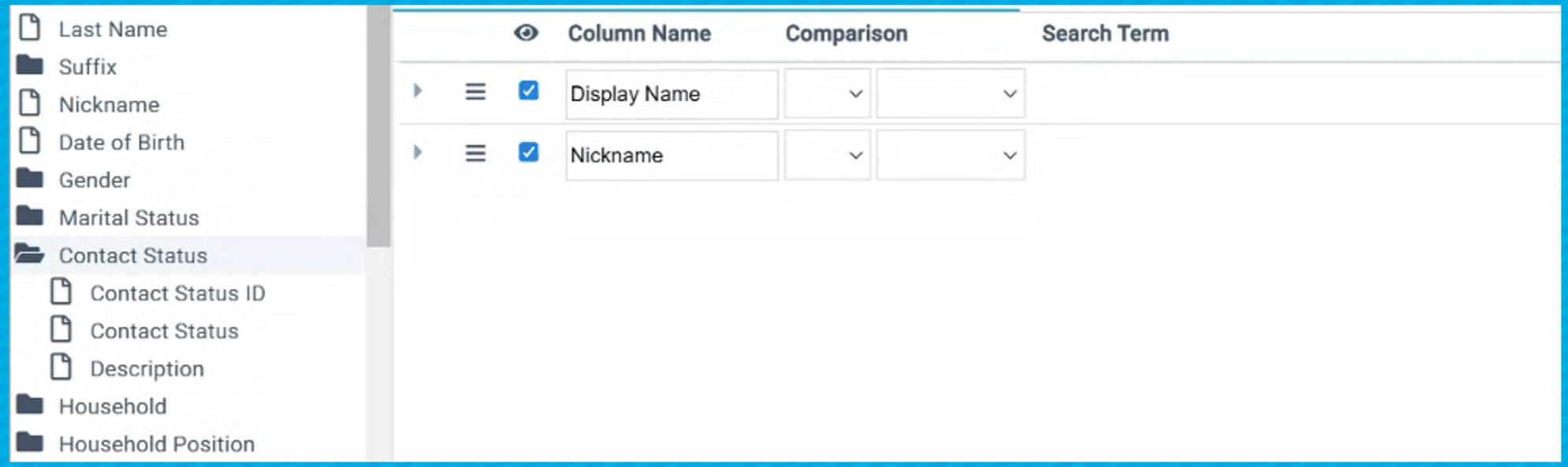
Drag & Drop

Move items around
Drag from field list
Rearrange as needed



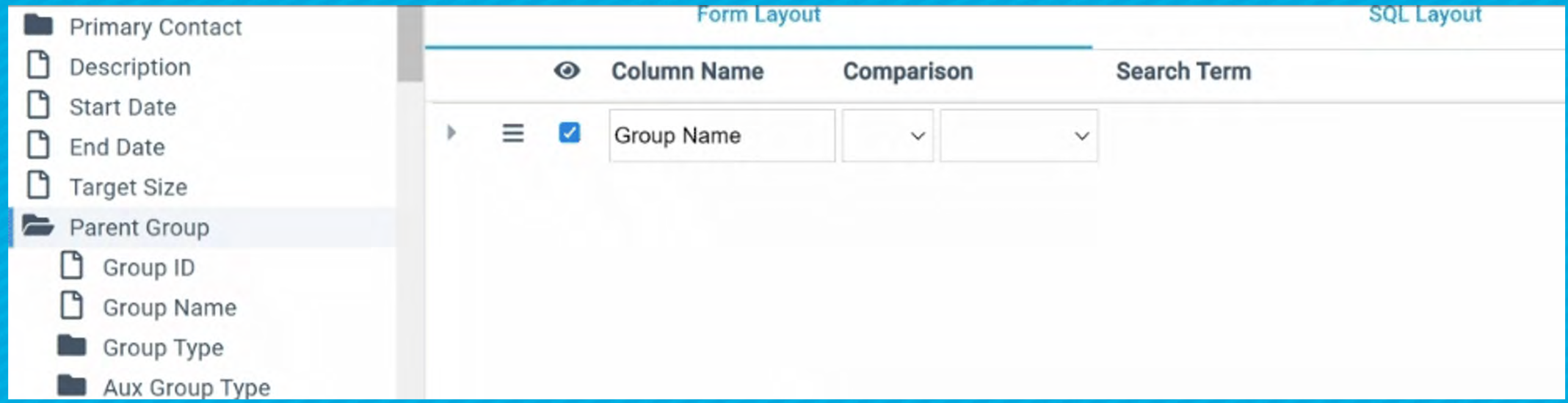
Understanding OR

Click the “Down” button
Drag your “Or” into the place
Use the same field or different



Rename Fields

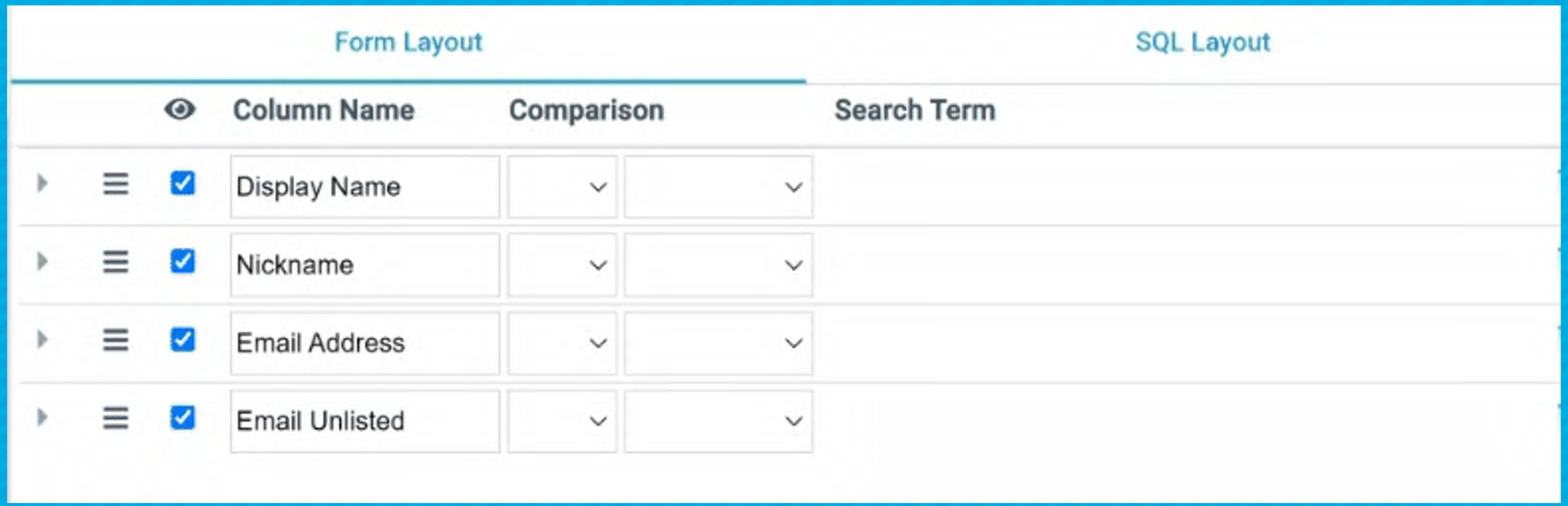
Simple way to help users
Imperative when using similar fields
(Parent group)



Hide Fields

Use with filters

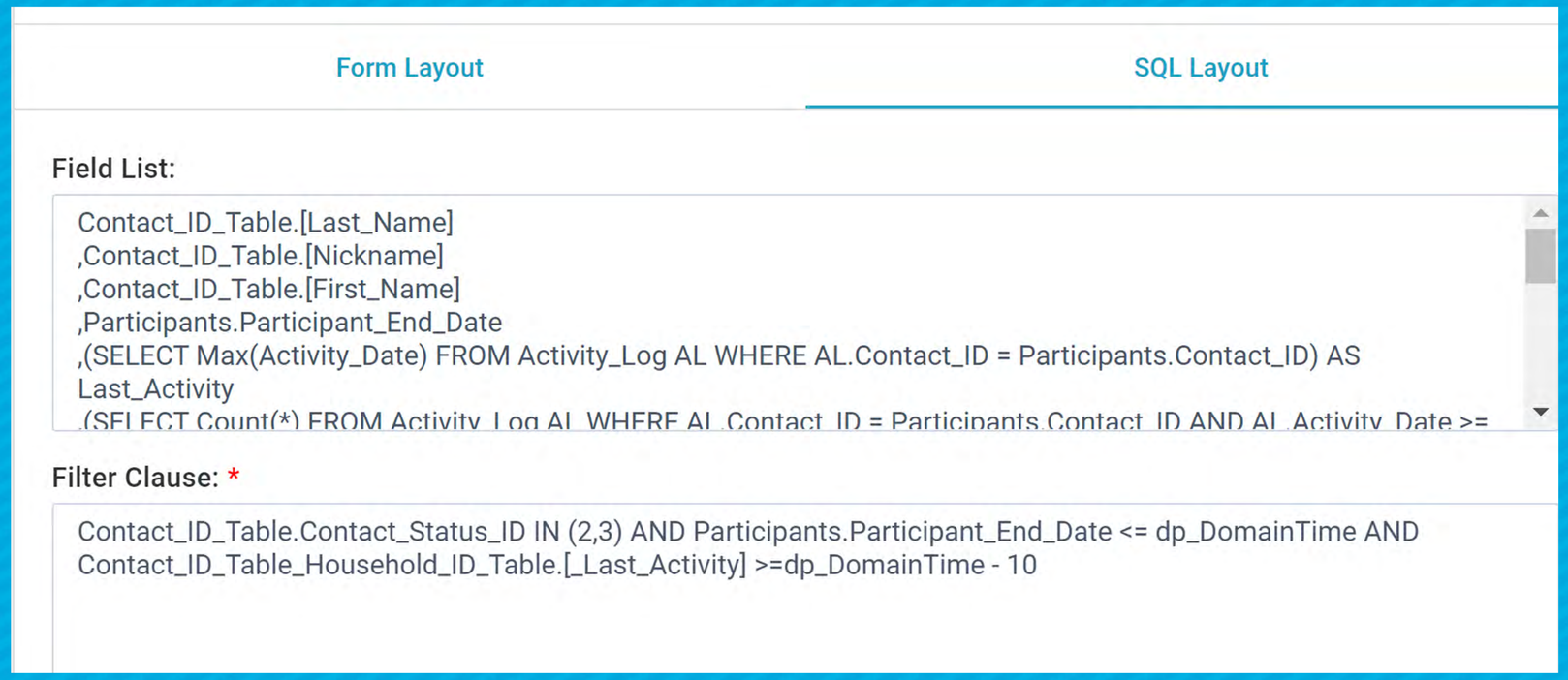
Hides the field but keeps the filter



Advanced SQL

Advanced SQL = Any SQL that the tool cannot read

The tool will open in the SQL layout when detected



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

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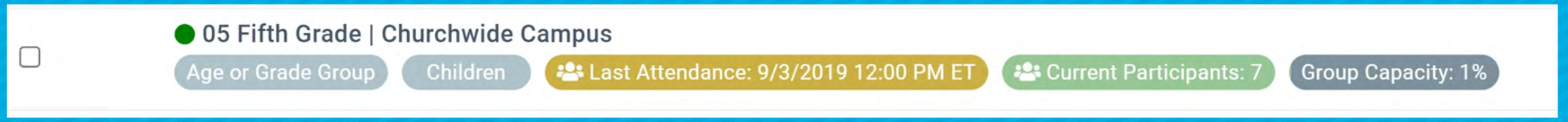
Views + Record Facts

- 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



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