



Sending Birthday Greetings



You should be able to use most of these instructions to send messages of any kind. Also included are instructions for setting up automated delivery of the greeting.

1. Click **Communications** and choose **Templates**
2. Click the **Tools** button and choose **Template Editor**.

Important: Any template created using the Template Editor **MUST** be edited through the Template Editor. You cannot click the "Edit" button for any template created with the Template Editor because it will corrupt the template.

Template Editor

Template: Name:

Subject:

Content Area: A large blue box with an image icon. A red arrow points from the 'Image' button in the right-hand menu to this area.

Right-hand Menu: Includes buttons for COLUMNS, BUTTON, DIVIDER, HEADING, HTML, IMAGE, MENU, TEXT, and VIDEO. A red arrow points from the 'Image' button to the 'Upload Image' button in the 'IMAGE' panel.

IMAGE Panel:

- Image:
- Drop a new image here, or click to select files to upload.
- Image URL:
- Auto Width: ☒

COLUMNS Panel: Shows a grid of column layouts. A red arrow points from the 'Columns' button in the right-hand menu to this panel.

3. Click the browser's "**maximize**" button to make Template Editor full screen if necessary.
4. Enter a name for your template in the **Name** field. (Sample: Birthday Greeting)
5. Enter an email subject in the **Subject** field. (Sample: Happy Birthday.)
6. Click the **Image** button and drag it to the **content** area that probably shows as "**No content here. Drag content from right.**"
7. Click the **Image** button in the content area. (The button shows a mountain scene.) The image panel will appear.
8. Click the **Upload Image** button and double click on the image found somewhere on your computer
 - a. If you want to resize the graphic, un-check the Auto width button and adjust your image.
9. Add text to your template:

Simple layout:

 - a. Click in the design area beneath the image
 - b. Drag the **Text** button beneath the image.
 - c. Edit the text using common formatting options on the formatting ribbon and the text panel.

Advanced layout:

 - a. Click in the design area beneath the image.
 - b. Drag the **Columns** button beneath the image.
 - c. Choose a column format (Options 1-4 create columns of equal size. Options 5-8 create columns of differing sizes.
 - d. Drag the Text or Image buttons into the new columns you've created and edit your template.
10. Choose a sender from the **From Contact** field
11. Choose someone to receive replies from the **Reply to Contact** field.
12. Click **Save** and **Close** your template.
13. Decide how to send your template

14. Deliver your template. For birthday greetings I recommend automatic delivery.

Manual Delivery	Automatic daily delivery
Remember to clear sticky selections	
Click Contacts and choose the Birthdays Today (over 18) view.	Click Contacts and choose the Birthdays Today (over 18) view.
Select some or all of the people in the view.	Click the Bell button next to the name of the view.
Click the Actions button in the upper right corner of the screen and choose Message .	Under Deliver To: put a dot next to Results Using Template and select the appropriate template.
Click the Insert button in the lower left corner of the New Message screen.	Select Daily/weekly and choose all 7 days.
Hover over Templates and select Contact Fields Templates .	Choose a time from the Time drop down. Don't use too early a time so as not to bother people who have notifications enabled.
Select your template from the list.	Click Save
Click Send . (If the send button is grayed out, check mark "Send to Parents" or put a space in the subject or body.	

1. The following day you should review the Action Statuses of your message to ensure you are reacting to any bounces, unsubscribe requests and spam alerts. Visit the training site to learn how to **Checking the status of sent messages**

The screenshot shows the 'New Message' screen on the left and the 'Add Notification' sidebar on the right. The 'New Message' screen has a 'Contacts' dropdown, a 'Recipients' field with 'Selected Contacts', a 'Type a subject...' field, and a rich text editor. The 'Add Notification' sidebar has sections for 'Items To Watch', 'Deliver To', 'Send Notification', 'Subject', and 'Time'. The 'Items To Watch' section has 'Contents of View' selected with 'Birthdays Today'. The 'Deliver To' section has 'Results Using Template' selected with 'Birthday Greetings'. The 'Send Notification' section has 'Using New Schedule' selected. The 'Subject' field is empty. The 'Time' section has 'Daily/Weekly' selected and '11:14 AM' chosen. The 'Send Empty Views' section has 'Notify me even when there are no results' unchecked. The 'Add Notification' sidebar has 'Save' and 'Cancel' buttons at the bottom.

Deleting a template

Ministry Platform discourages the deletion of templates because they are attached to processes and configuration settings in the system. You can mark them inactive but not delete them. If you must delete a template, create a support ticket requesting deletion of the template. Be sure to include the ID number.

Printing Labels for Birthday cards or letters

Birthday greetings are sent to the individual rather than the couple. That is why these instructions use the label report named **Mailing Labels** rather than the report named **Selected Labels 1 per Family – Erie** which is better suited for communication that could have couples in the list.

1. Clear your sticky selections.
2. Click **Contacts** and choose the view **Birthdays next month**.
3. Check mark those on the list to whom you wish to send a card. If you don't want to send labels to children, do this:
 - a. Use the check box at the bottom of the screen to select everyone.
 - b. Key ***child** in the search box under **Household Position** and press **Enter**. If you don't want to unselect those marked as "adult child," search for **minor** instead of ***child**.
 - c. Use the check box at the bottom of the screen to unselect the child.
 - d. Delete ***child** from the search box under **Household Position** and press **Enter**. Now adults and heads of household are checked but children are not.
4. Click **Reports** and choose **Selected labels**.
5. Fill out the Label options. Note, if you need to scoot your labels over to the right a bit, you can choose **1, 2 or 3 spaces** from the **Left Space Adjustment** drop down list.
6. Click the **Save** button (diskette)
7. Choose **PDF**.
8. Print your labels.

Printing a Birthday label list

1. Clear your sticky selections.
2. Click **Contacts** and choose the view **Birthdays next month**.
3. Click **Reports** and choose **Birthday List**
4. Fill out the report options
5. Choose **PDF**.
6. Print your report.