Sending Birthday Greetings

Ministry Platform

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 th Template Editor because it will corrupt the template.

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 bouces, unsubscribe requests and spam alerts. Visit the training site to learn how to **Checking the status of sent messages**

Deleting a template

Ministry Platform discourages the deletion of templates because are attached to processes and configuration settings in the system. You can mark them inactive but not delete them. If 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 <u>select</u> 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 <u>unselect</u> 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.