



# Sending Birthday Greetings



Remembering parishioner birthdays is a simple yet powerful way to show care, build connection, and foster a sense of belonging within your church community. MP makes this meaningful gesture effortless by allowing churches to print mailing labels or by automatically send beautifully formatted email messages. Either way, ensure no special day goes unnoticed with MP.

## Send birthday greetings the way you want.

- Mail only
- Email only (This can be automated)
- Both (May require assistance from Kathy)
  - mailing to specific age groups (like older members)
  - emailing to others (like younger members).

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## A word about Birthday views available for use

**Note:** Even if a view doesn't show mailing addresses, it can still be used to produce printed labels.

1. Click **Contacts** and choose from these views
  - **Birthdays today (over 18):** Only Active Adult contacts. Mailing addresses not included. *This is used for the automatic delivery of **emailed** birthday greetings.*
  - **Birthdays today:** All Active contacts – including children. Mailing addresses not included.
  - **Birthdays Next month:** All Active contacts – including children. Mailing addresses included. *This view is nice when **physically mailing** birthday cards.*
  - **Birthdays Next Month Adult with Email:** Active adults with emails. Mailing addresses not included.
  - **Birthdays Next Month Slim:** All Active contacts. Mailing addresses not included.
  - There are several views for Active contacts broken down by age group:
    - Birthdays with addresses (20-19, 20-29, 30-39 and so on.)** Mailing addresses included.
  - **Birthdays by Week:** All Active contacts – including children. Mailing addresses included.

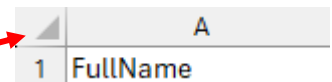
## Sending Birthday Greetings through the US mail

### 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**. (If your parish has their own view, open that view instead.)
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. Backspace over **\*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 - Erie**. (Do **not** pick Selected Labels: 1 per family – Erie)
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. Print your labels by clicking the Printer button followed by these buttons: **Print > Print > Done > Close**.
- 7.

### Exporting a Birthday label list to Excel where you can customize the look.



	A
1	FullName

1. Clear your sticky selections.
2. Click **Contacts** and choose the view **Birthdays next month**. (If your parish has their own view, open that view instead.)
3. Click the **Actions** button and choose **Export** and then click **Export** again.
4. Delete the first 4 columns. (Select all 4 columns, Right click on a column name and choose **Delete**)
5. Click this gray triangle button.
6. Double click on the line that appears between the A and B columns to automatically resize columns to the longest entry.
7. To put your list in order by day, if you would like to see birthdays as they occur:
  - click the **Data** ribbon and choose **Sort**.
  - Make sure **My data has headers** is checked
  - Add the field **Day only** to the **sort by column**.
  - Click **OK**.

## Printing a Birthday label list using a report

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.

## Sending Birthday Greetings Through Email

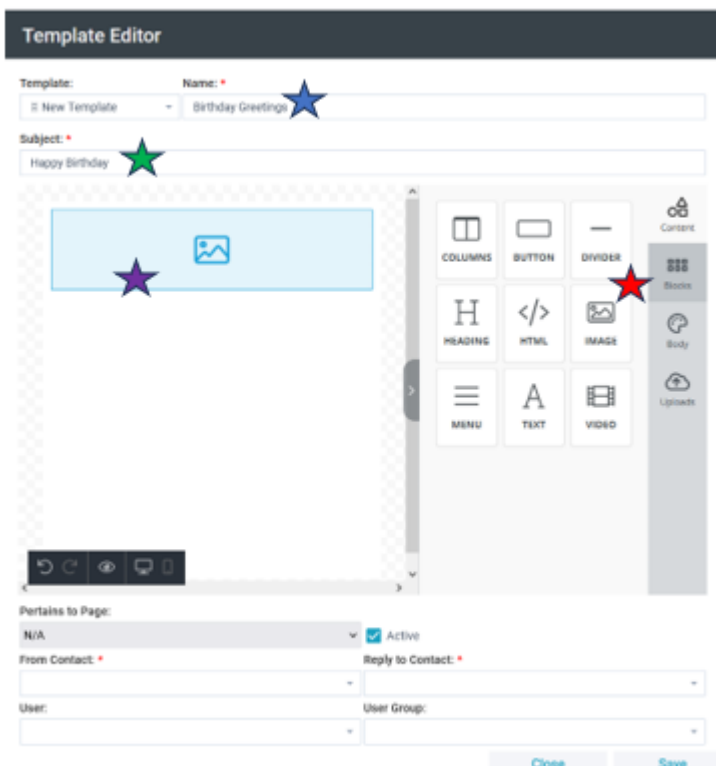
### Creating a beautifully formatted email template

You can send two types of email messages through MP – plain text and formatted with colors, images and pretty fonts. These instructions were written for sending beautiful birthday greetings but 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
- 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:

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

#### Advanced layout:

- Click in the design area beneath the image.
- Drag the **Columns** button beneath the image.
- Choose a column format (Options 1-4 create columns of equal size. Options 5-8 create columns of differing sizes.

- Drag the Text or Image buttons into the new columns you've created and edit your template.

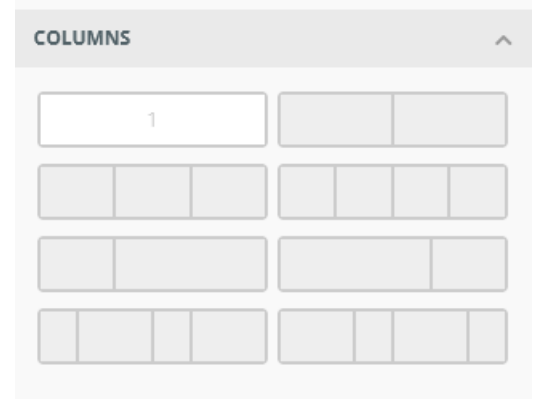
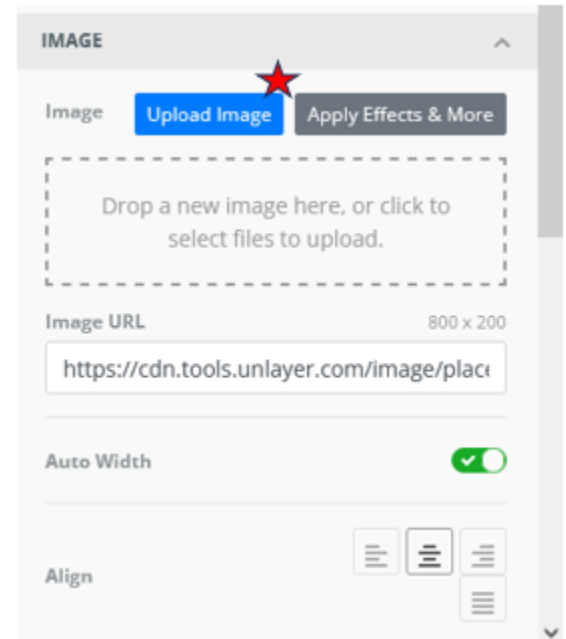
10. Choose a sender from the **From Contact** field

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.



Determine how you will deliver the email

Manual Delivery	Automatic daily delivery
Remember to clear sticky selections	
Click <b>Contacts</b> and choose the <b>Birthdays Today (over 18)</b> view.	Click <b>Contacts</b> and choose the <b>Birthdays Today (over 18)</b> view.
Select some or all of the people in the view.	Click the <b>Bell</b> button next to the name of the view.
Click the <b>Actions</b> button in the upper right corner of the screen and choose <b>Message</b> .	Under Deliver To: put a dot next to <b>Results Using Template</b> and select the appropriate template.
Click the <b>Insert</b> button in the lower left corner of the New Message screen.	Select <b>Daily/weekly</b> and choose all 7 days.
Hover over <b>Templates</b> and select <b>Contact Fields Templates</b> .	Choose a time from the <b>Time</b> 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 <b>Save</b>
Click <b>Send</b> . (If the send button is grayed out, check mark "Send to Parents" or put a space in the subject or body.	

- 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**

The screenshot shows the 'New Message' interface on the left and the 'Add Notification' dialog box on the right. In the 'New Message' window, the 'Insert' button is highlighted at the bottom left. In the 'Add Notification' dialog, the 'Daily/Weekly' radio button is selected under 'Send Notification:'. The 'Time' dropdown is set to '11:14 AM'. The 'Deliver To' section shows 'Results Using Template' selected, with 'Administrator, Church' and 'Birthday Greetings' chosen. The 'Send Notification' section shows 'Using New Schedule' selected, with checkboxes for all days of the week (Sunday through Saturday) checked. The 'Time' field is set to '11:14 AM'. The 'Send Empty Views' checkbox is unchecked. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

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.