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Ministry Platform – 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**.

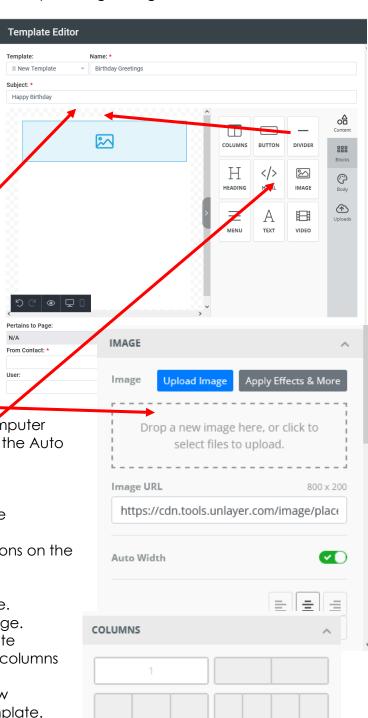
 Important: Any template created using the Template Editor MUST be edited through the Template Editor. You cannot click the "Edit" button for any template created with th Template Editor because it will corrupt the template.
 - Click the browser's "maximize" button to make Template Editor full screen if necessary.
 - 4. Enter a name for your template in the **Name** field. (Sample: Birthday Greeting)
 - 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 Autowidth button and adjust your image.
 - 9. Add text to your template:

Simple layout:

- a. Click in the design area be neath the image
- b. Drag the **Text** button be neath the image.
- c. Edit the text using common formatting options on the formatting ribbop 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

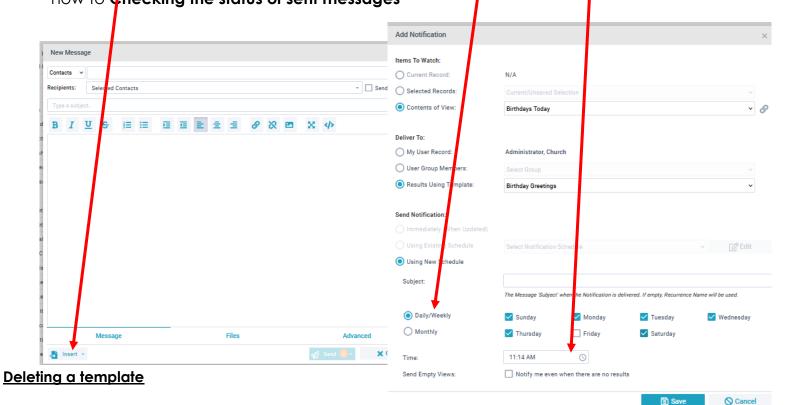


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14. Deliver your template. For birthday greetings I recommend automatic delivery.

Manual Delivery	Automatic daily delivery
Remember to clear sticky selections	
Click Contacts and choose the Birthdays Today	Click Contacts and choose the Birthdays Today
(over 18) view.	(over 18) view.
https://my.eriercd.org/mp/292-1354	https://my.eriercd.org/mp/292-1354
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	Under Deliver To: put a dot next to Results Using
corner of the screen and choose Message .	Template and select the appropriate template.
Click the Insert button in the lower left corner of	Select Daily/weekly and choose all 7 days.
the New Message screen.	1
Hover over Templates and select Contact Fields	Choose a time from the Time drop down. Don't
Templates.	use too early a time so as not to bother people
	who have notifications enabled.
Select you <mark>r template from the list.</mark>	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.	
Hover over Templates and select Contact Fields Templates. Select your template from the list. Click Send. (If the send button is grayed out, check mark "Send to Parents" or put a space in	use too eary a time so as not to bother people who have notifications enabled.

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



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.

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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.