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MP Beginner Basics
Shades Mountain Baptist Church

The Platform
Ministry Platform is not simply a rolodex, but is a swiss army knife.

Ministry Platform is a web-based database that stores our church's information and data.
This means:

Ministry Platform assigns SPoCs at each church.
Our SPoCs are:
Rob Searcy-IT SPoC
Kim Sims- Finance SPoC
Tori Harris- User SPoC

What does all this data have to do with my ministry?

Navigation

The left-hand side of the screen is a list of nouns , also known as: Pages.

The buttons at the top of each page are called verbs, also known as: tools.

There are 2 main types of records, and they are people and things.
How do we know the difference between these?

-Participants, Contacts, etc. are people records.
-Events, Groups, etc. are thing records.

The five main MP pages (found on the noun bar):
Home
Contacts
Households
Groups
Participants

Each of these pages contains records (people or things). You can <u>open</u> a record by <u>clicking it.</u>
An open record contains an overview of information, and has subtabs at the bottom that contain even more information. The best way to become acquainted with where information is located, is to use MP as often as possible. Practice, practice, practice!

Statuses & Engagement

Each person in our system is labeled through four different categories: <u>Contact Status, Member Status, Participant Types, and Participant Engagement (Engagement Levels).</u>

1. Contact Statuses (4)
    a. Active
    b. Inactive
    c. Deceased
    d. Homebound

2. Member Statuses (4)
    a. Member
    b. SS Member Only
    c. Watchcare
    d. Former

    It is possible for someone to have NO member status. This simply means they have not joined our church in any of these ways.

3. Participant Types (6)
    a. **Participant**- Contact Status of "Active". Event-only attenders (VBS, date night, etc.), also used for ELC, ATB, and KK families <u>who are not participating in any other regular, weekly programs.</u>
    b. **Prospect**- Contact status of "Active". Participants become prospects as soon as they attend a weekly event **one time**. (Sunday morning, or Wednesday night) Exceptions to this include visitors we know are only attending for a holiday or event. (Visiting grandchildren, visiting in-laws, etc.)
    c. **Church Family**-Contact status of "Active", regularly attending members of Shades. Includes all people with member status of: Member, SS Member Only, or Watchcare
    d. **Former Participant**-Contact Status of "Inactive". Anyone who was listed as any other participant type but is no longer.
    e. **SMBC Missionary**- Contact status of "Active". Shades Missionaries. This does NOT include all GIC Missionaries, but only Missionaries sent from Shades. These families are Members.
    f. **Other**-formerly "Misc." Used for staff who do not attend Shades, and GIC missionaries who are not Shades missionaries.

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"Awaiting Baptism" was formerly a participant type. It is now a milestone.
The participant type cycle is as follows:

Participant → Prospect → Church Family →Former Participant
                                SMBC Missionary

Other

4. Participant Engagement (Engagement Levels, or Participant Engagement Levels) (5)
   a. **Fully Engaged**-Small group, AND serving/Leading AND EITHER Individual Attendance (including registrations) OR giving past 90 days.
   b. **Partially Engaged**-Small group OR serving/leading OR individual attendance (including registration) OR giving past 90 days.
   c. **Observing**-Some individual or household activity in the past 90 days, but not enough to qualify as partially or full engaged.
   d. **Lapsing**-Contact Status of Active or Homebound, but no individual or household activity in 90 days.
   e. **Lapsed**-Contact status of inactive OR contact status of Deceased OR there is no individual or household activity in the past 180 days.

Engagement Levels are automated within MP. We do not assign these! They are based on the activity of a person. This is why taking attendance matters! We have different options for taking attendance to accommodate everyone. Never hesitate to ask about this, and we will find the best fit for your ministry area!

So, what do all these statuses and engagement levels have to do with my ministry?

Searches and Selections

The bottom left corner shows the total amount of records in your search or current <u>view</u>. The bottom right corner shows the total amount that you've selected. You can select a few records, or all the records on a page. The records you have selected are called a <u>selection.</u>

Basic Searches and Features

    a) <u>Main Search Bar-</u> Can be used for a broad or specific search. You can type "Harris" as a last name: "Harris,".   Or you can type simply "Harris" and it will give you all records that have "Harris" anywhere on any part of the page.

    b) <u>Quotes-</u> By putting quotation marks around the word you are searching for, you limit your search only to what is in the quotes. (Ex. "Jeff" only searches for Jeff and not Jefferson.)

    c) <u>Column Search-</u> The faster version of the comma search. Use the drop down arrow button next to your search bar to search in specific columns. You can also use this to search multiple columns at once. (Ex. You could search Tori in the Nickname column and Birmingham in the City column.)

    d) <u>Multiple Words-</u> You can search for more than one word in a column by placing "or" between words. (Ex.- you can search in the City column for Hoover or Vestavia or Chelsea.)

    e) <u>Ascending/Descending Order-</u> To sort by ascending or descending order, click the column title.

    f) <u>Expand Column-</u> To expand your column so you can read longer information, click and drag the lines that divide the column titles.

    g) <u>Asterisk-</u> using an asterisk before or after a word searches anything containing that word or words. (Ex: searching GIC* on the events page will pull any events that start with GIC.)

Let's practice!

1. How many active contacts have the last name "Smith"?

2. How many active contacts have the first name "John"?

3. How many total Members do we have?

4. How many active contacts live in Hoover?

5. How many Fully Engaged participants do we have?

6. How many Lapsed Members do we have?

7. How many events did we have last month?

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Messaging in MP

- Each Contact gets a unique email and cannot see who else received the same Message.
- If a Contact doesn't have an email address on file, the Message record for this individual (which can be seen in the Contact record > Message Log subtab) has a notation of "Error" and "Recipient's email address is not provided".
- Once sent, the Message author can find this Message in the Home page > My Messages tab > view: Sent.
- Once sent, the Message recipient receives the Message in their email inbox of the email account on their Contact record. Additionally, if the recipient has access to Ministry Platform, they can also see the Message in Home page > My Messages tab > view: My Inbox.
- The "From" Email that is used is the email address found on the Contact Record.

Sending a Message:
Home page > My Messages tab > click New Message.

You can also access the New Message Tool on almost any MP page from the Tools drop down.

- Indicate the Contact(s) to receive the Message by either:
  - Typing a name in the To line; when the desired name appears, choose it.
  - Clicking the [...] in the To line and selecting the desired records. You can also access previously saved selections by clicking the selection drop-down, as well as accessing other pages by changing the "Select From Page" drop-down.
- Indicate a Subject line. This is required in order for the Message to send.
- Type your message body content, being sure to include any desired Templates; Snippets; Contact Fields; Data Fields; formatting such as bold, italics, links and images.
- If desired, go to the Attached Files tab and include attachments.
- If desired, go to the Options tab and update the name in the Reply To field and/or indicate a future time for the Message to send.
- If desired, update the name in the From field if you're sending on behalf of someone else.
- Once satisfied with the Message setup, click Preview. The first ten Messages can be previewed. If needed, click Back to make additional edits and then click Preview again.

Once satisfied with the preview, click Send. The Message sends within about 5 minutes of clicking Send (unless you've scheduled it to send in the future).

Let's practice!
Send a message to the people in this room.