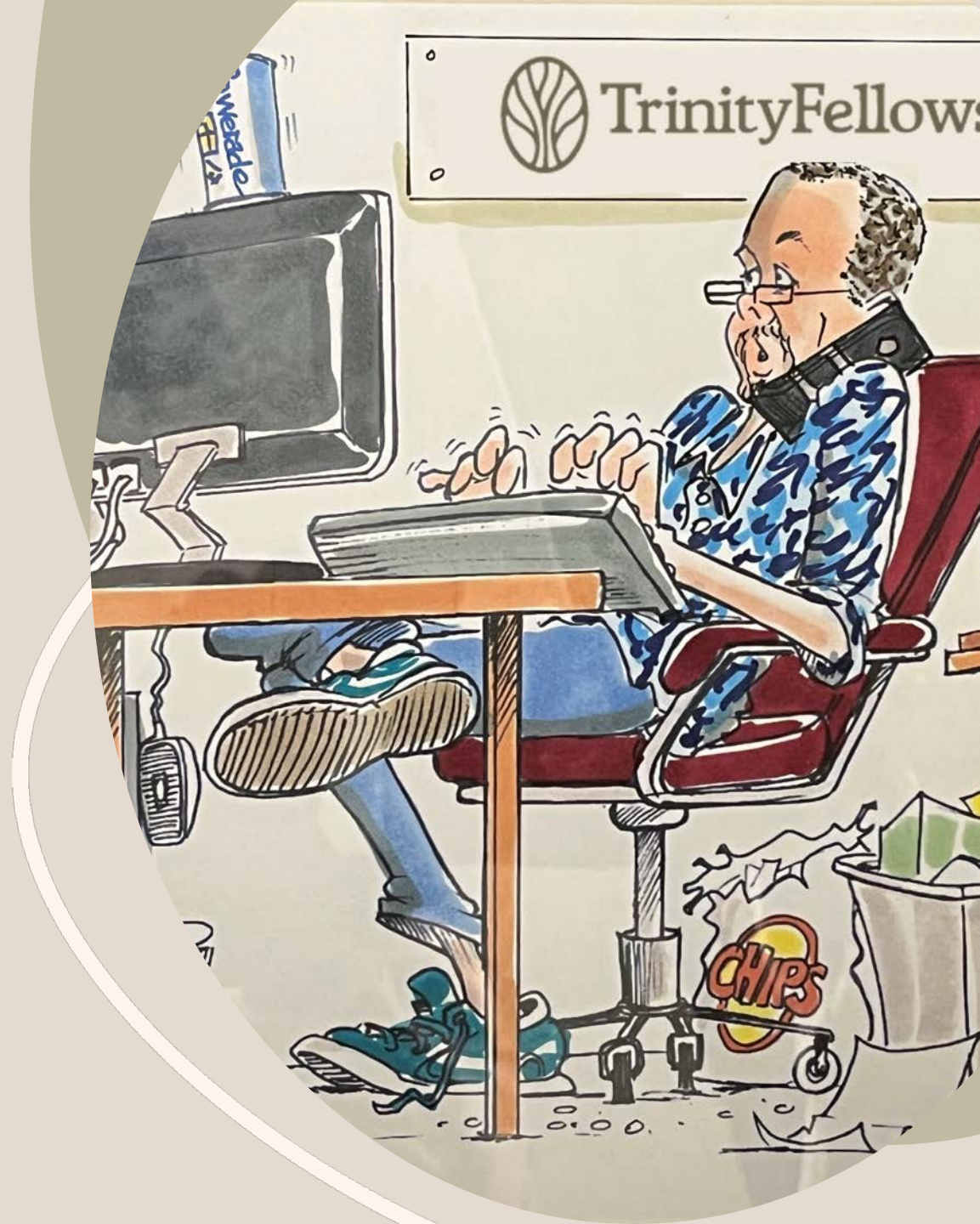




Contribution Statements Can Help Clean Up Personal Data

Kurt Vogeler

Director of HR – Rock Team Associate
Trinity Fellowship Ministries





agenda

DESCRIPTION

GENERAL ACCESS & BUILD NEEDS

IMPORTING THE WORKFLOW

CREATE A NEW PAGE

ADD HTML BLOCK

PROCESSING A MEMBERS REQUEST

RECIPE LINK

Q & A

Do you ever have people call in and request their contribution statement?

If so, this recipe will allow your Business / Accounting Staff to quickly send that person a link to their My Account page from a button on the person's profile contribution tab. You'll start by verifying the person's contact information and then send a tokenized link to the adults in the family. Once they click the link, they'll have the opportunity to view and verify their family information and download their contribution statement on the My Account page.

General Access & Build Needs

- Access to Import and edit a Workflow.
- Access to create a page and add blocks to an existing page(s).
- Access & Ability to review and/or set security to your organization's requirements.
- Active Communication / Email Transport.
- Knowledge and ability to verify Global attributes.

Importing the Workflow

Workflow Import/Export

Home > Power Tools > Workflow Import/Export

Please note that due to the complexities of workflows, not all workflow types can successfully be exported and re-imported.

Share Workflow


Workflow Type ?

Export

Preview

File ?

Send MyAccount Li...

✕

Upload

Category ?

📁 Data Integrity ✕

Test Only ?

Import

Importing the Workflow

- REQUIRED EDITs
 - UPDATE the Action be going to the Activities > ***“Send to Person”*** & ***“Send to All Emails”***
 - Go to the Action > ***“Send Email ...”***
 - UPDATE the ***“From Email Address”*** to your organization’s preferred email address.
- Verify the Global Attributes for you organization
 - Organization Name
 - Email Header
 - Email Footer

Create a New Page & Add / Update Blocks

The screenshot displays a web management interface with a sidebar on the left and a main content area on the right.

Sidebar (Pages):

- Pages (+)
- Internal Homepage
 - People
 - Manage
 - Engagement
 - Communications
 - Person Pages
 - Person Search
 - Person Profile
 - Send MyAccount Link (highlighted)

Main Content Area:

Send MyAccount Link (Site: Rock RMS)

Internal Name: Send MyAccount Link
Median Time To Serve: 0.07s (Details)

Page Title: Send MyAccount Link
Layout: Full Width

Browser Title: Send MyAccount Link
URL: /sendmyaccountlink

Buttons: Edit, Delete, and icons for share, copy, and lock.

Main Zone (Main (1))

Blocks From Site:

Blocks From Layout:

Blocks From Page:

- Send MyAccount Link (Workflow Entry) (with settings, lock, edit, and close icons)

Button: Add Block to Zone

Create a New Page & Add / Update Blocks

The screenshot shows a CMS interface for editing a page. On the left is a navigation tree with 'Contributions' selected. The main area is divided into two sections: 'Contributions' and 'SectionA2 Zone'.

Contributions Section:

- Internal Name: Contributions
- Page Title: Contributions
- Browser Title: Contributions
- Median Time To Serve: 2.02s (with a 'Details' link)
- Layout: Person Profile Detail
- URL: /page/177
- An 'Edit' button is located at the bottom left of this section.

SectionA2 Zone Section:

- Zone Name: SectionA2 (2)
- Blocks From Site: (empty)
- Blocks From Layout: (empty)
- Blocks From Page:
 - Giving Configuration (Giving Configuration) - includes edit, settings, lock, and delete icons.
 - MyAccount Link (HTML Content) - includes edit, settings, lock, and delete icons.
- An 'Add Block to Zone' button is at the bottom right.

Create a New Page & Add / Update Blocks

Edit HTML

Display from to

</> **B** *I* U **A** Segoe UI 18 X² X₁

```
1 [[ panel title:'Send MyAccount Email Link' icon:'fa fa-at' ]]  
2 <a href="{{ 'Global' | Attribute:'InternalApplicationRoot' }}sendmyaccountlink?PersonId={{ PageParameter.PersonId }}&rturl={{ 'Global' | Page:'Url' }}" class  
  = "btn btn-default btn-nav text-left"><i class="fa fa-at"></i> Email a MyAccount Link</a>  
3 [[ endpanel ]]
```

Save **Cancel**

Profile Extended Attributes Steps Groups Documents **Contributions** Benevolence Security History Staff

Kurt Vogeler **Member** Trinity Fellowship Hollywood Rd

Today 29 yr 11 / 75 eRA

Giving Alerts 0 0

Gives As **Family** Giving Journey **Consistent**

@ Send MyAccount Email Link

@ Email a MyAccount Link

Giving Configuration

Add One-time Gift

Text-To-Give Settings

Send MyAccount Link

Home > Profile > Send MyAccount Link

Send MyAccount Link Entry

Review the following contact information.

If you need to make corrections, hit the cancel button and return to the person/family screen.
If no corrections are needed, check if they would like the for the email to be sent only to them [Send to Person]
or to everyone listed [Send to All Emails] and press the appropriate button.

Kurt Vogeler

Email: [Redacted]
Email Allowed

Cell: [Redacted]
SMS Enabled

Cheri Vogeler

Email: [Redacted]
Email Allowed

Cell: [Redacted]
SMS Enabled

Person

Kurt Vogeler

Person Email

[Redacted]

All Emails (Person & Adults)

[Redacted]

Send to Person

Send to All Emails

Cancel



tfcropk@tfc.org
To Kurt Vogeler



Reply

Reply All

Forward



Tue 07/16/2024 12:45 PM



The following link can be used to view and verify your family information and download your contribution statment.

We thank you for your support of the Ministry at Trinity Fellowship!

[View My Account and Contribution Statement page.](#)

Website: <https://tfc.org>



My Account

[Home](#) / [My Account](#)

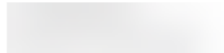


Mr. Kurt Vogeler



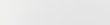
Contact Information

Home Address

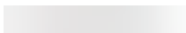


Phone

Mobile



Email



Receive Trinity Fellowship text message/email updates

Yes

[Update Profile](#)

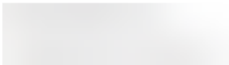
Vogeler Family



Cheri Vogeler



Contact Info



Receive Trinity Fellowship text message/email updates

Yes

Account Info

[Change Password](#)

Support Trinity Fellowship

[Give Now](#)

Contribution Statements

[2024 YTD](#)

[2023](#)

Preschool Payments

[Pay Now](#)

Groups

[BO Missions Team \(Member\)](#)

[HR Men's Table Leaders \(Member\)](#)

[HR Digital Connection \(Rock\) Team \(Team Leader*\)](#)

[Test Small Group \(Prospect\)](#)

[Test Dream Team \(Member\)](#)

[Schedule Toolbox](#)



[Add New Family Member](#)

[Request Profile Changes](#)

Rock Community Recipe Link

Clean Up Member Data w/ Contribution Statement Request

<https://community.rockrms.com/recipes/447/clean-up-member-data-w-contribution-statement-request>



Q & A
TIME



thank you

TRINITY FELLOWSHIP ROCK TEAM

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Contribution Statements Can Help Clean Up Personal Data

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General Access & Build Needs

- ✓ Access to Import and edit a Workflow.
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- ✓ Access & Ability to review and/or set security to your organization's requirements.
- ✓ Active Communication / Email Transport.
- ✓ Knowledge and ability to verify Global attributes.

Importing the Workflow

- Use the Workflow Import / Export power tool to add the Send MyAccount Link workflow to your site.
 - REQUIRED EDITS
 - UPDATE the Action Go to the Activities > "Send to Person" & "Send to All Emails"
 - Go to the Action > "Send Email ..."
 - UPDATE the "From Email Address" to your organization's preferred email address.
 - Verify the Global Attributes for you organization
 - Organization Name
 - Email Header
 - Email Footer

Create a New Page & Add / Update Blocks

- Create a new page "Send MyAccount Link"
 - Add a Workflow Entry Block & adjust the Block Properties.
- Add a Block to the existing Person > Contributions Page
 - Add a HTML Block and past the HTML form the "Page_Button.txt" file.

Processing a Members Request

- Navigate to the Contributor Page
- Click to Activate the "@ Email a MyAccount Link"
- On the new page, confirm the members Information (including other adults if applicable)
- "Send Email"

Recipe Link

- <https://community.rockrms.com/recipes/447/clean-up-member-data-w-contribution-statement-request>

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