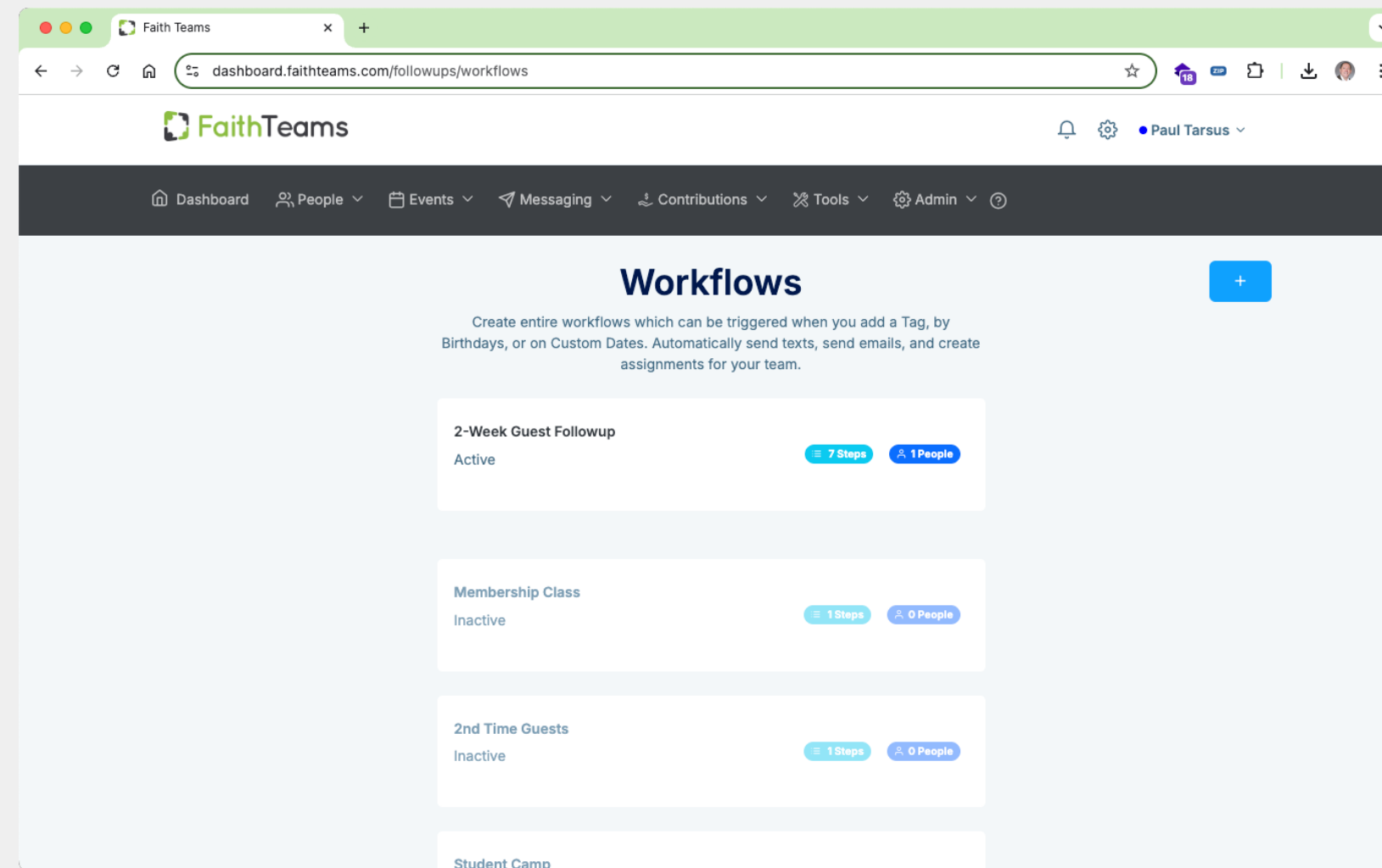


Faith Teams How To

January 15, 2024 – Workflows



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Faith Teams



In this session

- 1 Overview of Faith Teams Workflows
 - What are these?
 - Where are they created and managed?
 - How can they be used?
- 2 How to create Workflows
 - Defining a trigger
 - Adding Steps
 - Tags (adding and removing)
 - Email, SMS
 - Assignment to call or mail
 - Emailing and downloading
 - Removing from Workflow
- 3 Top Ways to use Workflows

Managing Workflows

Go to Tools and then Workflows

This page shows your list of Workflows (active and inactive). It also shows how many steps are in each along with people and steps in each Workflow.

Add a Trigger

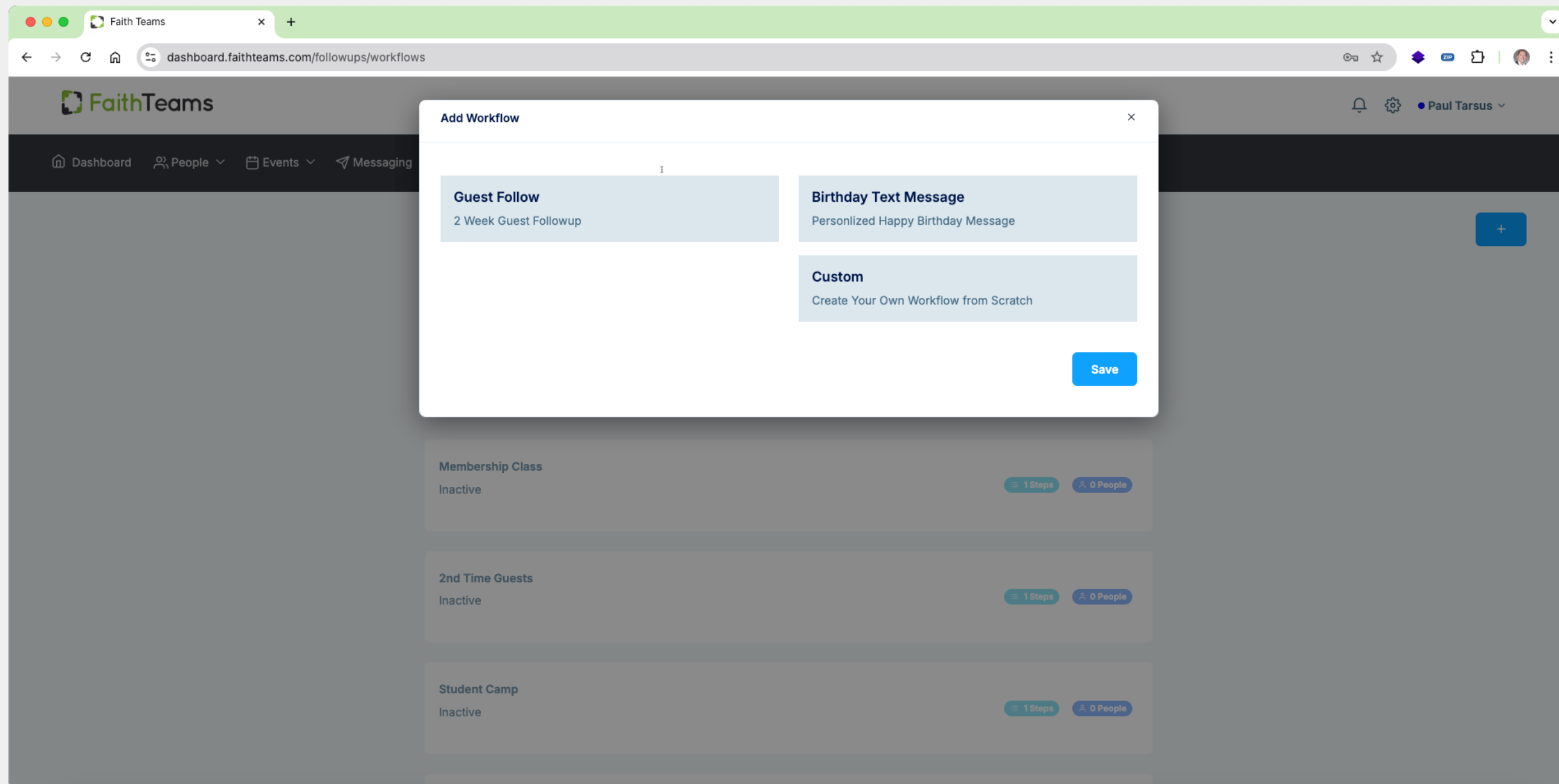
The most common triggers are being tagged (list) and landing on a certain date.

Add steps

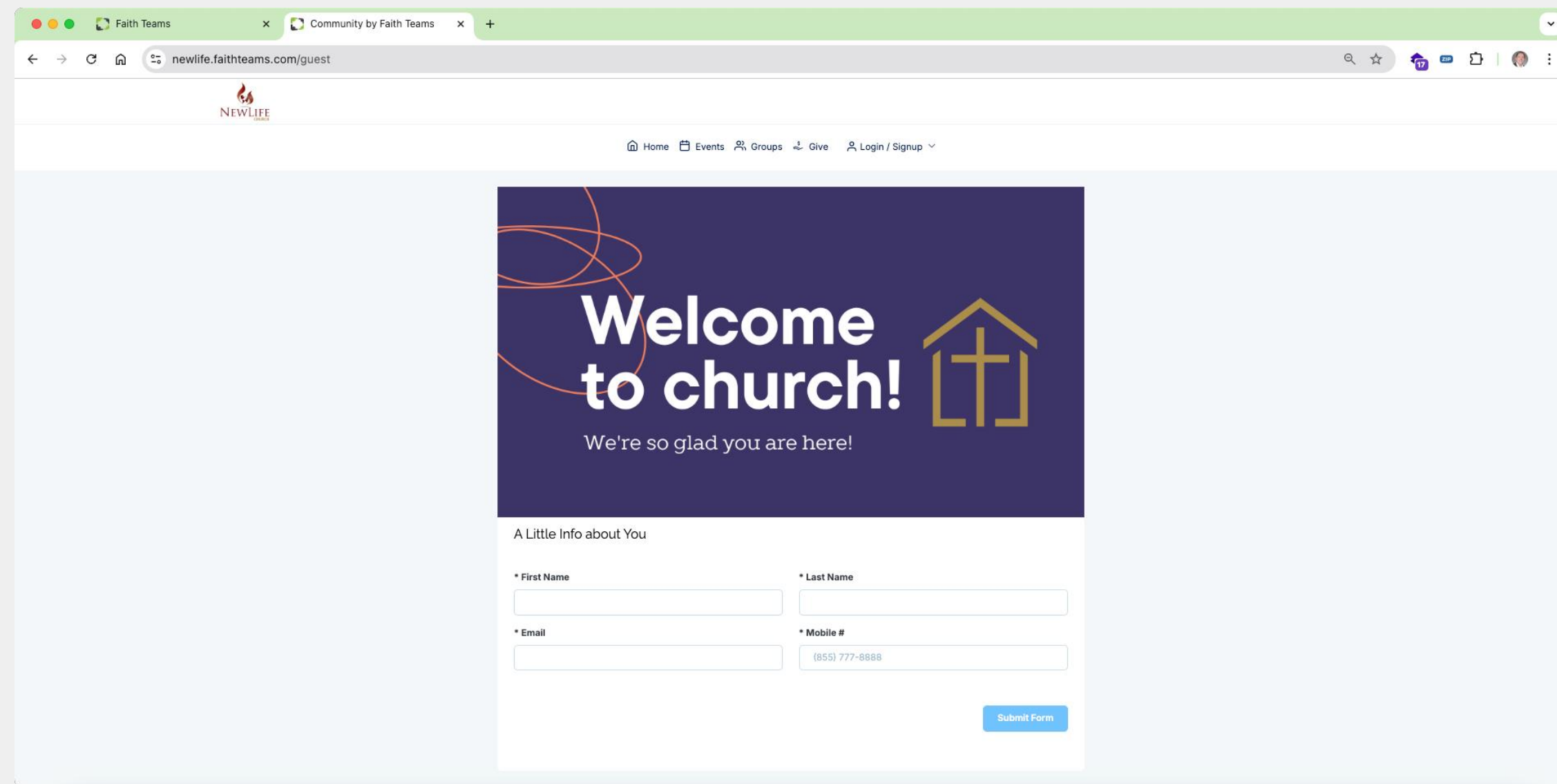
Faith Teams supports sending emails and text messages. It also though supports sending assignments to church members who are part of your leadership team and using Faith Teams.

Let's See It Live!

Create New



Tied to Community



The screenshot shows a web browser window with two tabs: 'Faith Teams' and 'Community by Faith Teams'. The address bar shows 'newlife.faithteams.com/guest'. The website header includes the 'NEWLIFE' logo and a navigation menu with links for Home, Events, Groups, Give, and Login / Signup. The main content area features a dark purple banner with the text 'Welcome to church!' and 'We're so glad you are here!' next to a yellow house icon with a cross. Below the banner is a form titled 'A Little Info about You' with four input fields: First Name, Last Name, Email, and Mobile #. The Mobile # field has a placeholder '(855) 777-8888'. A blue 'Submit Form' button is located at the bottom right of the form.

newlife.faithteams.com/guest

NEWLIFE

Home Events Groups Give Login / Signup

Welcome to church!

We're so glad you are here!

A Little Info about You

* First Name

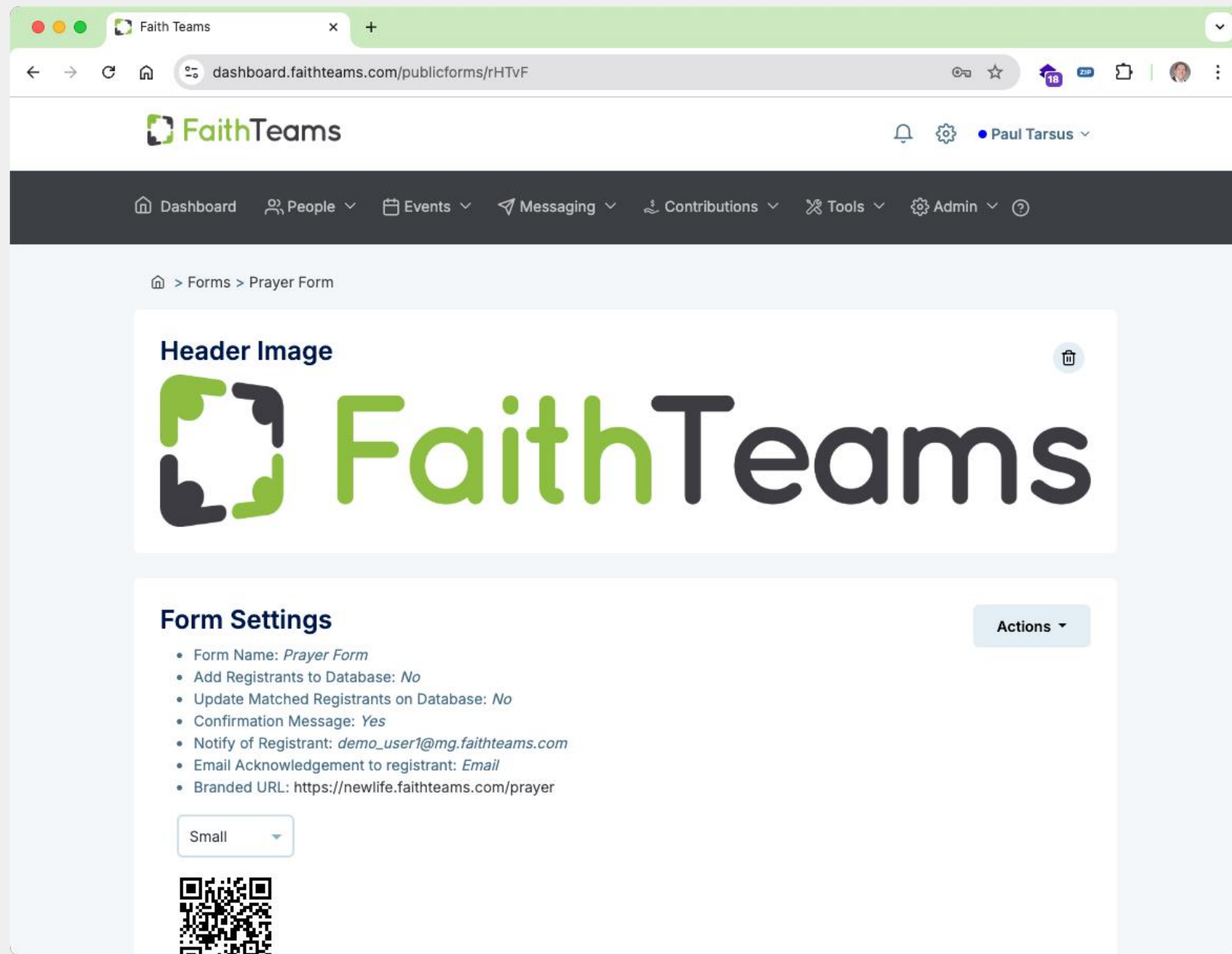
* Last Name

* Email

* Mobile # (855) 777-8888

Submit Form

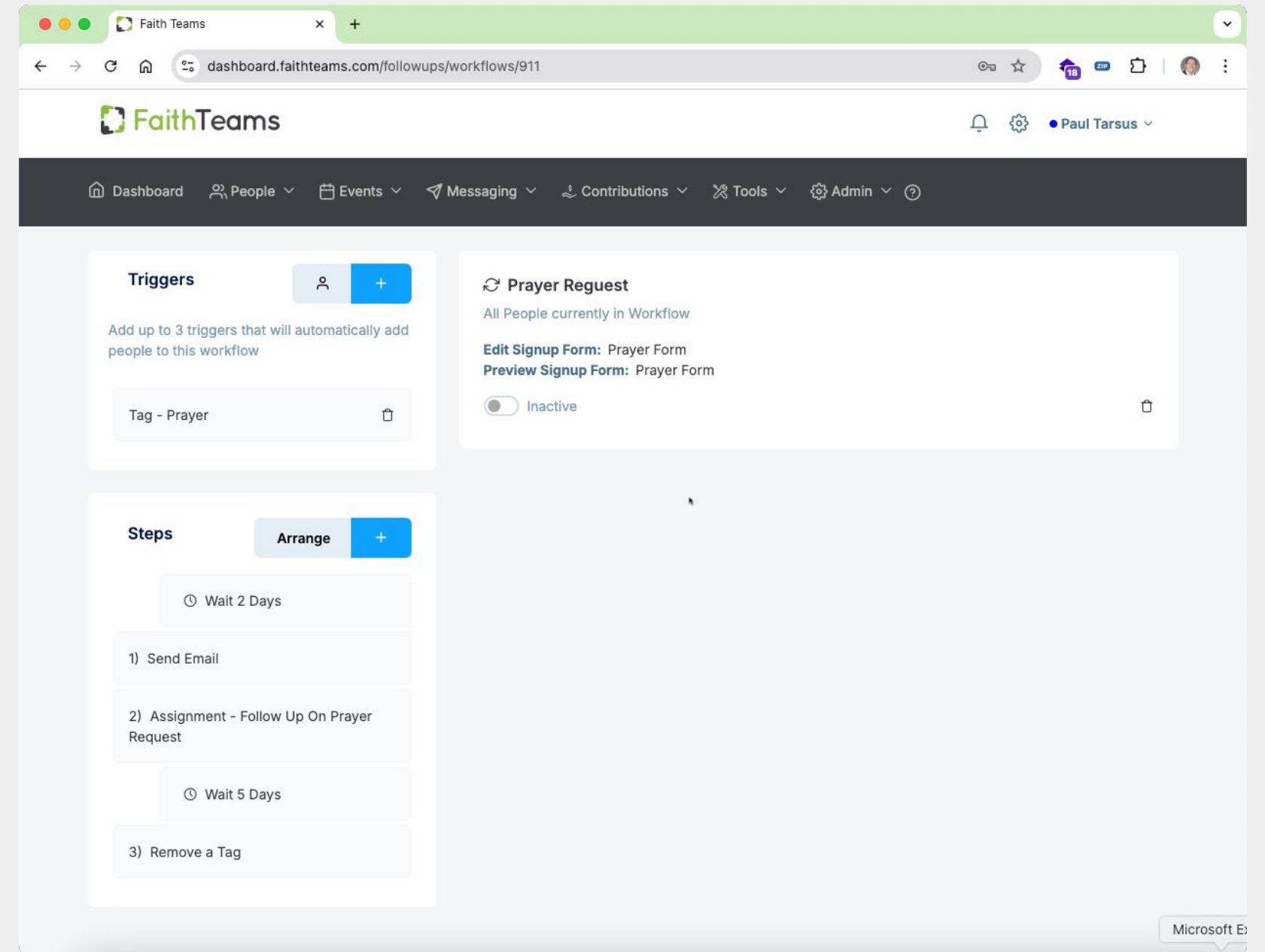
Tied to Any Form



The screenshot shows the FaithTeams dashboard at the URL `dashboard.faithteams.com/publicforms/rHTVF`. The user is logged in as Paul Tarsus. The navigation bar includes links for Dashboard, People, Events, Messaging, Contributions, Tools, and Admin. The main content area is titled "Forms > Prayer Form". It features a "Header Image" section with the FaithTeams logo and a "Form Settings" section with the following details:

- Form Name: *Prayer Form*
- Add Registrants to Database: *No*
- Update Matched Registrants on Database: *No*
- Confirmation Message: *Yes*
- Notify of Registrant: *demo_user1@mg.faithteams.com*
- Email Acknowledgement to registrant: *Email*
- Branded URL: <https://newlife.faithteams.com/prayer>

There is a "Small" dropdown menu and a QR code at the bottom of the settings section.



The screenshot shows the FaithTeams dashboard at the URL `dashboard.faithteams.com/followups/workflows/911`. The user is logged in as Paul Tarsus. The navigation bar is the same as the previous screenshot. The main content area is titled "Prayer Request" and shows the workflow configuration for "All People currently in Workflow".

Triggers

- Add up to 3 triggers that will automatically add people to this workflow
- Tag - Prayer

Steps

- Wait 2 Days
- 1) Send Email
- 2) Assignment - Follow Up On Prayer Request
- Wait 5 Days
- 3) Remove a Tag

Prayer Request

- All People currently in Workflow
- Edit Signup Form: Prayer Form
- Preview Signup Form: Prayer Form
- Inactive

Your Welcome Form

How to Promote Community

Use Your Community QR Code

Your QR Code is linked to your site.



<https://newchurch.faithtteams.com>

Mobile Download Page

Share this URL with your congregation. It provides them with links to Community Mobile and explains how they can use it to interact with your church.

<https://faithtteams.com/download-community-mobile/>

Share a Video

Here's a video that you can download to a flash drive and run on your televisions in your church.

<https://bit.ly/3Mm6Ux8>

Community Email Template

QR to Mobile Download Page

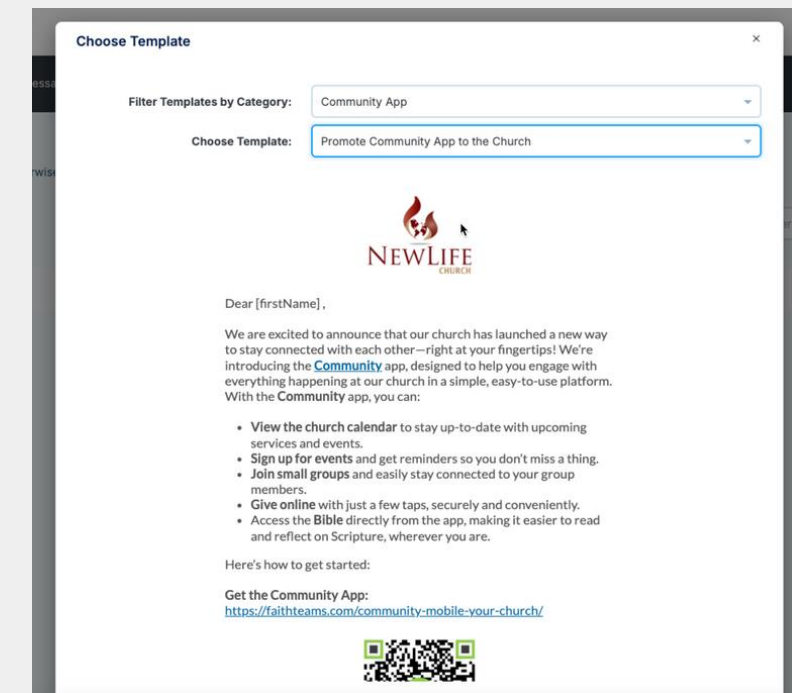
This QR code will take people to the download page. Also here:

<https://faithteams.com/community-getting-started/>



Email Template

Your Faith Teams account already has an email template you can use to let your congregation know about Community.



Send us Feedback on Your Community Setup

feedback@faithteams.com

See You Next Week!

Setup and Onboarding