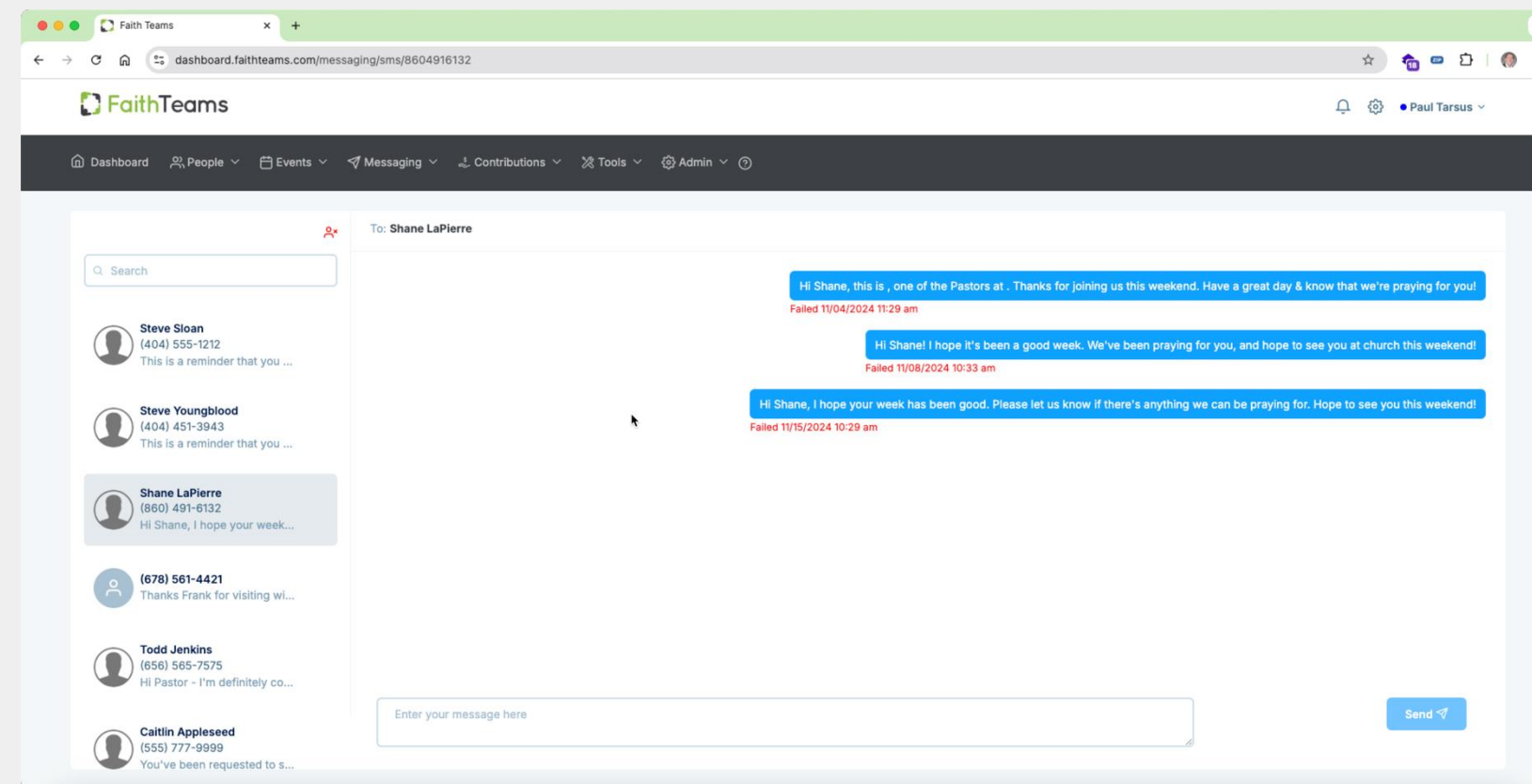


Faith Teams How To

November 20, 2024 – Messaging



Steve Youngblood
Faith Teams



In this session

- 1 Overview of Faith Teams Messaging
 - What is it?
 - How is it managed?
 - How you can message people (guests, members, staff)
- 2 How to setup and use
 - Your Outbound Number and Email Address(es)
 - Creating Templates
 - Using Templates
 - Messaging “on the fly” to a person and multiple people
 - Sending Messages via Workflows
 - Notifications
- 3 Receiving Messages
 - Email
 - E-mail and Text
 - Unsubscribing

Using Faith Teams Messaging

Setting Up a Phone Number First

<https://dashboard.faithteams.com>

Step one – Go to Admin and Church Profile and create your telephone number(s)

Step two – Go to the Admin preferences and choose notification choices

Step Three – Choose your SMS Code Words

Create Email Templates

Automated or manual emails can be sent with an email template.

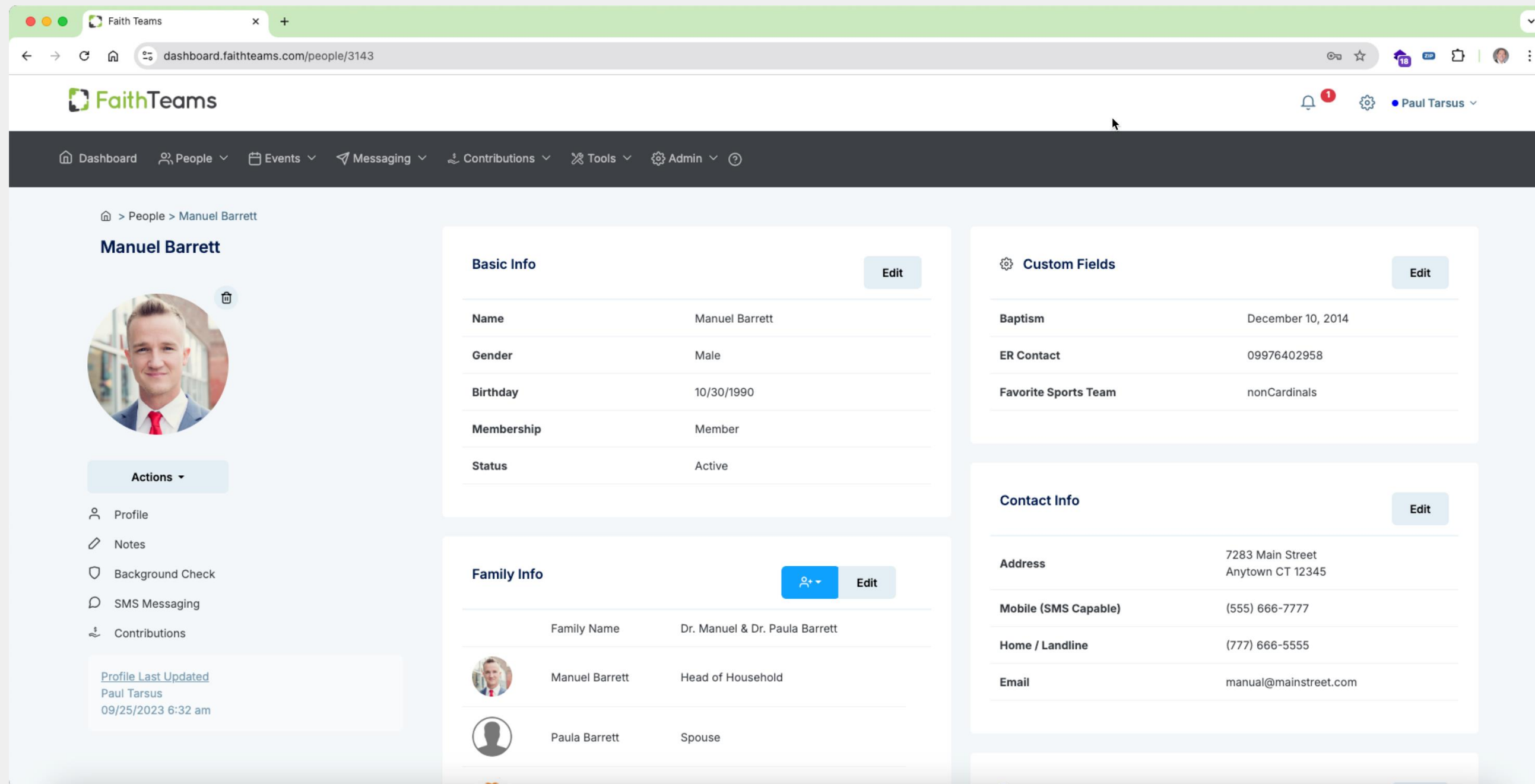
Supports merge fields

Sending and Queing

- Click on a person and then their email. Then send by typing or choosing a template
- Click on SMS capable mobile
- Adding a “send”, email or SMS to a workflow. Tie workflow to an action such as a form fill

Let's See It Live!

Click Email and #s



Manuel Barrett

Actions

- Profile
- Notes
- Background Check
- SMS Messaging
- Contributions

Family Info

	Family Name	
	Manuel Barrett	Head of Household
	Paula Barrett	Spouse

Basic Info

Name	Manuel Barrett
Gender	Male
Birthday	10/30/1990
Membership	Member
Status	Active

Custom Fields

Baptism	December 10, 2014
ER Contact	09976402958
Favorite Sports Team	nonCardinals

Contact Info

Address	7283 Main Street Anytown CT 12345
Mobile (SMS Capable)	(555) 666-7777
Home / Landline	(777) 666-5555
Email	manual@mainstreet.com

Profile Last Updated
Paul Tarsus
09/25/2023 6:32 am

Add to Workflows

Faith Teams

x

+

dashboard.faithteams.com/followups/workflows/867

18

ZIP

FaithTeams

Paul Tarsus

Dashboard

People

Events

Messaging

Contributions

Tools

Admin

Triggers

+

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

Tag - Guest

Steps

Arrange

+

1) Send Text Message

1

2) Assignment - Phone Call

Daily 9 am

1

3) Assignment - Mail Letter

Daily 9 am

1

4) Send Email

Wednesday 10 am

1

2-Week Guest Followup

1

All People currently in Workflow

Edit Signup Form: Welcome

Preview Signup Form: Welcome

Active

Send Text Message

Schedule a Specific Day/Time after the Wait Time

What Day?

Monday

What Time?

11 am

Message

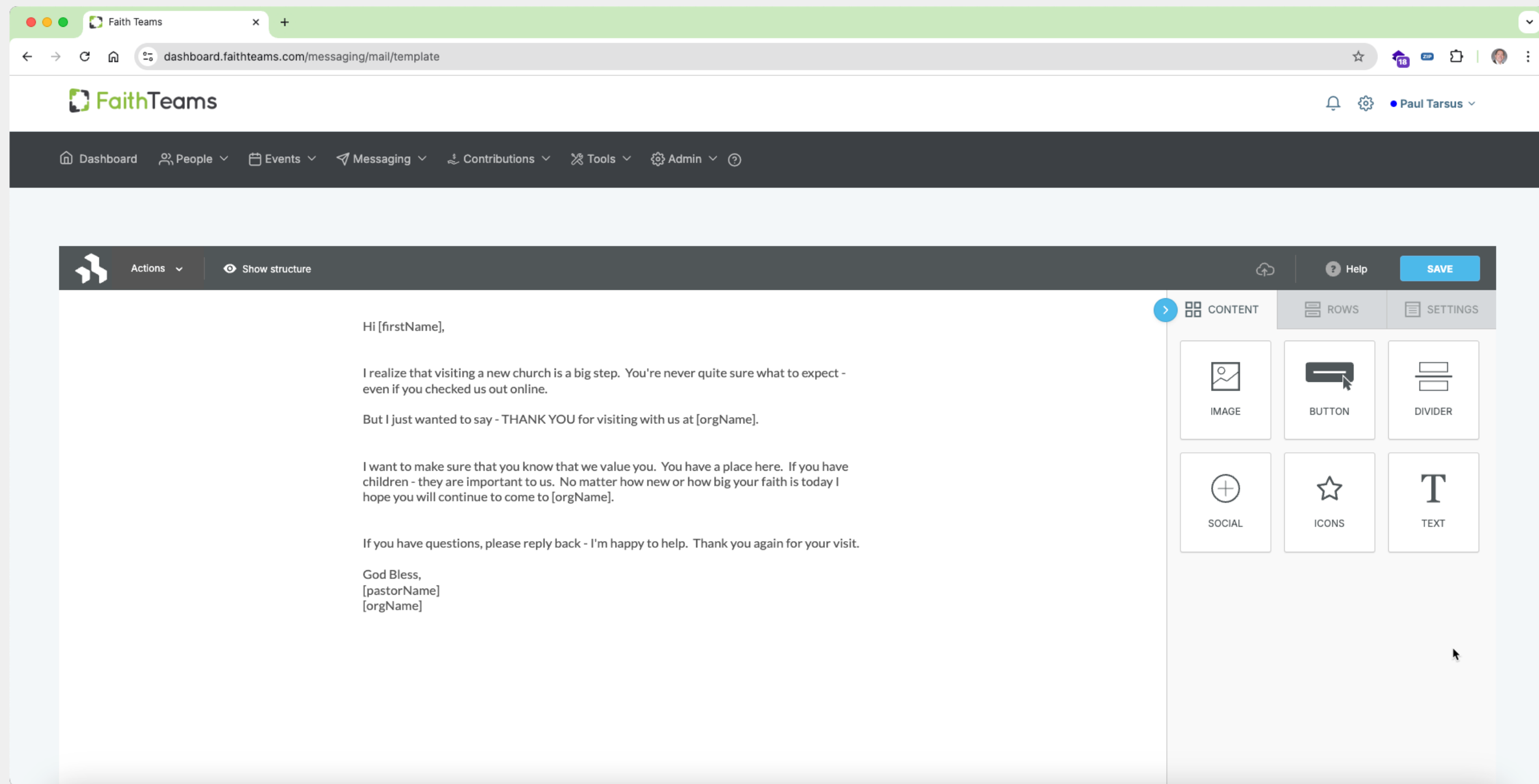
Hi [firstName], this is [pastorName], one of the Pastors at [orgName].
Thanks for joining us this weekend. Have a great day & know that we're

Delete

Cancel

Save

Email Template



Let's See It Live!

How to Get Started

Get/Register Phone Number

Included with Faith Teams

Can add more

Create Templates and Workflows

Follow-up to new guest

Key announcements

Use Tags to Create Lists

SMS and Email can be sent based on Tags

Next Session – December 4th

Send us Feedback on Your Community Setup

feedback@faithteams.com

See You Next Week!