



Texting User Guide

Table of Contents

Overview.....

1

Setup .....

1

New Phone Number.....

1

Signing off on Consent Page.....

1

Enable Texting, Author Security Rights .....

2

Before you send a text .....

2

Opt-in/Out .....

3

Managing Congregant Opt-in/Out with FellowshipOne .....

3

Opting-in via Text Message.....

3

Opting-out via Text Message .....

4

Navigating the Texting Feature.....

5

Sending a Text.....

5

Viewing Sent Text Messages.....

7

Scheduling a Text .....

8

Viewing and Editing Scheduled Text Messages .....

9

Understanding the results of a sent message.....

10

Texting Costs .....

11

What counts as a text? .....

11

Text messages sent by your church .....

11

Other text messages that count toward your total .....

12

Estimating your church’s costs.....

12

Frequently Asked Questions:.....

13

What churches can use this new feature? .....

13

Will my text messages be seen as group messages by my congregants? .....

13

Why can’t I opt a congregant in? .....

13

How is my church billed for text messages sent over 1000? .....

13

Is there a maximum number of individuals that I can send a message to? .....

13

Appendix A: Cost Breakdown .....

13

Overview

One of our goals here at FellowshipOne is to provide churches with organization and communication tools to keep their congregation informed, foster relationships, and grow the church. With the addition of texting to the FellowshipOne Portal, we hope this provides another avenue to accomplish our goals. Follow this guide to setup texting and begin leveraging this feature with your church!

Setup


First, it's important to note that Texting from FellowshipOne is available for churches located in the United States with any edition of FellowshipOne. Additionally, this feature is included in your Access Fees resulting in no additional up-front costs and includes 1000 free messages every month! Additional text messages are available at \$.03/text.

New Phone Number

On the *Communication tab* within the Individual Profile is a new section labeled **Texting Communication**. This new area is all things texting, including a new phone number field and opt-in/out visibility. This new phone number field may already be populated as we attempted to fill in valid mobile phone numbers to lighten the amount of data cleanup involved in this new field. This field is important because it is the **only** phone number that can be sent a text message from FellowshipOne.

People > Individual Profile

← BACK

 John Doe  
HEAD

Edit Individual   PROFILE   **COMMUNICATION**   PRIVACY SETTINGS

Phone Numbers

HOUSEHOLD

Shared across all household members.

MOBILE

WORK

EMERGENCY

Number should be outside of the household.

COMMENT

COMMENT

COMMENT

COMMENT

PREFERRED

☐

PREFERRED

☒

PREFERRED

☐

PREFERRED

☐

LAST UPDATED

08/27/2019

LAST UPDATED

09/16/2019

LAST UPDATED

09/16/2019

LAST UPDATED

Texting Communication ⓘ

PHONE NUMBER

USA +1 ▾

Phone number must only contain numerical characters

LAST UPDATED

Signing off on Consent Page

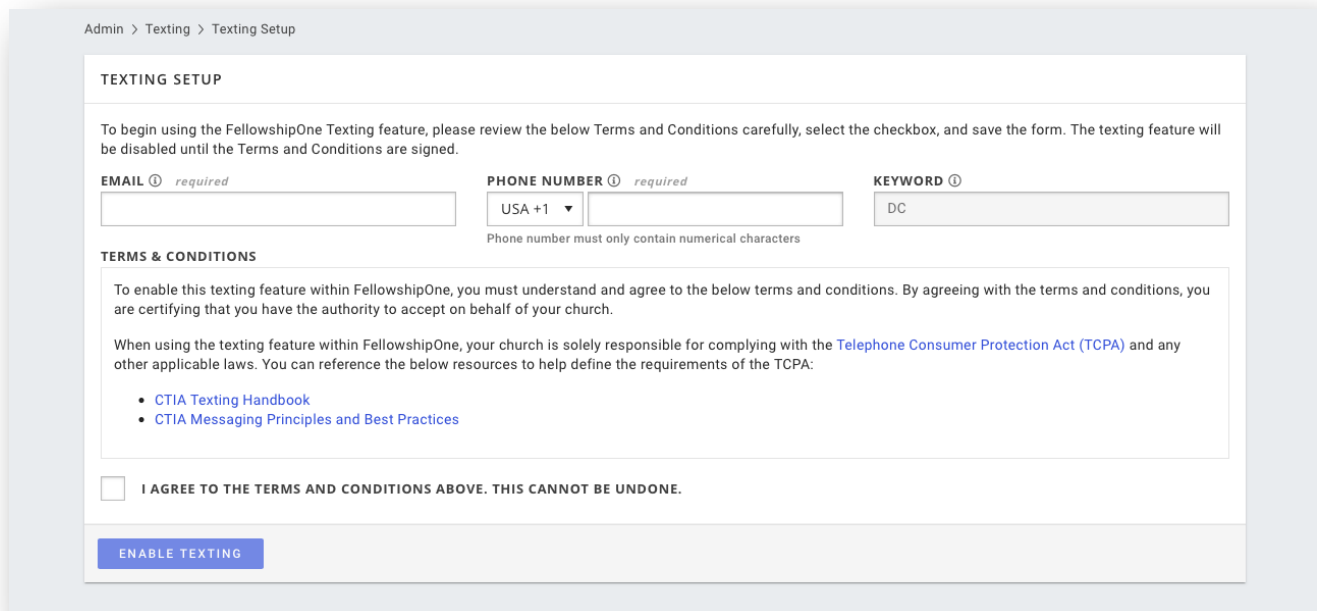
To begin texting, a portal user with the *Administrator* security must agree to the **Terms and Conditions** and input a few pieces of information. The Terms and Conditions can be accessed from the Admin menu tab or by clicking this [link](#). The Terms and Conditions outline the responsibility of your church to maintain compliance with applicable telecommunications laws and best practices. FellowshipOne does provide some assistance,

like opting in and out individuals that send specific keyword messages (more on that [below](#)), but be sure to read and understand the best practice documents we've linked to.

Secondly, this page request two specific values: *a phone number* and *email address*. These communication values will be provided to congregants if they send a HELP text message (see below for more on [HELP](#) messages). Make sure to provide the best phone number and email address in case the congregant has questions about the text messages they are receiving.

The keyword field displays your church code and is not editable. Your church code is the keyword that your congregants can text to opt-in to receiving messages from your church.

When all fields are complete and the Terms and Conditions box is checked, submit the form by clicking the **Enable Texting** button. If successful, texting from Portal is now enabled for your church! Now, you can assign the security rights to any users that will be using this new feature.



Admin > Texting > Texting Setup

### TEXTING SETUP

To begin using the FellowshipOne Texting feature, please review the below Terms and Conditions carefully, select the checkbox, and save the form. The texting feature will be disabled until the Terms and Conditions are signed.

**EMAIL** ⓘ *required*

**PHONE NUMBER** ⓘ *required*  

USA +1 ▼

Phone number must only contain numerical characters

**KEYWORD** ⓘ

### TERMS & CONDITIONS

To enable this texting feature within FellowshipOne, you must understand and agree to the below terms and conditions. By agreeing with the terms and conditions, you are certifying that you have the authority to accept on behalf of your church.

When using the texting feature within FellowshipOne, your church is solely responsible for complying with the [Telephone Consumer Protection Act \(TCPA\)](#) and any other applicable laws. You can reference the below resources to help define the requirements of the TCPA:

- [CTIA Texting Handbook](#)
- [CTIA Messaging Principles and Best Practices](#)

☐ I AGREE TO THE TERMS AND CONDITIONS ABOVE. THIS CANNOT BE UNDONE.

**ENABLE TEXTING**

Fill out the required fields and check the Terms and Conditions box to start texting

### *Enable Texting, Author Security Rights*

With the feature enabled, any users that want to send, schedule, or view sent messages will also need the new security right, **Texting, Author**.

### **Before you send a text**

While you can begin texting from FellowshipOne right away, it's best to make your congregation aware that you'll be sending them text messages. This is an important aspect of remaining TCPA compliant as well.

## Opt-in/Out

### *Managing Congregant Opt-in/Out with FellowshipOne*

With the addition of the *Texting Communication* section on the *Edit Individual* page, there is another section where you can track the individual's consent status of texting. Portal users with the **Edit Communication** security right will be able to update the consent status of an individual when the individual has opted-in via a paper form (like a contact card) or web form. When you select an option (Opted-in or Opted-out) you will be required to select a Consent method and Consent date.

**NOTE:** *Consent fields will only be available when a texting phone number is entered in the field.*

The screenshot displays the 'Edit Individual' page for 'Jane Doe SPOUSE'. The 'COMMUNICATION' tab is selected. Under 'Phone Numbers', there are fields for Household, Mobile (1231231234), Work, and Emergency. The Mobile field is highlighted. To the right, there are 'COMMENT' boxes and 'PREFERRED' radio buttons. The 'Texting Communication' section includes a 'PHONE NUMBER' field with a dropdown for 'USA +1', a 'CONSENT STATUS' dropdown (Set to 'Select...'), a 'CONSENT METHOD' dropdown, and a 'CONSENT DATE' field. The 'LAST UPDATED' column shows '09/16/2019' for the Mobile number.

New Texting Communication area with Consent fields for opting-in and out of texting

### *Opting-in via Text Message*

FellowshipOne also allows your congregants to opt-in and out of receiving messages from your church just by sending a text message. Congregants can send a text message with **“Start”** and your church code or just the church code itself in the body of the message to **48767** and be opted-in to texting. The consent fields on the Individual page will be updated accordingly. If opted-in successfully, your congregants will receive an opt-in confirmation message specific to your church.

Because the opt-in record is based on the phone number that sent the text message, only opt-ins that can be associated to an individual with the phone number can be opted in. If a congregant has an individual profile in FellowshipOne but not a *Texting Phone Number*, they will be unable to opt-in via text. An auto-response will be sent to their phone letting them know that they could not be opted-in and direct them to contact their church administrator.

Here are a few examples of messages that will opt-in congregants to texting, given that they exist in your church and have the associated phone number attributed to their individual:

- START MYCHURCHCODE
- start mychurchcode
- MyChurchCode
- MYCHURCHCODE

Here are a few examples of messages that will **NOT** opt-in congregants with the same criteria above:

- BEGIN MYCHURCHCODE
- Hello
- Thank you!
- MyChurchcode!!!

### Opting-out via Text Message

In addition to opting-in, your congregants can opt-out of receiving messages from your church via text message. Congregants can respond with **STOP, PAUSE, END, QUIT, or UNSUBSCRIBE** and FellowshipOne will automatically prevent future texts messages from being sent to this individual. The individual will receive an opt-out confirmation message letting them know they will no longer receive text messages from this phone number unless they opt back in.

Once successfully opted out, the Individual page will be updated accordingly and portal users with the edit communication right will no longer be able to update the consent status of the congregant. If the individual wants to opt back into receiving text messages, they will need to opt-in via text with the church code. Additionally, the system will automatically block messages from being sent to this congregant until they opt back in.

Texting Communication ⓘ

PHONE NUMBER

USA +1 ▾


8105559999

Phone number must only contain numerical characters

CONSENT STATUS ⓘ

Opt-Out ▾

CONSENT DATE

9/8/2020 

CONSENT METHOD

Text Message ▾

LAST UPDATED

08/11/2020

9/8/2020

New Texting Communication area with Consent fields for opting-in and out of texting

## Help Messages

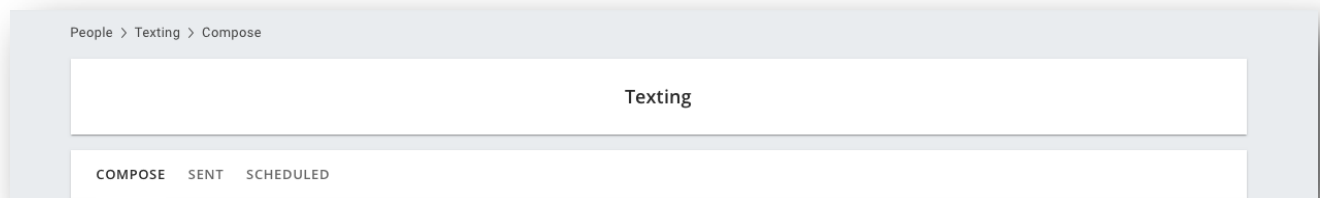
If your congregants want the ability to get more information about the text messages they receive, they can reply with the keyword **“Help”** or **“Info”**. If the congregant can be found in your church and has the incoming phone number associated to them, they will be sent a church-specific message including how to reach out for more information. This is where the details from the *Texting Setup page* come into play. The auto-response will contain the email address and phone number that were added so that the congregant has the opportunity to get in touch with your church.

## Navigating the Texting Feature

Once you’re ready to begin texting your congregation, click on **Compose** in the navigation menu within the *People* tab under the new headline *Texting*. You can navigate directly to the *Sent* and *Scheduled* pages that show any messages that have been sent or scheduled by your church.

For a more seamless experience, easily navigate to the various pages within the Texting feature by using the tabs. Quickly navigate to the *Compose* area directly from the *Scheduled* page by clicking **COMPOSE** from the tabs.

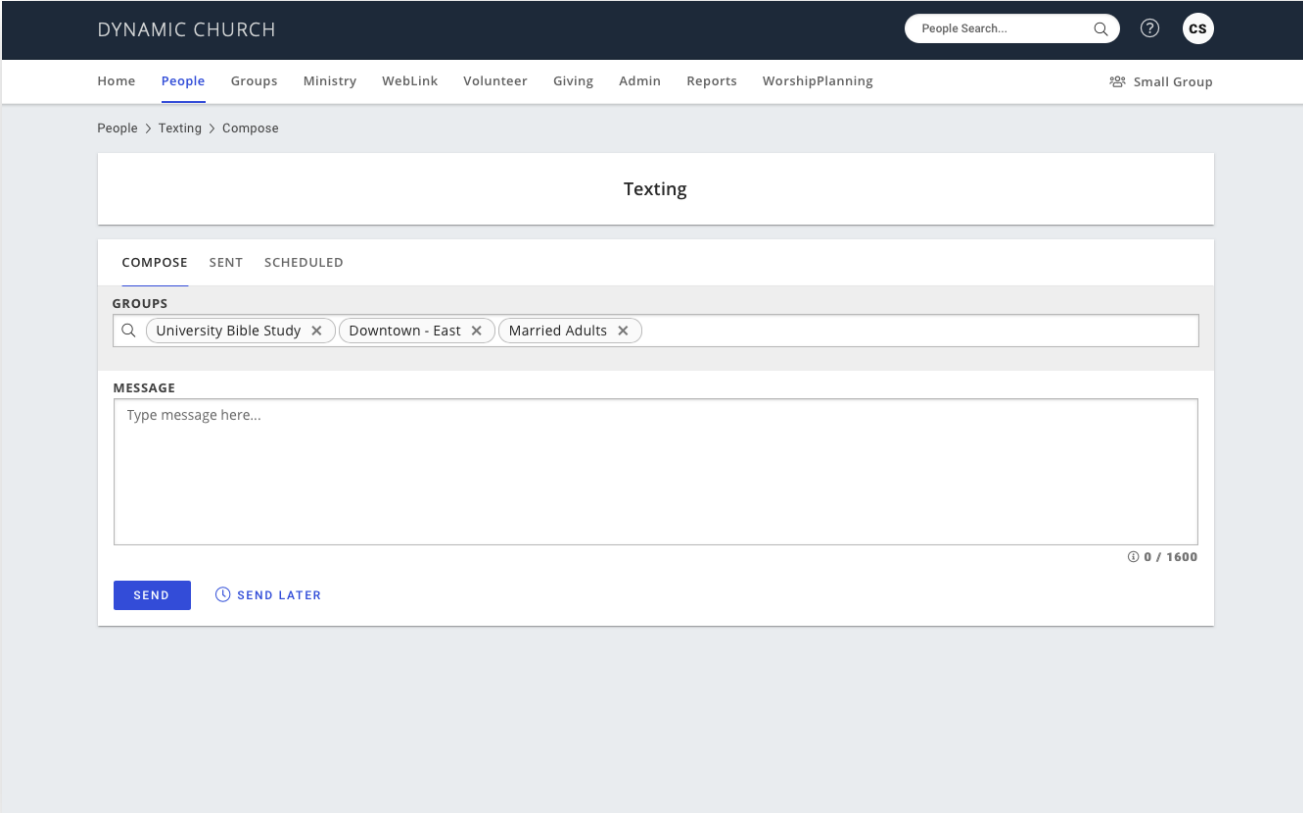
**NOTE:** Switching to another tab while composing a message will lose the progress you’ve made. Don’t forget that you must have the Texting, Author security right to access these pages.



The tabs allow you to easily navigate between the Compose, Sent, and Scheduled pages

## Sending a Text

On the *COMPOSE* page, all available groups appear in the **GROUPS** dropdown. The **GROUPS** dropdown includes *Groups*, *People Lists*, and *Temporary Groups*.



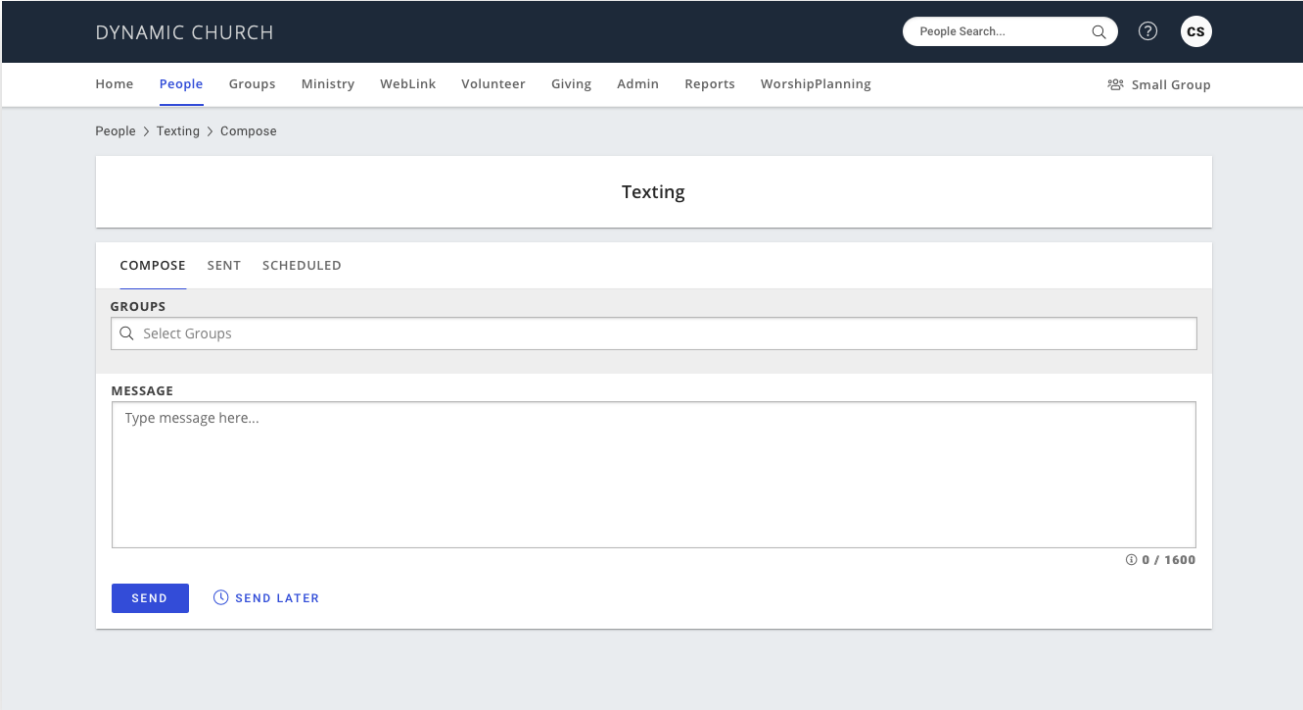
The screenshot shows the 'Texting' interface in the Dynamic Church system. At the top, there's a dark blue header with 'DYNAMIC CHURCH' on the left and a search bar, help icon, and user profile 'CS' on the right. Below the header is a navigation bar with links: Home, People (active), Groups, Ministry, WebLink, Volunteer, Giving, Admin, Reports, and WorshipPlanning. A 'Small Group' link is also visible on the right. The main content area has a breadcrumb trail: 'People > Texting > Compose'. The 'Texting' section has tabs for 'COMPOSE', 'SENT', and 'SCHEDULED'. Under 'COMPOSE', there's a 'GROUPS' section with a search bar and three selected groups: 'University Bible Study', 'Downtown - East', and 'Married Adults'. Below this is a 'MESSAGE' section with a large text box containing the placeholder 'Type message here...'. At the bottom right of the text box, it says '0 / 1600'. At the bottom of the 'COMPOSE' section, there are two buttons: 'SEND' and 'SEND LATER'.

Select as many groups to text as you'd like

**Create your message** in the large text box below the dropdown. You'll have up to *1600 characters* to use to craft your text. However, keep in mind that the **number of text messages** is determined by character count (roughly 152-160 characters = one text message) and that each individual that receives the message will count against your allotted *1000 messages per month*.

When your message is ready to be sent, select **SEND** to initiate the process.





The screenshot shows the 'DYNAMIC CHURCH' interface. At the top, there's a dark blue header with the church name and a 'People Search...' bar. Below this is a navigation menu with links: Home, People (active), Groups, Ministry, WebLink, Volunteer, Giving, Admin, Reports, and WorshipPlanning. A 'Small Group' icon is also present. The main content area is titled 'Texting' and has a sub-header 'People > Texting > Compose'. It features three tabs: 'COMPOSE' (active), 'SENT', and 'SCHEDULED'. Under 'COMPOSE', there's a 'GROUPS' section with a search bar labeled 'Select Groups'. Below that is a 'MESSAGE' section with a large text input area labeled 'Type message here...'. At the bottom right of the message input, it says '0 / 1600'. At the bottom left, there are two buttons: 'SEND' and 'SEND LATER'.

Create, schedule, and send text messages via the compose page

## Viewing Sent Text Messages

On the *Sent* page, the recently sent batch text message will be processing until all messages have been attempted to send. Once complete, you can select the message line item to review what messages were sent successfully.

People > Texting > Sent

← BACK

Texting

COMPOSE

SENT

SCHEDULED

Your church has used 20 messages this month. The first 1000 messages are free.

Recipient(s)	Message	Created By	Sent on	Status
480	Join us this Sunday for virtual worship!	John Doe	9/15/20 at 7:29 PM	Success
75	The annual fall festival is here, can you believe it! We have lots of fun socially distanced activities planned!... <a href="#">See more</a>	Jane Doe	9/15/20 at 1:43 PM	Success
1	Hi James, welcome to Dynamic Church, we are so glad you could join us this Sunday!	John Doe	9/15/20 at 1:10 PM	Success
2	Thank you for your interest in joining the serve team, one of our staff members will reach out soon with more information!	Jane Doe	9/11/20 at 4:20 PM	Success
472	Hello! Please join us this Sunday for virtual church. You can watch via our brand new Church Streaming service! Tune in and we'll see you soon.	Jane Doe	9/11/20 at 2:35 PM	Success
324	Our annual church picnic will be held this Sunday after church. Please bring a dish to pass!	Jane Doe	9/10/20 at 9:20 AM	Success

◀

1

▶

25

▼

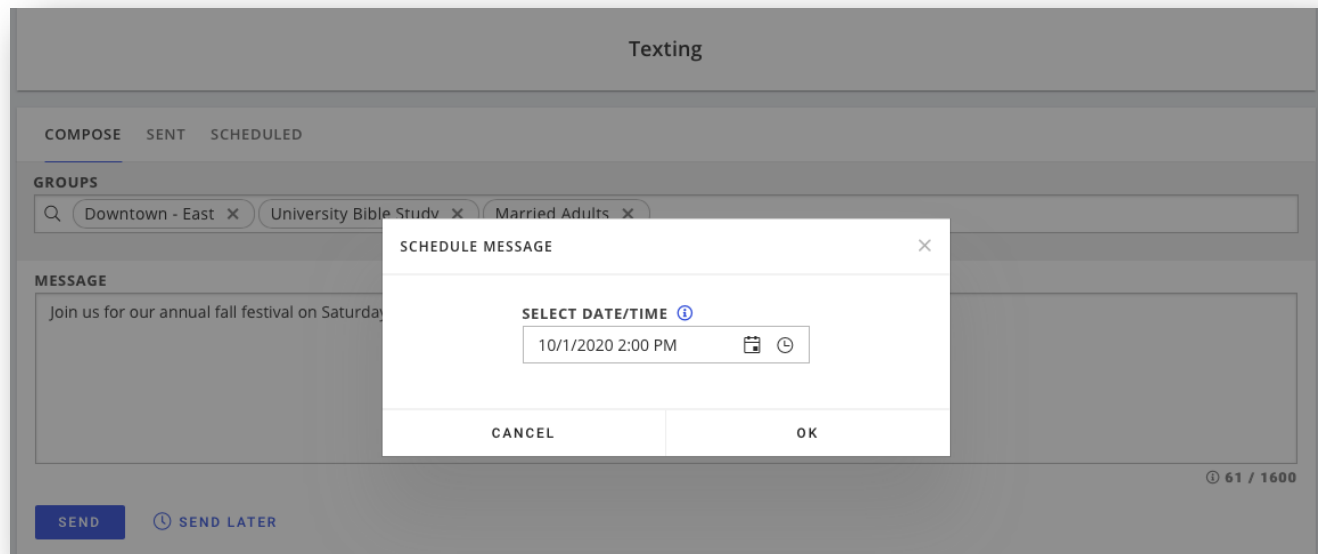
Items per page

1 - 7 of 7 items

## Scheduling a Text

You can easily schedule a message to be sent by following similar steps to sending a message. From the **COMPOSE** page, **select your group and craft your message as normal**. When complete, instead of selecting **SEND** click the **SEND LATER** button with the clock icon. This will open a modal and allow you to select a date and time to send a message. After you've chosen a date and time for the message to be sent, select **OK**. Select **Schedule Message** and the text will be scheduled to send for the chosen date and time.

**NOTE:** Because Temporary Groups expire in 72 hours, if any Temporary Groups are a part of a scheduled message, the date options will be limited to the expiration date of the group(s).



Schedule a text message for the future

## Viewing and Editing Scheduled Text Messages

After a text has been scheduled, review the details of the message by clicking the **number of recipients**. Keep in mind that since Groups and People Lists can change, the individuals that will receive the text message will not be final until the text message is sent.

Click on the **pencil icon** (if available) to edit the details of a scheduled text message. To edit a scheduled message, you must be the original creator of the scheduled message. However, any portal user with the *Texting, Author* security right can delete a scheduled text message by selecting the **delete trash can**.

DYNAMIC CHURCH

People Search...?

CS

Home

People

Groups

Ministry

WebLink

Volunteer

Giving

Admin

Reports

WorshipPlanning

Small Group

People > Texting > Scheduled

Texting

COMPOSE

SENT

SCHEDULED

Recipient(s)	Message	Created By	Scheduled for	
296	Hello, please join us this Sunday at 9:30 AM for our virtual service. See you then!	John Doe	9/24/20 at 1:30 PM	
145	Don't forget, our Fall Festival is virtual this year but will be just as fun!	Jane Doe	10/01/20 at 12:00 PM	
14	Thank you for your interest in our small groups, please join us for an informational session after church on Sunday. Lunch is provided!	John Doe	10/02/20 at 1:30 PM	

1

10

items per page

1 - 3 of 3 items

View of all scheduled text messages

## Understanding the results of a sent message

When a composed message has been initiated to send, an individual text message is generated and attempts to send to each individual found in the selected Groups, People Lists, and Temporary Groups. The status on the SENT tab shows the status of the entire batch of messages. For example, if a line item indicates that it is *Pending* that means the messages have begun to send but not all have been attempted yet. When *Pending* turns to *Success*, all messages have been sent.

But wait! Just because the batch of messages was a “Success” does not necessarily mean that **every** message was successfully sent to each congregant. To find the details of each individual message, click the **number in the Recipients column**. Here, you may find a mix of statuses which we have defined below. Be sure to check this page to see how you can correct any issues, like missing phone numbers, etc.

Here is a guide to the various statuses you may come across, what they mean, and what actions might be necessary.

Status	Reason	Action item required
<b>Sent</b>	Message has been sent from FellowshipOne	None
<b>Failed</b>	Message was unable to be sent	Try sending the message again or contact FellowshipOne Support
<b>Excluded &gt; Opted-out</b>	The individual has opted-out of texting and therefore no message was sent	If this user opted-out by mistake, they can always opt back in by sending a keyword text
<b>Excluded &gt; No Phone Number</b>	The individual does not have a texting phone number associated to their profile	Make sure this individual has a phone number in the "Texting Communications section" on their profile.
<b>Excluded &gt; Deceased</b>	This individual is marked as "Deceased" in FellowshipOne and therefore unable to receive messages	If this individual is marked deceased by mistake, you can update their status

## Texting Costs

Perhaps one of the best benefits of this texting feature is that FellowshipOne provides *1000 free messages every month*! Should you need more messages in a particular month, you only pay for the messages you use. No need to worry about adding additional text messages; keep on texting and only pay \$.03 per text.

**NOTE:** *If you're on a budget, be sure to plan your messaging campaigns accordingly to not rack up texting costs. Use up those free messages too because they do not roll over from month to month.*

## What counts as a text?

The first thing to note that is called out above is that if you stay under 1000 messages per calendar month, there are **no** additional costs for your church to use this feature. However, it's important to understand what messages are applied to your total and how one text message can be defined.

### *Text messages sent by your church*

While FellowshipOne gives you the ability to craft a message once and send it to a number of recipients, **each** individual message is counted as one text toward your free total every month. Additionally, the character count of a message is a factor in how many messages are sent. You'll notice on the *Compose* page that you have 1600 characters to work with. However, any text not successfully sent will not be counted against your total.

**NOTE:** Sending a message with 1600 character could result in 10 individual text messages sent to each recipient. Most major carriers define one text message as 150-160 characters.

Example:

- My Church sends a message containing 200 characters to 100 congregants. This will result in two messages sent to each of the 100 individuals. Thus, roughly 200 messages will be counted against My Church's 1000 monthly total.

#### *Other text messages that count toward your total*

As mentioned above in the Opt-in/Out section, your congregants will have the ability to opt-in and out of text messages by sending a Keyword (your Church Code) or STOP + Keyword (Church Code) text. These messages **will** be applied to your total of 1000 free messages per month and will be billed at \$.03 per text after the free allotment is surpassed. At this time, along with the messages that you send from FellowshipOne, opt-in/out incoming messages are the only billable messages your church is responsible for.

#### *Estimating your church's costs*

We've made it easy to view the total amount of messages that are applied to your monthly allotment. Simply navigate to the "Sent" page to view a message like "Your church has used 20 messages this month." This total accounts for all messages that apply against your total (sent messages and incoming opt-in/out messages). To estimate your costs, simply take the number of messages you've sent above 1000 (if any) and multiply by \$.03.

People > Texting > Sent

← BACK
Texting

COMPOSE
SENT
SCHEDULED

📘 Your church has used 705 messages this month. The first 1000 messages are free.

Recipient(s)	Message	Created By	Sent on	Status
206	The annual fall festival is here, can you believe it? We have lots of fun socially distant activities planned... <a href="#">See more</a>	Jane Doe	10/08/20 at 11:00 AM	Success
458	Join us this Sunday for Virtual Worship!	John Doe	10/08/20 at 9:53 AM	Success
1	Hi James, welcome to Dynamic Church, we are so glad you could join us this Sunday!	Jane Doe	10/07/20 at 12:46 PM	Success
32	Thank you for your interest in joining the serve team, one of our staff members will reach out soon with more information.	John Doe	10/07/20 at 12:14 PM	Success

## Frequently Asked Questions:

### What churches can use this new feature?

All editions of FellowshipOne can use texting. However, texting is only available for US churches at this time.

### Will my text messages be seen as group messages by my congregants?

No, each congregant will receive their own message. Using Groups, People Lists, and Temporary Groups is just a quick way to find recipients that you want to message.

### Why can't I opt a congregant in?

If a congregant chooses to opt-out of texting via a text message, portal users will no longer be able to alter the consent status of the congregant. If the congregant would like to receive messages again, they will have to opt-in via text message.

### How is my church billed for text messages sent over 1000?

Like the typical billing process, an invoice will be generated and sent to your church from our billing team.

### Is there a maximum number of individuals that I can send a message to?

Nope, send a text to as many people as you'd like. However, you may notice that it takes a little bit longer to finish sending the message to all individuals if you send it to more than 1000 people at one time.

## Appendix A: Cost Breakdown

Type of Message	Billable?	Example:
Text composed and sent from Portal	YES	Join us this Sunday at House of Worship Church for services at 9 AM and 11:30 AM.
Opt-in text message from your congregants	YES	CHURCHCODE
Opt-out text message from your congregants	YES	STOP
Help text message from your congregants	YES	HELP
Opt-in confirmation auto-response from FellowshipOne	NO	This number has been opted-in to CHURCHCODE. Reply STOP to cancel, HELP for help. Recurring messages, Msg&Data rates may apply.
Opt-out confirmation auto-response from Fellowship	NO	You have been opted-out and will no longer receive messages from CHURCHCODE. To-opt back in reply CHURCHCODE.

Help auto-response from FellowshipOne	NO	For help, call (phone number) or email (email address). To opt-out, reply STOP.
Other incoming messages	NO	Thank you, I'll be there!