

# Send Email w/ MyAccount Link

## Requirements

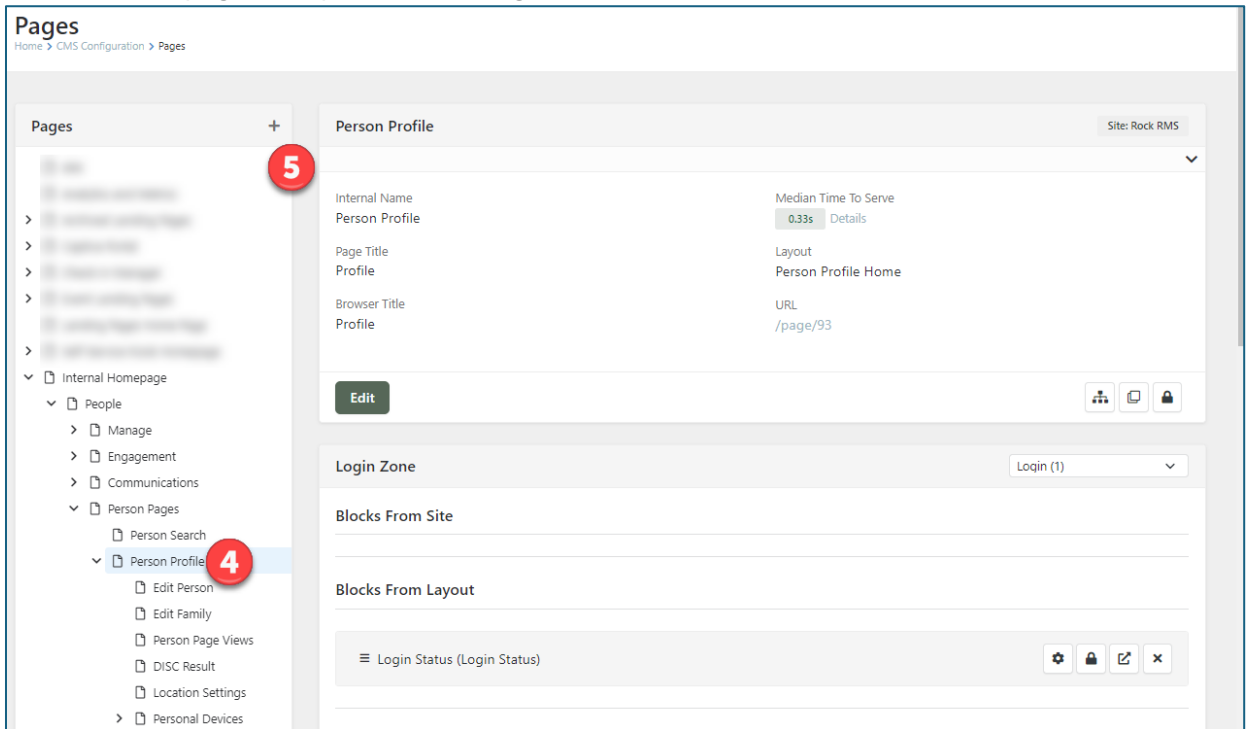
We are currently on Rock 16.4 running Lava – Fluid. This was started back on 14.?? with DotLiquid so that should not be an issue. You will need access rights to 1) Import a Workflow 2) Verify security settings on the Workflow 3) Create a new page and add a Workflow Entry block 4) Add an HTML block to an existing Person page or pages.

- 1) Unzip the **Send\_MyAccount\_Link.zip** file.
- 2) Login to your Rock instance and navigate to “Admin Tools > Power Tools > Workflow Import/Export”
  - a. Click “File > Upload” and select the “Send MyAccount Link.json” file.
  - b. Select the “Category” that you want for the Workflow.
    - i. SUGGESTION – “Data Integrity” because the security is already set for other workflows used on the Person Profile.
  - c. Click “Import”

- d.
- 3) Open the Workflow and verify the following information.
  - a. Details > Active ... Checked.
  - b. Details > Automatically Persisted ... UN-Checked.
  - c. Advanced Settings > Processing Intervals ... BLANK.
  - d. Advanced Settings > Logging Level ... None.
  - e. \*\*\* Adjust the Security according to your organization’s requirements. Note this location should inherit the same basic security as the Data Integrity category.
  - f. \*\*\* CRITICAL \*\*\*
    - i. Go to the Activities > “Send to Person” & “Send to All Emails”
      1. Go to the Action > “Send Email ...”
        - a. UPDATE the “From Email Address” to your organization’s preferred email address.
  - g. SAVE the Workflow.

4) Create a New Page

- a. Navigate to ADMIN Tools > CMS Configuration
- b. Then expand the Pages Tree at
- c. Internal Homepage > People > Person Pages > Person Profile



- d.
- e. Click the “+” sign (5) to create a new page and select > “Add Child To Selected”
- f. “Basic Settings”
  - i. Set the Internal Name / Page Title / Browser Title to “Send MyAccount Link” (no quotes)
  - ii. Layout “Full Width”

The screenshot shows the 'Edit Page' interface. At the top, there are three tabs: 'Basic Settings', 'Display Settings', and 'Advanced Settings'. The 'Basic Settings' tab is selected. The 'Parent Page' dropdown is set to 'Person Profile'. Below it, it says '(1 route exists)'. The 'Internal Name' field is set to 'Send MyAccount Link'. The 'Page Title' field is set to 'Send MyAccount Link'. The 'Browser Title' field is set to 'Send MyAccount Link'. The 'Layout' dropdown is set to 'Full Width'. The 'Site' dropdown is set to 'Rock RMS'. The 'Show Icon' checkbox is unchecked. The 'Icon CSS Class' field is empty. The 'Description' field is empty. At the bottom, there are 'Save' and 'Cancel' buttons. Red arrows point from a red circle 6 to the 'Internal Name', 'Page Title', and 'Browser Title' fields. A red circle 7 is placed over the 'Layout' dropdown.

- g.

- h. Display Settings > should default to your sites normal page settings.

**Edit Page** Site: Rock RMS

Basic Settings **Display Settings** Advanced Settings

**Page**

- ☒ Show Title on Page ⓘ
- ☒ Show Breadcrumbs on Page ⓘ
- ☒ Show Icon on Page ⓘ
- ☒ Show Description on Page ⓘ

**Menu**

Display When

When Allowed ▼

- ☐ Show Description ⓘ
- ☒ Show Child Pages ⓘ

**Breadcrumbs**

- ☒ Show Name in Breadcrumb ⓘ
- ☐ Show Icon in Breadcrumb ⓘ

**Save** Cancel

i.

j.

Advanced Settings

- i. Page Routes > Add “sendmyaccountlink” (no quotes)

**Edit Page** Site: Rock RMS

Basic Settings Display Settings **Advanced Settings**

- ☐ Force SSL
- ☒ Enable ViewState
- ☒ Allow Configuration
- ☐ Allow Indexing

Cacheability Type ⓘ

☐ Public ☒ Private ☐ No-Cache ☐ No-Store

Max Age ⓘ

Rate Limiting Enable ⓘ

Header Code ⓘ

Body CSS Class ⓘ

Page Routes ⓘ

Page Intent ⓘ

**8**

**9**

**Save** Cancel

k.

l. “SAVE” the new page.

5) To the “Main” Zone add a “Workflow Entry” block named “Send MyAccount Link”

The screenshot shows the configuration page for a "Send MyAccount Link" workflow entry. On the left is a "Pages" sidebar with a tree view. The main area is titled "Send MyAccount Link" and includes a table of metadata, a "Main Zone" configuration section, and a block list.

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

Page Title	Layout
Send MyAccount Link	Full Width

Browser Title	URL
Send MyAccount Link	/sendmyaccountlink

**Main Zone** (Main (1))

**Blocks From Site**

**Blocks From Layout**

**Blocks From Page**

- Send MyAccount Link (Workflow Entry) **11**

**10** Add Block to Zone

- a.
- b. Set the Workflow Type to your new workflow that was already imported..."Send MyAccount Link"

c. Set the following Block Properties

- i. Show Summary View > No
- ii. Block Title Icon CSS Class > “fa fa-at” (no quotes)
- iii. Disable Passing WorkflowId > No
- iv. Disable Passing WorkflowTypeld > No
- v. Log Interaction when Form is Viewed > No
- vi. Log Interaction when Form is Completed > No
- vii. Disable Captcha Support > Yes – since this is an internal form and captcha to verify a person is not needed, this setting will increase the page speed.
- viii. SAVE

**Block Properties** Workflow / Id: 4385 ×

**Basic Settings** Advanced Settings

**Name** \*

**Workflow Type** i  

⚙️ Send MyAccount Link × ▼

**Show Summary View** i  

No ▼

**Block Title Template** i  

1

**Block Title Icon CSS Class** i

**Disable Passing WorkflowId** i  

No ▼

**Disable Passing WorkflowTypeld** i  

No ▼

**Log Interaction when Form is Viewed**  

No ▼

**Log Interaction when Form is Completed**  

No ▼

**Disable Captcha Support** i  

Yes ▼

**Save** **Cancel**

d.

Hang in... we're almost done!

- 6) Navigate to Pages > People > Person Pages > Contributions
  - a. SectionA2 Zone
  - b. "Add Block to Zone"
    - i. Add an "HTML Content" block & Name it "MyAccount Link" (no quotes)

Pages

Home > CMS Configuration > Pages

Pages

Contributions

Site: Rock RMS

Internal Name: Contributions

Median Time To Serve: 2.02s

Page Title: Contributions

Layout: Person Profile Detail

Browser Title: Contributions

URL: /page/177

Edit

SectionA2 Zone

Blocks From Site

Blocks From Layout

Blocks From Page

Giving Configuration (Giving Configuration)

MyAccount Link (HTML Content)

Add Block to Zone

- c.
- d. Click the "Edit HTML" and add the add the HTML from the "Page\_Button\_HTML.txt" file.
- e. SAVE
- f. \*\*\* The HTML Button can be put on any of the Person Pages to allow your staff access to send a link.

Edit HTML

Display from

to

HTML Code:

```
1 <[[ panel title:'Send MyAccount Email Link' icon:'fa fa-at' ]]>
2 <a href='{{ 'Global' | Attribute:'InternalApplicationRoot' }}sendmyaccountlink?PersonId={{ PageParameter.PersonId }}&rtur1={{ 'Global' | Page:'Url1' }}' class
3 <[[ endpanel ]]>
```

Save Cancel

- g.

## Your Button is Live! Let's see how it looks and how to use it.

- 7) When you need to verify a person's information and/or they ask for a "Contribution Statement", you now have the ability to verify some general information and send a tokenized link to the MyAccount Page.

The screenshot shows the MyAccount page for Kurt Vogeler. The top navigation bar includes links for Profile, Extended Attributes, Steps, Groups, Documents, Contributions (highlighted), Benevolence, Security, History, and Staff. The main content area is divided into two sections. The left section, titled "Transaction List", is currently blurred. The right section, titled "Giving Configuration", contains several sub-sections: "Add One-time Gift" (with a text input field), "Text-To-Give Settings" (with a plus icon), "Scheduled Transactions" (with a plus icon), "Saved Accounts" (with a plus icon), "Pledges" (with a plus icon), and "Contribution Statements" (with buttons for 2024 YTD, 2023, 2022, and 2021). At the bottom of the right section, there are two buttons: "@ Send MyAccount Email Link" and "@ Email a MyAccount Link", with a red circle containing the number 17 next to the second button. The bottom of the page shows a "Transaction List" tab and a "Transaction Details" tab, with a count of 133 Transactions.

a.

- 8) After you click the "@ Email a MyAccount Link" button, you will be redirected to the page created in #4 above. This page will display the Person in addition to each adult in the family and allow you to send the link to JUST the person or to ALL listed.

- a. From here you can verify the basic information for the people shown and chose to send to the originating person on the call or request ... or send the link to every person in the ALL-Emails list.

The screenshot shows the "Send MyAccount Link" page. The top navigation bar includes links for Home, Profile, and Send MyAccount Link. The main content area is titled "Send MyAccount Link Entry" and contains a section for "Review the following contact information." Below this section, there are two columns of contact information for Kurt Vogeler and Cheri Vogeler. Each column displays the person's name, email address (kurtvogeler@tfc.org), email allowed status, cell number, and SMS enabled status. At the bottom of the page, there are three buttons: "Send to Person", "Send to All Emails", and "Cancel".

b.





9) Basic email is sent out from the Workflow



a.


10) Clicking the 30 day tokenized Link will bring the person to their MyAccount Page.

TrinityFellowship

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# My Account

Home / My Account



## Mr. Kurt Vogeler

### Contact Information

Home Address

Phone


Mobile

Email  
kurtvogeler@tfc.org

Receive Trinity Fellowship text message/email updates  
Yes

Update Profile

### Vogeler Family



#### Cheri Vogeler

Contact Info

Receive Trinity Fellowship text message/email updates  
Yes

Add New Family Member

Request Profile Changes

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

a.