

How to use Microsoft Outlook to Create an MTP Batch Email, plus Guidelines and Tips for Using MTP Text Messaging

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Updates to the Step-by-Step Guide

1. **September 10, 2024:** Step-by-step guide released.
2. **October 29, 2024:** Focus on using Microsoft Outlook to create an MTP batch email and separate the converting existing text into a new section.
3. **December 12, 2024:** Added how to clear all text formatting in Microsoft Outlook using the Clear All Formatting icon.
4. **March 18, 2025:** Changed the term “Outlook Message Format” to “Outlook Mail Format”. Added the Outlook Mail Format file extensions (.msg and .eml) to the step-by-step guide where needed.
5. **October 24, 2025:** Moved the Text Messaging Step-by-step Guidelines from the LIUNA Chicago MTP Manual and combined it with this step-by-step guide.

Using Microsoft Outlook to Create an MTP Batch Email

Overview and Preparation

Here are the steps to prepare and create an MTP Batch Email using Microsoft Outlook.

Start with a New Email in Outlook. **Do Not Use an existing Microsoft Outlook email as a starting point.** Using an existing Outlook email as a starting point can cause unseen formatting issues once the email is sent.

FYI: If you want to use an existing Outlook email (or are cutting and pasting from other applications), please review [How to Convert an Existing Outlook Email or Word Document to an MTP Batch Email.](#)

1. **Open** Microsoft Outlook and start a New Email.
FYI: MTP uses Outlook as its email editor to create and format emails.
2. **Write** your email copy and subject line in the Microsoft Outlook email. Get it approved.
3. **Personalize** the email copy using MTP Mail Merge Fields such as [First Name] or [Dues Amount]
4. **Format**, bold, underline, and add bullet points or hyperlinks to your email via Outlook Microsoft
5. **Insert** images in your email copy that you want to use for your message, like a Header, Footer, or Logo image
6. **Attach** files such as PDFs to your email
7. **Save** your email as an Outlook Mail Format (.msg or .eml) file
8. **Define** your email list of recipients in MTP using a User Define Report, such as all ACTIVE members or only members that are SUSPENDED
9. **Load** your Outlook Mail Format (.msg or .eml) file into MTP
10. **Review** your email and personalization, if added, in MTP
11. **Send** or **Schedule** your email in MTP
12. **Track** your email in MTP

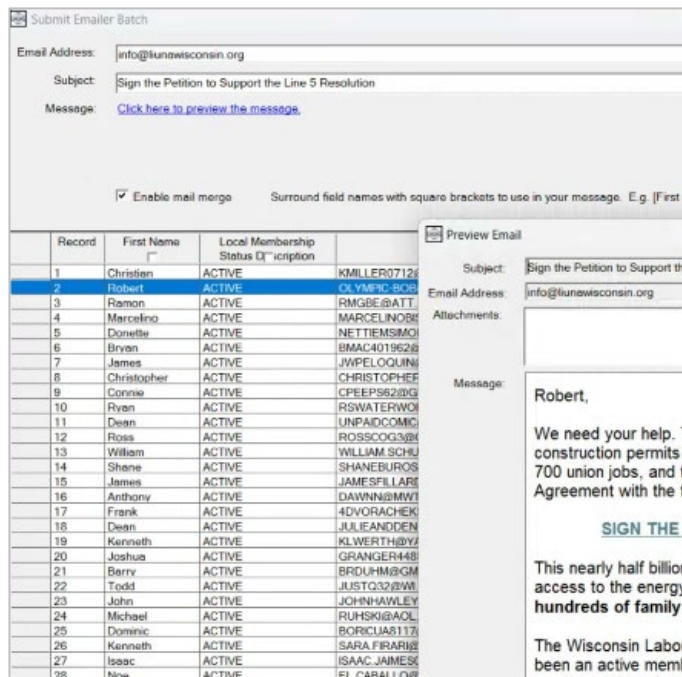


Image: MTP Batch Email

1) Open Microsoft Outlook and start a New Email

Start a New Email (Image 1.0).

Do Not Use an existing Microsoft Outlook email as a starting point. Doing so can result in unseen formatting issues once the email is sent.

If you want to use an existing Outlook email, please review the section [How to Convert an Existing Outlook Email or Word Document to an MTP Batch Email](#).

FYI: MTP uses Outlook as its email editor to create and format emails.

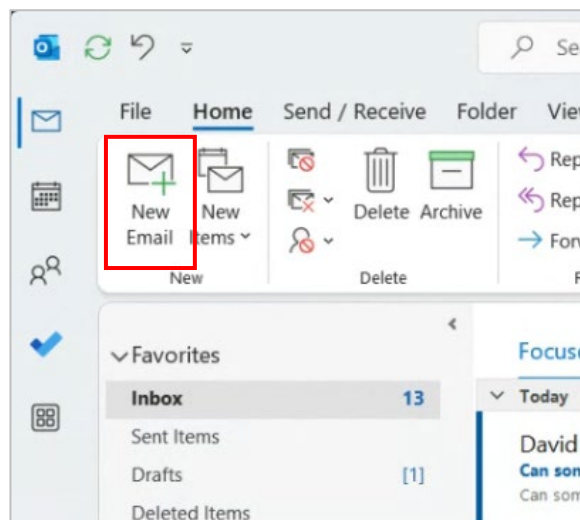


Image 1.0

2) Write Your Email Copy

Write (or re-type) your **New Email** in Microsoft Outlook. Get your copy (i.e., text) and email subject reviewed and approved for messaging, branding, spelling, and grammar rules (Image 2.0).

TIP: Formatting topics not to worry about at this point in the email writing process:

- Bolding
- Italicizing
- Underlining
- Bullet points
- Inserting images
- Inserting mail merge fields such as First Name, etc.

Why?

Don't worry about formatting at this point. When ready, you will format your email and insert images in Microsoft Outlook to create a finalized **Outlook Mail Format** (.msg or .eml) file for your HTML email to be loaded into MTP.

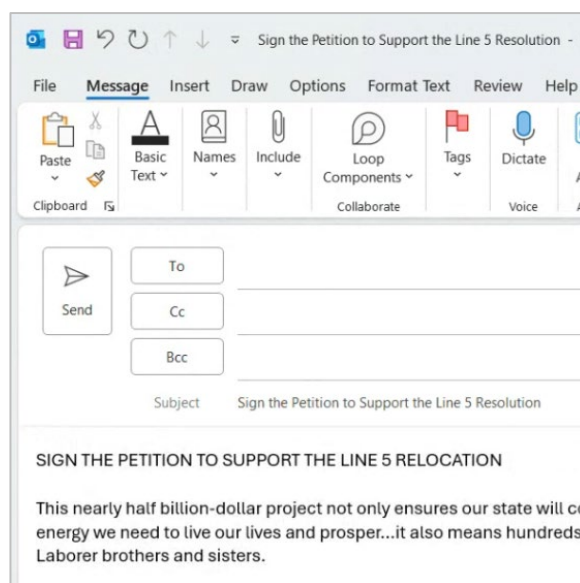


Image 2.0



3) Personalized the email using MTP Mail Merge Fields

One of the most common ways to personalize your email is to use the [First Name] **Mail Merge Field** from MTP to insert the member's first name at the beginning of the email (Image 3.0)

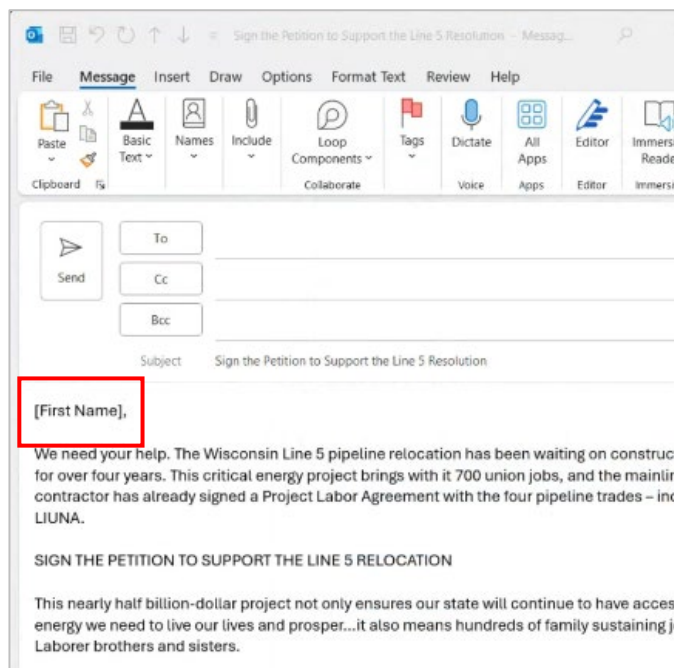
TIP 1: Mail Merge Fields can be found and documented when you export a spreadsheet from MTP using a **User Defined Report**. Each column header contains the Mail Merge Field (i.e., Row 1, the top row) in the exported spreadsheet (Image 3.1).

TIP 2: Mail Merge Fields used in email copy must be written exactly as they are displayed, i.e., capitalize letters and spaces with square brackets (left and right).

TIP 3: Left and Right Square Brackets are required to frame the Mail Merge Field within the email copy.

Example: [First Name] and [Training Id Number]

View the chart below for some of the most common **MTP Mail Merge Fields** used to personalize your Text-only or HTML Outlook email.



Merge Field with Square Brackets - Image 3.0

| | A | B | C | D | E | F | G | H |
|----|--------------------|-----------------|----------------|-------------|--------|--------------------|-------|-------------|
| 1 | Training Id Number | First Name | Middle Initial | Last Name | Suffix | City | State | Postal Code |
| 2 | | 9865 AARON | | FAIR | | CHICAGO | IL | 60619 |
| 3 | | 26851 AARON | | SANCHEZ | JR | CHICAGO | IL | 60629 |
| 4 | | 187003 AARON | M | ROHDE | | CEDAR LAKE | IN | 46303 |
| 5 | | 31433 ABEL | | VILLARREAL | | MERRIVILLE | IN | 46410 |
| 6 | | 26358 ADAM | M | RUCKER | | CHICAGO | IL | 60647 |
| 7 | | 186830 ADDIE | | BROWN | | COUNTRY CLUB HILLS | IL | 60478 |
| 8 | | 189154 ADRIAN | | VILLASENOR | | PLAINFIELD | IL | 60586 |
| 9 | | 186844 ALBERT | | VANCE | | MERRILLVILLE | IN | 46410 |
| 10 | | 88365 ALBERTO | | ACUAHUITL | | LAKE STATION | IN | 46405 |
| 11 | | 90007 ALEJANDRO | | DE LA TORRE | | SCHAUMBURG | IL | 60193 |

Spreadsheet Header Fields - Image 3.1

MTP Merge Field Chart (below)

| Personalization Options | MTP Mail Merge Fields |
|-------------------------------------|--|
| • First Name | • [First Name] |
| • Last Name | • [Last Name] |
| • Suffix | • [Suffix] |
| • Street Address | • [Address] |
| • City | • [City] |
| • State | • [State] |
| • Postal Code | • [Postal Code] |
| • Primary Phone | • [Primary Phone] |
| • Mobile Phone | • [Mobile Phone] |
| • Email Address | • [Email Address] |
| • Membership Type (Local) | • [Membership Type Description] |
| • Local Membership Type (TC only) | • [Local Membership Type Classification] |
| • Membership Status (Local) | • [Membership Status Description] |
| • Local Membership Status (TC only) | • [Local Membership Status Description] |
| • Card Number | • [Card Number] |
| • Training ID Number | • [Training Id Number] |

| | |
|--|--|
| <ul style="list-style-type: none"> • Local Number • Amount • Dues Amount • Net Due • Paid Thru Date • Local Initiation Date • International Initiation Date | <ul style="list-style-type: none"> • [Local Name] • [Amount] • [Dues Amount] • [Net Due] • [Paid Thru Date] • [Initiation Date] • [Insert Date] |
|--|--|

4) Format, bold, underline, and add bullet points or hyperlinks to your email via Outlook Microsoft

Now, you are ready to format your email.

In Outlook, modify and add the following to format and attach files to your email as needed (Image 4.0).

- Bolding
- Italicizing
- Underlining
- Highlighting
- Paragraphs
- Hyperlinks
- Don't forget to personalize your email with **MTP Mail Merge Fields** such as [First Name]



Footer Image - Image 4.0

5) Insert images that you want to use in the email messages, like a Header, Footer or Logo image

Re-leverage images, such as header or footer images already used in your organization's Outlook emails.

In Outlook, add/insert your images with the **Insert > Picture (This Device...)** menu in Microsoft Outlook (Image 5.0).

Your images should be saved on your local computer as an image file in one of the three types below (Image 5.1).

- .JPG – JPG File Interchange Format
- .JPEG – JPEG File Interchange Format
- .PNG – Portable Network Graphics

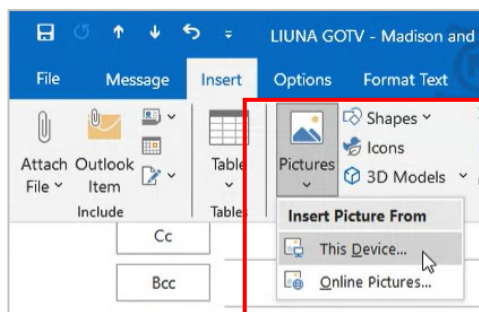


Image 5.0



Footer Image - Image 5.1

6) Attach files such as PDFs to your email

Re-leverage files, such as PDFs that are already used in your organization.

Ideally, these files, such as PDFs, should be saved on your local computer (i.e., your Desktop).

In Outlook, add/insert your files with the **Insert > Attach File** menu in Microsoft Outlook or **Cut & Paste** from Windows Explorer (Image 6.0).

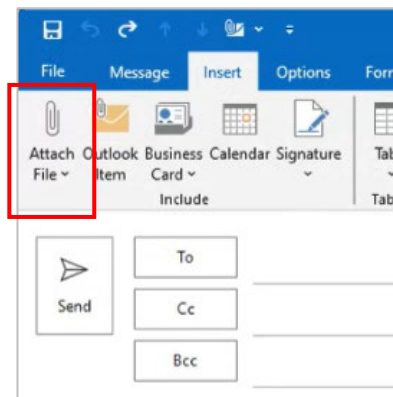


Image 6.0

7) Save your finalized (and approved) email as an Outlook Mail Format (.msg or .eml) file

Once you have personalized, formatted, inserted images, or attached files to your email in Outlook and you are happy with how it will be viewed/received by your members, save it as an **Outlook Mail Format**.

What are the steps?

A. In Outlook, click **File > Save As** (Image 7.0).

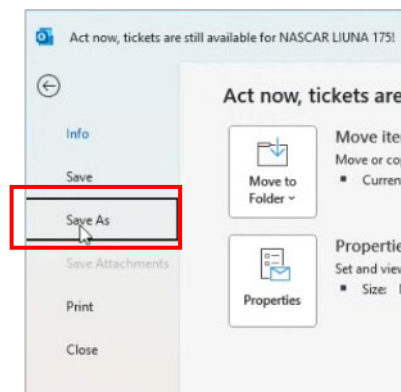


Image 7.0

B. In the **Save As** window, find the folder location (or create a new folder) where you will save all your **Outlook Mail Format (.msg or .eml)** files for re-use (or to re-leverage) at a later point in time (Image 7.1).

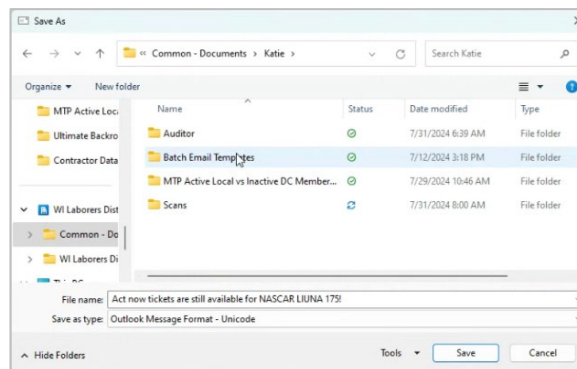


Image 7.1

TIP: If you don't have a folder, create a Batch Email Templates folder (or something similar) to share all the Outlook Mail Format (.msg or .eml) files with other staffers.

C. Rename the file using the **Year-Month-Date** format with the email subject at the end. This is a best-practice file management technique for determining when this email was sent. (Image 7.2)

Example: 2024-07-31 Act now tickets are still available for NASCAR LIUNA 175!

- D. Click the **Save as type:** pop-down menu to select **Outlook Mail Format (.msg or .eml)** (Image 7.2)
- E. Click **Save**

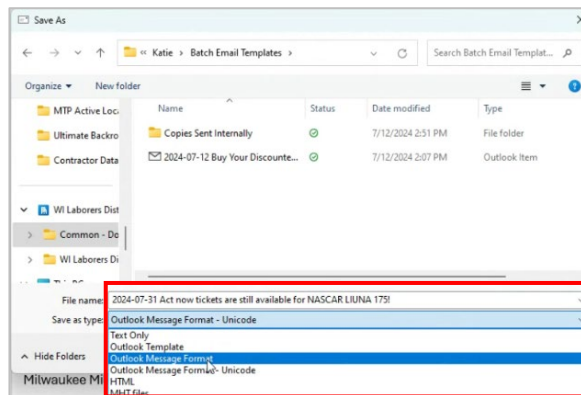


Image 7.2

8) Define your email list of recipients in MTP using a User Define Report

This step assumes you know how to create and modify a **User Defined Report** in MTP.

FYI: If you need help using **User Define Report** capabilities in MTP, please contact **MTP Support** at **(440) 439-7000**.

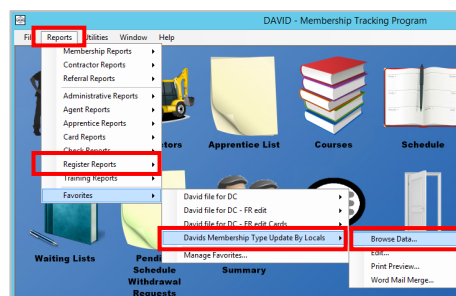


Image 8.0

- A. Open **MTP**.
- B. **Question:** Do you have a report tagged as a **Favorite** for this email?
 - a. **YES:** Open the report by going to **Reports > Favorites > REPORT > Browse Data...** (Image 8.0). Then proceed to Step 8G.
 - b. **NO:** Continue to Step 8C below.

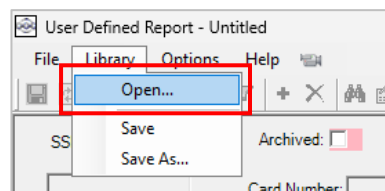


Image 8.1

- C. Perform a member **Search** and open a member's record – this will display the **Tools** pop-down menu.
- D. **Question:** Do you already have a previously **Saved** report for this email?
 - a. **YES:** Select **Tools > User Defined Report** or **CTRL+U**, and then **Library > Open** to open a previously saved report (Image 8.1). Then proceed to Step 8F.
 - b. **NO:** Continue to Step 8E below.

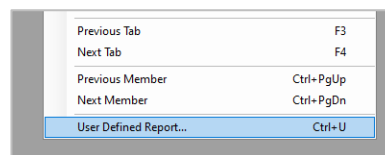


Image 8.2

- E. Select **Tools > User Defined Report** or **CTRL+ U** to build a new report from scratch. (Image 8.2)

- F. Finalize your **User Define Report** with selected (green) and criteria (red) fields needed for your email list. (Image 8.3)
- G. **Question:** Do you need to format any field for personalization in your email, such as a First Name?
 - a. **Yes:** Change the data from **All Caps** to **Proper Case**. Continue to **Step 8H** below.
 - b. **No:** Proceed to **Step 8O**.

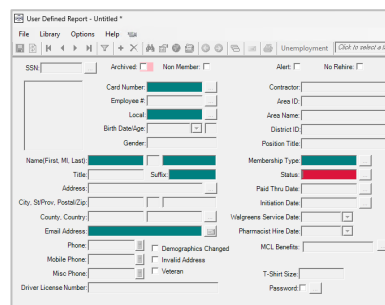


Image 8.3

FYI: By default, all fields in MTP are displayed and exported in **All Caps** (Image 8.4)

- H. With your User Define Report open, go to **Option > Report Options... (F8)** (Image 8.5)
- I. Click on the **Columns** tab. (Image 8.6)

| | First Name | Middle Initial | Last Name |
|---|------------|----------------|-----------|
| 1 | ALISA | T | |
| 2 | JIM | D | |
| 3 | DONATO | | |
| 4 | EDWARD | | |

Image 8.4

- J. Scroll to the right (using the horizontal scroll bar at the bottom) to view the column **Format**. (Image 8.6)
- K. Change the default option for First Name from **[None]** to **Proper Case**. (Image 8.6)

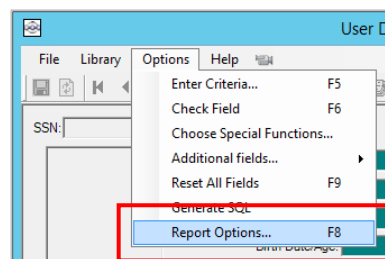


Image 8.5

- L. Click **OK**
- M. View your updated **Proper Case** display settings by clicking **File > Browse Data...** (Image 8.7)

| Fields to display | Caption | Width (in inches) | Format |
|-------------------|-----------------|-------------------|---------------------|
| First Name | First Name | -1 | Proper Case |
| Middle Initial | Middle Initial | -1 | (None) |
| Last Name | Last Name | -1 | Last 3 Characters |
| Suffix | Suffix | -1 | Mask First 5 Digits |
| Address | Address | -1 | Mask First 6 Digits |
| City | City | -1 | (None) |
| State | State | -1 | (None) |
| Postal Code | Postal Code | -1 | (None) |
| Mobile Phone | Mobile Phone | -1 | (None) |
| Local Name | Local Name | -1 | (None) |
| Date | Print Thru Date | -1 | 17/01/2000 |

Image 8.6

| | First Name | Middle Initial | Last Name |
|---|------------|----------------|-----------|
| 1 | Alisa | T | |
| 2 | Jim | D | |
| 3 | Donato | | |
| 4 | Edward | | |

Image 8.7

N. Save your **Proper Case** display setting by saving the User Define Report by clicking **Library > Save** (Image 8.8)

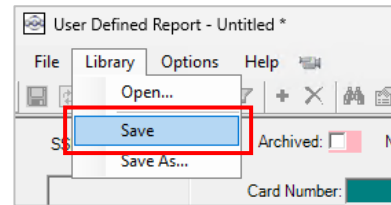


Image 8.8

NEXT: Set your User Define Report **Criteria** to only list members with an email address.

O. Ensure that the **Email Address** field is highlighted in green. If not, double-click on the field to turn it green. (Image 8.3)

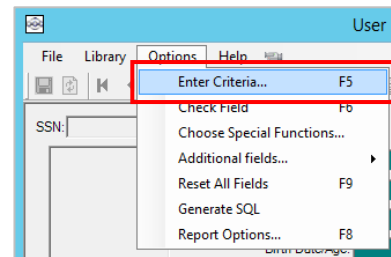


Image 8.9

P. Click the email address field once so your mouse cursor is visible within it (this means the field is ready to be modified), and then click **Options > Enter Criteria... (F5)**. (Image 8.9)

Q. Click the **Compare** column pop-down menu, scroll down, and select the option, **Is Not Blank**. (Image 8.10)

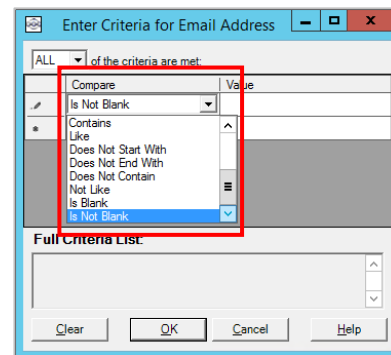


Image 8.10

R. Click **OK**.

S. Notice that the **Email Address** field is highlighted in red. (Image 8.11)

T. Save your email address **Is Not Blank** criteria by saving the User Define Report by clicking **Library > Save**. (Image 8.8)

U. Click **File > Browse Data** to check your email list based on your saved criteria. If needed, go back and adjust your criteria. (Image 8.12)

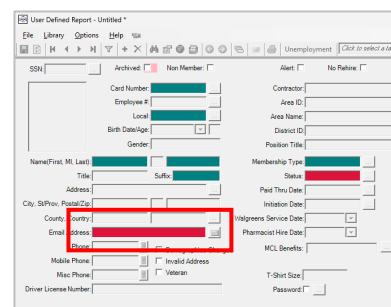


Image 8.11

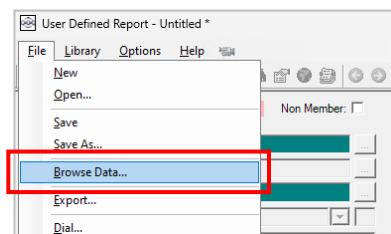


Image 8.12

As fields are selected or deselected, their colors will change depending on the **field's Selection, Criteria, and Special Functions** (Image 8.13).

| Color | Selected | Has Criteria | Has Special Function |
|--------|----------|--------------|----------------------|
| Green | ✓ | ✗ | ✗ |
| Red | ✗ | ✓ | ✗ |
| Yellow | ✗ | ✗ | ✓ |
| Blue | ✓ | ✓ | ✗ |
| Orange | ✓ | ✓ | ✓ |

Image 8.13

TIP: Once you have completed building your **User Defined Report**, flag it as a **Favorite** report for quick and easy access from the MTP Dashboard.

Follow the steps below to tag your report as a **Favorite**:

V. Click **Reports > Favorites > Manage Favorites...** (Image 8.14).

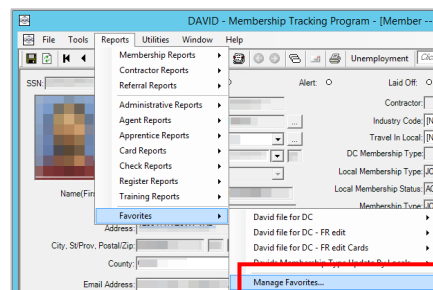


Image 8.14

W. Under the **User Define Report Library** section at the bottom, scroll (using the horizontal scroll bar at the bottom) and find your saved User Defined Report (Image 8.15).

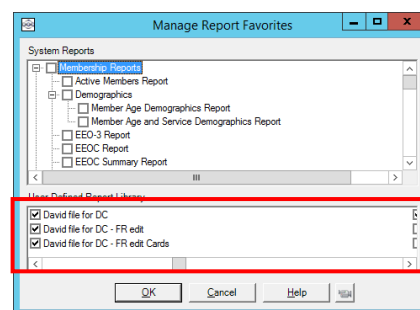


Image 8.15

X. Check the box next to the User Defined Report you want to favorite (Image 8.15)

Y. Click **OK** (Image 8.15)

9) Load your Outlook Mail Format file into MTP

Once you have defined your email list of recipients in MTP using a User Define Report (Step 8)...

A. Click **File > Email...** (Image 9.0)

B. Log in with your **Username** and **Password**. The log-in step provides permission to email the respondents.

C. Edit/check the sender's **Email Address** field. The email address that the recipients will see when they receive the email (Image 9.1)

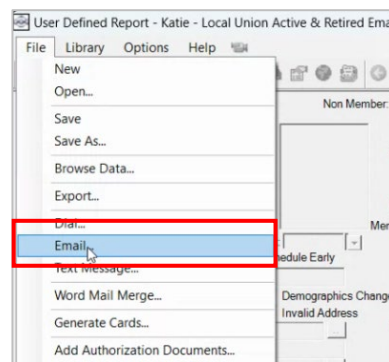


Image 9.0

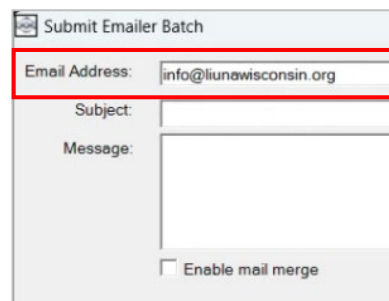


Image 9.1

- D. Edit/check the **Sender Name** field. The name that the recipients will see when they receive the email (Image 9.2)
- E. Click the **three-dot button** under the Sender Name field and select **Load** (Image 9.3)
- F. Find your saved **Outlook Mail Format** (.msg or .eml) file and click **Open** to load it into MTP
- G. A **Preview Email** of your HTML email will be displayed (Image 9.4). Please check the following fields at this point:
 - I. Subject
 - II. Email Address
 - III. Sender Name
 - IV. Attachments (if they have been added)
- H. If your **Preview Email** looks good, click the **X** in the upper right-hand corner to close the preview window.

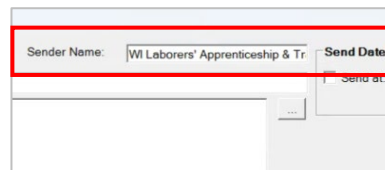


Image 9.2

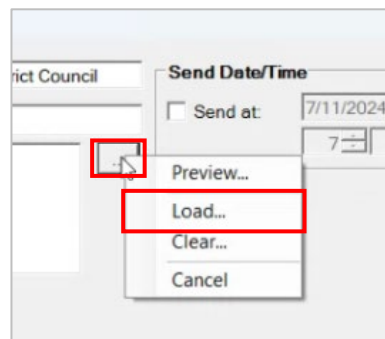


Image 9.3

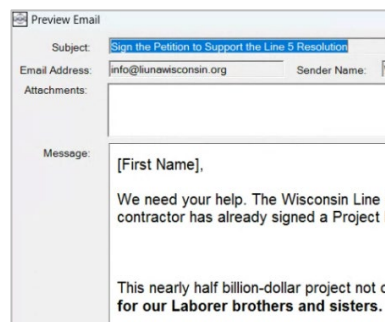


Image 9.4

FYI: If anything in the Preview Email (your email copy, formatting, or attachments) is incorrect, go back to **Step 6**, modify your **Outlook Mail Format** (.msg or .eml) file in Outlook, perform a **Save As**, and append the file name with version number, e.g., V2.

10) Review your HTML email and personalization, if added, in MTP

- A. Check the **Enable mail merge** box (Image 10.0)
- B. Check the **Email Address** box on the email address column (Image 10.1)

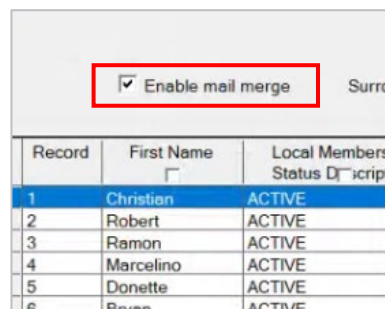


Image 10.0

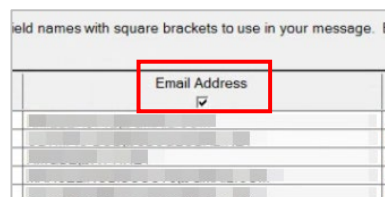
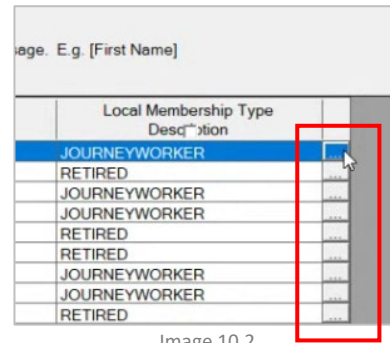


Image 10.1

- C. Click any of the **three-dot buttons** on a recipient row to view that recipient's email (Image 10.2)
- D. Preview and review the recipient's email. Check the personalization **Mail Merge Fields** to ensure they are correct, such as [First Name] (Image 10.3)
- E. Click the **X** in the upper right-hand corner to close the preview window.



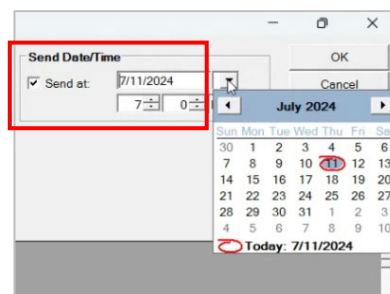
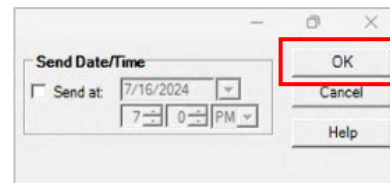
FYI: If your email copy, formatting, or attachments are incorrect in the preview email, go back to **Step 6**, modify your **Outlook Mail Format** (.msg or .eml) file in Outlook, perform a **Save As**, and append the file name with version number, e.g., V2.



11) Send or Schedule your HTML email in MTP

You have two options for sending your HTML email:

- A. Option 1: Send Immediately (Image 11.0)
 - I. Click **OK**
- B. Option 2: Select a Specific Date & Time (Image 11.1)
 - I. Check **Send at:**
 - II. Select the date
 - III. Select the time
 - IV. Click **OK**



12) Submit Your Email

- A. Click **Yes** in the **Submit Emler Batch** window. This window informs you how many credits your email will require (Image 12.0).
- B. Click **Yes** in the **Continue?** window. This window informs you that when using MTP to email your members, you must follow all the rules and laws associated with email marketing and telemarketing services (Image 12.1).
- C. Click **OK** in the Submit Emler Batch window (Image 12.2).

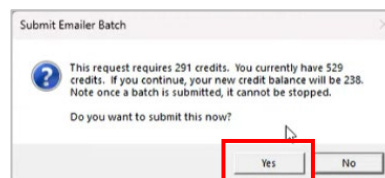


Image 12.0

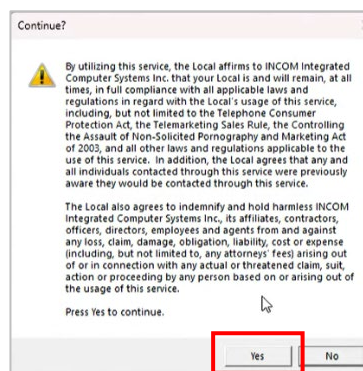


Image 12.1

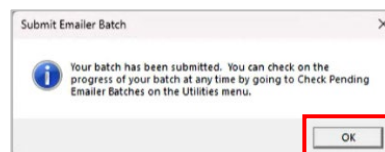


Image 12.2

13) Track your Email(s) in MTP

After you submit your email to be sent or scheduled, you can check its status and track it in MTP.

- A. Go to **Utilities > Check Pending Emler Batches...** (Image 13.0).
- B. In the **Emler Batches** window, check the status of all your batch emails sent or scheduled.
- C. Double-click on the desired batch row to display a report of all the emails made in the selected batch. MTP will notify you if the batch is still running (Imaged 13.1).

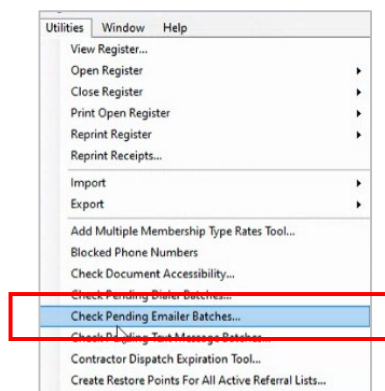


Image 13.0

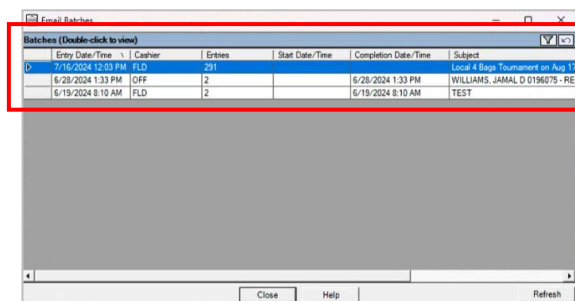


Image 13.1

How to Convert an Existing Outlook Email or Word Document into an MTP Batch Email

Clean your email copy using Microsoft Outlook or Notepad to clear all text formatting (i.e., remove hidden formatting code).

To ensure 100% that the formatting of your MTP Batch Email is sent and viewed precisely how you want it to look, it is a best practice to clean the email copy (i.e., text) in Outlook, especially if you pasted copy from a Word document or any other application.

FYI: This step is standard best practice with any email marketing program or system, not just MTP, to create a clean and properly formatted email.

Steps in Outlook

- A. On the **Message** tab, in the **Basic Text** group, click **Clear All Formatting** (Image A1). [Learn more from Microsoft Support.](#)

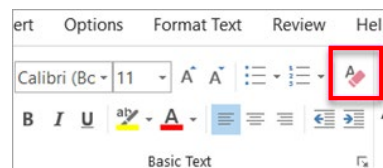


Image A1

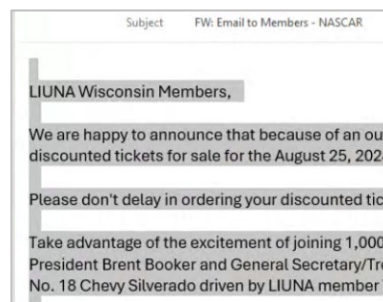


Image A2

Steps in Notepad

- A. Select and copy the email copy from Outlook, Word, Google Docs, or any other application (Image A2).
- B. Open **Microsoft Notepad** on your computer (Image A3).
- C. Paste your email copy into **Notepad** (Image A3).
- D. In **Notepad**, remove all paragraphs and returns so you are left with only one single paragraph of copy (Image A4).

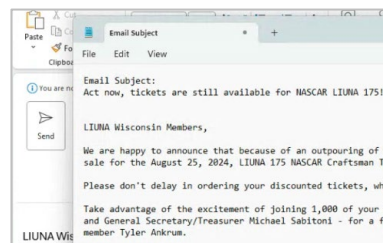


Image A3

FYI: This critical step removes any hidden formatting rules inherited from the previous application.

- E. In **Notepad**, select and copy the entire paragraph (Image A5).
- F. Open **Microsoft Outlook** and start a New Email
- G. Paste the copy into a new HTML Outlook email.
- H. Go to Step 2, “Write Your Email Copy,” from the “Using Microsoft Outlook to Create an MTP Batch Email” section and follow the step-by-step guide to create a clean MTP Batch Email.

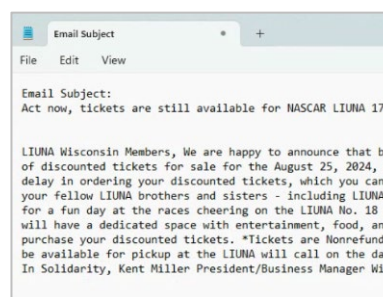


Image A4

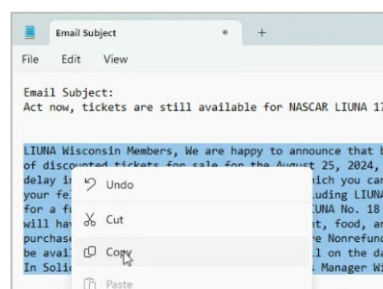


Image A5

Guidelines and Tips for Using Text Messaging

Text Message Rollout – Copy and paste into the MTP Submit Text Messages Screen

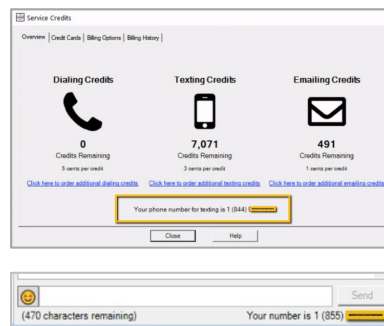
[First Name], this is **Name**. We are letting you know that XXX-XXX-XXXX is our new office txt msg #. We'll use this # for local meetings, dues, and other reminders. You can use this # to text the office as well.

The text message above is 192 characters (with spaces), not including the personalized mail merge [First Name] and the **Name** of the person who is sending the message from the Local.

TIP 1 – Where to Find Your Text Message Number?

You can find your permanently assigned Text Message Number in two locations within MTP:

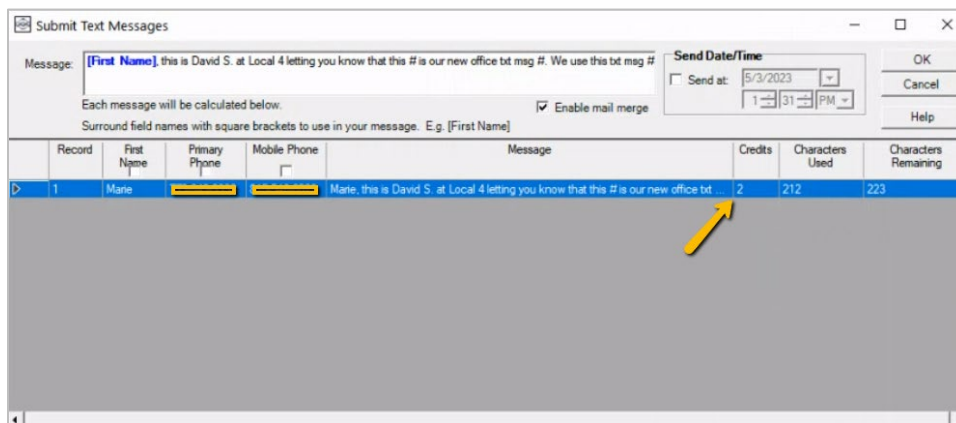
- 1) **Help > Credits > Manage Service Credits** (bottom of the window)
- 2) The **Text Inbox** icon on the MTP Dashboard (bottom right-hand side of the screen)



TIP 2 – Cost

Each text message (sent via a batch from a Local's MTP) that is 145 characters or less (including spaces) will cost \$0.03 (1 credit).

With the above text message, plus the personalized first names (which will vary in number of characters), **each text message will be \$0.06 (2 credits).**



TIP 3 – The Training Center or Your Local Text Message Number Never Changes

The text message number that is permanently assigned to the Training Center or your Local never changes and is connected to MTP. This means members can (and should) save those text message numbers as contacts on their mobile phone, so they conveniently recognize them as legitimate sources.

TIP 4 – Members Can Send Text Messages to the Training Center or the Local

The other benefit of a permanently assigned text message number connected to MTP is the capability for members (or contractors) to send their own text messages to the Training Center or Local – at no extra cost. Text messages that are sent to the Training Center or Local from a member will be received, flagged for notification, and track automatically (per individual). You can also respond to those text messages within MTP via the **Text Inbox**, so you do not have to share your personal mobile phone number and can keep it private.

TIP 5 – One Text Message Sent per Mobile Phone Number

Only one text message will be sent (and charged) if the same mobile phone is listed under two different profiles (e.g., a father and son have the same mobile phone number saved under their profiles).

TIP 6 – Adding URLs in the Text Message

When adding a URL (website address) to a text message you will need to add http:// or www before the website's domain name. For example: http://liunachicago.org (CORRECT) or www.liunachicago.org (CORRECT). In most cases, using www is best because it uses the least number of characters.

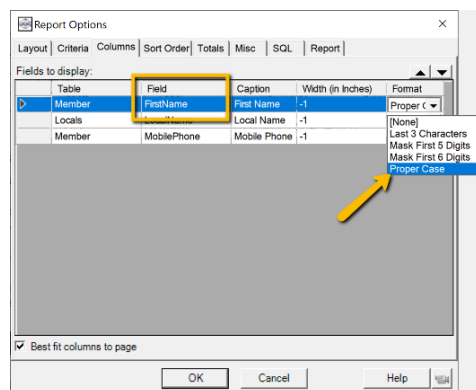
TIP 7 – How to Start a Batch Text Message?

Here are the general steps for a simple batch text message to multiple members:

- 1) Create a list of members
 - a. Option A: Add them to a **Label Queue** manually – and do this before proceeding to Step 2
 - b. Option B: Run a **User Defined Report** based on criteria, i.e., only ACTIVE members
- 2) Go to **Tools > User Define Reports...**
- 3) Double-click the **First Name** field to highlight it green, which means that it's selected
- 4) Double-click the **Phone** and **Mobile Phone** fields to highlight them green, which means they are selected.
FYI: We are selecting both just in case a mobile phone number has been saved in the Phone field.
- 5) Follow **TIP 8** (see below) for change the First Name from capitalized letters to Proper Case
- 6) Follow **TIP 9** (see below) if you are going to use a text message a list of members from a Label Queue
- 7) Then go to **File > Text Message...**
- 8) Type or copy & paste your message in the **Message** field with mail merge fields for personalization, e.g. **[First Name]**: first letters must be capitalized and bookended with square brackets.
- 9) Check **Enable mail merge** (on the bottom right-hand side of the Message field)
- 10) Verify that your message and **[First Name]** mail merge field is correct. If not, make corrections accordingly.
- 11) Check the top-level check box for the **Phone** and **Mobile Phone** columns.
FYI: We are selecting both just in case a mobile phone number has been saved in the Phone field.
- 12) Send the batch text message:
 - a. **Option A:** Send immediately by clicking **OK**
 - b. **Option B:** Schedule to send the batch text message by clicking **Send at:** and select a future time & date for the text message to be sent. Always double check your "send" time before clicking OK.

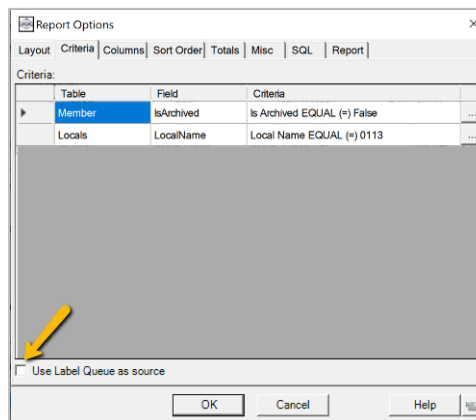
TIP 8 – Proper Case

Before you send the message, set the [First Name] merge field to use Proper Case – View **User Define Report > Options > Report Options > Columns (tab)** – change **[First Name]** mail merge field to Proper Case in the Format pop-down.



TIP 9 – Label Queue or User Define Report Options

You can use the Label Queue or a User Define Report to send batch text messages to selected members. View **User Define Report > Options > Report Options > Criteria (tab)** – check the bottom-left option to use the Label Queue as source for the batch text message list.



TIP 10 – Move Mobile Phone Numbers to the Correct Field

Over time, it is best to clean up your phone number fields by making sure only mobile phone numbers are saved in the **Mobile Phone** field.

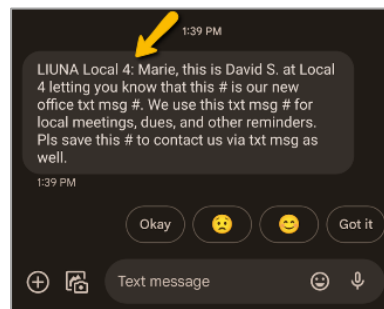


NOTE 1: If you want to send an individual text message, use the Mobile Phone field icon (to the right of the phone number field) on the Membership Screen. See **TIP 1** for the cost of an individual text message.

NOTE 2: Use the **Phone** field only for saving the member's LAND line at home, not their mobile phone number.

TIP 11 – Automatic Pre-text in your Text Message

The automatic pre-text "LIUNA Local 4:", as seen in the example is controlled on the backend of MTP and does not count as additional characters for your text message.





TIP 12 – Verify that the Text Messages were Delivered

To verify which text messages were delivered successfully (or not), use the MTP tool, **Utilities > Check Pending Text Message Batches....** Use this tool to help clean up the phone number fields by viewing the report results.

- **SENT** – Successfully sent and delivered
- **ERROR: LANDLINE**– A LAND line phone number such as a home phone number
- **ERROR** – The mobile phone number no longer has a cell phone plan with a provider such as Verizon or AT&T
- **DO NOT TEXT** – The member has requested to **STOP** text messages (i.e., the **Permit SMS** option is unchecked)
- **CANNOT TEXT** – The phone number is not a valid, mobile or LAND line, or some other delivery error at that time

NOTE 1: Text messages sent or received from a member (or a contractor) can be viewed on the Membership Screen under the **Text Messages** tab and in the **Text Inbox** screen. See **TIP 12 and 13**.

NOTE 2: On the mobile phone of the member (or contactor), they can also use the **"Block this Caller"** feature to block text messages via their cellular provider such as Verizon. A successfully **SENT** message will be displayed under **Check Pending Text Message Batches...** but the message has been blocked on their mobile phone. In this situation, you must contact the individual to specifically **check and unblock** your text message number on their mobile phone.

TIP 13 – View and Track Text Messages Sent or Received from within the Profile’s Text Message Tab

To view and track all the text messages sent or received from a member (or contractor), turn **ON** and display the **Text Messages** tab on your Membership Screen. All information within the tab is read-only. If you currently don’t have the option to display this tab, please contact MTP Support at (440) 439-7000 for help.

NOTE: Text messages sent or received from a member (or a contractor) will also be displayed in **Text Inbox**. See **TIP 13**.

| Entry Date/Time | Cashier | Entries | Start Date/Time | Completion Date/Time | Message |
|------------------|---------|---------|-----------------|----------------------|-----------------------------------|
| 5/3/2023 1:39 PM | OFF | 2 | | 5/3/2023 1:39 PM | [First Name], this is David S. at |

5/9/2023 11:47 AM
8000000 Page 1 of 4

LABORERS' INTERNATIONAL UNION OF NORTH AMERICA

Text Message Batches

LiUNA LOCAL 4

Work shifts am/pm in Local 41-Cleveland Cities - Indiana Wage Rates apply-Must pass drug test - If interested call Frank@773-376-XXXX

| Record | Primary | Mobile | Seconda | Referral | Deletion | Insertion | InserSe | FirstNa | LastNa | CardNo | Message | Message |
|--------|---------|-----------------|---------|----------|----------|-----------|---------|---------|--------|---------|---------|----------|
| 1 | | 773-367-773-606 | 1 | | 1/1/1799 | 1/13/201 | 1 | MICHA | NICHOL | 0004078 | SENT | 5/9/2023 |
| 1 | | 708-795-708-256 | 1 | | 1/1/1799 | 2/3/2020 | 1 | FRANK | NOVAK | 0004363 | ERROR | 5/9/2023 |
| 2 | | 708-795-708-256 | 1 | | 1/1/1799 | 2/3/2020 | 1 | FRANK | NOVAK | 0004363 | ERROR | 5/9/2023 |
| 3 | | 773-344- | 1 | | 1/1/1799 | 2/24/202 | 1 | FLOREN | ANAYA | 0003902 | SENT | 5/9/2023 |

Press insert to add new category. Drag and drop tabs into categories as desired.

| Categories: | Tabs: |
|----------------------------|-----------------------------|
| Contractor | Dates |
| Contractor Hours | Documents |
| Comments | Emails |
| Dates | Imported Training Hours |
| Documents | Meeting History For Apprent |
| Skills | Membership Level History |
| Transcript Details | Monthly Apprentices Reports |
| Training ID Number History | Paid Thru Dates |
| Transcript Summary | Paperwork |
| Web Module Login History | Payment History |
| CRM | Phone Calls |
| Emails | Previous Skill Certificates |
| Phone Calls | Schedule |
| Text Messages | Skills |
| | Text Messages |

Sort the tabs to match the order specified by the categories above
 Hide any tabs that are not in a category
 List tabs in tab selector dropdown alphabetically and uncategorized

OK Cancel Help

TIP 14 – View and Respond to Text Messages Sent and Received from Members

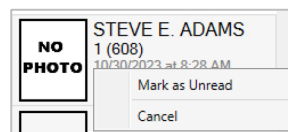
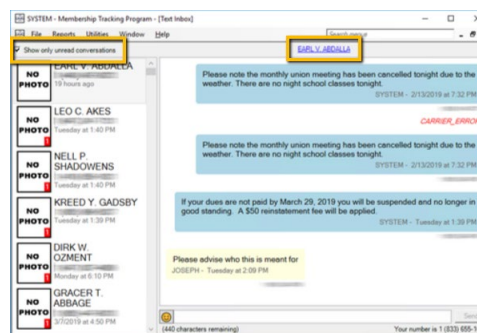
The **Text Inbox** screen allows you to view replies and send responses to incoming text messages. This screen can be accessed from the **Text Inbox** icon on the MTP Desktop or through the menu under **File > Open > Text Inbox**.

NOTE 1: On the top left, uncheck **Show only unread conversations** to view the history of all read (sent and received) text messages.

NOTE 2: In the middle, at the top of the response column, the member's (or contractor's) name is hyperlinked to easily view and open their profile.

NOTE 3: Change the **Text Inbox default behavior** of changing the message to **Read** automatically after it's clicked by going to **System Settings > Text Inbox**. With this option checked (ON), you can now right-click on the member (left-side column) to either **Mark as Unread** or **Mark as Read**.

NOTE 4: Text messages sent or received from a member (or a contractor) will also be displayed under the **Text Messages** tab. See **TIP 12**.



Right-click to Mark as Unread

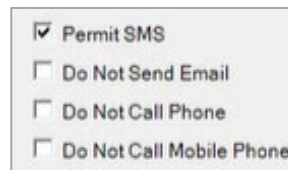


Right-click to Mark as Read

TIP 15 – Manually Turn ON/OFF the Permit SMS Option for a Member

When a member has **requested over the phone or through an email** to stop receiving Training Center or Local text messages, can you manually turn ON/OFF the **Permit SMS** option.

NOTE: Even with the **Permit SMS** unchecked, a member (or contractor) can send their own text messages to the Training Center or Local – at no extra cost.

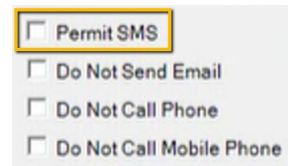
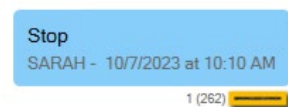


TIP 16 – Members Can Opt-Out with a “STOP” Text Message Reply

When a member replies to the Training Center or a Local text message with the word, **STOP**, the member's **Permit SMS** check box (on the Membership Screen) will be automatically “unchecked”. Hence, they will not receive future text messages. **NO-SMS** will be displayed in the **Submit Text Message** screen.

NOTE 1: Even with the **Permit SMS** unchecked (OFF), a member can still send text messages to the Training Center or a Local. The messages will be tracked in the **Text Inbox** and under the member's **Text Message** tab.

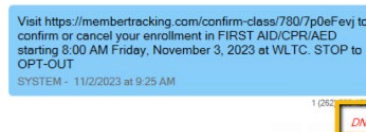
NOTE 2: The **Permit SMS** can be manually checked (ON) but the member **must submit a signed Text Message Permission Form** to receive future text messages. See **TIP 17**.



| | | | |
|-----|----------|----------|--------|
| 616 | | 708-774- | |
| 617 | | 708-473- | |
| 618 | | 847-514- | |
| 619 | NO-SMS | NO-SMS | NO-SMS |
| 620 | | 847-833- | |
| 621 | | 773-965- | |
| 622 | 847-551- | 847-899- | |
| 623 | | 630-744- | |

NOTE 3: When you see a red **DNT** indicator in the **Text Inbox** under a sent text message to an individual, the initialism stands for **Do Not Text**.

NOTE 4: On the mobile phone of the member (or contactor), they can also use the **"Block this Caller"** feature to block text messages via their cellular provider such as Verizon. A successfully **SENT** message will be displayed under **Check Pending Text Message Batches...** but the message has been blocked on their mobile phone. In this situation, you must contact the individual to specifically **check and unblock** your text message number on their mobile phone.



TIP 17 – “Do Not Call” Membership Screen Check Boxes for Phone Fields

When you select a **Do Not Call** check box option for any phone field on the Membership Screen, this will unselect and opt-out that phone field for Text Messaging or Robocall features – i.e., this will override the PERMIT SMS option for the specific phone field. **OPTED-OUT** will be displayed in the **Submit Text Message** screen.

Permit SMS
 Do Not Send Email
 Do Not Call Phone
 Do Not Call Mobile Phone
 Do Not Call Misc Phone

| Record | Primary Phone | Mobile Phone | Secondary Phone |
|--------|---------------------|---------------------|-----------------|
| 1 | 773-849- [redacted] | 815-546- [redacted] | OPTED-OUT |

TIP 18 – How Does a Member Opt-In to Receiving Text Messages?

When a member has requested to stop receiving Training Center or Local text messages, either by asking you directly (over the phone or email) or by replying to the text message number with the word, STOP, there is only one way to make them eligible again to receive individual or batch text messages. The member must sign a **Text Message Permission Form** printed on Local letterhead (see the next page for copy).

NOTE: The **Permit SMS** can be manually checked (ON) but the member must submit a signed **Text Message Permission Form** to receive future text messages.

STEPS:

- 1) Ask the member to sign the **Text Message Permission Form** – See next page
 - a. Scan and save the signed form as a PDF and insert it under the Documents tab on the member’s profile
 - b. Contact MTP Support at (440) 439-7000 and email Support the PDF as an email attachment. Once they receive it, they will enable and check the Permit SMS option on the member’s profile.
- 2) Ask the member to send a “test” text message from their mobile phone to your text messaging number. Verify that you’ve received the “test” text message in your **Text Inbox** and under the member’s **Text Message** tab. If not,

TEXT MESSAGE PERMISSION FORM

In the ever changing world of technology, we are always looking for better, faster and more efficient ways to connect with our Members. As part of this technology we want to be able to send out text messages to each individual. In order to accomplish this undertaking, we need your written consent to send you messages.

Please fill out the information below to permit us to send you text messages. If you do not complete this written consent form, we will not be permitted to send you the communications necessary for your successful attendance at training.

Name: _____

Cell Phone Number: _____

I hereby give the Laborers and LiUNA permission to send me text messages

 Signature

 Date

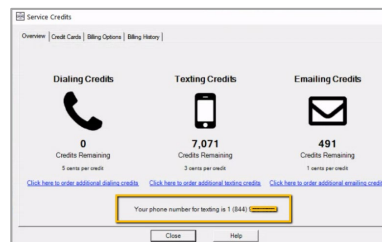


correct the mobile phone number with an over-the-phone Change Authorization in MTP.

- 3) On the mobile phone of the member (or contactor), they can also use the **"Block this Caller"** feature to block text messages via their cellular provider such as Verizon. A successfully **SENT** message will be displayed under **Check Pending Text Message Batches...** but the message has been blocked on their mobile phone. In this situation, you must contact the individual to specifically **check and unblock** your text message number on their mobile phone.

TIP 19 – How to manage Your Robocall, Text Message, and Emailing Credits?

Go to **Help > Credits > Manage Service Credits**. In the Service Credits window, you will also need to add a credit card for reoccurring payments on robocall, text message, or emailing credits.



Template Text Message Permission Form

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

TEXT MESSAGE PERMISSION FORM

In the ever-changing world of technology, we always seek better, faster, and more efficient ways to connect with our members at LIUNA Local XXXX. As part of this technology, we want to be able to send out text messages to each individual. We need your written consent to send you text messages to accomplish this.

Please fill out the information below to permit Local XXXX to send you text messages. If you do not complete this written permission form, we cannot send you Local XXXX communications regarding local meetings, dues, and other reminders.

Name: _____

Mobile Phone Number: _____

I hereby give the LIUNA Local XXXX permission to send me text messages.

Signature: _____

Date: _____

REMINDER: Once the above Text Message Permission Form is signed by the member:

1. Saved the signed form as a PDF and insert it under the **Documents tab** on the member's profile.
2. Please contact MTP Support at (440) 439-7000 and email the PDF to them. Once they receive the PDF, they will be able to check the **Permit SMS** option on the member's profile.

Email Template (Long Version) – How to Update Your Mailing Address

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

Dear [NAME OF MEMBER],

[LOCAL #] is reaching out to you to let you know that your current mailing address on file with LIUNA Chicago came back to us from the United States Postal Service as invalid.

Therefore, we'd like to take this opportunity to show you how to update your mailing address online (with a phone, tablet, or computer).

Please read and follow the instructions below:

1) View your Public Directory – Your new LIUNA Chicago Membership Card contains a square QR code with your new ID Number below it. When you scan your QR code with your smartphone, you will be able to view your Public Directory.

View your Public Directory here: [https://mtp.chicagolaborers.org/MemberDirectory/\[MEMBER ID NUMBER\]](https://mtp.chicagolaborers.org/MemberDirectory/[MEMBER ID NUMBER])

2) Access your membership profile – After viewing your Public Directory (view link above), find and select the Login Page link. It will take you to the Membership Portal Login Page <https://mtp.chicagolaborers.org>.

On the Login Page, log in to the Membership Portal using your ID Number or International Card Number, which are listed on your Public Directory (view link above).

If this is your first visit to the Membership Portal Login Page, your first-time password is the last four digits of your Social Security number. Once you log in, with your first-time password, you will be required to change it.

If you forgot your password, click Recover Password on the Login Page.

3) Review your profile information – Once you're logged into the Membership Portal, select the menu links to view your mailing address, phone numbers, Training Center skills, class registrations, and a digital version of your membership card.

If your membership card does not include a photo of you, please visit your Local office or one of the Training Centers to have your photo taken and added to your profile.

Please take the time to make sure your profile information is accurate and correct.

4) Update your mailing address – To edit your profile on the Membership Portal, such as your address or phone number, click the Edit Profile link. After you've updated your mailing address, click Submit.

SECURITY NOTE: Before you can update your mailing address, your identity needs to be verified with a confirmation number. The confirmation number can be received in one of two ways: text message or email.

Need more help?

Learn all about the Membership Portal, in English or Spanish, by clicking the "How to" links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.

If you are having any issues with the Membership Portal, please contact the Chicagoland Laborers' Training Center at 630-653-0006.

Email Template (Short Version) – Update Your Mailing Address

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

Dear [NAME OF MEMBER],

[LOCAL #] is sending you this reminder to update your mailing address on file with LIUNA Chicago.

Please read and follow the instructions below to update your mailing address online (with a phone, tablet, or computer):

1) View your Public Directory

Scan the QR code on your LIUNA Chicago Membership Card or click the link below:

Your Public Directory: [https://mtp.chicagolaborers.org/MemberDirectory/\[MEMBER ID NUMBER\]](https://mtp.chicagolaborers.org/MemberDirectory/[MEMBER ID NUMBER])

TIP – Take note of your ID Number or International Card Number because you will need it for step #2.

2) Log into the Membership Portal

Go to the Membership Portal Login Page <https://mtp.chicagolaborers.org> and log in with your ID Number or International Card Number.

If you forgot your password, click Recover Password on the Login Page.

3) Update Your Mailing Address

Click “Edit Profile” after you are logged into the Membership Portal.

As a security measure before you can edit your profile online, verify your identity with a confirmation number that is sent to you by email or text message.

Once verified, please update your mail address as needed and click “Submit” to save your changes.

Need more help?

Learn more about the Membership Portal, in English or Spanish, by clicking the “How to” links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.

If you are having any issues with the Membership Portal, please contact the Chicagoland Laborers’ Training Center at 630-653-0006.

Email or Text Templates – Meeting Notes, Suspension, Autopay

Meeting Notice

Good afternoon, [First Name]. This is a reminder that the December membership meeting will be IN PERSON ONLY. It will be this Saturday, 12/17/2023, at 10 a.m. in Local 4.

Good afternoon, [First Name]. This is a reminder that our meetings will be on the first Thursday of every month. Food and beverages will be provided. Attendance is important. See you there.

Suspension Notice

Hi, [First Name].

Good morning.

Your dues of [Net Due] are due by the end of the month to avoid SUSPENSION.

If your dues are unpaid by the 1st, you will be suspended per Article VIII, Section 4 of the Local Union Constitution.

Please log into the membership portal with your computer or mobile device and pay your dues online: <https://mtpweb.your-local-membership-portal-url>.

Autopay failure notice

Good morning, [First Name].

Your dues of [Amount] were declined on autopay for your monthly dues.

Please log into the membership portal with your computer or mobile device by the end of the month to update your payment method and pay your dues online: <https://mtpweb.your-local-membership-portal-url>.