

Chapter 3: Managing Contacts

“Soon afterwards, He (Jesus) began going around from one city and village to another, proclaiming and preaching the kingdom of God. The twelve were with Him, and also some women ... and many others who were contributing to their support out of their private means.” LUKE 8:1-3

“You yourselves also know, Philippians, that at the first preaching of the gospel, after I left Macedonia, no church shared with me in the matter of giving and receiving but you alone; for even in Thessalonica you sent a gift more than once for my need.” PAUL, IN PHILIPPIANS 4:15-16

God’s work is accomplished by people, and the *normal* method of God’s provision for those in His service is through the generous contributions of individuals and churches.

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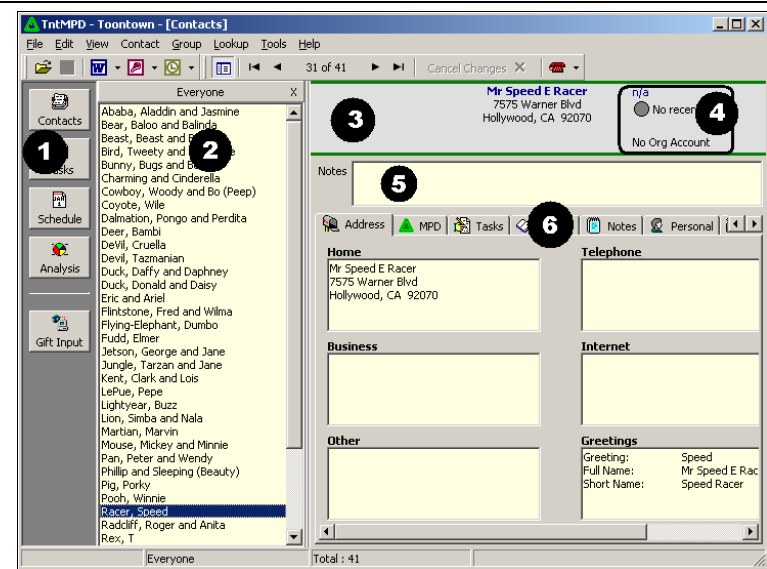
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Contact View

The Contact view is the place where you will spend most of your time. Even though you may access your tasks and schedule from their views, you still apply tasks and scheduled activities to individual contacts... in the Contact View.

Attributes of the Contact View

1. Shortcut Bar (toggle on/off by pressing F2).
2. Group of contacts (at the top of the column is the lookup value, in this case, **Everyone**).
3. Selected contact (when you open TntMPD, that is you). The address will be bold and red if it does not agree with your organization's address for this contact (Web feature), or crossed out if it is incomplete (to USPS standards). *Click on the name to edit name & address.*
4. Summary data (see explanation at right).
5. Notes you have written about this contact (on the Notes tab).
6. The personal information tabs:
 - Address
 - MPD
 - Tasks (see Chapter 4)
 - History (see Chapter 4)
 - Notes
 - Personal
 - Photos
 - User



\$60 monthly
 ● Current
 Ave: \$66/mo
 418005083

MPD Phase OR Pledge Amt (if PARTNER-Financial)
Status of their pledge (colored dot; see list below)
Average giving (see page 5-3)
Their donor # from your donation system

- Purple = Recently gave a gift (last 30 days)**
 - Green = current on their pledge (monthly, annually, etc.)**
 - Yellow = 30-60 days late**
 - Red = More than 60 days late**
 - Gray = No recent gifts**
- Tip: Click on one of the top three lines (giving status) to go to Organization Info (see p. 3-32 for more info.)**

ADDING A NEW CONTACT

While most, if not all, of your donors will already be in your list because of the steps taken to set up your TntMPD database, we'll start with the **New Contact** screen so you can see the whole process.

Go to the next page if the new contact is an organization—a business, church, foundation, etc.

- The Menu item **Contact | New Contact** brings up this dialog box.
- As you enter data, grayed out buttons such as **Greetings...** become available.
- You can enter as much or little about a contact here. Once a contact is added, though, you can only edit their personal information on the **Address** tab or by clicking on their name at the top in the Address Window.

If the wife has a different last name than the husband, uncheck **Same Last Name** and enter the wife's last name. In the contact list they will appear as: "Hislastname, Hisfirst and Herfirst (Herlastname)", e.g., "Cowboy, Woody and Bo (Peep)".

- When you enter their names, TntMPD automatically creates Greeting data about them (see note below).
- It creates a name to appear in the contact list, which is "Lastname, Husband and Wife Lastname" (e.g., "Duck, Donald and Daisy").
- Then it creates the three types of greetings (see page 3-5).

You can scroll through your contacts by pressing the **Prev (<<)** and **Next (>>)** buttons. You can also add another new contact by pressing **New (+)**.

Note: If you do not enter a Title for a contact, TntMPD will automatically create the greetings as "HusbandFirst HusbandMiddle and WifeFirst WifeMiddle Lastname".

New Contact [X]

Organization

Name

Title [] Spouse (Wife) []

First []

Middle []

Last [] Same Last Name

Suffix []

Address

[Home] This is the mailing address

Deliverable

Address []

City []

State []

Zip []

Country []

Phone []

OK

Apply

Cancel

Greetings...

Addr Block...

New (+)

Prev (<<)

Next (>>)

New Contact [X]

Organization

Name

Title [Capt.] Spouse (Wife) [Mrs.]

First [John]

Middle [Pocahontas]

Last [Smith] Same Last Name

Suffix []

Address

[Home] This is the mailing address

Deliverable

Address [5099 New World Drive]

City [Orlando]

State [FL]

Zip [32882]

Country [United States of America]

Phone [407-855-4658]

OK

Apply

Cancel

Greetings...

Addr Block...

New (+)

Prev (<<)

Next (>>)

ADDING AN ORGANIZATION

If your new contact is an organization, check the **Organization** box. TntMPD will automatically remove all of the “name” information and replace it with one box for the Company Name.

The **Greetings** for the company will all be the same, but you may want to change them. For example, if the organization is a church you may want to make the Greeting to the “Missions Committee” or to “Our friends at (church)”.

The screenshot shows the 'New Contact' dialog box with the following details:

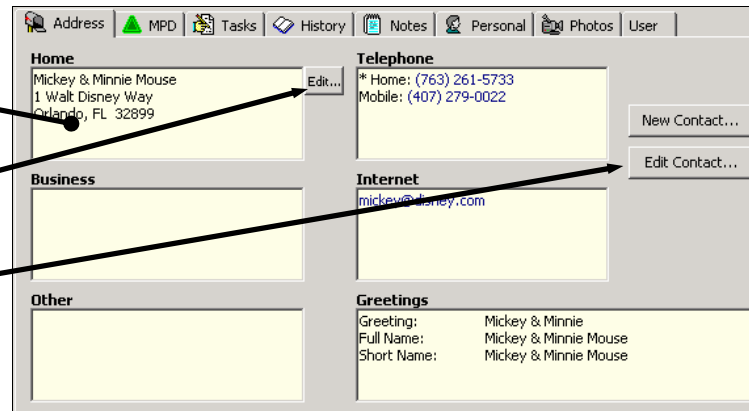
- Organization:** Organization
- Name:** Company: First Pedestrian Church
- Address:** Business (dropdown), This is the mailing address
- Greetings:** A button labeled 'Greetings...' is highlighted with a dashed border and an arrow pointing to a smaller dialog box.
- First Pedestrian Church (Greeting Dialog):**
 - Greeting: Missions Committee
 - Full Name: First Pedestrian Church
 - Short Name: First Pedestrian Church
 - Buttons: Restore Defaults, Cancel, OK
- Other Buttons:** OK, Apply, Cancel, Addr Block..., (+), (<<), Next (>>)

Personal Information Tabs

ADDRESS TAB

There are four ways to edit information about your contacts. You can either:

1. Double-click in the individual field you want to edit.
2. Put your cursor in any of the six yellow boxes and press the **Edit...** button that appears to the right of that box.
3. Click **Edit Contact...** This will bring up the contact's name and address box (the same one used when you added a new contact on the previous page).
4. Click on their name in the Address Window at top (not shown).

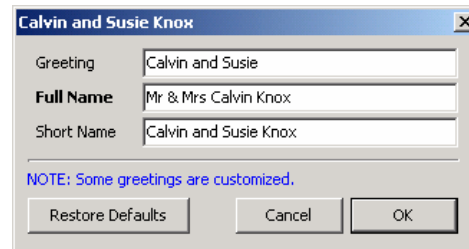


Address Tips

- The “Full Name” in the Greetings is the name that is posted at the top of the contact page.
- If you run your cursor over the phone number, it will turn blue and a hand will appear. Pressing this link will automatically dial the number using your phone (if you have your phone connected to your computer) or attempt to do so if you do not. *This feature cannot be turned off.*

You can have up to 19 different phone numbers for each contact, and you can choose which one is the “main” phone number shown at the top in the main address window.

- You can have up to three different addresses for a single contact, and you can choose which one is the “mailing address”.



The Greetings box.

These are the default Greetings, but you can modify them. The “Full Name” appears in the “Address Window” box at top, and is often the one you will use as the name on the outside of the envelope. The “Greeting” is the one you would use for mail merging the letter itself. (TntMPD indicates when a contact has a customized greeting.)

Tip: When a contact’s address/phone in TntMPD does not match your organization’s address/phone, their address/phone will be bold and red. See page 3-32 for more info.

MPD TAB

The MPD tab in the Contacts area is the core financial information area about your contacts. This page tells you the MPD phase of the contact—from stranger to committed financial giver or prayer—as well as who referred this contact, all of their gifts to date, whether they get your newsletter or not, etc. Here's what the MPD tab looks like:

OVERVIEW

TOP SECTION. (Explained on following pages.)

MPD Phase—Where this contact falls from stranger to committed giver

Next Ask—When you would like to next ask this contact for financial support (offers date or time).

Pledge—Yes/No, amount, and frequency (check box indicates the first gift has been received)

Send Newsletter—Yes/No

Region—Allows you to group contacts in any geographical manner you choose

Referred by—Who referred you to this contact (may be one or many)

Likely to Give—Handy if you are looking for a group of contacts to send an appeal to

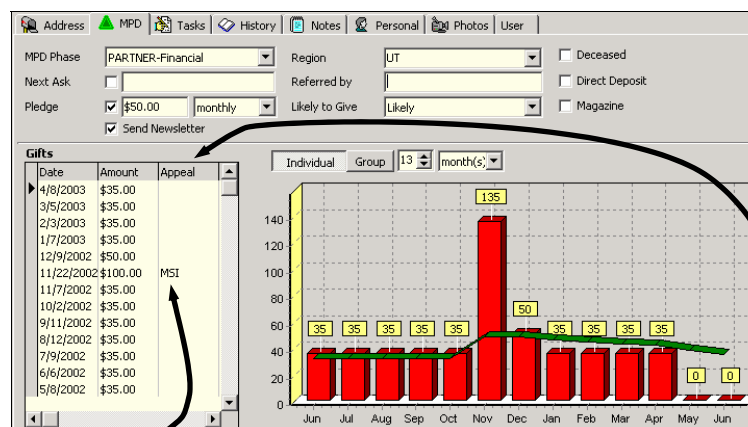
Deceased—Informational only

Direct Deposit—Informational only

Magazine—Informational only

BOTTOM SECTION.

The lower half of the page is the giving history of this contact. The column on the left lists the date of each gift, followed by the amount, and any appeal with which this gift is associated.



The box on the right is a graphic history of this contact's giving. You can choose how many periods to view, as well as whether you want to view just this contact (**Individual** button) or the current group of contacts (**Group** button). The "current group" is the list of contacts to the left (not shown in the above picture).

Tip: You can change the columns shown by dragging the column headings to the left or right (there may not always be additional columns).

MPD PHASE

See inside the front cover for a graphical view of the MPD Phases. The # of the phase is relevant when doing lookups on your contacts.

#	Phase	Description
0	n/a	The default MPD phase for a new contact. However, you should move your contacts into another phase as quickly as possible. If this contact is a person you do not intend to ask to join your team, you should move them to #100, "Never Ask"
10	Never Contacted	The typical starting place for a new contact. Ideally, most contacts will move through phases 0-50 rapidly!
20	Ask in Future	As a contact moves through the phases, you will typically start them with Ask in Future. Also, a contact may have requested that you contact them again "at a later date".
30	Call for Appt	You have initiated some form of 'contact' with your 'contact' and now need to follow up on it. For example, you may have sent a letter and now need to follow it up with a phone call.
40	Appt Scheduled	Obvious.
50	Call for Decision	The appointment or phone call has occurred, and now you need to follow it up (soon) for a decision.
60	PARTNER-Financial	This contact is a regular giver; their giving will be automatically checked against their pledge, and you will be alerted when they give an amount greater than their pledge.
70	PARTNER-Special	This giver does not have a regular pledge. When they give, you will be alerted to send a thank you.
80	PARTNER-Pray	A contact who has committed to praying regularly for your ministry.
90	Not Interested	This person has been contacted and has indicated a desire not to be a part of your ministry.
100	Never Ask	You do not intend to ask this person to join your team. They may be a family member who gets your newsletter but is not interested in your ministry per se. Or, they may be deceased.

→
This is the "Decision Line". All contacts with an MPD phase of 50 or below have not decided their level of commitment (if any) to your ministry.

NEXT ASK

The **Next Ask** box is for assigning a future ask date to a contact. If you move your cursor over the words **Next Ask**, you will see the letters change color and the cursor becomes a hand.

- Click once and a calendar will appear, enabling you to select a date, and even a time. Doing so allows you to utilize your “Next Ask” lookup. However, it does not put an ask/call in your task list or schedule. (This is a handy feature if you are making a lot of calls and continually refreshing your **Call for Appts** lookup.)
- Other options on the **Next Ask** screen include the ability to check on or off a specific time. For example, if you are scheduling an ask for 6 months from now, it may not need to be done at exactly 11:18AM.

- You can also select **Never** ask for a contact, either from here or from the MPD tab. An example of this may be a monthly partner who has indicated they do not want to be asked for special gifts. Or it may be a person who gets your letter but does not want to give financially. If you check the **Never** box here, the calendar will disappear.

PLEDGE

MPD Phase	PARTNER-Financial	
Next Ask	<input type="checkbox"/>	
Pledge	<input checked="" type="checkbox"/> \$65.00	monthly
	<input checked="" type="checkbox"/> Send Newsletter	

This box allows you define the amount and frequency of a contact’s gifts. TntMPD uses this data to generate automatic alerts to you when a contact’s giving is outside the parameters you have assigned to them. The check box allows you to confirm that the contact is actually giving the pledge. As a matter of process, when a contact *pledges* to give a certain amount / frequency, you can enter that amount, but do not check the box. You can check this box if they have already started giving their pledge. If you have a current contact who has pledged to increase, change the pledge amount and uncheck the box.

Web Feature: TntMPD will automatically check the box for you when the next gift comes in (whether keyed manually or downloaded via the web). TntMPD will also auto-schedule a Thank for their “FIRST” gift.

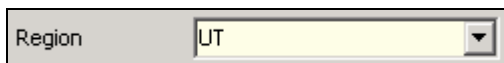
Frequencies you can assign to contacts:

monthly.....gives pledge amount every month
 bi-monthly.....gives pledge amount every other month
 quarterlygives pledge amount every three months
 quad-monthlygives pledge amount every four months
 semi-annual.....gives pledge amount every six months
 annualgives pledge amount every 12 months
 biannual.....gives pledge amount every 24 months

TntMPD offers an alert system based upon some parameters you typed in the **Tools | Options** box. Examples of when a contact’s gifts would alert you. For this example, you have recorded a **\$50 monthly pledge**.

Gives \$50 this month No alert.
 Missed this month Appears on Late Donor Report.
 Missed three months in a row Appears on Late Donor Report.
 Gives \$50 on the 1st and 29th No alert. TntMPD assumes they are ahead.
 Gives \$75 this month and \$50 next Automatic *Thank You* for extra gift of \$75 (nothing next month).
 Gives \$50 and \$75..... Automatic *Thank You* for extra gift of \$75.
 Gives \$60 this month and ongoing Automatic *Thank You* for extra gift of \$60; change their pledge amount.
 Gives \$600 and nothing for 12 mos..... You will be auto-scheduled to Thank them for their “EXTRA” gift, but it will also recognize that they have given 12 full months (that is, they will not appear on the Late Donor Report).

REGION

A screenshot of a software interface showing a dropdown menu labeled "Region". The menu is open, and "UT" is selected and highlighted in yellow. The dropdown arrow is visible on the right side of the menu.

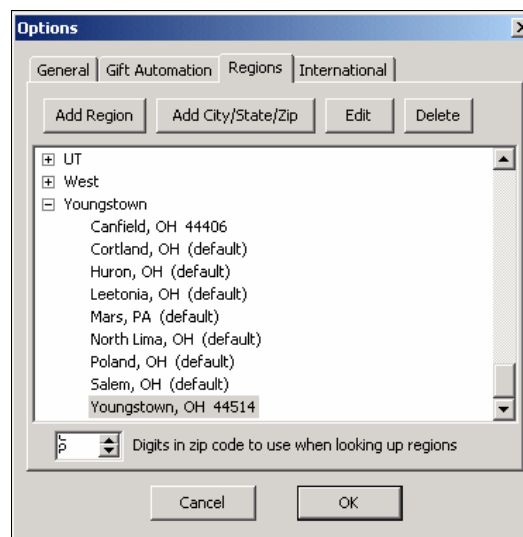
The Region field is intended to help you group multiple contacts from one city—or even one section of a city—to facilitate visits to those contacts. For example, if you have a number of contacts in New York City, you can’t realistically visit two of them in the same evening if one is in Manhattan and another in Staten Island. You can use the Region field to manage this. You could, for example, set up a region for each of the Boroughs in New York City.

Another option—and this is how I personally handled regions long before I started using TntMPD—is to break them down by useful geographic areas that are relevant to you. Our contacts are grouped in four key states, with the rest sprinkled all over the U.S. So I have my regions as UT, MN, NC, OH, and “East” and “West”. There is no city where I have enough contacts to make a city/postal code arrangement useful to me.

There are two ways to define regions; you can define them “on the fly” as you work with individual contacts. Or you define regions in the **Tools | Options** area.

Region quick notes:

- If you use zip codes to define regions, you can choose how many digits to broaden that lookup.
- A city/zip code combination can only be in one region. If you are working with a contact and change that contact’s region, *all* other contacts who live in that city will automatically be reassigned to the new region.
- If you try to add a city to a region and that city is already assigned to a different region, TntMPD will ask you if you want to change the region.



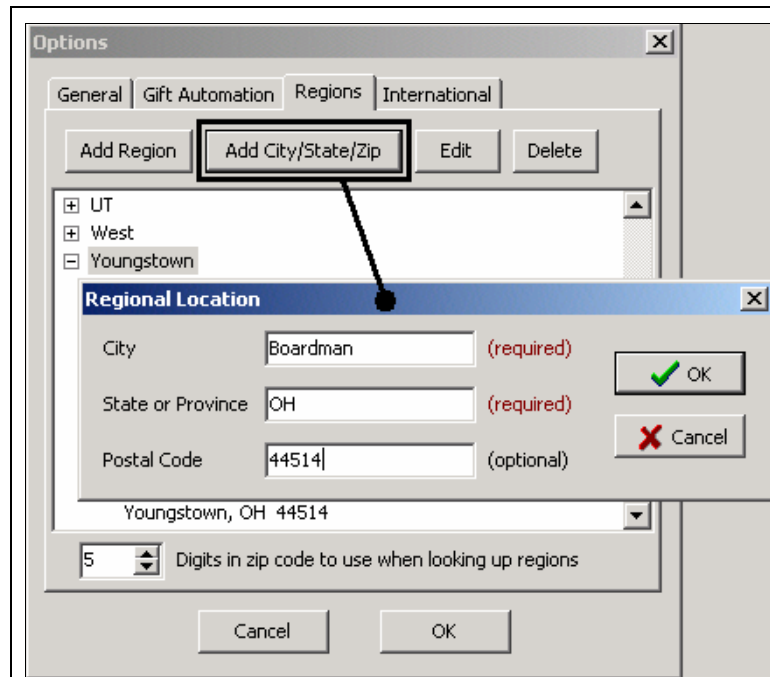
See next page to manually edit Regions.

Manually Editing Regions

- Press **Add City/State/Zip**.
- Key in the city and state
- You can also specify a postal code (if you do not specify a specific postal code, all contacts in that city will be in the same region).

Dividing One City into Multiple Regions

- A city/postal code combination can only be in one region. However, the same city and different postal code could be in a different region. In New York City, for example, you could have a region for Brooklyn, Queens, Manhattan, etc., all of are addressed to “New York, NY”, but have different postal codes.
- Note in the picture at right that the new city, Boardman, has the same zip code as the existing Youngstown entry in that region. Again, it is the **combination** of a city & postal code that makes it unique.



MPD Phase	<input type="text" value="PARTNER-Financial"/>	Region	<input type="text" value="Hollywood"/>	<input type="checkbox"/> Deceased
Next Ask	<input type="checkbox"/> <input type="text"/>	Referred by	<input type="text" value="Mickey & Minnie Mouse"/>	<input checked="" type="checkbox"/> Direct Deposit
Pledge	<input checked="" type="checkbox"/> <input type="text" value="65.00"/> <input type="text" value="monthly"/>	Likely to Give	<input type="text" value="Most Likely"/>	<input checked="" type="checkbox"/> Magazine
	<input checked="" type="checkbox"/> Send Newsletter			

REFERRED BY

The **Referred By** field offers a lookup when you fly your cursor over it. If a contact has multiple referrers, the words “Referred by” will be bold-faced, and the *primary referrer* will appear in this box.

LIKELY TO GIVE

This box helps you make a simple financial assessment for each of your contacts. There are four levels of likelihood to give:

Unassigned • Least likely • Likely • Most likely

This field can be helpful in determining to whom to send an appeal.

MPD TAB CHECK BOXES

Send Newsletter

This handy check box helps you define which contacts get your newsletter.

Tip: If you have contacts who want an email-only newsletter, use one of your custom fields on the User tab for that purpose.

Deceased

It is unwise to delete any contact from your database who has given in the past, because doing so would eliminate their financial history as well. However, for the purpose of advanced lookups, it may also be helpful to exclude any contact who is deceased.

Tip: To prevent accidental mailing, delete their address and phone number.

Note: TntMPD does not have a method for tracking a widow/widower. You may want to keep both names in the address box, but change the Greeting and Full Name to reflect only the living spouse.

Direct Deposit

This field is helpful for future lookups. Or, there may be times when you want to send a letter solely to those who are on direct deposit, for example when you want to encourage them as a group to increase their monthly amount. (You have to check this box yourself. TntMPD will not automatically detect a direct deposit giver.)

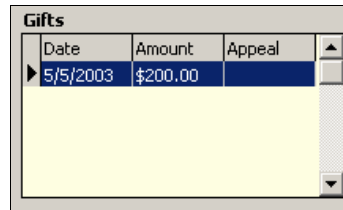
Magazine

If you give your ministry’s magazine to this contact, you can track that here.

BOTTOM SECTION

GIVING HISTORY

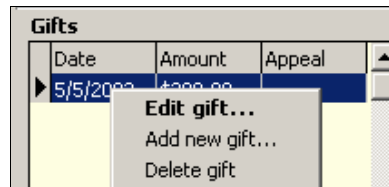
- The bottom section is divided into two parts. The column on the left is the giving history for the selected contact.



Date	Amount	Appeal
5/5/2003	\$200.00	

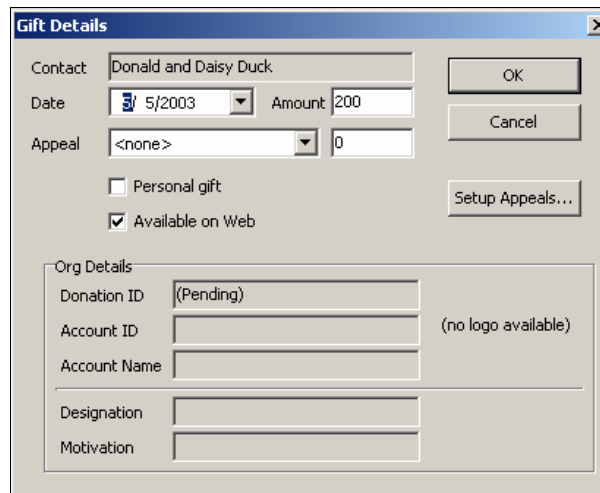
EDITING GIFTS

- You can split gifts and/or assign appeals by double-clicking on the gift OR by right-clicking and selecting **Edit gift...**
- The date of the original gift is already pre-loaded; however, both the date and the amount can be changed. Also, a portion of the gift can be assigned to a particular appeal. (See *Tools | Appeals Tracking in Chapter 5 for more information.*)
- The technical information about a gift is included in the boxes at the bottom titled “Org Details”. This information cannot be modified by you. In some cases, the words “Org Details” may be replaced by your organization’s abbreviation, such as “CCC Details” or “CCCC Details” (CCC Canada), etc.



Date	Amount	Appeal
5/5/2003	\$200.00	

- Edit gift...
- Add new gift...
- Delete gift



Gift Details

Contact: Donald and Daisy Duck

Date: 5/2003 Amount: 200

Appeal: <none> 0

Personal gift

Available on Web

Setup Appeals...

Org Details

Donation ID: (Pending)

Account ID: (no logo available)

Account Name:

Designation:

Motivation:

ADDING NEW GIFTS

If you cannot link TntMPD with your organization's donation system, all of your gifts would be added manually. If you *can* input gifts via the web, there are three reasons why you might want to manually add gifts:

1. A contact gives you a personal gift that is not processed through your organization's contribution system. (Note that a donor cannot receive a tax-deductible receipt for gifts given to you personally, and your organization may have limits on how many personal gifts a missionary may receive.)
2. You receive checks written to your organization that you will later submit, but want to enter them in advance for analysis purposes.
3. You receive a gift from another member of your organization via an internal transfer that does not appear in your organization's donation system.

Adding a gift is very similar to Editing an existing gift. On the MPD tab, in the gift section, right click and select **Add new gift....**

Note: TntMPD allows you to enter a gift that you then mail to your organization for processing. If that gift does not download within 30 days, TntMPD will ask you if you want to delete it so that your gift record on TntMPD is in sync with your organization. See the FAQ page on the TntMPD web-site for more information on this.

DELETING GIFTS

Times when you might want to manually delete a gift (among others):

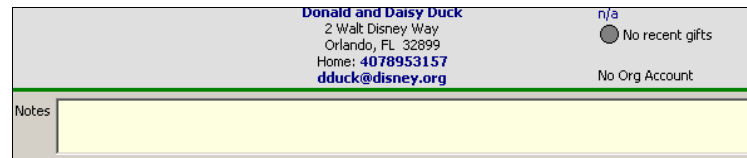
1. It was a personal gift that you decided you did not want to include with the contact's other gifts
2. You manually entered a gift that was later processed through your organization's donation system but then posted to your TntMPD as another gift (a duplicate gift).

NOTES TAB

We'll come back to the MPD tab later. (The Tasks and History tabs are covered in Chapter 4.) The **Notes** tab is a simple note pad where you can take notes about your contact. What you key here will be shown in the Notes box of each contact, directly below their name. If you synchronize your TntMPD database with your Outlook and/or Palm Pilot, these notes will go to the notes section of each contact on both of those systems.

The Notes box has a couple of limitations you should know about.

- You can only see the first few lines of your notes from the contact view (without selecting the Notes tab), so if you have very critical information you want to view, be sure it is in the first two or three lines of the note.
- The Palm Pilot allows only 4,023 characters per note, so if you sync your TntMPD with Outlook and then Outlook with your Palm Pilot, you'll want to be judicious about what you write here. If you exceed the limit, you will receive a warning every time you sync your Palm Pilot.
- You can record notes on all your phone calls and letters on the History tab—but those past activities have to be opened one-at-a-time to be viewed.



Tip: I have found it easier to simply have only three lines of notes for each contact so I never have to scroll and I always see the most pertinent notes.

PERSONAL TAB

The **Personal** tab allows you to add some handy, touchy-feely type information about your contacts. You can enter the following types of information:

Family Side – can be used for actual relations or for combining support teams after a marriage (see Tip below, right).

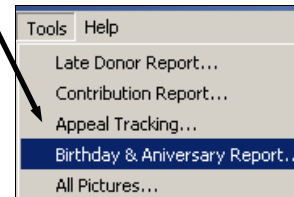
Family Level – for relatives

Birthday – allows you to use the **Birthday and Anniversary Report** (see Chapter 5: Analysis Tools). Format is mm/dd/yyyy. TntMPD is not picky about the year: You can put 75, 1975, or leave it blank.

Children – Allows you to enter names and ages (or birth dates).

Church – Allows you to create a Lookup of all supporters at the same church. Also helpful in the Analysis view.

Address	MPD	Tasks	History	Notes	Personal	Photos	User
Family Side	His	Family Level	Cousin	Birthday	Month	Day	Year
Children	Baby Bugs			Spouse Bday	11	27	1933
Church	First Pedestrian Church			Anniversary	12	31	41
					4	8	
Him							
Company	Warner Bros.			Profession	Cartoon character		
Hobbies	Squishing, bombing, splatting			Nick Name	Bugs		
Her							
Company	Warner Bros.			Profession	Cartoon character		
Hobbies	gardening (esp. carrots)			Nick Name	Babs		

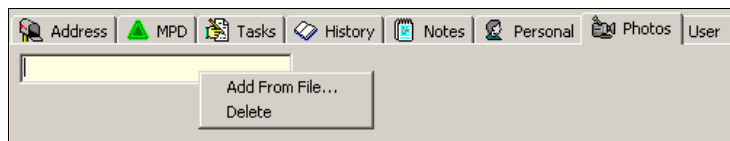


Tip: My wife and I were both missionaries with Campus Crusade for Christ as individuals before we were married. Because we each brought a significant number of contacts to our now-combined team, I use the Family Side field to identify who (His / Hers) had the relationship with this contact. I can then use the Analysis Tools (Chapter 5) to see charts based on that field.

PHOTOS TAB

- The Photos tab presents you with a single empty box. By right-clicking in that box, you are given an option to **Add From File....** Selecting this will open a box from which you can find your pictures.
- TntMPD will allow you to load any Bitmap (.bmp) or JPEG (.jpg) photo. However, Bitmap photos are not compressed and it is not recommended that you load them into your TntMPD database. Also, large JPEG photos will substantially enlarge your database and should be avoided. For best results use your photo software to get each of your photos down to 25kb or less.
- You can view a contact's photo from this tab, or you can view all your photos from the **Tools | All Pictures** menu. This menu will also tell you the size of each photo.

See *Chapter 5: Analysis Tools for an explanation of **Tools | All Pictures***.



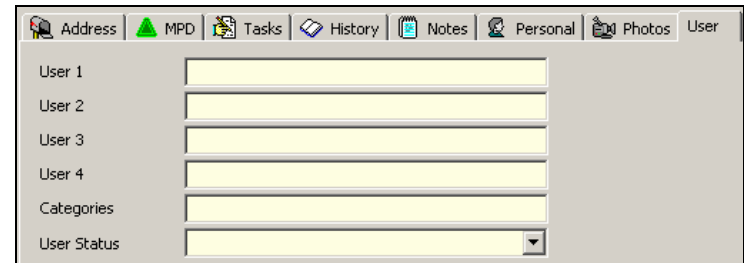
Tip: You can have multiple photos for a single contact.

USER TAB

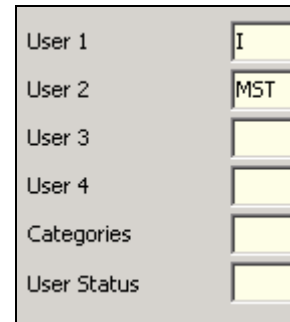
The User tab offers you one place where you can create custom fields. Let's say, for example, that you love movies, and you always use movies to open up discussions with your contacts as a way of building relationships. Since there are no "favorite movies" fields, you can use them here. "User 1" could be "Favorite Movies" and "User 2" could be "Favorite Actors" etc.

Categories are used by Outlook and Palm Pilot to classify contacts. For example, in my Palm and my Outlook, I have my "ministry partner" contacts separated into three fields: MPD (meaning they get my monthly newsletter), Christmas (meaning they only get our Christmas letter), and Family. I have other Outlook fields that I use in my ministry, but none of those contacts are in TntMPD. You can assign multiple categories by separating them with a comma (for example, my sister is both a monthly newsletter recipient and Family).

User Status. This box allows you to enter some specific information about your contact, information that might apply to multiple contacts. Any item you type here will also be available in the drop down list of all your other contacts.



The screenshot shows the 'User' tab interface with a menu bar at the top containing 'Address', 'MPD', 'Tasks', 'History', 'Notes', 'Personal', 'Photos', and 'User'. Below the menu bar, there are six input fields: 'User 1', 'User 2', 'User 3', 'User 4', 'Categories', and 'User Status'. The 'User Status' field has a small downward arrow on its right side, indicating it is a dropdown menu.



This screenshot shows the same 'User' tab interface as above, but with the 'User 1' field containing the letter 'I' and the 'User 2' field containing 'MST'. The other fields are empty.

Tip: One way I use the "User" fields is to put "I" or "We". This is helpful for when I make response devices: "We would like to be a part..." or "I would like to be a part...". Also, I use another field for time zone so that I can use Lookups and make calls at the appropriate time of day/evening. Another use is to define people who may get a letter separate from your regular Newsletter; for example, a Christmas letter may go to a broader audience.

Groups

Another helpful feature of TntMPD is the **Groups** feature that allows you to assign the same task/event/appeal to an entire group of contacts simultaneously rather than one-at-a-time.

A **Group** is simply the list of all contacts in the list on the left side of the Contact View. It could be **Everyone**—the list of all your contacts in TntMPD. Or, it could be your **Send Newsletter** list or all of the new contacts from one Referrer, etc. There are two things you can do with a Group:

1. You can view the giving history of the entire group. If you are looking at a contact, you see the graph in the lower right showing their giving history. If you press the “Group” button in that screen, TntMPD will compile the giving history for ALL contacts in the Group list.
 2. You can assign something to all of them simultaneously. *Example: You send an appeal to all of your Newsletter recipients.* You generate the group by using a lookup (see the following section on Lookups for how to create a Send Newsletter lookup).
- From the menu bar, select **Group | Log History**. The standard Log History box comes up, just like it would for an individual contact. You enter the appropriate information about the “Appeal”, then click OK.
 - TntMPD then asks if you want this Log History to apply to the entire group.

Frankly, working with groups is a wonderful feature because of the incredible time savings it offers you. However, there are also a couple of warnings about using groups:

1. The biggest danger of Groups is that the last item on the Group menu item is **Delete Group**. If you select this, thinking that you are “ungrouping” them but keeping the contacts, *you will lose ALL of these contacts*. Poof. That’s it. That is one BIG reason why it is critical that you back up your TntMPD file very often. Fortunately, TntMPD requires you to actually type **DELETE** to proceed.
2. If you inadvertently assign an event to a group, then realize that you assigned the wrong event or something else was wrong, you have to either (a) go to each contact individually to manually resolve your error, or (b) go to the History tab, select the Group button, then select all of the history events for those contacts and delete them.

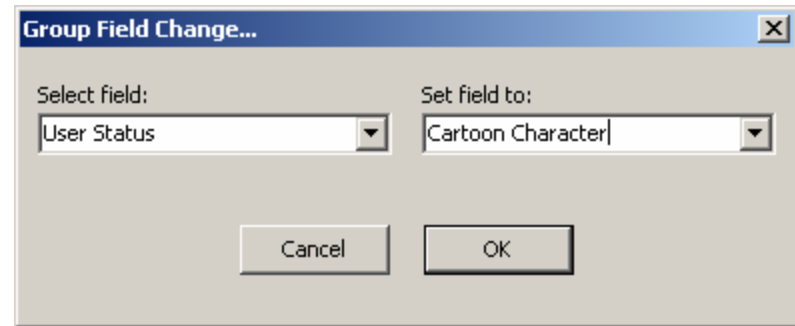
Finally, you may be asking why you would ever want to delete a group. There are rare instances, but one of them is when you want to split your database into two groups. For example, let’s say you are leaving the mission field and sharing half of your contact list with one missionary and half with another. You could create two backup copies of your database, naming them differently for your two friends. Then open the files, delete the groups of names you didn’t want and save it, then do the same for the other friend.

CONTACT | FIELD CHANGE

Field Change

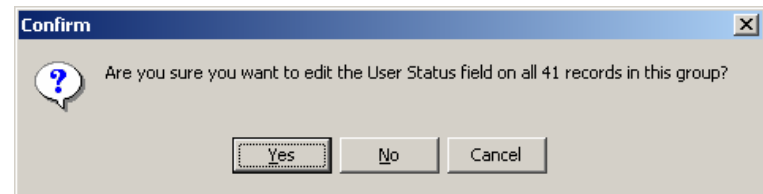
allows you to apply a word or code to an entire list of contacts simultaneously. For example, you could change an entire group's User Status to "Cartoon Character". I also used this to modify certain members of my list of contacts since I did not load church name or referrer when I first created my list.

- Select **Group | Field Change**
- Select the field you want to modify from the drop-down list
- Type in the text you want to apply to everyone in the displayed group OR choose from the drop-down list of all the text already in that field.



Tip: The "Set field to:" drop-down box will list everything already in that field for some of the users. When you select **OK**, your new text will overwrite what was in that field before.

TntMPD will confirm that you want to make this change, since you cannot **Undo** the change.



Remember: Field Change replaces all existing text, if any, in the chosen field, for the currently displayed Group.

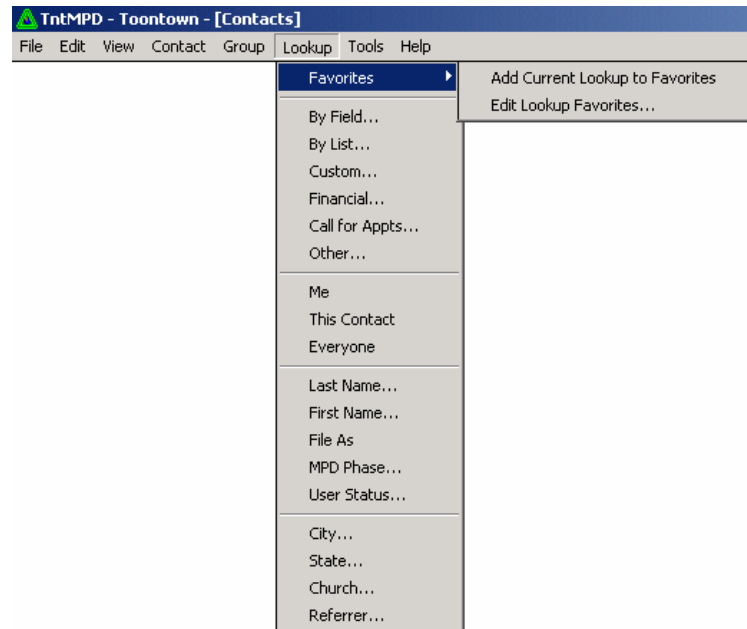
Tip: Contact | Field Change is very similar to Group | Log History where you can you apply an action (such as sending an appeal) to everyone in the displayed group.

Lookups

The Lookup function allows you to query your database and choose a group of contacts based on common characteristics. This can be helpful for many reasons, including choosing contacts to call for appointments, to send newsletters or support letters, or to see in a particular region as you travel.

To use the Lookup function you must be in the Contact View.

Choose **Lookup** from the menu options.



When you select any of the Lookup menu items (except Favorites), you will be taken to the Contact Lookup dialog box. For your reference, 15 of the 18 different menu items simply pre-populate the fields on the Lookup dialog box.

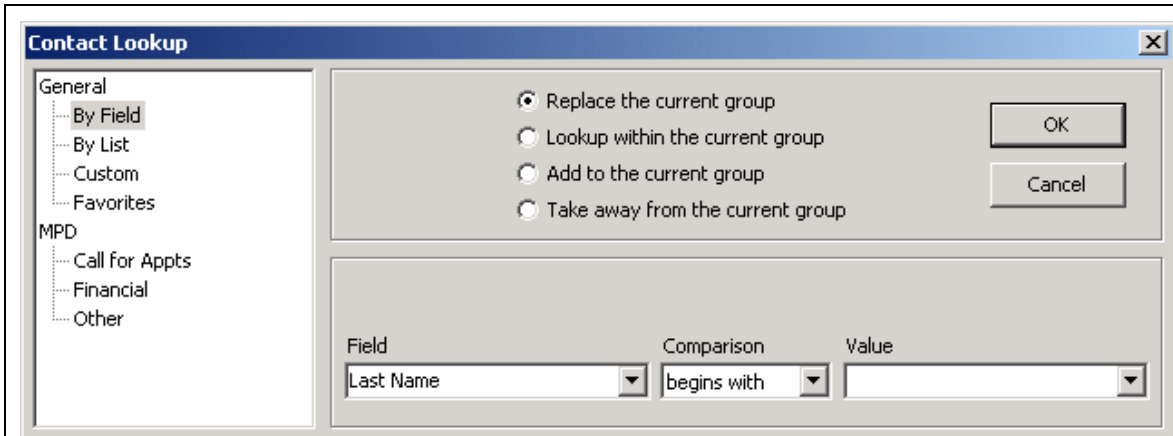
Menu Item	Description
<i>The first seven menu items are the seven tabs of the Contact Lookup dialog box.</i>	
Favorites	Create, save, and edit custom lookups.
By Field...	Select contacts based on one particular field or characteristic, such as zip code or whether they receive your newsletter.
By List...	Select individual contacts by name to create a group.
Custom...	Create more complex queries, such as those based in two or more fields.
Financial...	Find contacts based on the timing of their most recent gift.
Call for Appts...	Find your contacts on hand (including all whose MPD phase is Call for Appt, Ask in Future, Never Contacted, or n/a), based on region and appropriate time for next contact with that person.
Other...	Find all contacts whose phone or address is out of sync with your organization's recorded information.
<i>These three items don't take you to the Contact Lookup dialog box, but to specific contact(s).</i>	
Me	Your own information is listed here.
This Contact	Choose one particular contact. This removes all the other names from the group, leaving only the highlighted name.
Everyone	Return to the full list of contacts
<i>These five help you find contact(s) you might be looking for from a small pool.</i>	
Last Name...	Find all contacts with the same last name or part of a name.
First Name...	Find all contacts with the same first name or part of a name, which is helpful when you cannot remember someone's last name.
File As	Look up contacts by name from a list or by partial name.
MPD Phase...	Look up all contacts with the same MPD phase.
User Status...	Look up contacts by user status.
<i>The last four look up based upon certain commonalities.</i>	
City...	Find all contacts from the same town.
State...	Find all contacts from the same state.
Church...	Find all contacts from the same church.
Referrer...	Look up all contacts referred by one person.

Favorites sub-menu:

Menu item	Description
Add Current Lookup to Favorites	<p>Save frequently-used, custom lookups for quick access, or track particular groups. Some examples include newsletter recipients, Christmas card lists, those who responded to a particular request, or key contacts with whom you maintain more frequent contact.</p> <p>Tip: I create and delete favorites frequently. Some of my favorites are permanent, like my “Send Newsletter” favorite. But others are temporary. For example, while writing this, I am following up on a number of new contacts across the country. I have created several lookups based on these new contacts time zone and decision status. This enables me to focus on calling small groups of contacts different hours each evening. When I am finished with this follow-up process, I will delete the lookups from my favorites list.</p>
Edit Lookup Favorites	Modify your saved favorites or delete them.

CONTACT LOOKUP DIALOG BOX

When you select any lookup (except the three specific contact ones—Me, This Contact, Everyone), you will be presented with the **Contact Lookup** dialog box. Note that *all* of these lookups are custom lookups in that you have to select certain criteria.

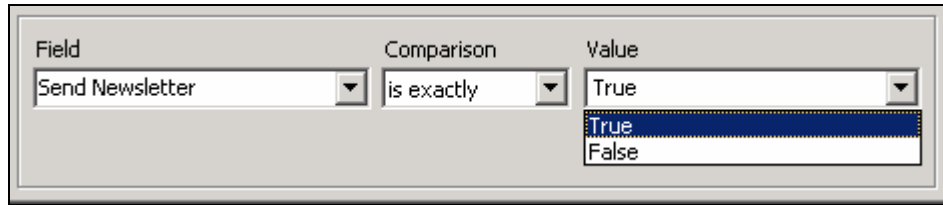


Lookups appearing in a tree in the left box. You will see the shaded one representing the lookup you have selected.

Group Activity:	Option	Description
Before selecting the criteria for your lookup, you have to define the contact activity. Your options are to:	Replace the current group	Queries the entire database and displays a new group.
	Lookup within the current group	Queries the currently viewed group and displays only those contacts that meet the criteria from the current group.
	Add to the current group	Queries the entire database, but maintains the currently viewed group and combines the two lists.
	Take away from the current group	Queries the current group and removes those contacts that meet the criteria chosen.

CONTACT LOOKUP TABS

BY FIELD



The screenshot shows a search interface with three dropdown menus. The first dropdown, labeled 'Field', has 'Send Newsletter' selected. The second dropdown, labeled 'Comparison', has 'is exactly' selected. The third dropdown, labeled 'Value', has 'True' selected. A small menu is open below the 'Value' dropdown, showing 'True' and 'False' as options.

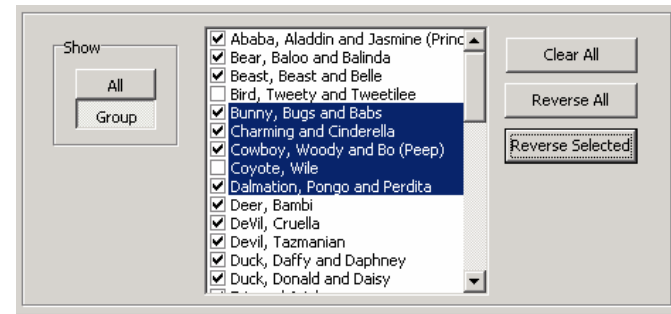
Box	Description
Field	Drop-down box offers you over 150 different TntMPD fields from which to choose.
Comparison	Varies depending on the Field chosen above, but basic options are: <ul style="list-style-type: none">• is exactly• is not• begins with• contains• is greater than• is less than• is at least• is at most
Value	The specific value to search for. In some cases, TntMPD only accepts certain values. In those cases, a drop-down box is provided (as in this example: Send Newsletter is TRUE or FALSE for every contact). In other cases, you enter a number, dollar amount or letters (like a name).

BY LIST

To query your database by list, you must choose to see all the contacts in your database, by choosing **Show All** or, if you have previously selected a group of contacts, by choosing **Show Group** to start from this smaller number of contacts.

The list to choose from will appear in the middle box, and you will click in each box that you want to select.

I used this when I sent out an appeal to a select group that had no common features. I could not create a Group using any custom lookup.



Reverse All will change all checked boxes to unchecked and all unchecked boxes to checked.

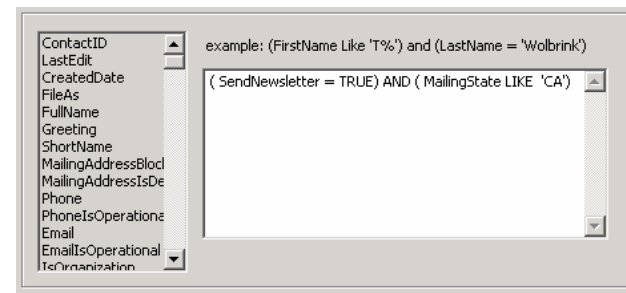
Reverse Selected will reverse the check on all the selected boxes.

CUSTOM

This option will allow you to combine two or more lookups by field queries into one query, thus saving time.

Fields can be dragged from the list at left to insure accurate spelling.

This type of Lookup is very advanced and requires knowledge of Access Query syntax. On the next page are some Developer's notes regarding how custom lookups can be written.



From the Developer:

There are two different ways to write “not”. You could either write:

Region <> 'UT', or
NOT (Region = 'UT').

Once you understand how the custom lookup works, you'll find plenty of documentation on the web. Given the custom lookup, I construct a SQL statement like this: SELECT ContactID FROM Contact WHERE <custom lookup here> ORDER BY FileAs . Now if you know SQL this all makes sense. But even if you don't know SQL, you can use Access 2000/XP to help construct the SQL using its visual query designer. This designer will let you switch into SQL mode so you can find the WHERE clause. There are many operators you can use with SQL: BETWEEN, IN, LIKE, =, <, >, <>, IS NULL, ANY, SOME, ALL, etc.

Here are several examples:

- Contacts who have ever given a gift between 25 and 50:
Contact.ContactID IN (SELECT ContactID FROM Gift WHERE (Amount BETWEEN 25 and 50))
- All contacts who have an average monthly gift more than 20% of their pledge (and their pledge is greater than zero):
(AveMonthlyGift > MonthlyPledge * 1.2) AND
(MonthlyPledge > 0)
- All partners who do not receive a newsletter:
(MPDPhaseID BETWEEN 60 AND 80) AND
(SendNewsletter = FALSE)

- All financial partners for whom we don't have their birthday:
(MPDPhaseID = 60) AND ((BirthdayDay IS NULL) OR ((Spouse <> ") AND (SpouseBirthdayDay IS NULL)))
- Contacts who have given their first gift ever in the last 180 days:
(FirstGiftDate > Date() - 180)
- Contacts who have a last name starting with "W", followed by any single character, followed by "I". Firstname starting with "a" through "j", or starting with "t", followed by "r".
FileAs LIKE 'W_!%, [a-j,t]r%'
(This matches:
Walker, Brian
Williams, Brent
Wolbrink, Arnie
Wolbrink, Troy)

Two good starting points on the Web to learning more:

- <http://msdn.microsoft.com/library/default.asp?url=/library/en-us/dnacc2k/html/acfundsqli.asp>
- <http://msdn.microsoft.com/library/default.asp?url=/library/en-us/dnacc2k/html/acintsql.asp>

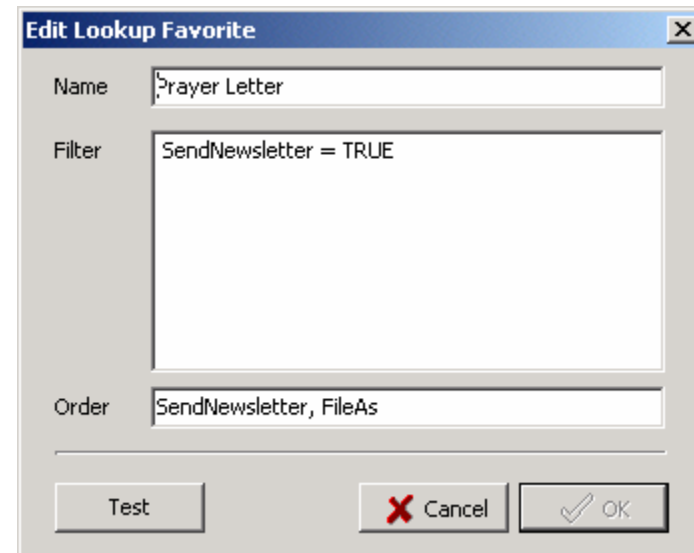
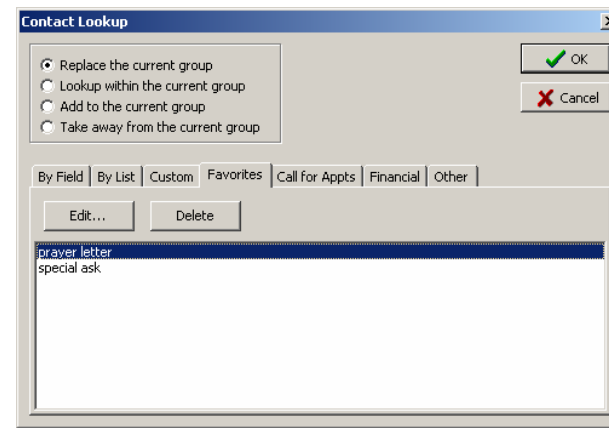
FAVORITES

You cannot add to your Favorite lookups from this location, but it is possible to edit favorites or delete them.

Choose the Favorite query that you wish to **Edit...** or **Delete** from the list, and click either edit or delete. If you choose to delete, TntMPD will ask you to confirm. If you choose to edit, you will have more options.

Here queries are defined mathematically (e.g., `SendNewsletter = TRUE` or `Pledge > 60`).

Again, editing this type of lookup can be complex and requires knowledge of query syntax.



CALL FOR APPOINTMENTS

This specialized query will bring up all contacts whose MPD phase is

- n/a
- Never Contacted
- Ask in Future
- Call for Appt

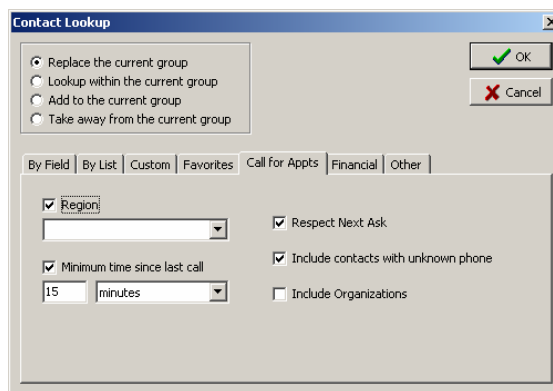
In addition, you can limit your query by Region by checking the box and choosing from the list.

Minimum time since last call allows you to exclude those that you have a call logged in history within a certain time frame; click the box and select the amount of time that you want to have passed since your last attempt.

Respect next ask will remove anyone for whom a next ask date has been set which has not yet arrived.

Uncheck **Include contacts with unknown phone** if you are making calls for appointments, since you cannot call the contact without a phone number.

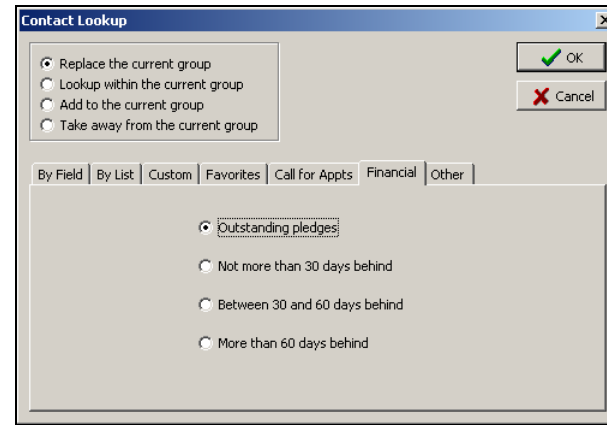
Include Organizations. You might want to uncheck this box if you are making calls at night when organizations on your list are normally closed.



FINANCIAL

This specialized query will bring up all regular financial partners (those who give on a regular basis) based on the length of time since their last gift. This information is also available by running the **Tools | Late Donor Report**. The categories available are:

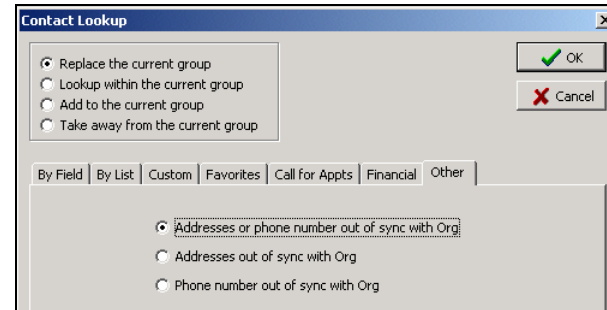
- Outstanding pledges
- Not more than 30 days behind
- Between 30 and 60 days behind
- More than 60 days behind



OTHER

You can use this lookup to find any addresses or phone numbers which you have entered that do not correspond to the address or phone number on record with your organization. You may choose to find both addresses and phone numbers at the same time or to query them separately.

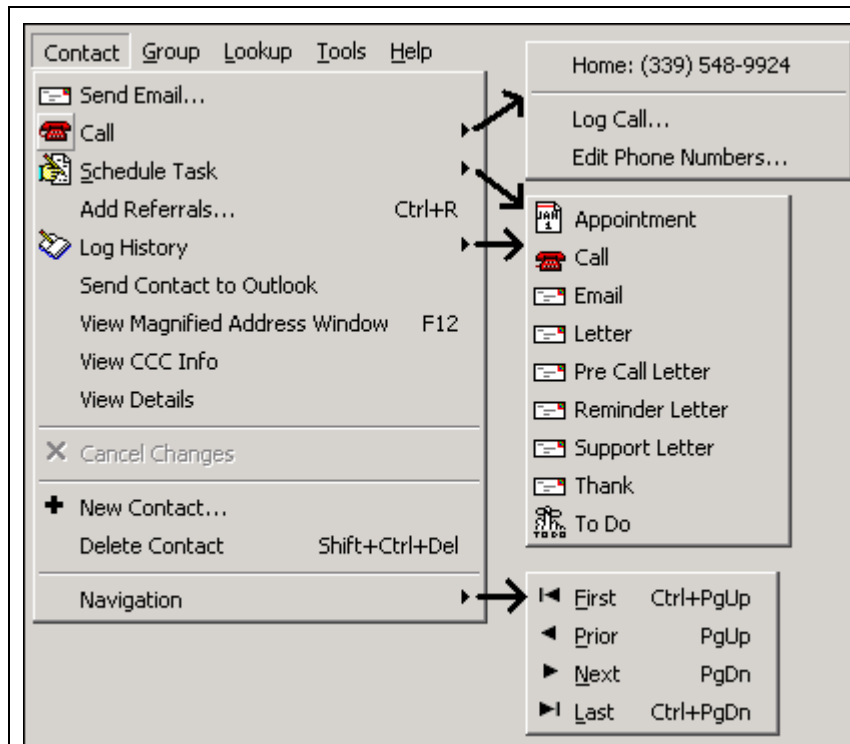
Tip: When you download donor information from your organization, TntMPD will not overwrite a contact's existing address or phone number. Instead, it will indicate there is a discrepancy by making the contact's address and/or phone bold and red. This lookup saves you from having to go through all your contacts looking for red data.



Other Contact Menu Items

The Contact Menu offers a number of helpful tools for working with your contacts, some of which are available elsewhere (such as the Schedule Task and Log History commands).

- **Send Email.** Opens Outlook and addresses a blank email message to the selected contact. (You must have Outlook configured in your Windows setup for this to work.)
- **Call.** Allows you to use your dial your phone through your computer (if you have it hooked up that way), or log a Call you made.
- **Schedule Task.** The same as the Schedule button on the Task tab.
- **Add Referrals.** See following pages.
- **Log History.** The same as Log History found in several other locations.
- **Send Contact to Outlook.** Sends this contact's Address information to Outlook.
- **View Magnified Address Window.** Shows the contact's name and address in a larger, separate box.
- **View CCC Info.** (Actually, this is "View [Your Organization] Info".) See following pages.
- **View Details.** See following pages.
- **Cancel Changes.** Usually, TntMPD saves changes as you make them, but in those instances when it does not, you can press the cancel button (big red " X "), or select this menu item.



- **New Contact.** Add a new contact.
- **Delete Contact.** As a general rule, you never want to delete a contact if you have any history, referred by, or giving information on them.
- **Navigation.** You can move up and down your list of contacts, but using the keyboard is faster. Ctrl+PgUp (or Ctrl+Home) takes you to the top, Ctrl+PgDn (or Ctrl+End) takes you to the bottom. PgUp and PgDn take you up and down one screen at a time.

ADD REFERRALS

I have found in my own personal MPD that a few of my contacts have given me most of my referrals, and often several at once. TntMPD's **Add Referrals** feature is designed for just this event, allowing you to key in many referrals at one time.

- The **Add Referrals** box (titled “Those referred by ...”) allows you to add only basic name and address information about referrals (all 8 fields shown in the picture at right).

You then have three options for a **Lookup when you press the Finished** button.

- **Don't do lookup:** returns you to the Contact View.
- **Lookup these contacts:** Creates a new group in the Contact View composed only of these referrals. This is the default option, and is helpful because it allows you to immediately edit or take action on this group.
- **Lookup all contacts referred by...:** Creates a new group in the Contact View composed of both the new and previous referrals from this contact.

First	Spouse	Last	Address	City	State	Zip	Phone
James		Olson	10 Broadway #404	Metropolis	NY	10010	212-484-0400
Chief				Metropolis	NY	10024	212-272-6369
Mr	Mrs	Kent	212 Highway 87	Smallville	KS	73060	570-992-3920

When Finished

Don't do lookup

Lookup these contacts

Lookup all contacts referred by Clark and Lois Kent

When Finished

Don't do lookup

Lookup these contacts

Lookup all contacts referred by Clark and Lois Kent

Tip: Use File | Import Contacts (see Chapter 7) if you want to import more detail than the Add Referrals box offers, such as Region, custom Greetings, etc.

VIEW ORGANIZATION INFO (Web Feature)

If your organization can link with TntMPD, then your organization's information on this contact will be stored in TntMPD.

It is not uncommon for your address information to be out of sync with your organization's.

Tip: You can combine multiple accounts for one contact (see next page).

- **Account List.** Most contacts will have only one "account" with your organization. However, there may be times when a single contact has multiple accounts but you want to view them as one (see next page for more information).

In the example shown at right, Clark and Lois were both givers to the ministry on behalf of Mr. Speed Racer, and their accounts were merged after they married. Now all of their gifts—both prior to and since their marriage—appear in one list.

- **[Your Organization] Name.** Displays the name of this contact as your donor system sees it (may often differ from the name you use in your contact list).
- **[Your Organization] Account.** This number is the same as the one selected in the Account List.

Tip: When a contact's address/phone in TntMPD does not match your organization's address/phone, their address/phone will be bold and red.

The screenshot shows a web application window titled "Campus Crusade for Christ Info". It features a sidebar with an "Account List" containing two entries: "44483439" (selected) and "40439396". The main content area displays details for the selected account, including "CCC Name" (Kent, Clark & Lois), "CCC Account" (44483439), "CCC Address" (2553 ... and ... 01000 1007), and "CCC Phone". There are "Keep TntMPD" and "Accept CCC" buttons next to the address and phone fields. A "Staff Web" logo is in the top right, and the "Last Updated" date is 11/9/1994.

- **[Your Organization] Address.** Again, may differ from the one you actually send mail to, for several reasons:
 1. They have moved and notified the organization but have *not* notified you (press the **Accept** button to update TntMPD).
 2. They have moved and notified you but not the organization. EFT givers, for example, may often go many months between received communications from your organization's contributions dept.
 3. You send mail to their home, but their receipts are mailed to a post office box or company address. (Press **Keep TntMPD** for these two cases.)
- **[Your Organization] Phone.** Many donors do not give a phone number to the organization, so this may often be blank. It is also more likely to be incorrect than any other personal information item as area codes are constantly changing.

COMBINING MULTIPLE ACCOUNTS FOR ONE CONTACT (Web Feature)

Again, this feature only applies to contacts whose gifts are downloaded via the web. Reasons why you might combine accounts:

- Two single contacts have married and combined their accounts.
- Your organization has inadvertently given this contact a new account #.
- Your contact gives both personally and through his business but you want to view the gifts together.

- Select the contact whose account you want link
- Select **Contact | View [Your Org.] Info.**
- Right-click on their account #. The menu item that appears is **Link Account to Different Contact....**
- TntMPD provides a list of your contacts for you to select from.
- Select the contact and press **OK**.

The original contact will remain in your contact list, but all gifts associated with their account # will be shown in the new contact.

You can see which Account # they used for each gift by right-clicking on each gift and selecting **Edit Gift...**

Tip: This feature is also useful when an account is associated with the *wrong* contact.

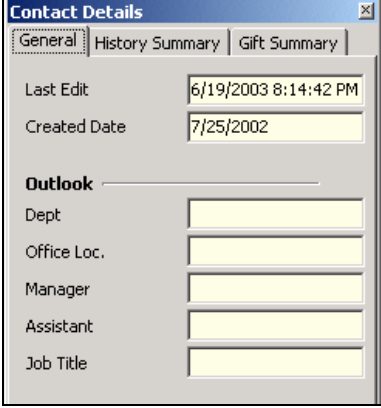
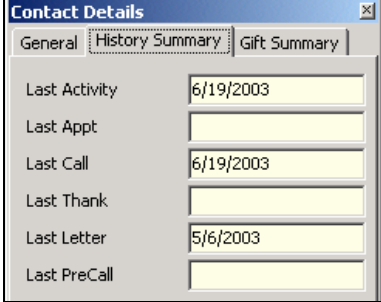
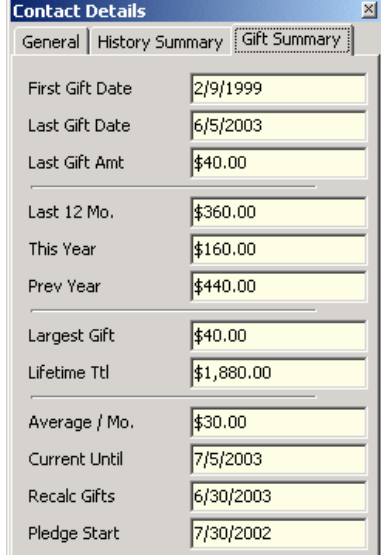
Tip: You can undo a link by re-linking the account to the original contact.

The screenshot shows a web application window titled "Campus Crusade for Christ Info". On the left, there is an "Account List" with one entry: "414379800". A right-click context menu is open over this entry, showing the option "Link Account to Different Contact...". On the right side of the window, there are several form fields: "CCC Name" (empty), "CCC Account" (414379800), "CCC Address" (888 Brookfield Ave, Youngstown, OH 44512), and "CCC Phone" (empty). Below the address and phone fields are buttons labeled "Keep TntMPD" and "Accept CCC". A "Last Updated: 1/31/2001" timestamp is shown below the address field. In the top right corner, there is a logo for "Staff Web".

The screenshot shows a dialog box titled "Select a contact...". It contains a list of contact names: "Ababa, Aladdin and Jasmine (Princess)", "Bear, Baloo and Balinda", "Beast, Beast and Belle", "Bird, Tweety and Tweetilee", and "Lightyear, Buzz". There are "Cancel" and "OK" buttons at the bottom.

VIEW DETAILS

This menu item offers summary data for the selected contact in three different categories, General, History Summary (that is, “last” history event for several items), and a financial summary of their giving.

General	History Summary	Gift Summary
		
<ul style="list-style-type: none"> • This box shows you the last time some activity (either a history event, or whether you made a change to their address or MPD data, or a gift was received, etc.). • Created Date represents the date this contact was added to your TntMPD database. 	<ul style="list-style-type: none"> • This box shows the last time you completed a task involving this contact in each of the 5 types of activity. 	<ul style="list-style-type: none"> • This informative box summarizes all the giving of this contact (as it appears in TntMPD). <i>At some point I intend to load giving data for the five years between the time I joined Campus Crusade for Christ and TntMPD can provide histor, so that I can have complete gift information on each of my contacts.</i>

Note: The **View Details** box will remain on **TOP** until you close it, so you can move from contact to contact to see their details quickly. If you close TntMPD without closing the View Details box, it will still be there the next time you open TntMPD.

