

# Chapter 4: Tracking Features

*“The plans of the diligent lead surely to advantage, but everyone who is hasty comes surely to poverty.” PROVERBS 21:5*

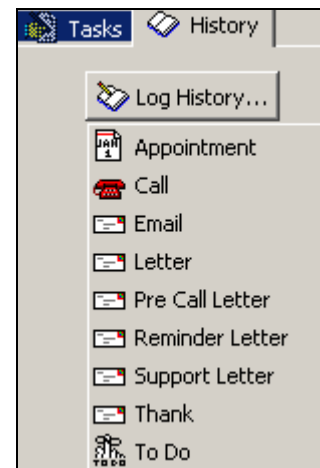
Having significant personal information about your contacts is the first step in building deeper relationships with your contacts. *Maintaining* that relationship is the second step, and TntMPD offers a number of task tracking and scheduling features to help you be pro-active in your ministry partner development work. Again, these features are similar to those found in other personal information managers that Troy Wolbrink used when first seeking to build better relationships with *his* ministry partners.

This chapter covers:

1. The Task View—and how to manage your tasks.
2. The Task tab in the Contact View.
3. The History tab in the Contact View—and how to know about your past interaction with your contacts.

4. The Schedule View—using TntMPD to manage your personal MPD schedule.

For your reference, these are the assorted tasks you can track with your contacts:



# Tasks

## TASK VIEW

When you press the **Tasks** button on your button bar, you are taken to the second primary view of TntMPD.

**Tip: Right click on a call task to Log an Attempt without clearing the task.**

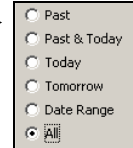
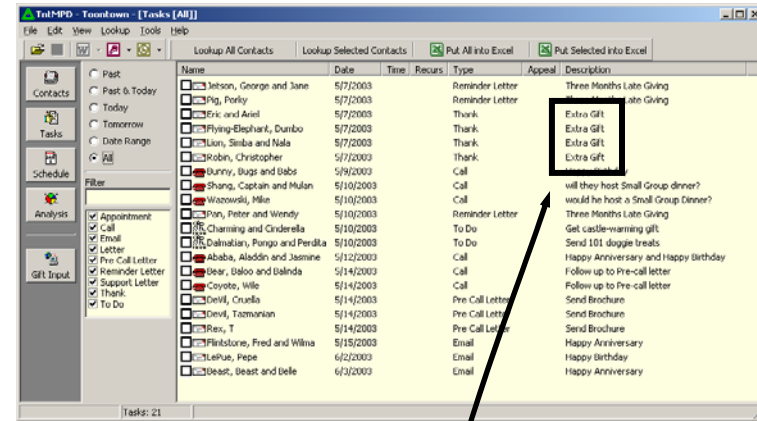
**When you Log an Attempt, any notes you wrote in the Details tab of the scheduled task (see page 4-4) becomes the details of the completed task.**

The “default” view in the window is all the tasks up to and including today. You can change the date range to include any of the following:

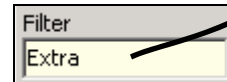
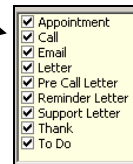
- Past**—tasks that are overdue
- Past & Today**—all task prior to and including today
- Today**—only what I must do today
- Tomorrow**—only what’s up tomorrow
- Date Range**—tasks scheduled between a specific pair of dates
- All**—all scheduled tasks, past and present

You can change what types of tasks are shown by unchecking the types. As you uncheck boxes, those types of tasks will disappear from the task window.

The **Filter** box will filter based on the Descriptions in your list of tasks. For example, if you type ‘Extra’, four tasks in the list will remain showing. (It would capture any description with “extra” in it, not just those that start with “extra”. And it is not case-sensitive.)



**Note: On “Date Range”, you can only select a date range in a single month. Select the start date, the press the shift key and select the end date.**



## WRITING DESCRIPTIONS

You can save time when creating tasks or scheduling appointments by creating some frequently used “descriptions”. In addition to saving you typing time, favorite descriptions can help with Lookups and Filters.

- Wherever a **Description** box appears, a **Select...** button will appear to the right. This button brings up the list of your favorite descriptions (see samples at right). You can add, modify, and delete all of your descriptions.

**Tip: If you write comments on a phone call or other History item, you have to double-click on the specific event in order to see the notes you wrote. To help me know which events have comments, I put an asterisk\* in the description field. I have also found it helpful to indicate which spouse I talked to when I called.**

	Date	Time	Type	Result	Appeal	Description
	5/22/2003	11:08:30 AM	Support L...	Done	2003-05 Summ...	Sent Summer Ask
	2/4/2003	2:49:51 PM	Call	Done		Chit chat (George)
	10/2/2002	2:50:19 PM	Call	Done		Seeking referrals* (Jane)

## CHANGING THE MPD PHASE OF A CONTACT

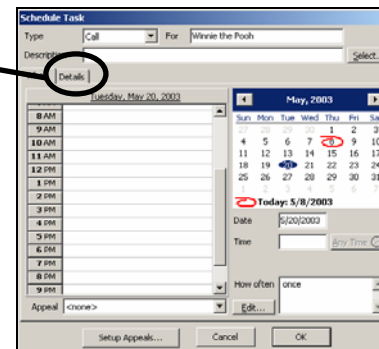
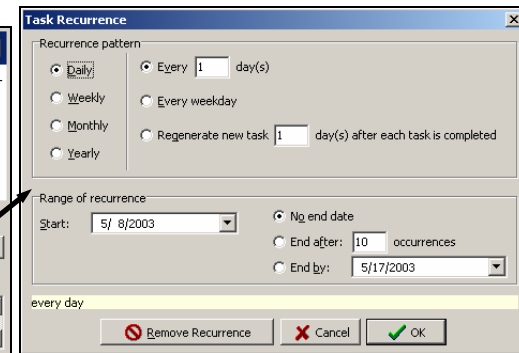
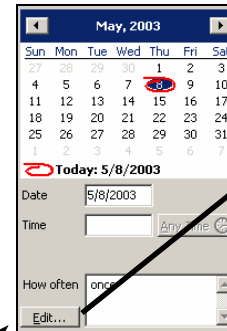
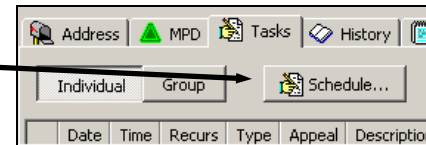
When you complete a task on a contact whose MPD phase is below the “decision line” (that is, less than PARTNER), TntMPD will automatically ask if you want to change the MPD Phase. The suggested new phase varies depending on what their current Phase is.

## CONTACT VIEW: TASK TAB

From the Task view you can only see existing tasks. You create new tasks in the Contact View. To see tasks for an individual contact, go to your Task view, then select the contact's task and press the **Lookup Selected Contact** button. The contacts are in order of tasks due, with the highlighted task as the displayed contact. Viewing or acting on a task for a contact has the same effect as if you were in the Task view.

### Scheduling a new Task

- Press the **Schedule...** button.
- Select what type of task you are scheduling.
- Type in a Description or select one from your list of saved descriptions.
- Select a date and time (if desired) for this task. You can pick a date from the calendar or just type it in the date box. The default occurrence is **once**, but you can schedule a recurring task. For example, you have a contact you write a letter to each month; you could schedule a letter task for once a month for the following year by pressing the **Edit...** button.
- The Schedule Task dialog box also has a **Details** tab where you can track your progress on a particular task and syncs with Outlook task progress features.
- Click **OK**.

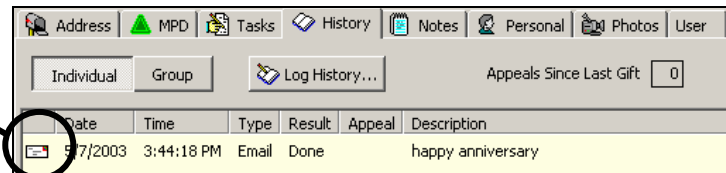


# History

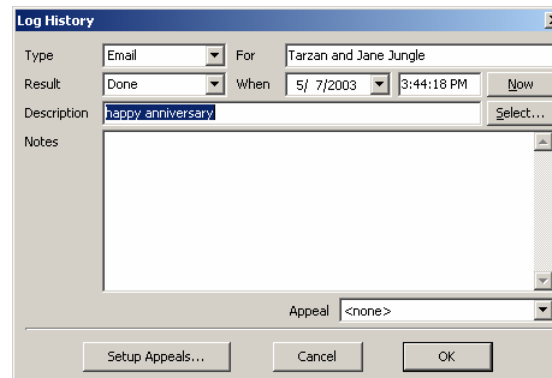
## CONTACT VIEW: HISTORY TAB

The History tab in the Contact view allows you to see all of the history you have recorded with each contact. The History tab shows you the tasks you have completed.

- At the left is an icon representing a Call, a To Do, an Appointment, or a Letter of some kind.
- The date and time the task was posted.
- Whether it was “Attempted”, “Done” or “Received”.
- If the task was associated with a particular appeal, that will appear in the fifth column. (For example, if you sent a special ask to all of your Send Newsletter contacts, then recorded that appeal for the group, each member of the group would have a Letter task completed in their history.)
- Description.



Date	Time	Type	Result	Appeal	Description
5/7/2003	3:44:18 PM	Email	Done		happy anniversary



Log History

Type: Email For: Tarzan and Jane Jungle

Result: Done When: 5/7/2003 3:44:18 PM Now

Description: happy anniversary Select...

Notes:

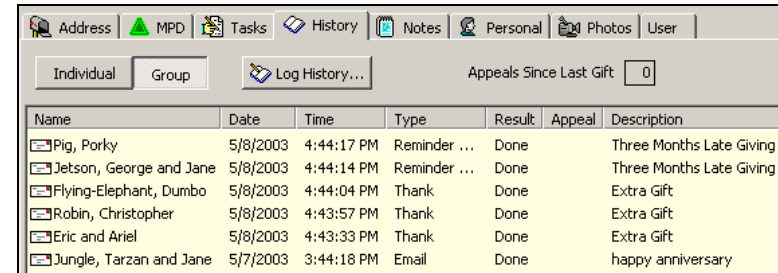
Appeal: <none>

Buttons: Setup Appeals..., Cancel, OK

## VIEWING HISTORY FOR A GROUP

By pressing the **Group** button, all of the History for all contacts in the group appear. Note, however, that you cannot press the **Log History...** button here to log an event for the whole group. That can only be done from the **Group | Log History** menu.

If you press **Log History...** while the Group's tasks are showing, TntMPD will create a history event **only** for the contact currently selected in the Contact list.



Name	Date	Time	Type	Result	Appeal	Description
Pig, Porky	5/8/2003	4:44:17 PM	Reminder ...	Done		Three Months Late Giving
Jetson, George and Jane	5/8/2003	4:44:14 PM	Reminder ...	Done		Three Months Late Giving
Flying-Elephant, Dumbo	5/8/2003	4:44:04 PM	Thank	Done		Extra Gift
Robin, Christopher	5/8/2003	4:43:57 PM	Thank	Done		Extra Gift
Eric and Ariel	5/8/2003	4:43:33 PM	Thank	Done		Extra Gift
Jungle, Tarzan and Jane	5/7/2003	3:44:18 PM	Email	Done		happy anniversary

## SPORADIC GIVERS

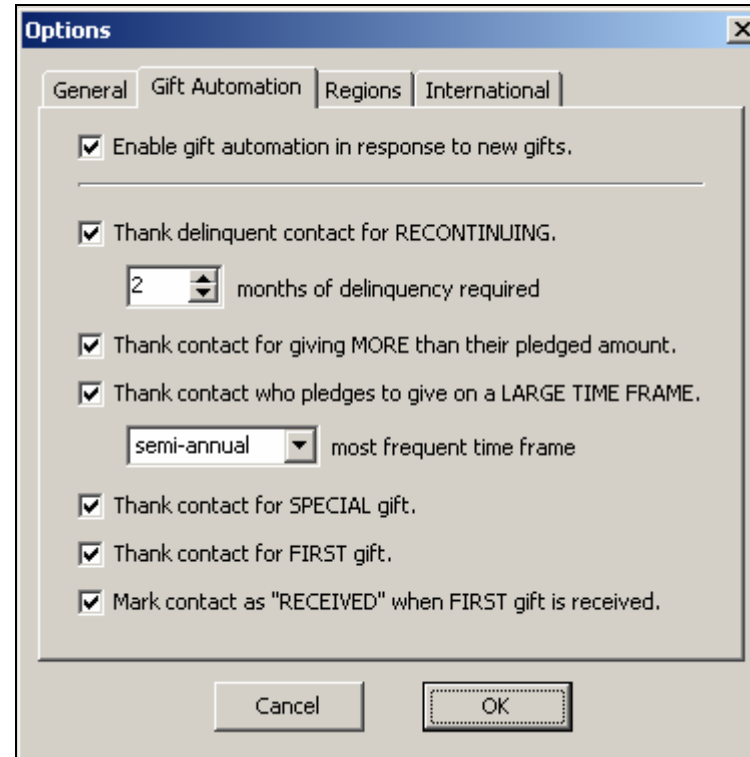
A **sporadic** giver is a person who pledges a certain amount at a certain frequency, but is not faithful either in the amount or the frequency. Because of this, you may enter a pledge for them, but TntMPD will be continually reminding you that they are behind on their giving. Conversely, if you do *not* put a pledge amount, you will be alerted to send a thank you each time they give because TntMPD will regard their gift as a special gift. Frankly, there is no way around this.

## AUTO-TASKS (WEB FEATURE)

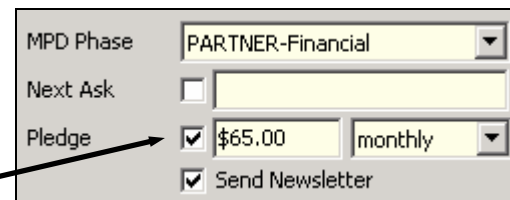
One delightful feature of TntMPD is how it automatically creates tasks for you. (This was covered briefly in the *Pledge* area of the MPD tab.) Gifts are credited to your account, then downloaded by you into TntMPD. TntMPD then analyzes each of the gifts and compares them to what you have identified as normal for each contact. If the gift equals the pledge amount and they are current on their pledge, no auto task is created.

- **Enable gift automation...** turns on the auto-task feature.
- **RECONTINUING.** If a pledged giver misses the number of months you specify, then gives again, TntMPD alerts you to send a thank you.
- **MORE.** TntMPD signals you when a financial partner gives more than their normal pledge.
- **LARGE TIME FRAME.** When a financial partner gives their pledge several months apart, TntMPD can alert you to send a Thank You simply for giving their normal pledge amount.
- **SPECIAL.** TntMPD can alert you when a contact gives a gift separate from their normal pledge (they have to be current on their pledge for the alert to appear).
- **FIRST.** This is the first gift for a financial partner... that is, someone who has pledged but never given that pledge amount. This is related to the **RECEIVED** check box below; TntMPD will automatically check the pledge box

Gift Automation is found in the Tools | Options box.

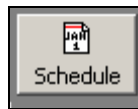


The screenshot shows the 'Options' dialog box with the 'Gift Automation' tab selected. The 'General' tab is also visible. The 'Gift Automation' section contains several checked options and two dropdown menus. The first dropdown menu is set to '2' and is labeled 'months of delinquency required'. The second dropdown menu is set to 'semi-annual' and is labeled 'most frequent time frame'. The 'OK' button is highlighted with a dashed border.



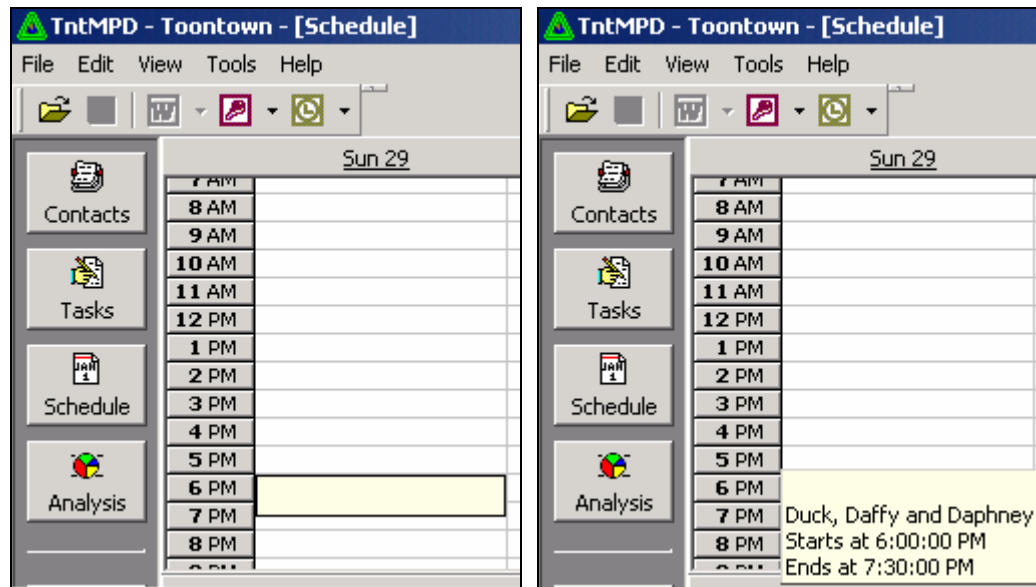
The screenshot shows a portion of the MPD Phase and Pledge fields. The 'MPD Phase' dropdown menu is set to 'PARTNER-Financial'. The 'Next Ask' checkbox is unchecked. The 'Pledge' checkbox is checked, and the amount is '\$65.00' with a 'monthly' dropdown menu. The 'Send Newsletter' checkbox is also checked. An arrow points from the 'RECEIVED' check box in the text above to the 'Pledge' checkbox in this screenshot.

## Schedule



### SCHEDULE VIEW

The Schedule button brings up your TntMPD calendar. The primary value of the Schedule View is your ability to view your schedule while setting up with other appointments. The Schedule View is fairly limited in that it cannot show individual days or whole months, etc.



**Tip:** To view the scheduled appointment (left), move your cursor over the appointment and wait a moment. Simple details about the appointment will appear (right).