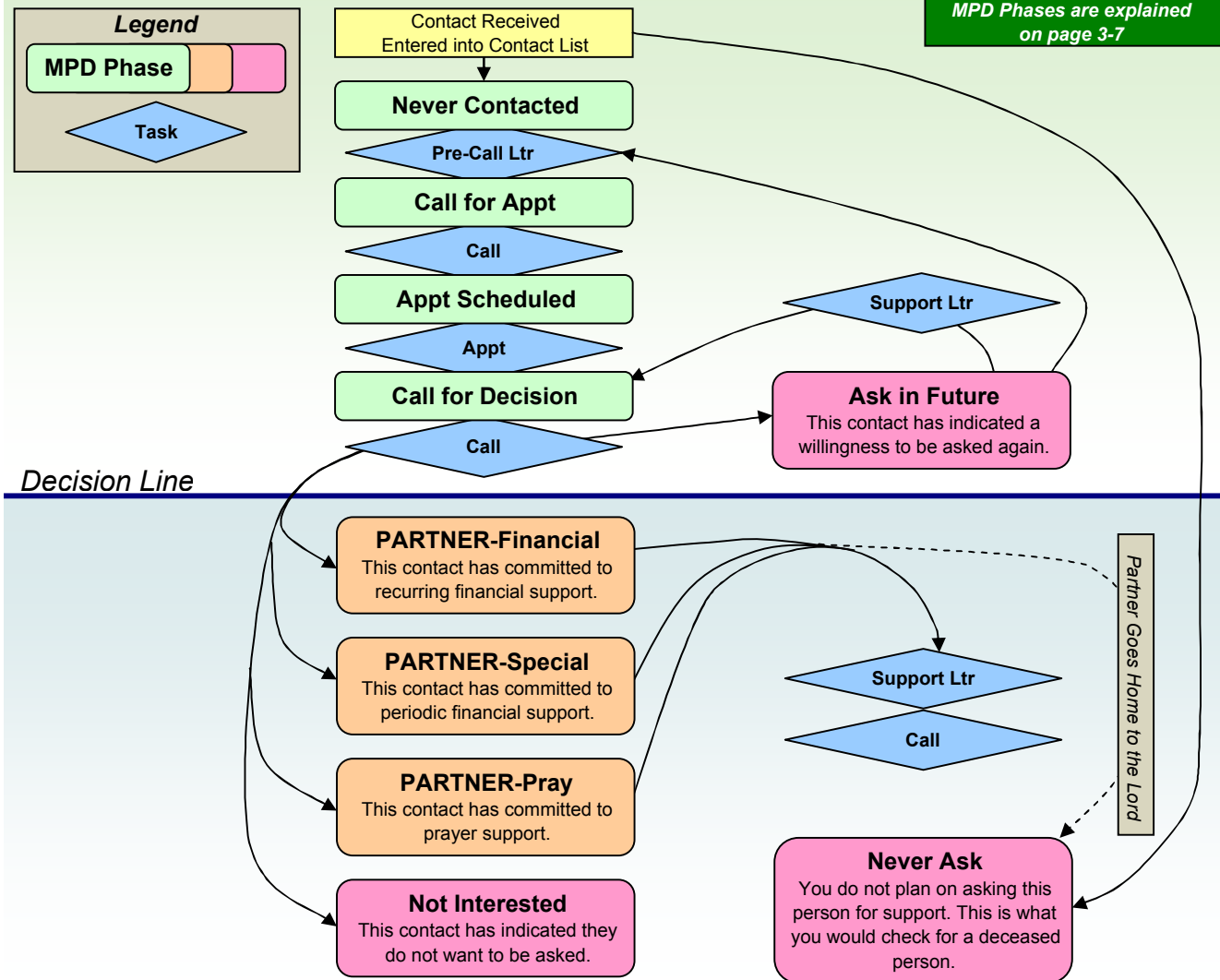


*A comprehensive guide to maximizing your use of  
TntMPD in your personal ministry partner development*

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with Melissa Richeson  
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## MPD Phase Flow-Chart & Task Process



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**EXPLODING TNTMPD.** (Current to 1.6 r54. Printed January 25, 2004)

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**Improvement suggestions welcomed:**

Email [bob.macleod@ccci.org](mailto:bob.macleod@ccci.org).

*Unfortunately, we cannot provide technical support for your use of TntMPD. It is our hope that this manual will answer 'practically all' of your questions.*

Scripture taken from the NEW AMERICAN STANDARD BIBLE®, Copyright © 1960, 1962, 1963, 1971, 1972, 1973, 1975, 1977, 1995 by The Lockman Foundation. Used by permission.

# Chapter 1: Quick Start Guide

## Welcome!

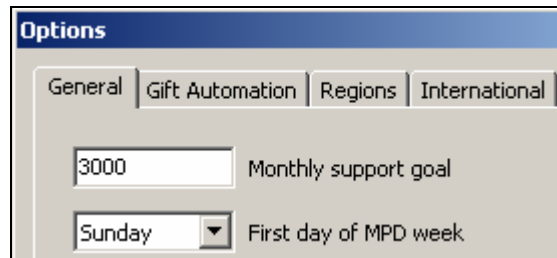
This TntMPD manual is designed to do two things:

- 1 Get you up and running in TntMPD quickly and easily.
2. Help you make the most of TntMPD by walking you through practically every feature of TntMPD.

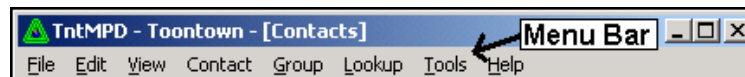
**Most pages in this manual are divided into three columns, like this:**

This column contains explanatory notes or additional information.

- This column highlights specific features or tasks of a page displayed at right, or
- Walks you through a set of steps to complete some operation.
- When you are instructed to press a button, it looks like this:  
“Press **Schedule** to add an appointment.”
- When you are instructed to access something from the menu bar, the menu path looks like this:  
“Select **Tools | Options** to view your personal options.”



**This column usually contains a screen shot to help you see the topic at hand, and often a bold-faced “Tip:” to help you understand TntMPD a little bit better.**



## ***TntMPD 1-2-3***

If you are brand new to TntMPD, here are the steps you need to take:

1. Go to the TntMPD web and install the software on your computer (Chapter 2: Getting Started)
2. Load your contacts into TntMPD (Two different ways: Chapter 3: Managing Contacts and Chapter 7: Technical Features-Importing Contacts). You can stop there if you are just using TntMPD as a contact manager. If you want to go deeper with TntMPD, you will want to:
3. Track relationship activity with your contacts (Chapter 4: Tracking Features).
4. Analyze your financial support so you can do better (Chapter 5: Analysis Features).
5. The next step you advance to is using your data outside TntMPD, using mail merges or exporting data to Excel (Chapter 6: Getting Data Out of TntMPD).
6. Finally, when you are very comfortable with TntMPD, you may want to take advantage of some of the technical features (Chapter 7: Technical Features).

### **ABOUT CONNECTING TO THE WEB**

This software was designed initially for use by staff members with Campus Crusade for Christ. They can take advantage of Campus Crusade for Christ's donation system which allows staff members to view donation activity via the web. CCC and many other organizations have systems compatible with TntMPD which allow web download of donor and donation information. (To find out more about connecting

your organization to TntMPD, please contact Troy Wolbrink via the TntMPD web site.)

TntMPD—and this manual—can be used by anyone, whether they link TntMPD to the web or not. Most of the features in this manual are web independent, but where they are not, I put **“Web Feature”**.

TntMPD also has a web connect feature for updates and bulletin boards, and any TntMPD user can use those features.

### **TNTMPD WORDS TO KNOW – “GLOSSARY”**

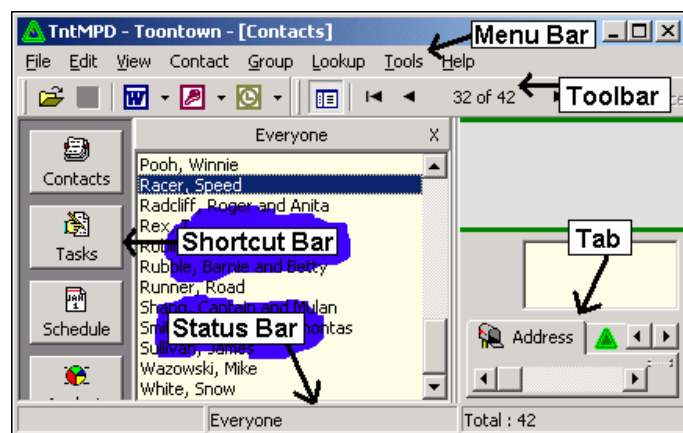
- **Contact.** A contact is any person in your TntMPD database, not just “donors.” Contacts may be: Current or former donors/prayer-ers (even former, deceased donors); a company, church or other organization; someone you are cultivating to be a partner in your ministry, etc.
- **History.** This is a task that has passed, such as a call made, a letter sent, etc.
- **MPD.** “Ministry Partner Development”. Every Ministry uses a different term to describe the relationship development with the donors and prayer-ers God uses to supply the financial and spiritual support to the Ministry. In Campus Crusade for Christ we call it MPD; since TntMPD uses this term in its panels, this documentation uses it as well.

- **MPD Phase.** The status of a contact ranging from ‘just entered into TntMPD’ (“n/a”) to committed partner (“PARTNER-Financial”). *See inside front cover for a diagram of TntMPD’s MPD Phases.*
- **Tab.** There are several places in TntMPD where you have different options available to you, just like you might see file tabs in a filing cabinet.
- **View.** One of four primary screens in TntMPD, described on the following pages. You can access each view directly using the *Shortcut Bar* shown at left.

## NAVIGATING IN TntMPD

There are three ways to navigate in TntMPD:

- (1) using various buttons,
- (2) selecting menu commands, and
- (3) by using shortcut keys.



## BUTTONS

Again, there is the shortcut bar down the left for the five primary functions of TntMPD.

There are also various buttons on the toolbar such as open, save, etc. (Toggle the toolbar on/off by selecting **View | Toolbars.**)

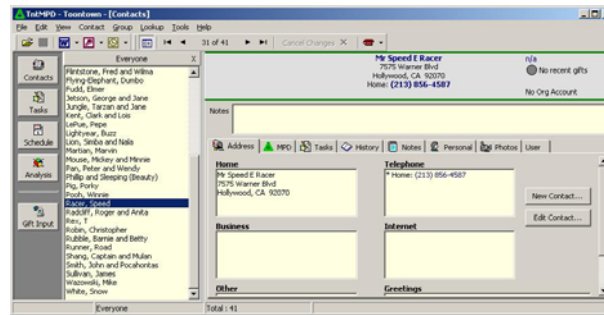


## SHORTCUT KEYS

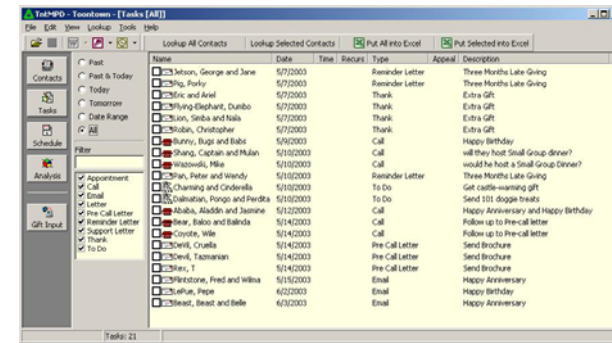
Ctrl-A	Select All
Ctrl-Z	Undo (most things cannot be undone)
Ctrl-X	Cut
Ctrl-C	Copy
Ctrl-V	Paste
Ctrl-O	Open (another TntMPD database)
Ctrl-R	Add Referrals (in Contact View)
Ctrl-S	Save
F1	About TntMPD
F2	Turn on/off Shortcut bar
F3	Turn on/off Contact list (in Contact View)
F5	Refresh
F8	See your <i>System Information</i>
F12	See address block enlarged (in Contact View)
Alt-F4	Exit
Shift-Ctrl-Delete	Delete Contact (see Chapter 3 for why you don't want to do this)
Ctrl-L	Log History (in Contact View)

# TntMPD Views

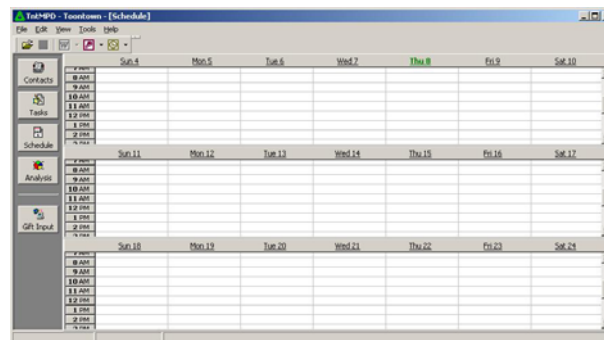
## CONTACT VIEW (CHAPTER 3)



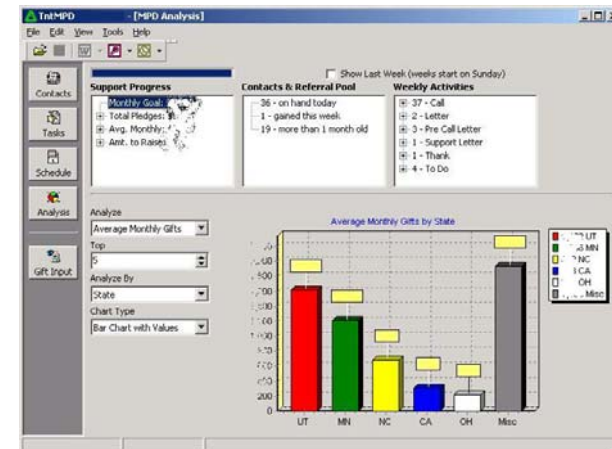
## TASK VIEW (CHAPTER 4)



## SCHEDULE VIEW (CHAPTER 4)



## ANALYSIS VIEW (CHAPTER 5)





# Chapter 2: Getting Started

## Overview

This chapter is designed to get a person from not having TntMPD to having it up and running and ready for use... the Basics. The following concepts are covered:

- What you need to do BEFORE downloading TntMPD
- Finding TntMPD
- Downloading it to your computer
- Downloading and/or adding your Ministry Partners
- Downloading your gifts
- Regular maintenance of your contacts and donations

## BEFORE YOU DOWNLOAD TntMPD

You can improve your use of TntMPD by doing some legwork ahead of time. You do not have to do these things, but if you do, it will save you time later.

- **Get a CD writer.** Because your MPD database is so central to your work as a missionary, it is imperative that you back up your TntMPD database often. I back

it up every day to a different directory on my hard drive, with a different file name (like “toontown backup.mpd”). I also back it up to a CD weekly. I advise you not to back up to a floppy disk because your file will very quickly grow to greater than 1.44 Megs. *See Chapter 7 for more information on backing up your TntMPD database.*

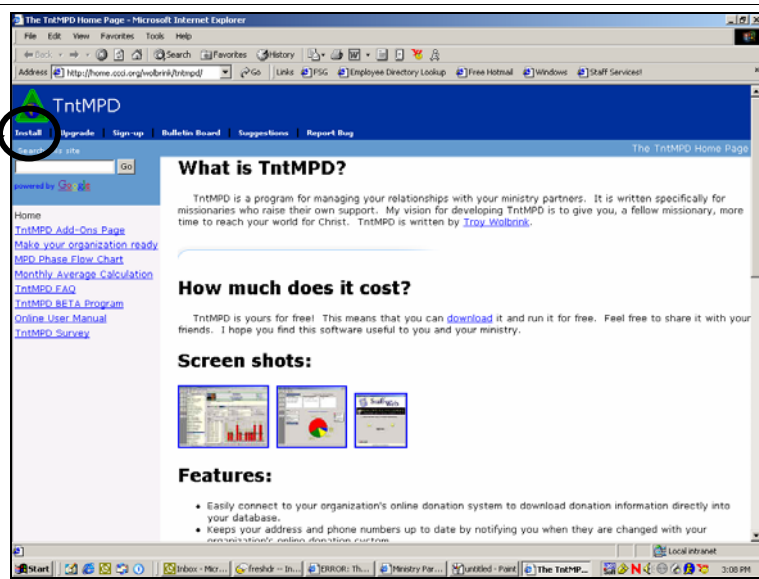
- **Have your contact list ready.** You *can* manually key all your contacts into TntMPD... if you have just joined your ministry and are wondering what to do with all those daytime hours between appointments. You can also automatically load all your contacts from your ministry’s donor database (if your ministry supports that). However, if you already have a big list, it’s best to import your contacts to TntMPD from another program... even if your entire list is on paper and you have to type it in Excel first. This is also covered in Chapter 7.

## Finding & Downloading TntMPD

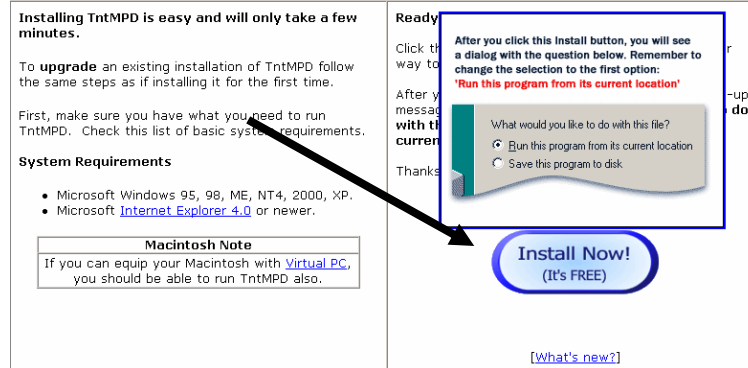
Go to [www.google.com](http://www.google.com) and search for “TntMPD”. The first item should be the official TntMPD web-site; just click on the link and your browser will be directed to the TntMPD web-site.

TntMPD installs on your computer like most other software... except that it's free!

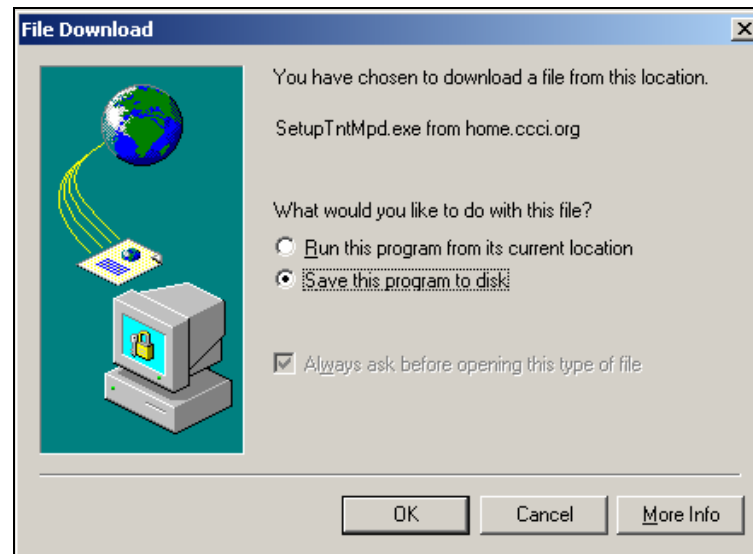
1. Click the **Install** link in the upper left hand corner of the TntMPD website.



2. Click **Install Now!**.



3. Change the radio button from “Save...” to “Run this program from its current location.”
4. Press **OK**.

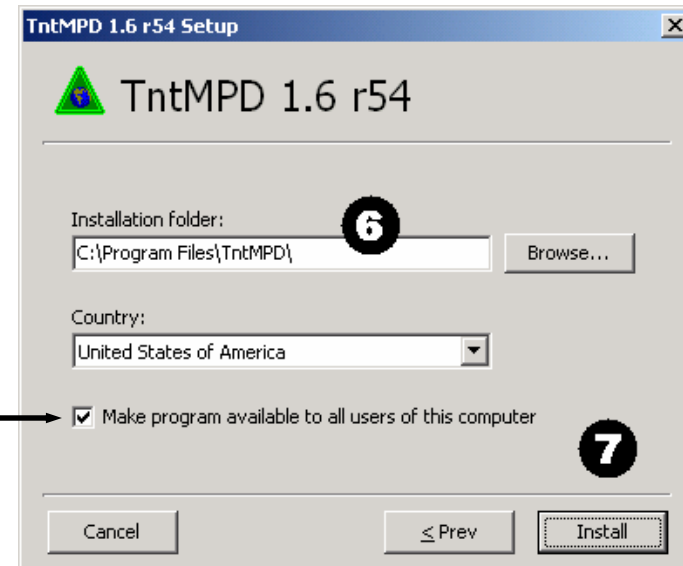


5. **Security Warning** dialog box. Answer **Yes** to indicate you want to install and run TntMPD.

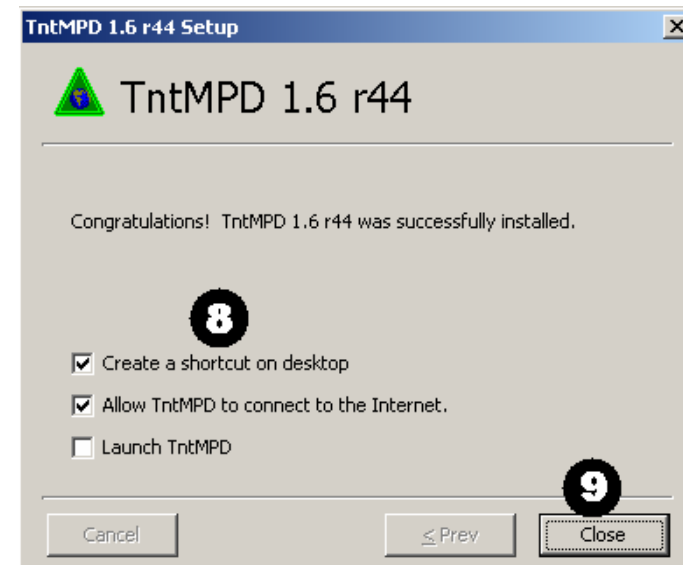


6. Select your installation folder, most likely the default **C:\Program Files\TntMPD\**
7. Press **Install**.

*Note: You can make TntMPD available to all users of the computer.*



8. TntMPD will install to your computer, then give you three options before continuing:
  - a. Create a shortcut on your desktop (check this for quick access to TntMPD in the future).
  - b. Allow TntMPD to connect to the Internet (uncheck this if you are in a place where you do NOT want auto-connect).
  - c. Launch TntMPD. This will launch TntMPD automatically.
9. Press **Close**.



## RUNNING TntMPD FOR THE FIRST TIME

When you run TntMPD for the first time, you are asked if you want to create a new database. Click **No** if you have a database already (for example, if you are downloading TntMPD to a new computer).

For this manual, we created a fictional database for Mr. Speed Racer of Toontown.

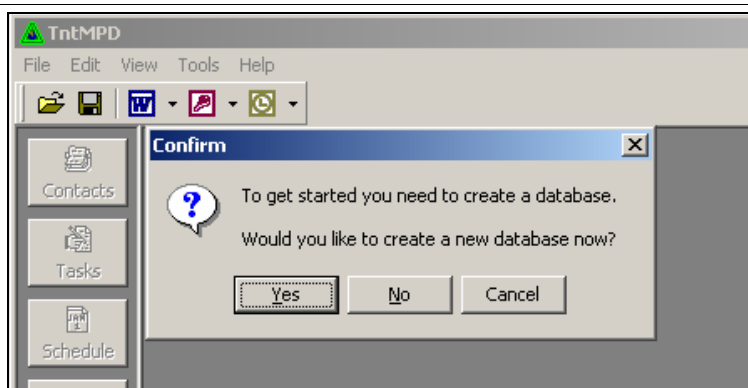
1. Click **Yes** to create a new database.
2. Click **No** or **Cancel** to start TntMPD without an open database.

*If yes, continue reading. If no, then select **File | Open** to open an existing database. You can also create a new database at any time by selecting **File | New**.*

3. Create yourself as your first contact. You do not necessarily need an Address or Greetings for yourself unless you will be mailing things to yourself.
4. Click **OK**.

**Tip: Having yourself as a contact allows you to assign tasks for yourself later.**

**Tip: You might want to have multiple TntMPD databases if you are tracking contacts & gifts not only for yourself but also for your local ministry operations.**



Please enter your name.

☐ Organization

Name		
Title	Mr.	Spouse (Wife)
First	Speed	
Middle	E.	
Last	Racer	<input checked="" type="checkbox"/> Same Last Name
Suffix		

Address

Home ☒ This is the mailing address

☒ Deliverable

Address 75 Warner Drive

City Hollywood

State CA

Zip 98746

Country

Phone

OK

Cancel

Greetings...

Addr Block...

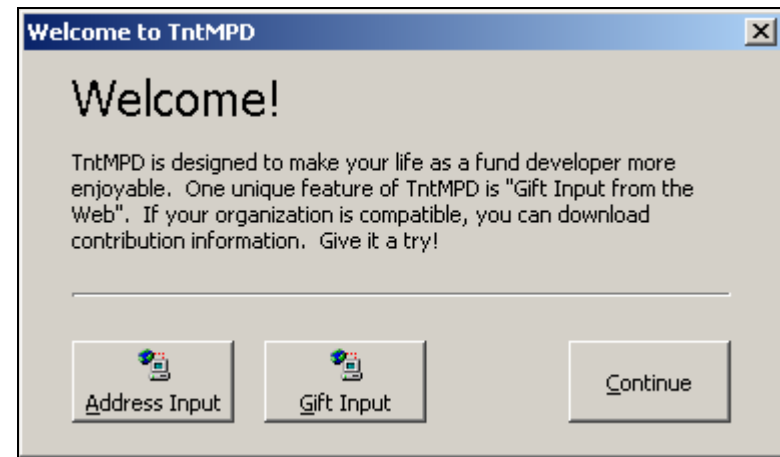
## WELCOME TO TntMPD!

Isn't it nice to feel welcome?

**WEB FEATURE:** TntMPD gives you an opportunity to automatically download addresses or gifts from your ministry's web server. If your ministry is TntMPD-compatible, select one of those two options, otherwise just press **Continue** to start using TntMPD.

Before you press either button, read the rest of this chapter about the three ways to get contact information into your TntMPD database.

*The instructions on the following pages are for Gift Input, but the same steps work for Address Input.*



**Tip:** You can download all your donors' addresses from your ministry's server... without the gifts. Or you can press **Gift Input** and download the gifts and the addresses simultaneously.

# Getting Contact Info

## GETTING YOUR CONTACTS INTO TntMPD

There are three ways to get your contacts into TntMPD.

► *This is the most thorough method. It is worth the effort and time to do it correctly the first time.*

<ul style="list-style-type: none"> <li>• <b>Adding them manually.</b> <i>Covered in Chapter 3.</i></li> </ul>	<p><b>Primarily useful only if you are just starting out with your MPD. Very time consuming.</b></p>
<ul style="list-style-type: none"> <li>• <b>Download contacts from your ministry's database</b> <i>Covered on the next page.</i></li> </ul>	<p><b>Advantages:</b></p> <ul style="list-style-type: none"> <li>• Requires little work on your part.</li> <li>• Downloads corrected USPS addresses with complete Zip Codes (if your organization takes advantage of this service).</li> <li>• Downloads past partners who are not currently on your list.</li> </ul> <p><b>Disadvantages:</b></p> <ul style="list-style-type: none"> <li>• Receipt addresses may not match the addresses where you normally send newsletters.</li> <li>• Donor names are often formal names because they are taken from checks and therefore they may not match your list.</li> <li>• Only downloads the names of donors.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Import data from your own database (e.g., Excel, Access, Word, Palm, Outlook, etc.)</b> <i>Covered in Chapter 7.</i></li> </ul>	<p><b>Advantages:</b></p> <ul style="list-style-type: none"> <li>• Your contacts' names and addresses appear as you normally use them.</li> <li>• You can load contacts who have never given but receive your letter.</li> </ul> <p><b>Disadvantages:</b></p> <ul style="list-style-type: none"> <li>• TntMPD will not always automatically connect your imported donors with the existing donor info from your TntMPD database (but you can correct that either at the time of download or later).</li> </ul>

## DOWNLOADING GIFTS AND/OR ADDRESSES DIRECTLY FROM THE WEB

**WEB FEATURE**  
TntMPD will connect with your organization's donation system if your organization supports web-download of donation data.



- Press the **Gift Input** button on your shortcut bar.
- Select your **Organization** from the drop-down list.
- Enter the **Login** and **Password** you use to access your donor software.
- The **(Click here if you need a User Name and Password)** link connects you with your organization's donation system.

**1. Setup account information.**

Download Organization List

Organization: **Campus Crusade for Christ - USA**

Login:

Password:

[\(Click here if you need a User Name and Password.\)](#)

- Select a date range (as far back as your organization has data for maximum benefit).
- Click ☒ **Try to match existing contacts** if you have your contacts in your database already. Though TntMPD can't match perfectly, you can manually connect contacts later.
- Press **Download**.

**Tip:** If you click on the year, you can scroll up/down one year at a time.

**2. Select date range you would like to synchronize to.**

Starting Date: **January, 1996** Ending Date: **April, 2003**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

**Today: 4/17/2003**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

**Today: 4/17/2003**

☐ **Try to match existing contacts**

Account Balance: 1682.19

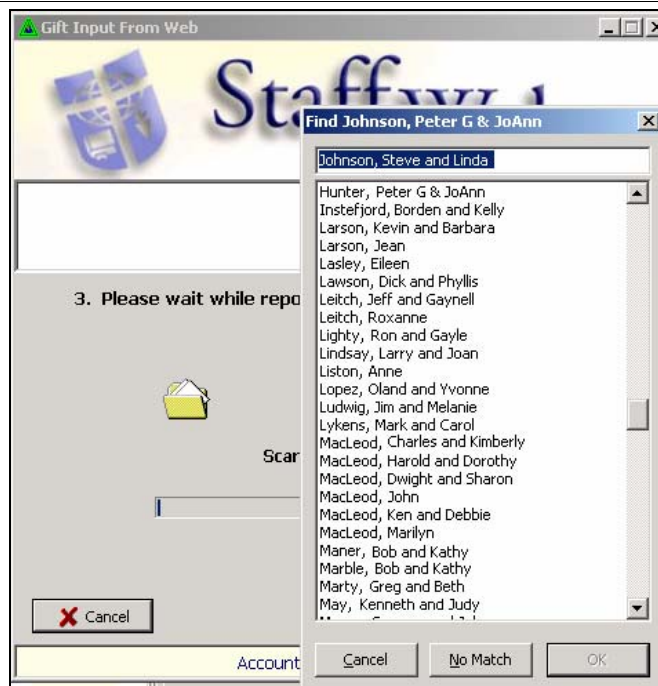
**Tip:** Most ministries keep only a limited number of years on their database. Go back as far as you can.



Downloading addresses and gifts from your ministry's donation system can be a time-consuming process. The speed is primarily based on your donation system's processing ability, but may also be affected by your modem speed and your computer's speed.

**Tip: You can also assign gifts to an appeal at this point. Double-click on any gift to bring up a box that will allow you to modify information about that particular gift. (See Chapter 5.)**

- You have to wait while TntMPD downloads the contacts from your ministry's donation system.
- Whenever TntMPD encounters a name that it cannot find in your database, it asks you if you want to connect that name with someone who is already in your database. It provides a list of your contacts (shown in box at right).
- Click **OK** if you have selected a match.
- Click **No Match** if this contact is not in your list already.



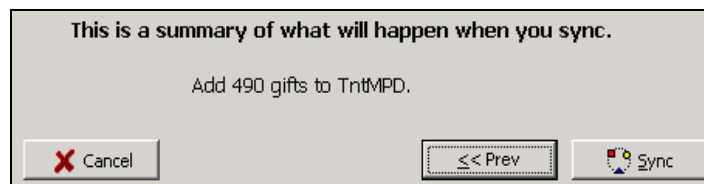
- TntMPD will then provide a list of all contacts it wants to add, and you have the option of *not* adding them.
- You will also see a list of all gifts to be downloaded.

These gifts will be added to TntMPD.

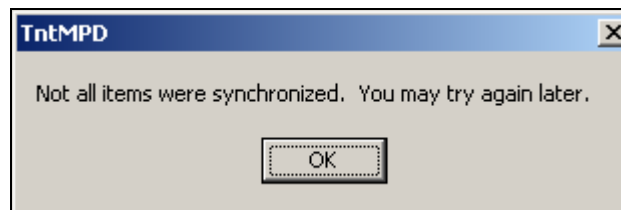
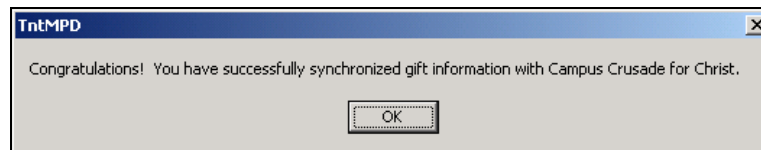
Name	Date	Amount
<input checked="" type="checkbox"/> Nyseth, Hiro & Elaine	8/1/2003	45
<input checked="" type="checkbox"/> Heffington, Annette	8/1/2003	60
<input checked="" type="checkbox"/> Anderson, Goldie E	8/4/2003	150
<input checked="" type="checkbox"/> Turrill, Ryan and Susan	8/4/2003	100
<input checked="" type="checkbox"/> Anderson, Glenn W & Teresa	8/5/2003	15
<input checked="" type="checkbox"/> Iwasaki, Jeanette J	8/5/2003	10
<input checked="" type="checkbox"/> Adams, Mark & Carmen	8/5/2003	20
<input checked="" type="checkbox"/> Sette, David B & Mytrice L	8/5/2003	50
<input checked="" type="checkbox"/> Ballew, Derwyn L and Jacquelyn	8/5/2003	50
<input checked="" type="checkbox"/> Strunk, Richard J & Karen M	8/5/2003	75

**Cancel** **Next >>**

- TntMPD will summarize the activity it is about to perform. You have the option to NOT perform this procedure by pressing **Cancel** at this point.
- Press **Sync** to finish.



- Generally, your gift load will be “successful” and TntMPD will congratulate you!
- Sometimes TntMPD cannot synchronize and you will have to perform the download and synchronization again. Doing so will not affect those gifts already downloaded.

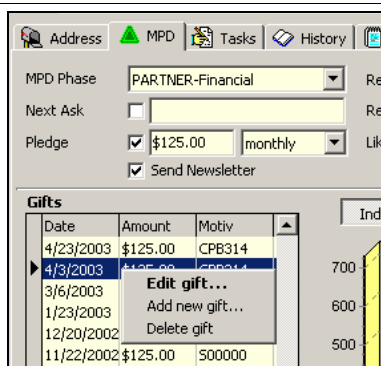


## GIFT INPUT MANUALLY (OPTION 1: RIGHT CLICK ON THE CONTACT'S GIFT RECORD)

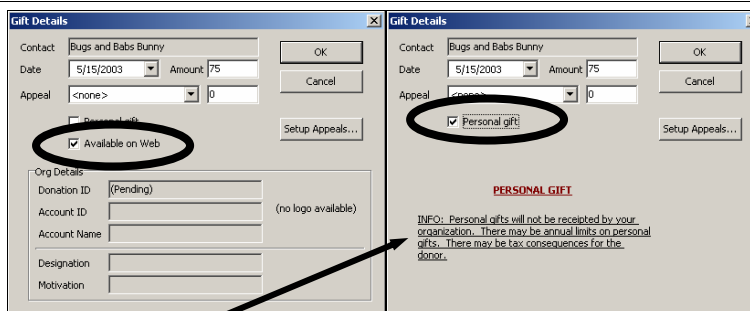
Sometimes you will want to manually input a gift. For example, to record a cash gift received while visiting a contact in person. Or, you may want to manually record a gift written to the organization; TntMPD will later record the organization details associated with the gift you manually entered.

A ☒ **Personal gift** is a gift of cash, check, or some other tangible item given to you personally and not to your ministry.

- In the Contact View, select the contact's MPD tab. Then, right-click in the **Gifts** section and select **Add new gift...**



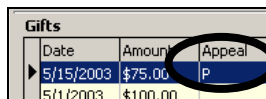
- Enter the date and amount of the gift.
- Assign the gift to an appeal, if needed. (See Chapter 5 for more info on **Tracking Appeals**.)
- Identify whether the gift is a personal (non-receiptable) gift or one that will be processed through your mission agency and therefore download later via the **Gift Input** button.



### Tips:

- **Personal gifts cannot be receipted; donors cannot claim those gifts as tax-deductible contributions.**
- **Your agency may have limits on the dollar amount of personal gifts you can receive during the year.**

- If the gift is personal, the letter "P" will show up next to the gift.



## GIFT INPUT MANUALLY (OPTION 2: SELECT TOOLS | MANUAL GIFT INPUT)

The **Gift Input Form** came from the early days of TntMPD before web-download of gifts was possible. It is also very helpful for those who serve in ministries which do not have automatic download. It lists all of your partners in alphabetical order (if they have given in the past 12 months).

- Select **Tools | Manual Gift Input**.
- In the picture to the right, notice that in May 2003, Bugs Bunny has given two gifts (\$100 normal monthly gift + \$75 manually added moments ago).
- To add an additional gift for a partner on the list, click on the **Day** or **Amount** of the partner and press **Another Gift**. (That's the blank line you see between the two gifts.)
- Enter the date and amount of the gift.
- To add a gift for a partner in your contact list but not appearing on the manual form, press **New Partner** and select the partner from your list of contacts. (That's the **Select a contact...** box shown.)
- Enter the date and amount of the gift.
- Press **OK**.

The screenshot shows the 'Gift Input Form' window. It contains a table with columns 'Day', 'Amount', and 'Partner'. The table has two rows of data: one for May 1st with an amount of 100, and another for May 15th with an amount of 75, both for 'Bunny, Bugs and Babs'. There is a blank row between the two data rows. To the right of the table are dropdown menus for the year (2003) and month (May), and buttons for 'New Partner', 'Another Gift', and 'OK'. A hint at the bottom right says 'Hint: Use arrow keys to navigate grid.' A dialog box titled 'Select a contact...' is open, showing a list of names including Ababa, Aladdin and Jasmine, Bear, Baloo and Balinda, Beast, Beast and Belle, Bird, Tweety and Tweetilee, Bunny, Bugs and Babs, Charming and Cinderella, Cowboy, Woody and Bo (Peep), and Coyote, Wile. An arrow points from the 'Another Gift' button in the main form to the 'Select a contact...' dialog box.

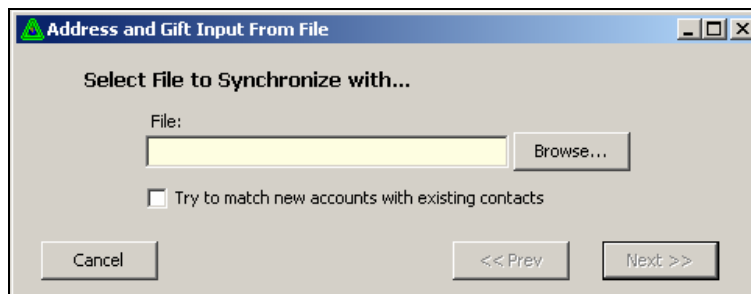
Day	Amount	Partner
1	100	Bunny, Bugs and Babs
		Bunny, Bugs and Babs
15	75	Bunny, Bugs and Babs

## GIFT INPUT MANUALLY (OPTION 3: UPLOAD A GIFT FILE USING TOOLS | ADDRESS AND GIFT INPUT FROM FILE...)

- DEVELOPER'S NOTE: "This feature is designed as an alternative for ministries which want to provide donation information for their staff, but they don't have a web server or the technical know-how to make the data available on demand. A ministry could send out monthly emails with this file attached. The staff member would only need to double-click on the file attachment and TntMPD would automatically open it and launch this dialog."

Because this is a complex procedure, look at this web link for more information:

- <http://home.ccci.org/wolbrink/tntmpd/HowToCreateDataSyncFile.htm>.



**Tip:** For best results, format your gift file using your organization's "people id" (their unique # for that donor), which is filed in TntMPD as "PEOPLE\_ID".

## Compact & Repair Database

This is covered in detail in *Chapter 7: Technical Features*. In brief, as you work with your database—and download data from the web—your database will naturally balloon in size. To get it down to a manageable size, select **File | Compact & Repair Database**. (TntMPD will do this automatically every 30 days.)

## Tools | Options

The **Options** dialog box offers a number of settings that apply to your use of TntMPD. Most of these tabs are covered later in the book when the options apply to the activity you are performing.

### 1. General tab. Basic settings.

- **Monthly support goal.** Used for calculating your support progress on the Analysis tab. (See page 5-2.)
- **First day of MPD week.** Used to calculate your task activity. Has no bearing on your 'calendar' in the Schedule view. (Also see page 5-2.)
- **Organization Abbreviation.** Places the abbreviation wherever "your organization" would appear, such as the **Contact | View XYZ Info.**
- **Organization Name.** Defined when you loaded TntMPD.
- **Allow TntMPD to connect to the Internet.** Used for checking for updates as well as downloading gift information.
- **Display extended information.** Um, I don't know what this does.

Options dialog box, General tab. The dialog has four tabs: General, Gift Automation, Regions, and International. The General tab is active. It contains fields for Monthly support goal (4400), First day of MPD week (Sunday), Organization Abbreviation (CCC), and Organization Name (Campus Crusade for Christ). There are checkboxes for 'Allow TntMPD to connect to the Internet' (checked) and 'Display extended information (TntMPD Pro)' (unchecked). Buttons for Cancel and OK are at the bottom.

- 2. **Gift Automation.** Used for creating auto-tasks. (See page 4-7.)
- 3. **Regions.** Used for geographically organizing your contacts. (See page 3-10.)
- 4. **International.** TntMPD can automatically include your home country in the mailing address block for your letters when you are outside your home country (when the contact's mailing address country is different from your **current location**).

Options dialog box, International tab. The dialog has four tabs: General, Gift Automation, Regions, and International. The International tab is active. It contains two dropdown menus: 'Default country for new contacts' (United States of America) and 'Current location (country you are mailing from)' (Canada).

# 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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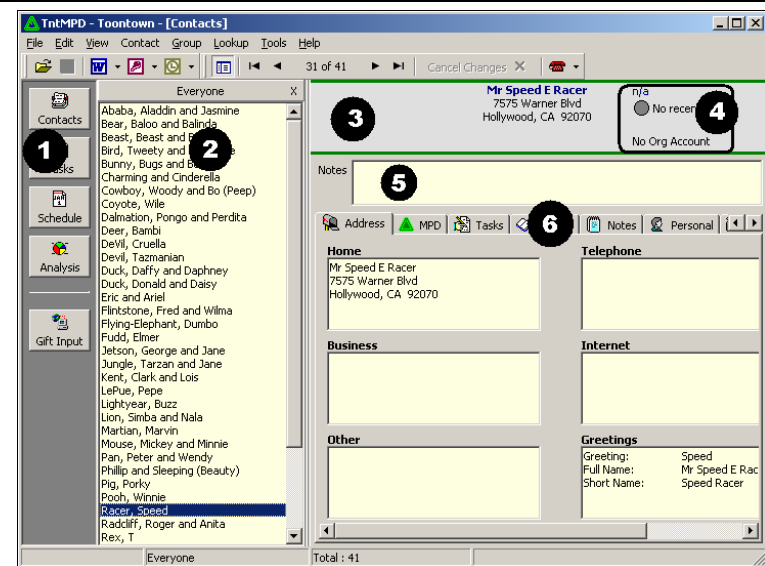
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## Contact View

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".

## 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 in a software application. The 'Organization' checkbox is checked. The 'Company' field is populated with 'First Pedestrian Church'. The 'Address' section has a dropdown menu set to 'Business' and the 'This is the mailing address' checkbox checked. A 'Greetings...' button is highlighted with a dashed border and an arrow pointing to it. A secondary dialog box titled 'First Pedestrian Church' is open, showing fields for 'Greeting' (Missions Committee), 'Full Name' (First Pedestrian Church), and 'Short Name' (First Pedestrian Church). The main dialog has buttons for OK, Apply, Cancel, and Next (>>). The secondary dialog has buttons for Restore Defaults, Cancel, and OK.

# 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

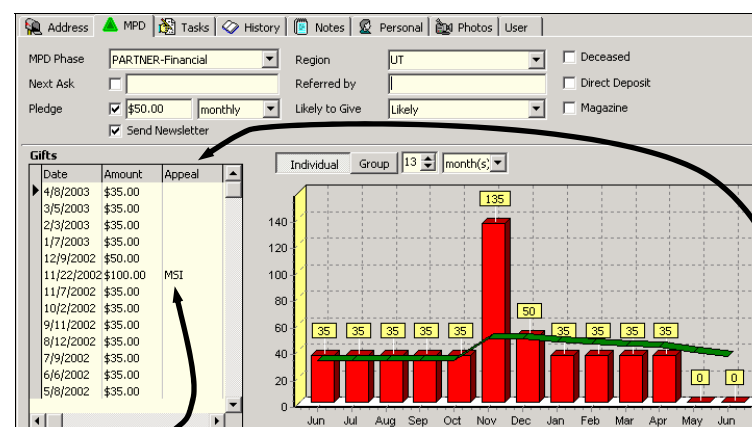
**Deceased**—Informational only

**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.

→  
*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.*

#	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 <b>greater</b> 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.

## 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  
 quarterly .....gives pledge amount every three months  
 quad-monthly .....gives pledge amount every four months  
 semi-annual.....gives pledge amount every six months  
 annual .....gives 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

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.*

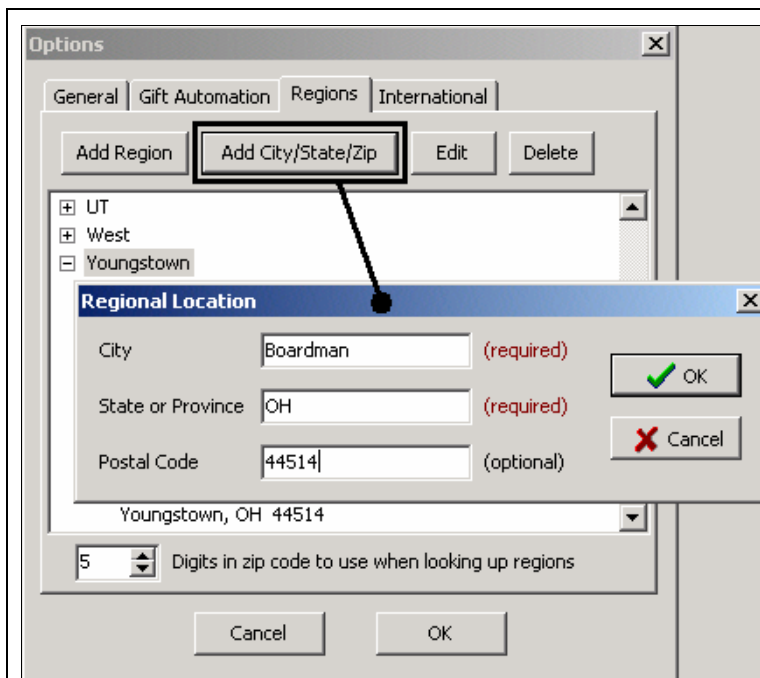


### Manually Editing Regions

- 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 &amp; 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.

Gifts		
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.

Gifts		
Date	Amount	Appeal
5/5/2003	\$200.00	

**Edit gift...**  
Add new gift...  
Delete gift

Gift Details		
Contact	Donald and Daisy Duck	OK
Date	5/2003	Amount 200
Appeal	<none>	0
<input type="checkbox"/> Personal gift		Setup Appeals...
<input checked="" type="checkbox"/> Available on Web		
Org Details		
Donation ID	(Pending)	(no logo available)
Account ID		
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):

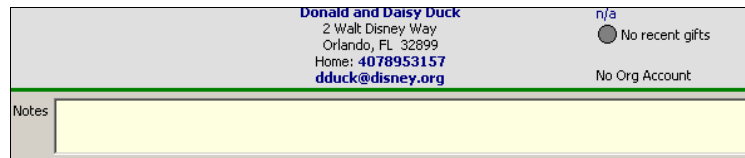
1. It was a personal gift that you decided you did not want to include with the contact's other gifts
2. You manually entered a gift that was later processed through your organization's donation system but then posted to your TntMPD as another gift (a duplicate gift).

## 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.

The screenshot shows a contact's information at the top, including the name "Donald and Daisy Duck", address "2 Walt Disney Way, Orlando, FL 32899", phone number "Home: 4078953157", and email "dduck@disney.org". To the right, it says "n/a" and "No recent gifts". Below this is a "Notes" tab with a yellow text area containing three lines of text: "Notes", "Notes", and "Notes".

**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	12	31	41								
Church	First Pedestrian Church			Anniversary	4	8									
<b>Him</b>															
Company	Warner Bros.			Profession	Cartoon character										
Hobbies	Squishing, bombing, splatting														
<b>Her</b>															
Company	Warner Bros.			Profession	Cartoon character										
Hobbies	gardening (esp. carrots)			Nick Name	Babs										

Tools	Help
Late Donor Report...	
Contribution Report...	
Appeal Tracking...	
Birthday & Anniversary Report...	
All Pictures...	

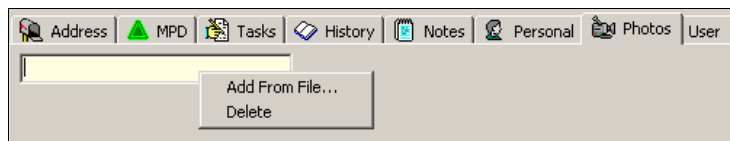
**Tip: My wife and I were both missionaries with Campus Crusade for Christ as individuals before we were married. Because we each brought a significant number of contacts to our now-combined team, I use the Family Side field to identify who (His / Hers) had the relationship with this contact. I can then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

## PHOTOS TAB

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- 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**.*



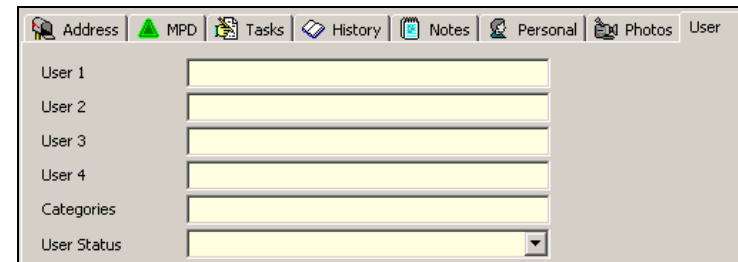
**Tip: You can have multiple photos for a single contact.**

## USER TAB

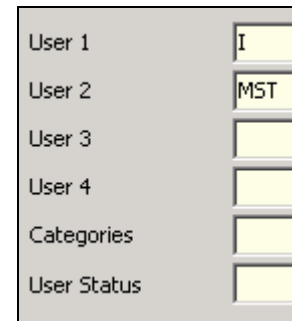
The User tab offers you one place where you can create custom fields. Let's say, for example, that you love movies, and you always use movies to open up discussions with your contacts as a way of building relationships. Since there are no "favorite movies" fields, you can use them here. "User 1" could 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 in a software interface. At the top is a navigation bar with icons and labels for Address, MPD, Tasks, History, Notes, Personal, Photos, and User. Below this, there are several input fields: 'User 1', 'User 2', 'User 3', 'User 4', 'Categories', and 'User Status'. All these fields are currently empty, except for 'User Status' which has a small downward arrow indicating a dropdown menu.



This screenshot shows the same 'User' tab interface but with some data entered. The 'User 1' field contains the letter 'I', and the 'User 2' field contains 'MST'. The 'User 3', 'User 4', 'Categories', and 'User Status' fields remain 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.

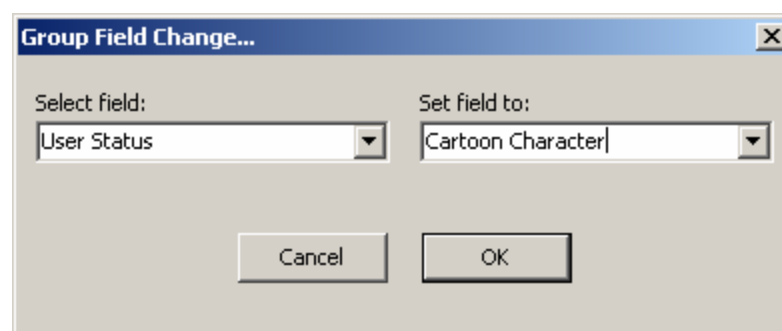
Finally, you may be asking why you would ever want to delete a group. There are rare instances, but one of them is when you want to split your database into two groups. For example, let’s say you are leaving the mission field and sharing half of your contact list with one missionary and half with another. 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

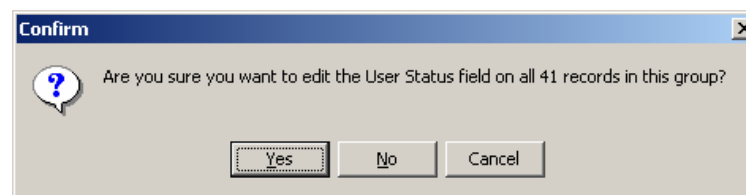
allows you to apply a word or code to an entire list of contacts simultaneously. For example, you could change an entire group's User Status to "Cartoon Character". I also used this to modify certain members of my list of contacts since I did not load church name or referrer when I first created my list.

- 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.

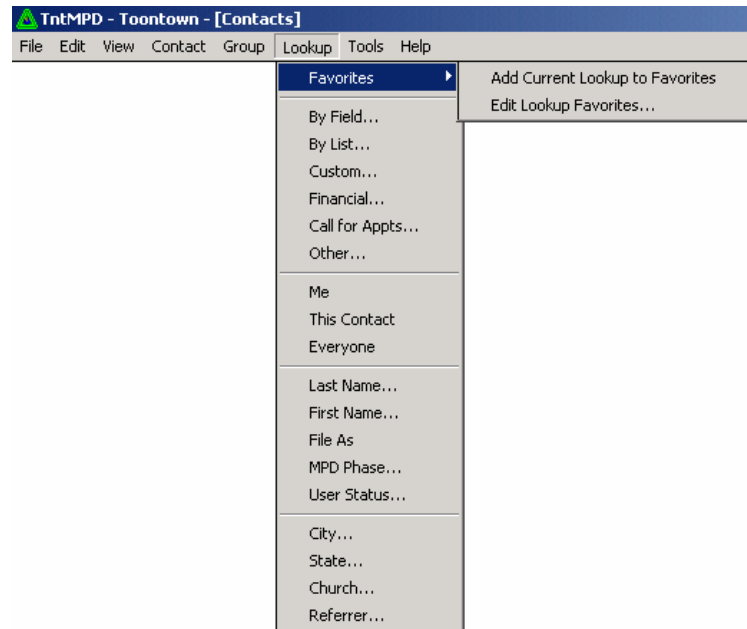
**Tip:** Contact | Field Change is **very similar to** Group | Log History where you can you apply an action (such as sending an appeal) to everyone in the displayed group.

## 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.

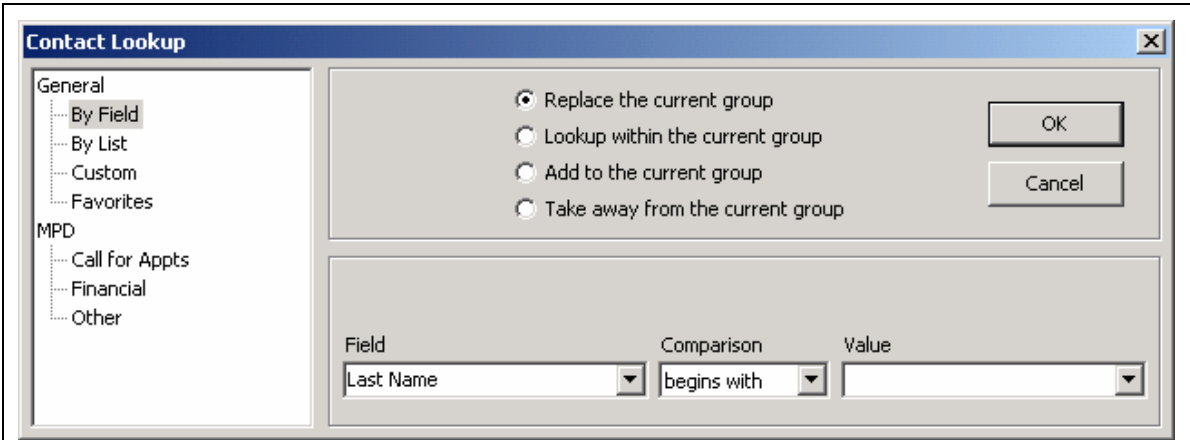
Menu Item	Description
<b><i>The first seven menu items are the seven tabs of the Contact Lookup dialog box.</i></b>	
Favorites	Create, save, and edit custom lookups.
By Field...	Select contacts based on one particular field or characteristic, such as zip code or whether they receive your newsletter.
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.
<b><i>These three items don't take you to the Contact Lookup dialog box, but to specific contact(s).</i></b>	
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
<b><i>These five help you find contact(s) you might be looking for from a small pool.</i></b>	
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.
<b><i>The last four look up based upon certain commonalities.</i></b>	
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.</p> <p>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><b>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.</b></p>
Edit Lookup Favorites	<p>Modify your saved favorites or delete them.</p>

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.



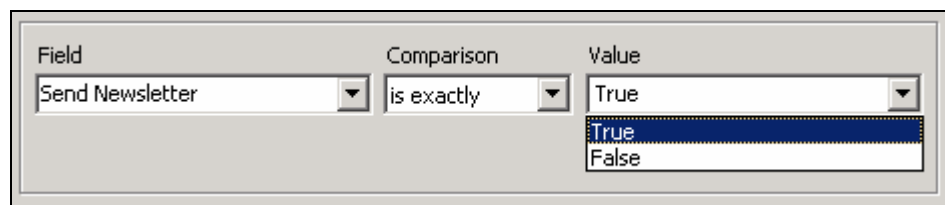
*Lookups appearing in a tree in the left box. You will see the shaded one representing the lookup you have selected.*

**Group Activity:**  
Before selecting the criteria for your lookup, you have to define the contact activity. Your options are to:

Option	Description
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 web interface for searching contacts by field. It consists of three dropdown menus arranged horizontally. 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 and is currently open, showing a list with 'True' (highlighted) and 'False'.

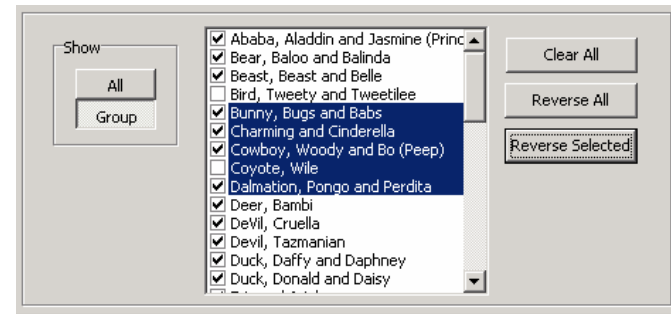
Box	Description
Field	Drop-down box offers you over 150 different TntMPD fields from which to choose.
Comparison	Varies depending on the Field chosen above, but basic options are: <ul style="list-style-type: none"><li>• is exactly</li><li>• is not</li><li>• begins with</li><li>• contains</li><li>• is greater than</li><li>• is less than</li><li>• is at least</li><li>• is at most</li></ul>
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.

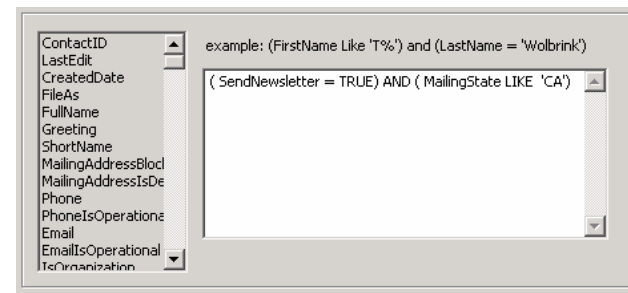
**Reverse Selected** will reverse the check on all the selected boxes.

## 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\_l%, [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>

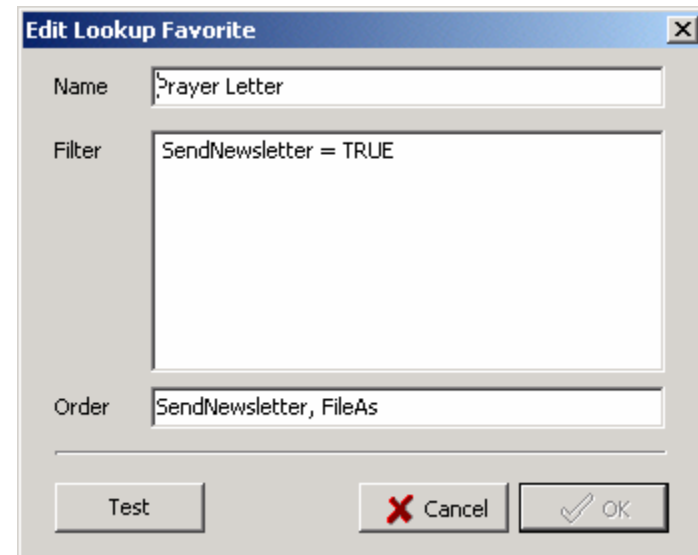
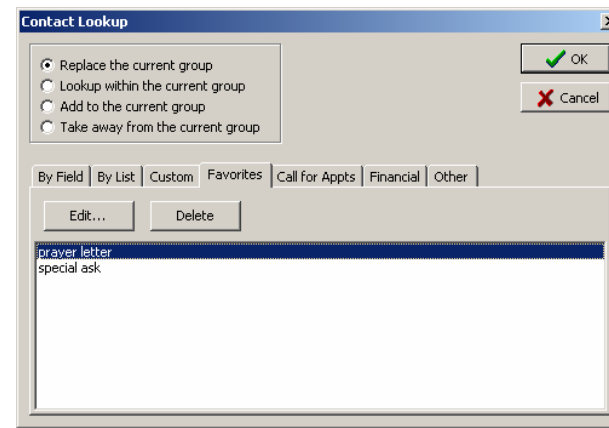
## FAVORITES

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

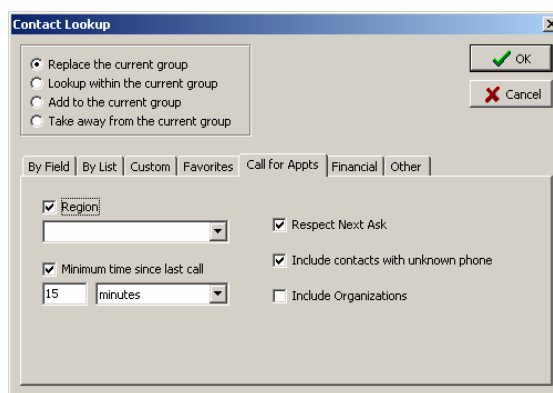
In addition, you can limit your query by Region by checking the box and choosing from the list.

☒ **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.



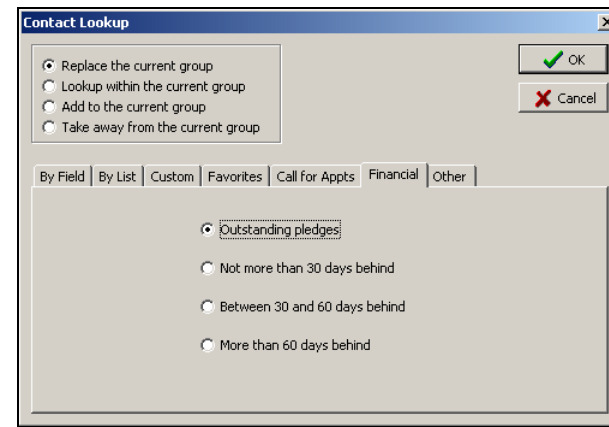
The screenshot shows a 'Contact Lookup' dialog box with a blue title bar and a close button. It contains four radio buttons for group management: 'Replace the current group' (selected), 'Lookup within the current group', 'Add to the current group', and 'Take away from the current group'. There are 'OK' and 'Cancel' buttons. Below is a tabbed interface with tabs for 'By Field', 'By List', 'Custom', 'Favorites', 'Call for Appts' (selected), 'Financial', and 'Other'. The 'Call for Appts' tab is active, showing a 'Region' dropdown menu with a checkmark, a 'Minimum time since last call' section with a checked box, a '15' value in a text box, and a 'minutes' dropdown. To the right are two more checked boxes: 'Respect Next Ask' and 'Include contacts with unknown phone', and an unchecked box for 'Include Organizations'.

## FINANCIAL

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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

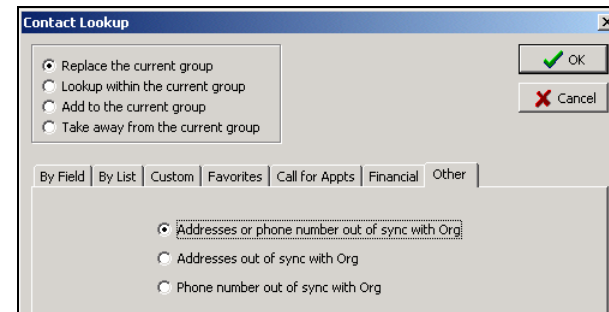


## OTHER

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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.

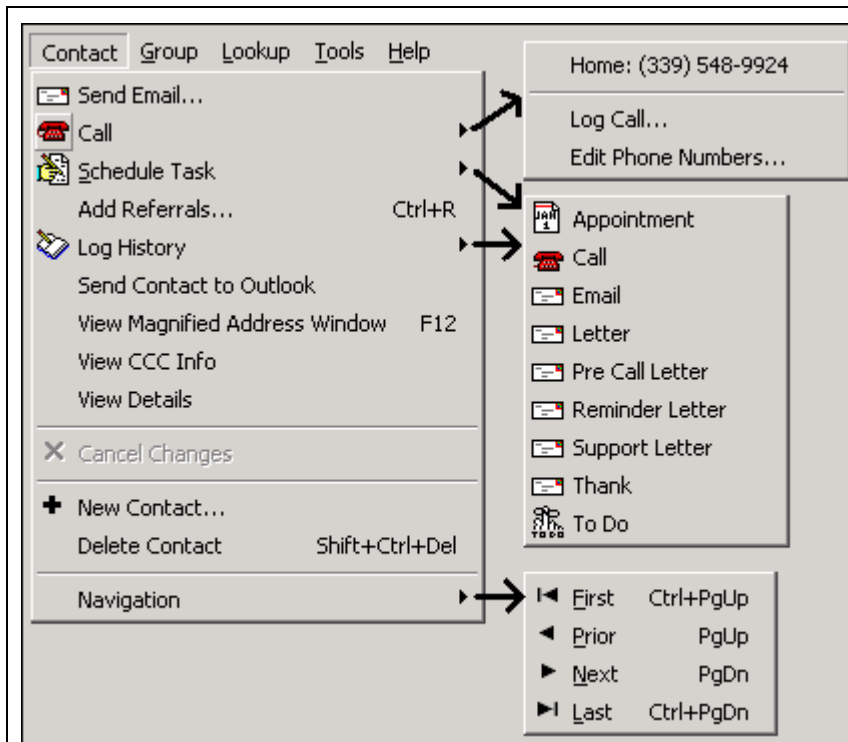
**Tip: When you download donor information from your organization, TntMPD will not overwrite a contact's existing address or phone number. Instead, it will indicate there is a discrepancy by making the contact's address and/or phone bold and red. This lookup saves you from having to go through all your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

Those referred by Clark and Lois Kent							
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

✗ Cancel ✓ Finished

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.

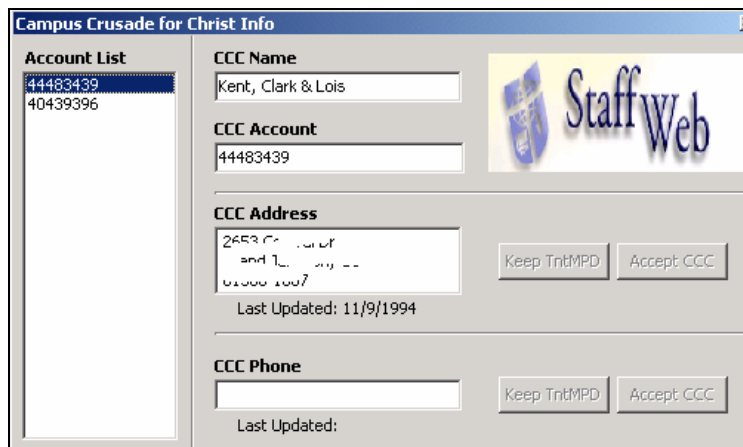
**Tip: You can combine multiple accounts for one contact (see next page).**

- **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.**



- **[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.

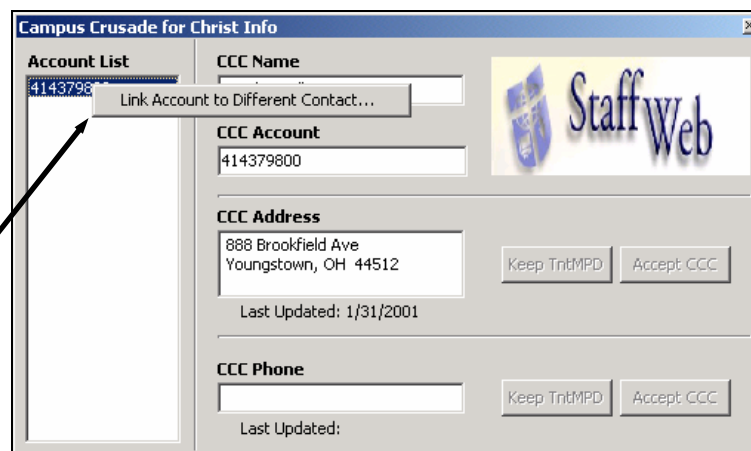
- Select the contact whose account you want link
- Select **Contact | View [Your Org.] Info.**
- Right-click on their account #. The menu item that appears is **Link Account to Different Contact...**
- TntMPD provides a list of your contacts for you to select from.
- Select the contact and press **OK**.

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.**

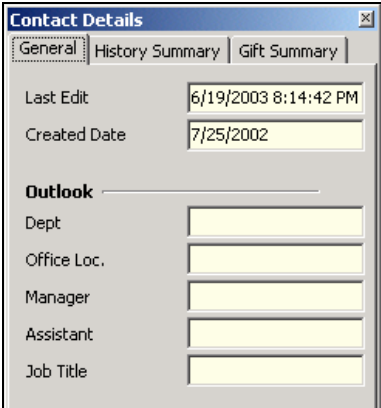
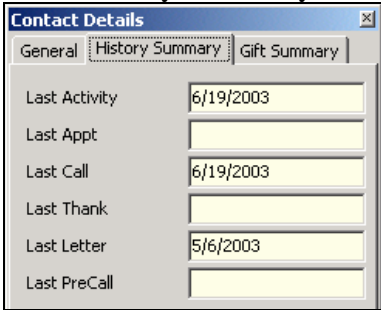
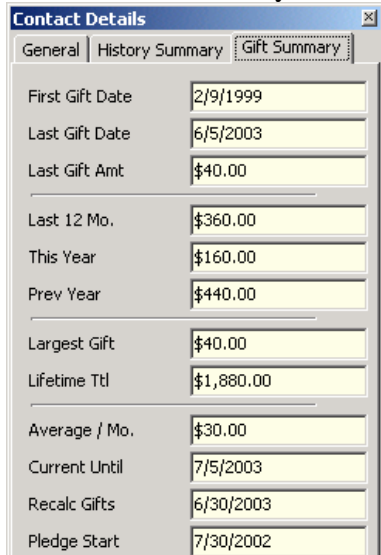
**Tip: You can undo a link by re-linking the account to the original contact.**





## 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"> <li>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.).</li> <li><b>Created Date</b> represents the date this contact was added to your TntMPD database.</li> </ul>	<ul style="list-style-type: none"> <li>This box shows the last time you completed a task involving this contact in each of the 5 types of activity.</li> </ul>	<ul style="list-style-type: none"> <li>This informative box summarizes all the giving of this contact (as it appears in TntMPD).</li> </ul> <p><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></p>

**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.



# 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*

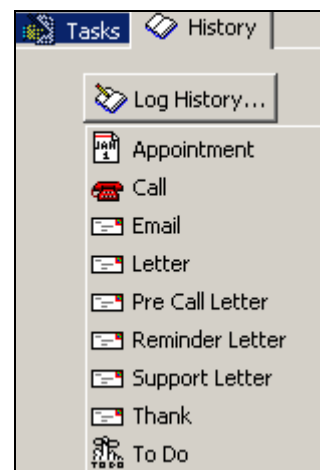
Having significant personal information about your contacts is the first step in building deeper relationships with your contacts. *Maintaining* that relationship is the second step, and TntMPD offers a number of task tracking and scheduling features to help you be pro-active in your ministry partner 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.**

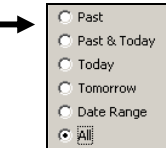
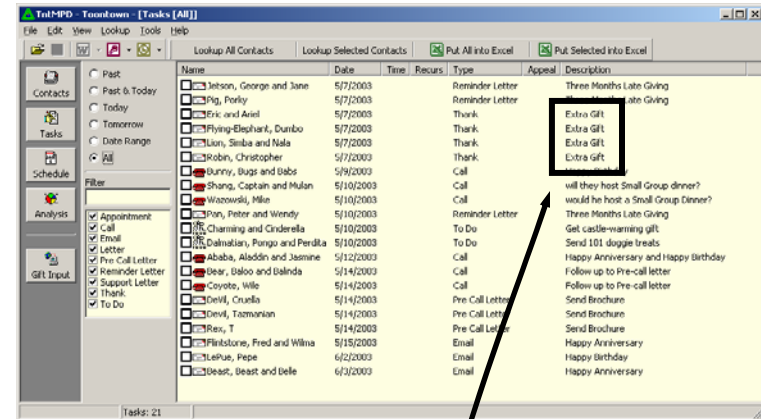
**When you Log an Attempt, any notes you wrote in the Details tab of the scheduled task (see page 4-4) becomes the details of the completed task.**

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:

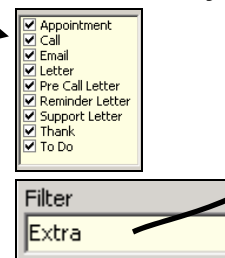
- Past**—tasks that are overdue
- Past & Today**—all task prior to and including today
- Today**—only what I must do today
- Tomorrow**—only what’s up tomorrow
- Date Range**—tasks scheduled between a specific pair of dates
- All**—all scheduled tasks, past and present

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.

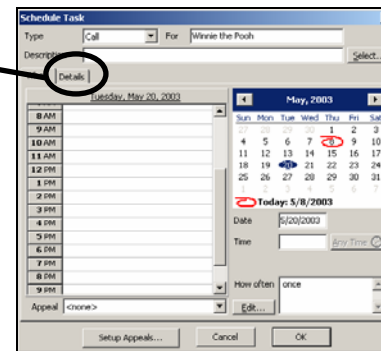
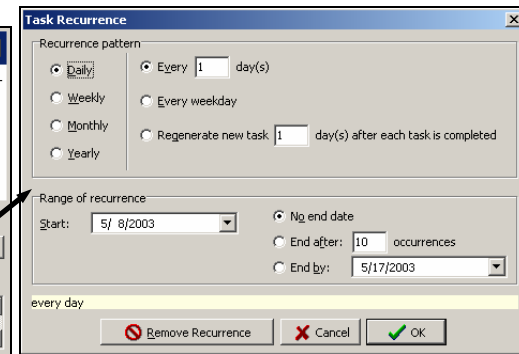
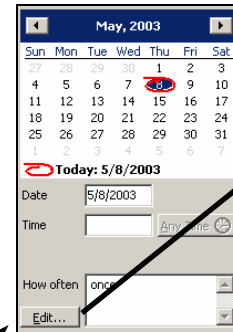
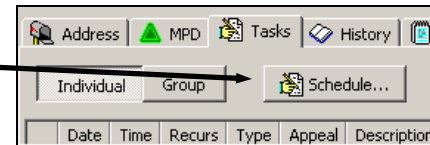
## CONTACT VIEW: TASK TAB

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**.

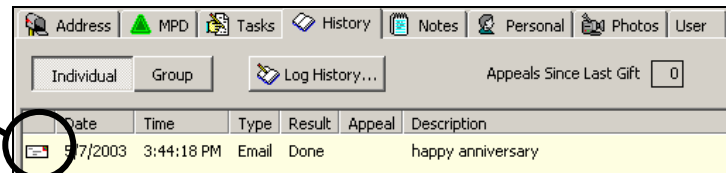


# History

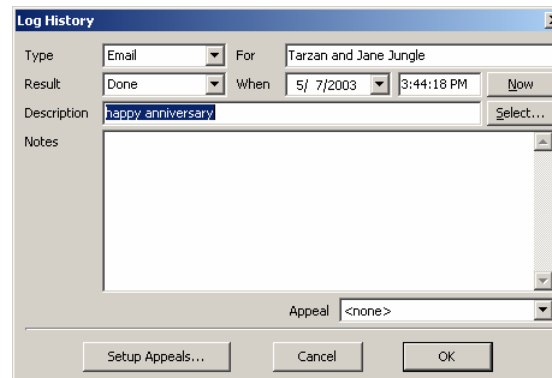
## CONTACT VIEW: HISTORY TAB

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.



Address MPD Tasks History Notes Personal Photos User						
Individual Group		Log History...		Appeals Since Last Gift 0		
Icon	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:

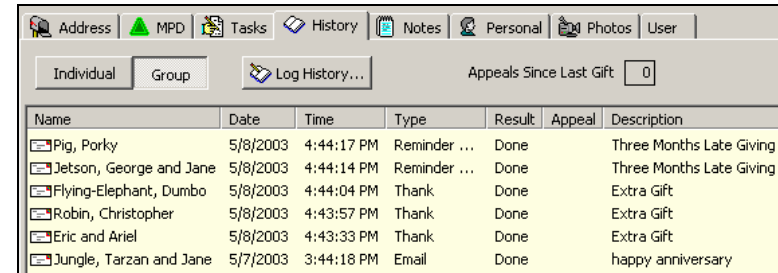
Appeal: <none>

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.

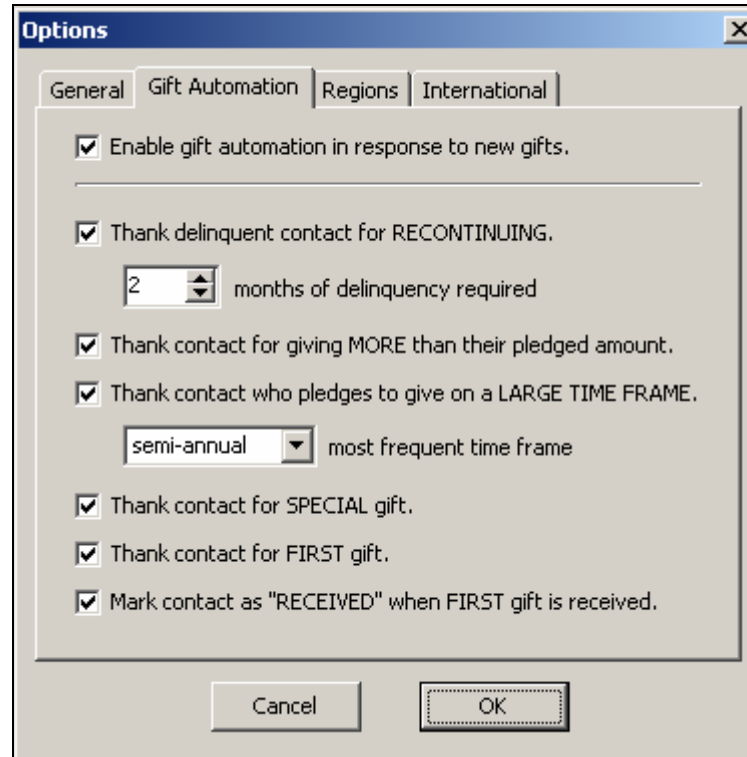


## AUTO-TASKS (WEB FEATURE)

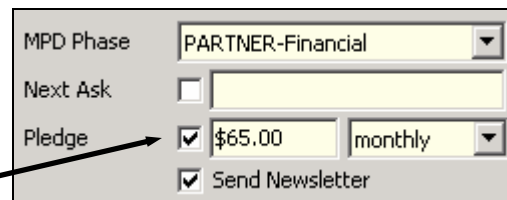
One delightful feature of TntMPD is how it automatically creates tasks for you. (This was covered briefly in the *Pledge* area of the MPD tab.) Gifts are credited to your account, then downloaded by you into TntMPD. TntMPD then analyzes each of the gifts and compares them to what you have identified 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.

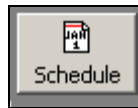


The 'Options' dialog box has four tabs: General, Gift Automation, Regions, and International. The 'Gift Automation' tab is selected. It contains several checkboxes and dropdown menus. The 'Enable gift automation in response to new gifts.' checkbox is checked. Below it, the 'Thank delinquent contact for RECONTINUING.' checkbox is checked, with a dropdown menu set to '2' and the text 'months of delinquency required'. The 'Thank contact for giving MORE than their pledged amount.' checkbox is checked. The 'Thank contact who pledges to give on a LARGE TIME FRAME.' checkbox is checked, with a dropdown menu set to 'semi-annual' and the text 'most frequent time frame'. The 'Thank contact for SPECIAL gift.' checkbox is checked. The 'Thank contact for FIRST gift.' checkbox is checked. The 'Mark contact as "RECEIVED" when FIRST gift is received.' checkbox is checked. At the bottom are 'Cancel' and 'OK' buttons.



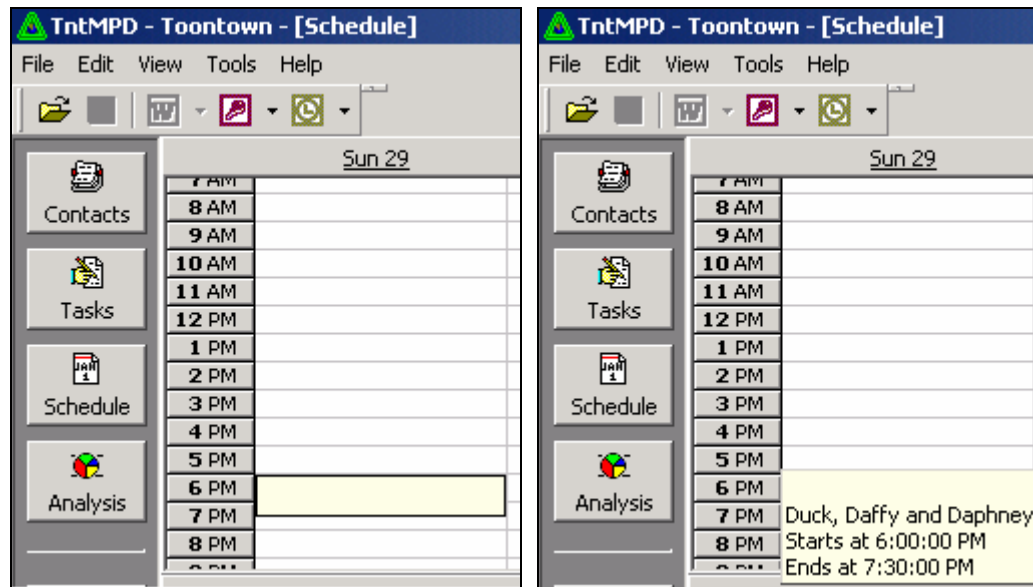
This section of the dialog box shows the 'MPD Phase' dropdown menu set to 'PARTNER-Financial'. Below it is the 'Next Ask' checkbox, which is unchecked. The 'Pledge' checkbox is checked, with a dropdown menu set to '\$65.00' and a dropdown menu set to 'monthly'. The 'Send Newsletter' checkbox is checked. An arrow points from the 'Pledge' checkbox to the text in the list above.

## 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).

# Chapter 5: Analysis Features

*“Know well the condition of your flocks, and pay attention to your herds; for riches are not forever, nor does a crown endure to all generations. When the grass disappears, the new growth is seen, and the herbs of the mountains are gathered in, the lambs will be for your clothing, and the goats will bring the price of a field, and there will be goats’ milk enough for your food, for the food of your household, and sustenance for your maidens.”*

PROVERBS 27:23-27

Effective analysis helps ensure that your “flocks” – the sources of your financial support – are in good condition.

TntMPD offers a number of nifty analysis features to help you make the most of your MPD data. These analysis tools are found in the Analysis View and in the **Tools** menu.

This chapter covers:

1. The Analysis View.
2. **Tools | Late Donor Report** – to help you be aware of donors who are behind on their pledges.
3. **Tools | Contribution Report** – to give you a table-based view of your contributions for one or more months.
4. **Tools | Appeal Tracking** – to help you create appeals and track the results.
5. **Tools | Birthdays and Anniversaries** – to take your relationship building to a very high level.
6. **Tools | All Pictures** – where you can store small photos of your contacts.

## Analysis View

The Analysis View offers a wealth of fascinating information about your contacts and their giving. The more information you have about your contacts—both in quantity and quality—the better you'll be served by the Analysis View.

### 1. Support Progress.

- **Monthly Goal** is defined in your **Tools | Options**.
- **Total Pledges** is the monthly sum of all pledges for contacts whose MPD Phase is "PARTNER-Financial".
- **Avg. Monthly** is TntMPD's computed current monthly average for Financial and Special PARTNERS. *This is not simply "All gifts divided by 12". See next page.*
- **Amt. to Raise** = Monthly Goal minus Total Pledges.

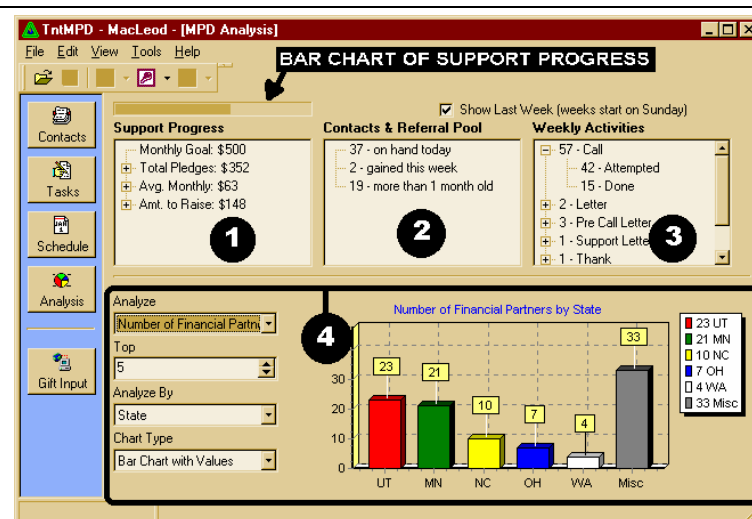
*All three of these have a plus button (+) that will show you more detail.*

### 2. Contacts & Referral Pool

tells you how many contacts you have whose MPD Phase is below the Decision Line. (See the **Life Cycle of a Contact** inside the front cover.)

### 3. Weekly Activities

summarizes all items in the History Tab for all your contacts for this week or last week. (You define your week's start day in **Tools | Options**.)



### 4. Analyze

your support in the lower section. The very cool graphical views of your support offer 3D views of gifts, pledges, contacts and more: 10 different reports you can view 14 different ways. The best way to learn about the graphical views is to just start clicking and see what you learn.

*Seeing these charts helped me make wiser decisions in regard to which states I directed future development activity. Until I started using TntMPD, I did not realize how significant one particular state was both in the number of contacts and amount of annual giving, and have more actively sought new contacts in that state.*

## HOW TntMPD COMPUTES MONTHLY GIVING



**Note:** This text is copied verbatim from the TntMPD web site. Go to the web site and select the above link to see this text as well as several tables of examples of donors who give consistently—but not monthly—and how that impacts the *Monthly Average Calculation*.

Contacts in TntMPD have an AveMonthlyGift field that can be used to determine past giving performance and can also be used to estimate future expectations. This field is not necessarily a simple average. If you want a simple average, you can just divide the TwelveMonthTotal field by 12.

### Special Partners

When a contact does not have a financial pledge, they are treated as a special partner and the AveMonthlyGift field does represent the simple average. This is the TwelveMonthTotal field divided by 12.

### Financial Partners

When a contact has a financial pledge, their MonthlyPledge ( $\text{PledgeAmount} / \text{PledgeFrequency}$ ) is taken into consideration. First of all, the average is based upon  $(12 + \text{PledgeFrequency})$  months. This means that a monthly giver has the average based on  $(12 + 1)$  13 months. A quarterly giver is based on  $(12 + 3)$  15 months, and an annual  $(12 + 12)$  24 months. If no gifts have been received within this time frame, the average is zero. If there are no gifts before this range, the number of months is shortened to just include the first gift.

Once this range is established, the first month with gifts prior to the range and the last month with gifts within the range are treated uniquely. The first month with gifts prior to the range is spread out evenly to fill in all months without gifts up until right before the first month with gifts within the range. This is done because the donor probably intended for that gift to cover those months. The last month with gifts is spread out into the future based upon the MonthlyPledge. This is done because the donor probably intends for the gifts that month to count for future months if it is larger than the MonthlyPledge.

## Tools | Late Donor Report

While TntMPD can create auto tasks for donors who DO give (either resuming their pledge or giving an amount different from their pledge), it will *not* flag you when a donor is behind on their pledge. You have to run the **Tools | Late Donor Report** yourself.

- Select **Tools | Late Donor Report**.
- TntMPD spends a moment analyzing all of your contacts and compares them to (a) their pledge and (b) their most frequent gift.
- **No Gifts Recorded** are contacts who have a pledge recorded but have yet to give their first gift.
- **Not more than 30 days late** are all contacts whose most recent gift has fallen within their pledge frequency. TntMPD also lists the date their next gift is due. An annual donor could be as much as 365 days away. (Notice Simba & Nala Lion's next gift is due eight months after Road Runner's next gift.)
- **30 to 60 days late** and **More than 60 days late** alerts you to donors for whom you should take action. You can press **Lookup Contacts** to look them up as a Group, then schedule a task to call or write to them.

**Late Donor Report**

No Gifts Recorded

Ababa, Aladdin and Jasmine: NO GIFTS RECORDED.  
Flintstone, Fred and Wilma: NO GIFTS RECORDED.

Lookup Contacts

Not more than 30 days late

Bunny, Bugs and Babs: GOOD. (6/9/2003)  
Duck, Donald and Daisy: GOOD. (7/4/2003)  
Lightyear, Buzz: GOOD. (4/13/2003)  
Lion, Simba and Nala: GOOD. (2/29/2004)  
Mouse, Mickey and Minnie: GOOD. (6/11/2003)  
Runner, Road: GOOD. (4/24/2003)

Lookup Contacts

30 to 60 days late

Fudd, Elmer: (51 days late)  
Rubble, Barnie and Betty: (35 days late)

Lookup Contacts

More than 60 days late

Pan, Peter and Wendy: (61 days late)

Lookup Contacts

# Tools | Contribution Report

This report is a table of your gifts and offers a number of different options for types of gifts shown and time period displayed.

- The default display is 13 months.
- Select which gifts to include in the report.
- You can Export this report. Before you Export, you can also add fields not shown on the report.

Notice that John & Pocahontas Smith—\$45 monthly donors—missed in February but doubled in March. They actually sent two gifts, but they were posted on the web on March 1 and March 31.

Jan	Feb	Mar	Apr	May	PARTNER NAME	FullName	Greeting	MailingAddressB	Phone
50	50	50	50	100	Bird, Tweety and Tweetlee	Tweety and Twe	Tweety & T	Tweety and T	
0	0	0	0	100	Duck, Daffy and Daphney	Daffy and Daph	Daffy & Daphne	Daffy and Daph	
0	0	0	0	75	Eric and Ariel	Eric and Ariel	Eric & Ariel	Eric and Ariel	
0	0	0	0	250	Jungle, Tarzan and Jane	Tarzan and Jane	Tarzan & Jane	Tarzan and Jane	
45	0	90	45	45	Smith, John and Pocahontas	John and Pocah	John & Pocahon	John and Pocah	
95	50	140	95	570	TOTALS				

The **Extra Fields...** button allows you to select non-displayed fields to include in your export.

**Tip from the Developer:**  
*The ways I use the report is to check on my total “personal gifts” to see how close to the annual limit I am. I also check on all my non-web gifts to see if there are any gifts I manually entered that haven’t been processed by CCCI. I’ve had a few times where after a month, it became obvious that the gift I mailed in was credited to the wrong account, and I’ve been able to correct this. “Non-web gifts” includes any gift not actually found on the web yet.*

## Tools | Appeal Tracking

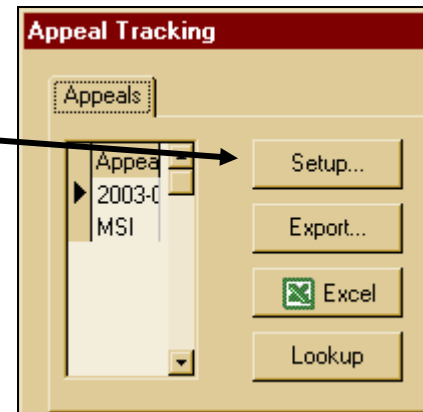
### SETTING UP NEW APPEALS

The report itself is called **Tools | Appeal Tracking**. This section also covers

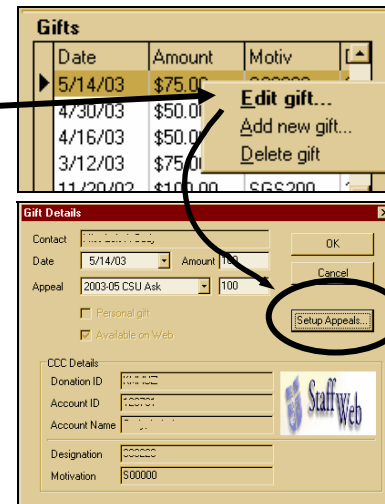
1. Setting up new appeals
2. Assigning activity to an appeal, such as the sending out of an appeal to 41 contacts.
3. Assigning gifts received to an appeal.
4. Viewing the results of the appeal.

Appeals can be set up from several different places.

- From the **Tools | Appeals Tracking** dialog box.



- In the **Gift Details** box. Double click on a contact's gift (or right click and select **Edit Gift...**).



- (Not shown.) In the **Log History** box when logging history for an individual contact or a group.

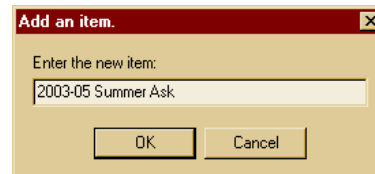


## Creating an Appeal.

Press **Add** to create an Appeal.



Type in the name of your appeal.  
Click **OK**.



**Tip:** I personally recommend using a date code (YYYY-MM) prior to the actual appeal name, so that as you have more and more appeals, you will be able to easily find them. This will be particularly helpful if you send an appeal at the same time each year.



## ASSIGNING ACTIVITY TO AN APPEAL

*Note: Use the “Appeal” on a history event only when sending out the appeals. For example, if you make a call to follow-up on an appeal, do **not** select the appeal when logging the event. If you do, TntMPD will register an additional appeal to that contact.*

- You can assign an appeal to an individual contact by logging a history item on the History tab.
- Choose the **Type** (typically a “Support Letter”). Write a **Description**, then select the Appeal from the drop-down list.
- Click **OK**.

The screenshot shows the 'Log History' dialog box. The 'Type' is set to 'Support Letter'. The 'Result' is 'Done'. The 'When' is '5/22/03' at '12:47:26 AM'. The 'Description' is 'Sent Summer Appeal'. The 'Notes' field is empty. The 'Appeal' dropdown menu is open, showing '<none>' and '2003-05 Summer Ask'. The 'Setup Appeals...' button is visible at the bottom left, and the 'Cancel' button is at the bottom right.

- You can also assign an appeal to an entire group. Select **Group | Log History**.
- Same as above, except that when you click **OK**, this item will apply a history event to each one of the contacts in the group.
- Press **OK**.

The screenshot shows the '[Contacts]' menu. The 'Log History...' option is highlighted, with the keyboard shortcut 'Ctrl+L' displayed next to it. Other options visible include 'Group', 'Lookup', 'Tools', 'Help', 'Schedule New Task...', 'Send Group to Outlook...', 'Field Change...', and 'Delete Group'.

The screenshot shows the 'Log History' dialog box. The 'Type' is 'Support Letter'. The 'Result' is 'Done'. The 'When' is '5/22/03' at '12:53:08 AM'. The 'Description' is 'Sent Summer Appeal'. The 'Notes' field is empty. The 'Appeal' dropdown menu is set to '2003-05 Summer Ask'. The 'Setup Appeals...' button is at the bottom left, 'Cancel' is at the bottom middle, and 'OK' is at the bottom right.

**Remember: A Group History item cannot be undone, so be certain you want to log this event for the whole group before you click **OK**! See *Groups* in Chapter 3 for how to undo an error like this.**

## ASSIGNING GIFTS TO AN APPEAL

Once you start receiving gifts in response to an appeal, you can assign those gifts to the appeal so that your analysis of the appeal will be complete.

**When using Gift Input from the Web:**

1. **Select the Gift to edit.**  
After downloading gifts from the web, double-click on the name of the donor. This opens the Gift Details dialog box. (After the gift is posted, you can edit the gift in the contact's MPD tab.) Double-click on the gift or right-click and select **Edit gift....**
2. Select the Appeal they are responding to.
3. If their gift includes their regular pledge amount + an extra gift for the appeal, you can assign just a portion of their gift to the appeal. Click **OK**.
4. You can also **Setup Appeals...** here if you had not done so previously.

**PROMISES**  
A Daily Guide to Living

**These gifts**

Name
<input checked="" type="checkbox"/> Bennett, David
<input checked="" type="checkbox"/> Bennett, Greg R E
<input checked="" type="checkbox"/> Bennett, Jack
<input checked="" type="checkbox"/> Bennett, David
<input checked="" type="checkbox"/> Bennett, Michael
<input checked="" type="checkbox"/> Bennett, Julie
<input checked="" type="checkbox"/> Bennett, David
<input checked="" type="checkbox"/> Bennett, William

**Gift Details**

Contact: Mr and Mrs. Michael R. Bennett

Date: 5/21/2003

Amount: 100

Appeal: 2003-05 Summer Ask

Personal gift: ☐

Available on Web: ☒

CCC Details:

Donation ID: K9900

Account ID: 41000000

Account Name: Bennett, Michael R and Julie

Designation: 000000

Motivation: Z01000

Buttons: OK, Cancel, Setup Appeals...

**Gifts**

Date	Amount	Motiv
5/14/03	\$75.00	
4/30/03	\$50.00	
4/30/03	\$50.00	
4/30/03	\$50.00	
4/30/03	\$75.00	
4/30/03	\$100.00	SGS200

**Gifts**

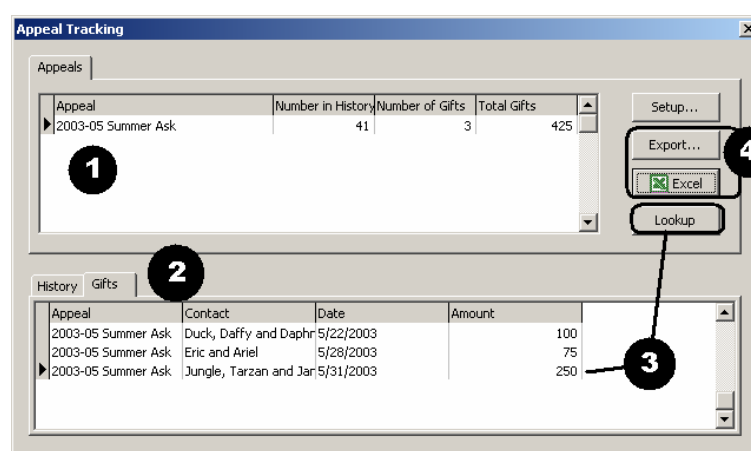
Date	Amount	Appeal
5/22/2003	\$100.00	(50) 2003-0
4/24/2003	\$50.00	
3/19/2003	\$50.00	
2/20/2003	\$50.00	
1/22/2003	\$50.00	

## TRACKING THE RESULTS OF AN APPEAL: TOOLS | APPEAL TRACKING

The *bottom line* of Appeal Tracking. In this example, we sent 41 appeals and have received 3 gifts in response (so far).

### Select **Tools** | **Appeal Tracking**.

1. View the list of appeals, how many 'history' events are associated with that appeal, the number of gifts received in response and the total \$\$ amount of the gifts.
2. **Double-click** on the appeal name to view the details in the lower box. You can toggle between the history (the 41 appeals sent) and the gifts received (3) in response to the appeal.
3. Press **Lookup** to show all the contacts listed in the box (either the 41 in the History tab or the 3 in the Gifts tab).
4. **Export** the displayed group to Excel or a .csv file. You might want to do this to print out a list of names for thank you, etc.



## Tools | Birthdays & Anniversaries

- Select **Tools | Birthday & Anniversary Report**.
- Identify **who** and **what**:
- Press **Build Report**.

LastName	FirstName	Type	Month	Day	Year	Address

- See the report sorted by month, then day, then year. Note that TntMPD is not overly particular about the year. It will accept both “52” and “1952” or no value at all.
- You can then **Export** the table to a .csv file or to **Excel**.

LastName	FirstName	Type	Month	Day	Year	Address
Mouse	Mickey and Minnie	Anniversary	1	1	52	1 Walt Disney W
Wazowski	Mike	Anniversary	1	1	1984	
Duck	Donald and Daisy	Anniversary	1	19	1968	2 Walt Disney W
Kent	Lois	Birthday	1	20		

## Tools | All Pictures

Selecting this link shows you:

- All the pictures you have loaded in your TntMPD database.
- The first and last name of the contact (but not the spouse's name).
- The file format used.
- The size of the file.
- The original filename.

Thumbnail	LastName	FirstName	File Format & Size	Original Filename
	Pooh	Winnie	jpg 2 KB	19-20 Pooh.jpg
	Mouse	Mickey	jpg 3 KB	19-20 Mickey.jpg
	Pan	Peter	jpg 3 KB	19-20 Peter Pan.jpg

© Disney. All rights reserved.

**Tip:** From this screen you can see the file-size of all your pictures. Try to keep your pictures 25 KB or less.



# Chapter 6: Getting Data out of TntMPD

## **Overview**

One of the many great features of TntMPD is the ability to use your data in other programs. There are five primary ways of using your TntMPD database *outside* of TntMPD itself:

1. Create a Mail Merge in Microsoft Word using a group of Contacts.
2. Create an Email Merge in Microsoft Word using a group of Contacts.
3. Export to Excel (or text) a group of contacts, a set of tasks or some other subset of data.
4. View your entire database to Access (that is, Link with Access). This is not “exporting” as the data is permanently linked with your TntMPD database.
5. Synchronize your database with Outlook.

## Mail Merge

You can merge a letter to your ministry partners, or you can mail merge a thank you to a group of people from your task list.

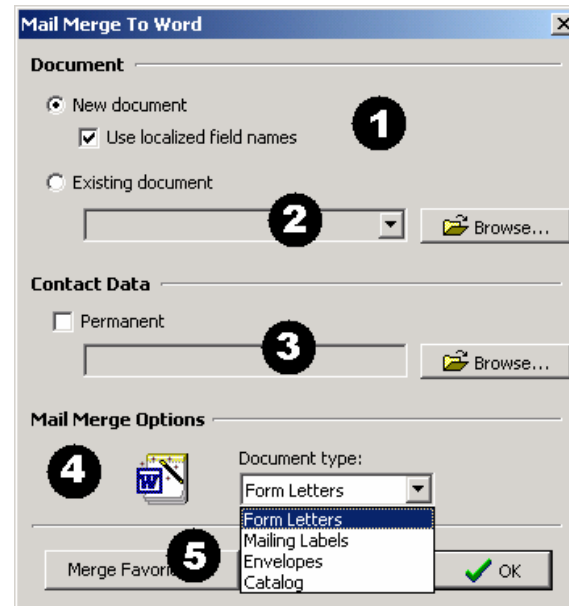
*Using Mail Merge in TntMPD will be much easier if you are already familiar with using Mail Merge in Microsoft Word. Trial and error is the best way to learn this process, so be patient the first time you attempt this, and don't be afraid to try it a few times just to become familiar with the process.*

Select **Tools | Mail Merge with Word | Create Mail Merge...**



**Tip:** The menu option “Edit Mail Merge Favorites...” brings up the same dialog box as the **Merge Favorites** button in the “Mail Merge To Word” dialog box (below). If you had Favorites, they would appear in a list below “Edit Mail Merge Favorites...”.

1. Merge to a **New Document** and TntMPD will automatically open Word and give you field options.
2. Merge to an **Existing Document** if you have already prepared your document and just want to add the merge data.
3. **Contact Data.** If you want to save the contact list (a .csv file) for later use, enter a filename here. Otherwise, TntMPD will create a temporary file and automatically delete it when you exit TntMPD.
4. **Mail Merge Options.** Choose what you want to create from the drop-down list.
5. **Merge Favorites.** Favorites are covered shortly.



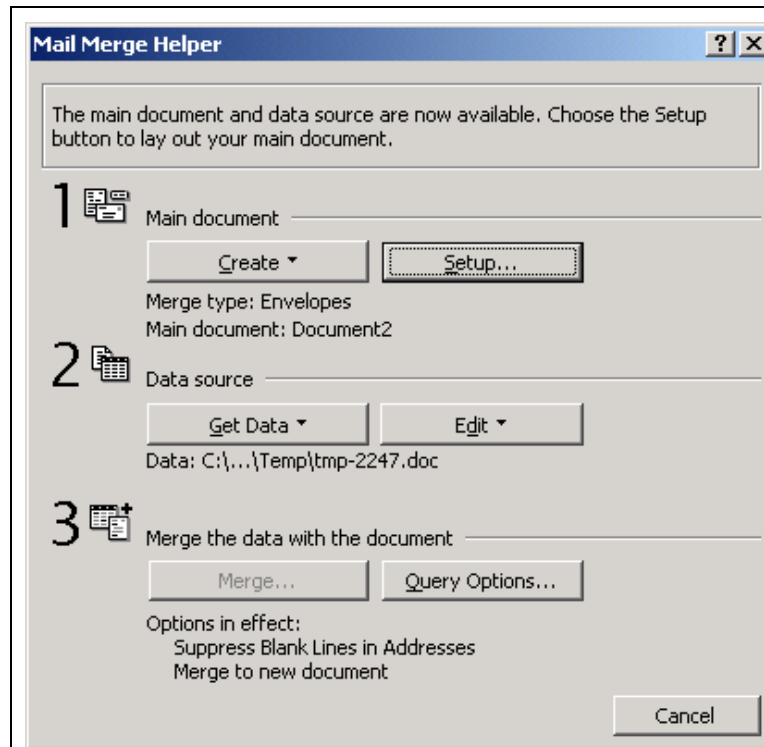
(“Localized field names” means that Word puts an underscore between words in a field name.)



## MAIL MERGE TO A NEW DOCUMENT

If you selected “Form Letters”, you will automatically get a blank document. If you selected “Envelopes” or “Mailing Labels”, you will be taken to Word’s Mail Merge Helper.

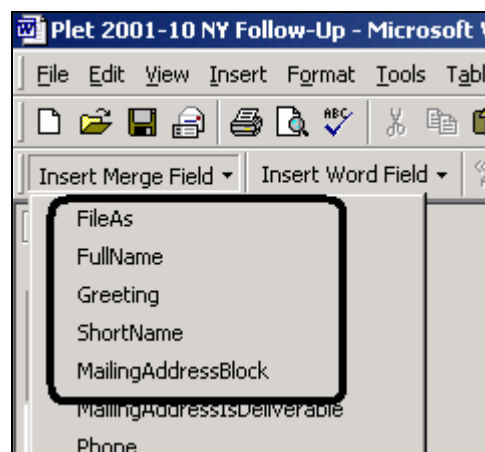
The **Mail Merge Helper** in Word helps you set up your envelopes or labels. Press **Setup...** to specify your envelope or label size.



## MAIL MERGE TO AN EXISTING DOCUMENT

If you have already created your letter or envelope in Word, you can select to **Mail Merge to an Existing Document...**, browse for the file, and press OK. Word will then open the file and make it into a merge document.

- Position your cursor at the place in your document where you want the TntMPD field to go. For example, if it is a letter, put the cursor right after “Dear”, then press **Insert Merge Field** and select “Greeting”.
- If it’s an envelope, the “MailingAddressBlock” is the quick and easy way.



**Tip:** Remember that for envelopes, TntMPD will ignore the recipient’s Country if it is the same as the country you are mailing from. This is defined in the Tools | Options box.

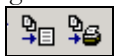
**Note:** If you are using Windows XP, the Mail Merge feature works a bit differently. Visit this link to see how the Mail Merge works with XP:

[http://home.ccci.org/wolbrink/tntmpd/merge\\_with\\_word\\_xp.htm](http://home.ccci.org/wolbrink/tntmpd/merge_with_word_xp.htm)

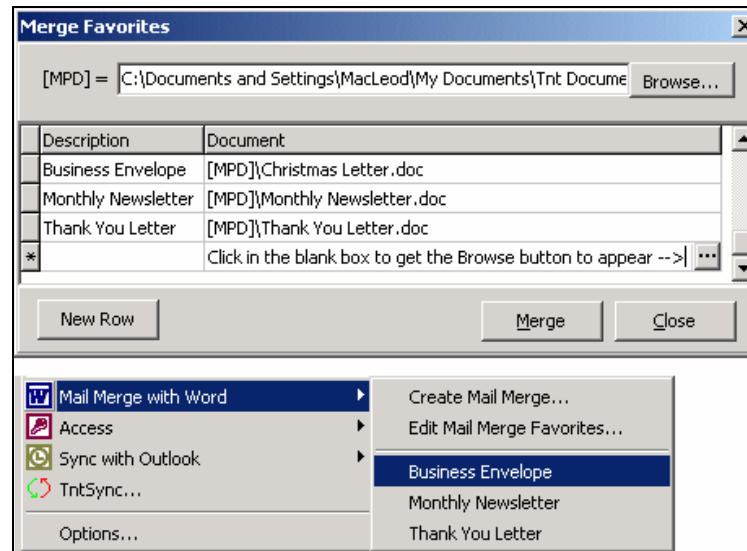
## MAIL MERGE FAVORITES

Merge Favorites are a handy way to save documents you use repeatedly. A helpful feature with merge favorites is that when you select them, the Word document will show you the merged data for the last contact you were on in TntMPD. This way you can just hit “Print” to print the document for just the last contact you were on in TntMPD.”

To create a merged document (e.g., a monthly newsletter) for the entire group, you can then just press the Word button for “Merge to New Document” or “Merge to Printer”



- After you add some favorites to the list of Merge Favorites, they will show up right on your **Mail Merge with Word** menu.
  - *Example:* You want to send a letter to thank them.
1. Select the contact.
  2. Select Mail Merge with Word and then Thank You Letter.
  3. TntMPD will open that document in Word, showing you the merged data for the last contact you were on in TntMPD.
  4. To print the envelope, do the steps again but select the envelope file.



**Tip:** Selecting a favorite automatically opens the favorite document (“Business Envelope” shown above) and supplies the contacts as the data source. If you use a document frequently—like a thank you or an envelope—the Mail Merge Favorites can be a real time-saver.

**Note from the Developer:** Let me share how I use merge favorites, and why I love this feature. As you may know, Merge Favorites show up in my drop down list and simply refer to saved Word documents. (These documents are already set up to merge with TntMPD.) I have a Merge Favorite called “#10 Envelopes”. Whenever I want to create an envelope for someone, I just select “#10 Envelopes” from the drop down list, then in Word I just hit Print. A single envelope prints out to this person. If I want to print envelopes for the current group, I click on “Merge to Printer” in Word. So the merge favorites can be used to very quickly print a word document for either just the current contact, or for each contact in the current group. Some other favorites I have are “Reminder Letter”, “Precall Letter”, and “Meeting Directions”. (The “Meeting Directions” has the contact’s name/address/phone, notes, and many other fields. I print this before going on an appointment to have a hard copy of all the contact data for the appointment I’m going on.) This feature allows me to very quickly match a contact or group to a commonly used Word document.

## Mail Merge to Email

TntMPD uses Microsoft Word's mail merge features to create a merged email to your contacts.

Word 2000 uses Outlook 2000 and Word XP uses Outlook XP to send email. You cannot use this feature with Outlook Express.

### Steps to creating an email merge.

1. Create and save your email message text in a Word document (or you can create the document as you go).
2. In TntMPD, write a **By Field** lookup where the "Email 'is not' (blank)". See example at right. This will create a group of all the contacts who have an email address.
3. Select **New document** or **Existing document**.
4. Select **Form Letters** for the type of merge in the *Mail Merge Options* box.
5. Click **OK**. Microsoft Word will open the document and connect your data to the document.

By Field | By List | Custom | Favorites | Call for Appts | Financial | Other

Field: Email Comparison: is not Value:

Lookup ▲	Result ▼
	Email is not X
	Bunny, Bugs and Babs
	Duck, Donald and Daisy
	Flintstone, Fred and Wilma
	Mouse, Mickey and Minnie

Mail Merge To Word

Document

☐ New document ☒ Existing document

C:\Documents and Settings\MacLeod\ Browse...

Contact Data

☐ Permanent

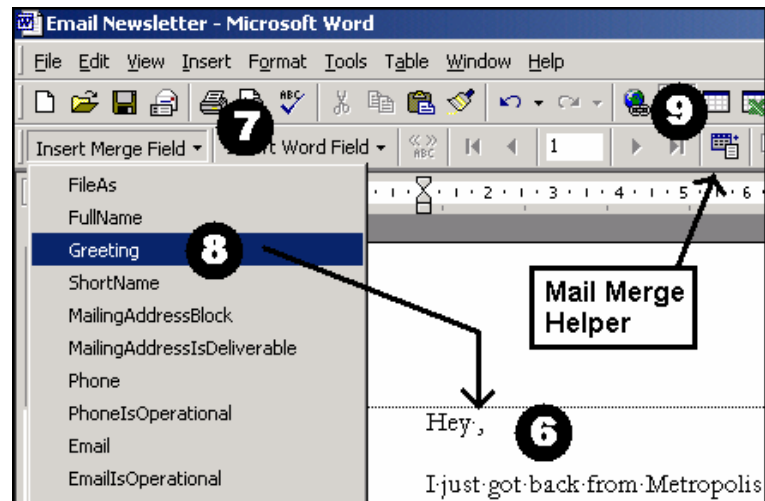
Browse...

Mail Merge Options

Document type: Form Letters

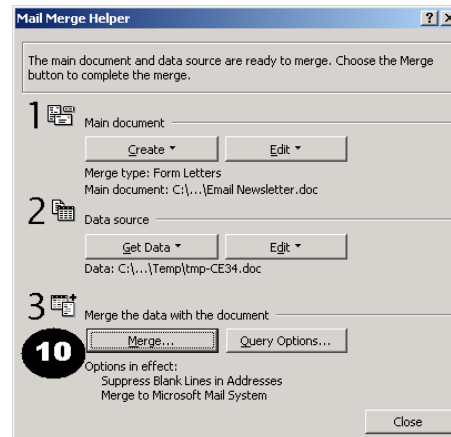
Merge Favorites... Cancel OK

6. Place your cursor where you want the greeting to be placed.
7. Press **Insert Merge Field ▼**.
8. Select "Greeting".
9. Press the **Mail Merge Helper** button.



10. Press **Merge**. (Don't worry, this won't actually *run* the merge!) This will take you to the **Merge** dialog box where you will select electronic mail as the merge type and write the subject.

*(continued on next page)*



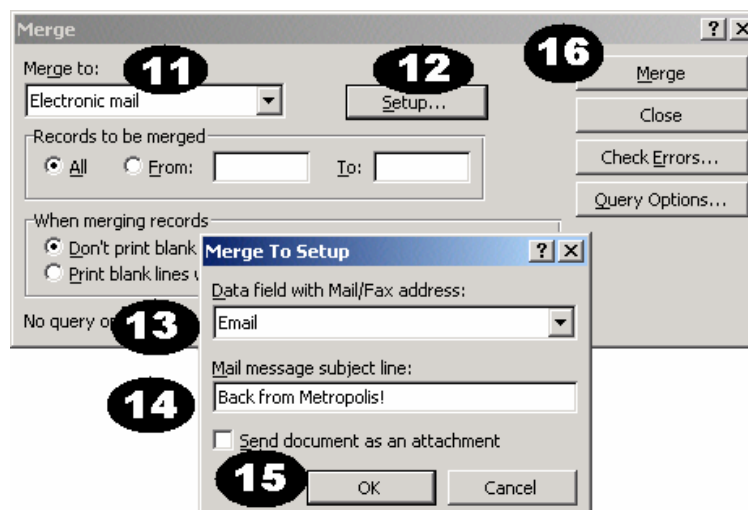
11. Select “Electronic mail” from the **Merge to:** drop-down box.

12. Press **Setup...**.

13. Select “Email” (the TntMPD email address field) from the **Data field with Mail/Fax address:** drop-down box.

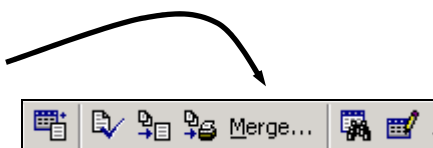
14. Write a subject line for your email message.

15. Click **OK**. *This returns you to the Merge box.*



**Tip:** Do not check “Send document as an attachment” unless you want your Word document to be sent as a file rather than as the message text.

16. Press **Merge** and off it goes! (Or, you can press **Close** and return to your document; then press the **Merge** button on the Mail Merge toolbar when you are ready.)



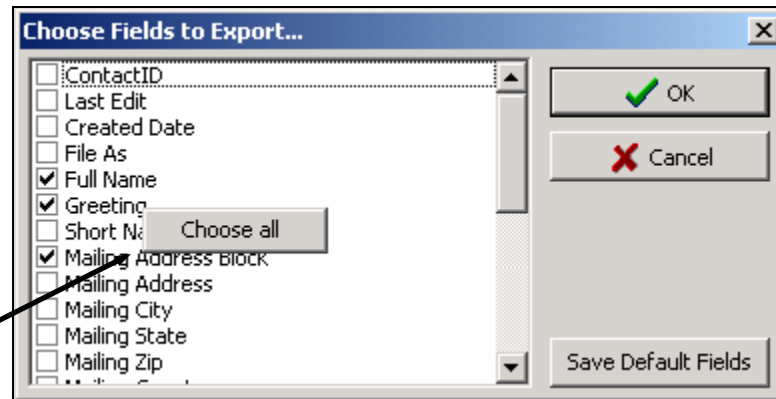
## ***Export to Excel or Text***

### **EXPORTING CONTACT INFORMATION**

You can only export the entire group that is showing. If you want to export some of the contacts in the group, create a new lookup that will identify just those you want to export.

- Select **File | Export Current Group**.
- Select the fields you want to export. TntMPD defaults an assortment of common name & address fields. You can change those selections and press **Save Default Fields** to personalize your list of contact fields to export.

**Tip: Right-click to “Choose all”**

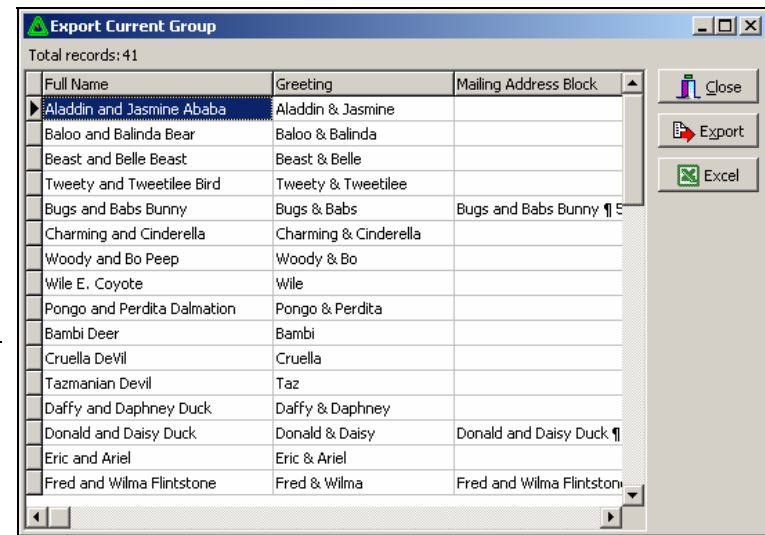


**Tip: For the data obsessive, select a ton of fields and run the export. Then you can see what your data really looks like to TntMPD!**

- TntMPD will create a table of the data which you then choose to export.
- Click **Export** to create a .csv text file. Comma-delimited (.csv) is the same format you use when *importing* contacts into TntMPD.
- Click **Excel** to send this table directly to Excel.

**Tip: You can sort and/or filter this list by right-clicking in any column and selecting from the sort or filter options.**

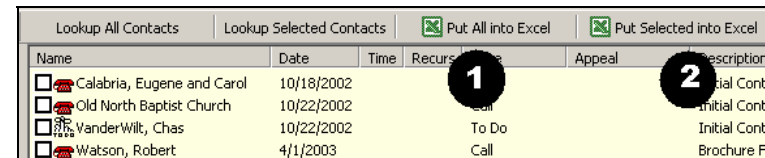
Sort Ascending  
Sort Descending  
Filter By Selection  
Filter Excluding Selection  
Filter By Value...  
Remove Filter/Sort  
Customize Filter...



## EXPORTING TASKS

You can select individual tasks by using the Shift and/or Control keys.

1. Press **Put All Into Excel** to get all the tasks into Excel.
2. Press **Put Selected into Excel** to get one or more selected transactions into Excel.



**Tip: You can Export your contacts from the Task View**  
Press **Lookup all contacts** (from the tasks view). This will bring you to the contacts view. Then, select File | Export Current Group. (The group should be obvious since you are in the contacts view.)



## ***Linking your database with Access***

For maximum data manipulation, you can link your database to Access. This section is not designed to be a thorough treatise on using Access.

### **WHAT YOU CAN DO IN ACCESS**

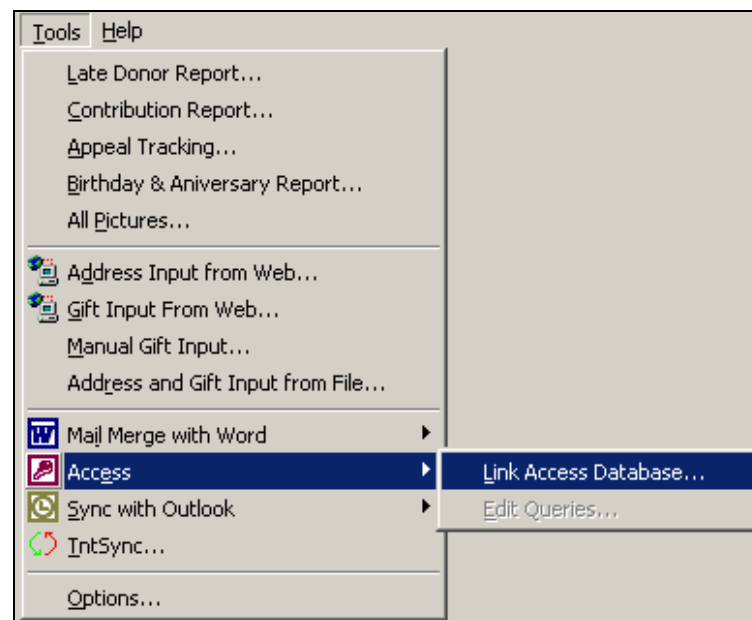
- View all your completed tasks in one place instead of having to look them up contact-by-contact.
- Tell your MPD coach how many phone calls or other tasks you have attempted and/or completed over a certain time frame beyond this week or last week (that information is available in the Analysis View).
- Make significant changes to your database more quickly than you can contact-by-contact in TntMPD. There are risks with modifying your data; see the warning below. Also, if you make changes to your database using Access, you should go to the **File | Maintenance** menu and press each of the **Recalculate** buttons to ensure the quality of your database.
- Get a list of all gifts on which you can do further analysis in Excel, such as # of gifts between certain dollar amounts, etc.

**Warning: You can cause significant damage to your TntMPD database by manipulating it in Access. Be sure to create a backup copy of your TntMPD database before attempting to work with it in Access.**

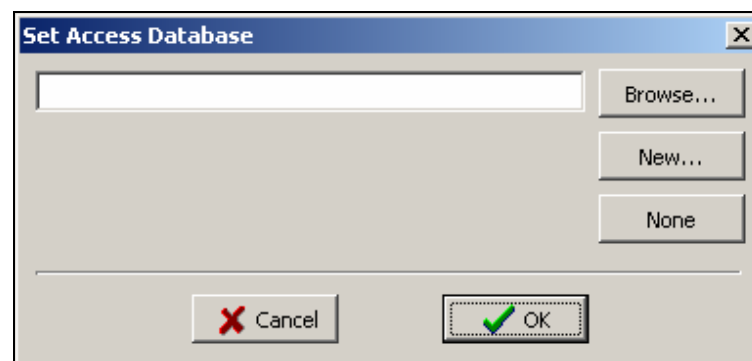


*The Access button  
on the TntMPD  
toolbar.*

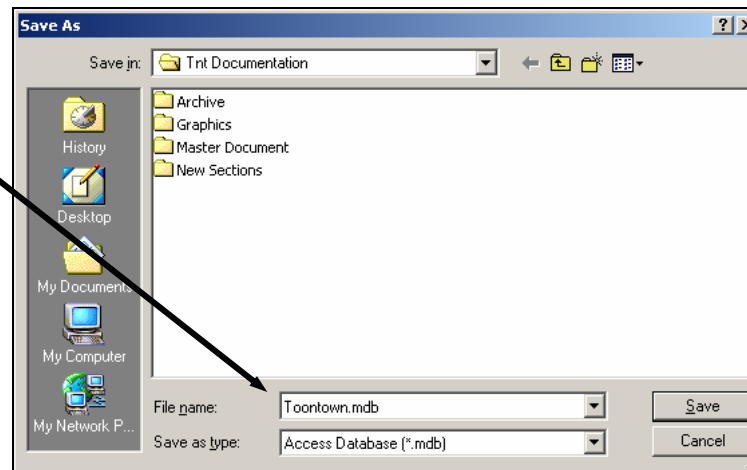
- Press the **Access** button on your button bar or select **Tools | Access | Link Access Database...** to begin the process.



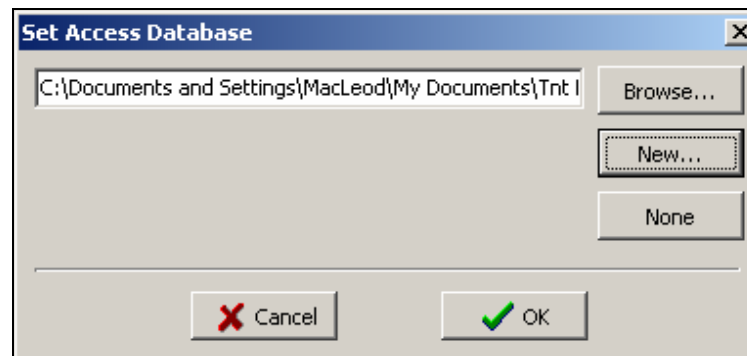
- Choose an existing Access database for linking or **Browse...** if you have one already. If this is your first time, press **New...**.
- **None** resets the filename box to blank.



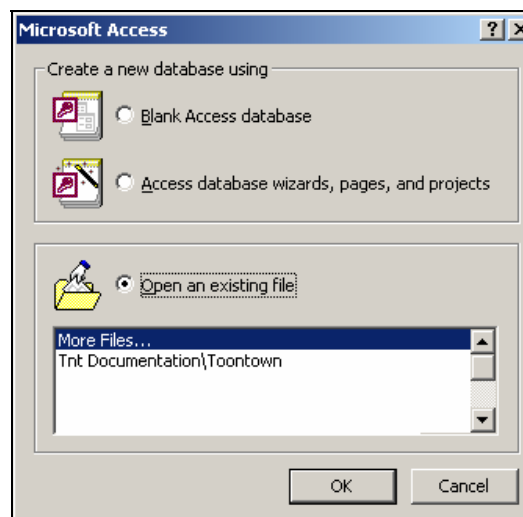
- Name your Access database.
- Click **Save**.



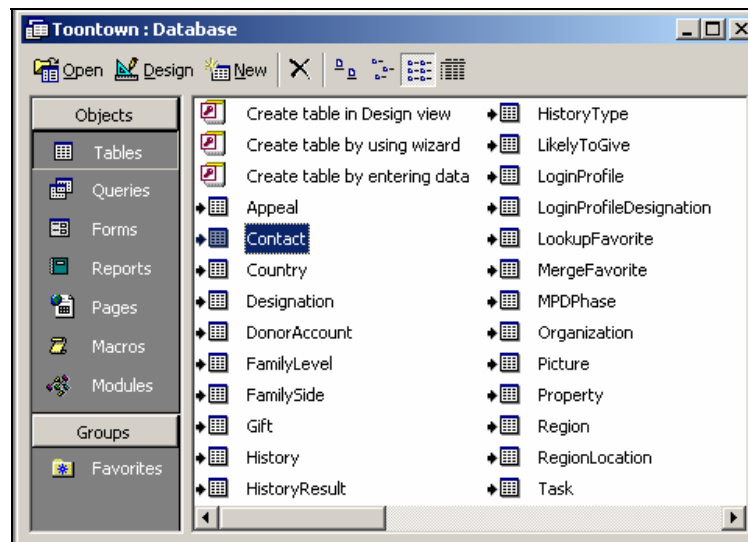
- The filename is created and posted in the name box.
- Press **OK**.
- You won't see anything really happen at this point, but TntMPD has created a link with Access so that you can work with the underlying data in Access.



- Open Microsoft Access
- Find your new Access database either by using **File | Open** or the Access “Startup Dialog Box” shown at right.



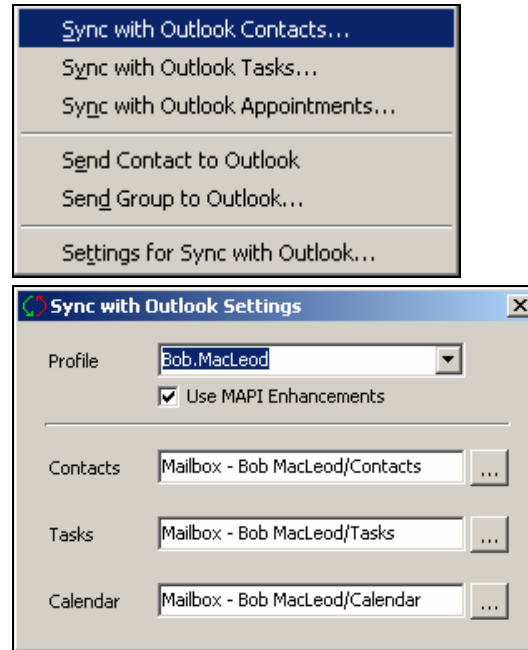
- You can select any table and open and edit the data on that table. The changes are **immediately** applied to your TntMPD database because accessing your tables via Access is like peeking directly into your TntMPD database.



## Sync with Outlook

If you use Outlook as your personal information manager and/or email agent, then you want to avoid maintaining two sets of contact information. This is particularly true if you sync your handheld device with Outlook. Sync with Outlook allows you to export contacts, tasks, and schedule data to Outlook.

- From the **Tools | Sync with Outlook** menu you can choose which TntMPD activity to synchronize (contacts, tasks, or appointments).
- You can also send one individual contact to Outlook or an entire group.
- You can also define the settings for your Outlook synchronization.



### CAUTIONS ABOUT SYNCHRONIZATION WITH OUTLOOK

Be cautious about synchronizing your TntMPD database with Outlook, particularly if the data in the two databases are different. For example, if you created your TntMPD contact database by downloading it from your ministry's website, there may be many differences between the contact

information in your Outlook and your TntMPD contact list.

When you Sync with Outlook, the TntMPD database will overwrite any information found in the Outlook for the same contact (if it can identify the contact).



# Chapter 7: Technical Features

TntMPD has a number of technical features for the advanced user. These features allow you to lookup and/or manipulate data in advanced ways.

This chapter covers:

1. How to prepare an existing list of contacts for importing into TntMPD.
2. How to protect your data through regular backups.
3. **File | Maintenance** features.
4. Data management tools on the **Tools** menu.
5. Tools on the **Help** menu.

## ***Import Contacts***

Before you can import your contacts, you need a TntMPD database set up (see Chapter 2). You can even have existing contacts in that database, as long as they are not in the list of contacts you wish to import. However, you **cannot** upload additional information about existing contacts.

### **STEP 1: PREPARE YOUR OUTSIDE DATABASE**

Importing your contacts is the fastest way to hit the ground running with TntMPD. This is especially true if you are already maintaining your data in another data source such as Outlook, Excel, Access, or even Word. However, even if you just keep your list on paper, or are just starting out with a handful of names on paper, you can put it into Excel and load it into TntMPD much faster than by hand-keying all your data directly into TntMPD.

This chapter covers the importing of a “comma separated value” file (.csv) from Excel. A .csv file can be prepared from most programs.

It is easier to import from a file simply because there are 150 different fields you can import for every single contact. The more thorough your existing database, the more time you will save by importing your data. Those 150 fields are broken down into 10 basic areas:

- Name
- Address
- Phone

- Internet
- Notes
- Greetings
- MPD
- Personal / Professional Information
- Anniversary / Birthday Information
- User-defined Information

Starting on the next page is a list of all the fields for which you can import data. You will likely only have partial information on most of your contacts; in some cases, just a name and a phone number; in others, you may have quite a bit more. That’s okay.

I have helped many people convert their databases, and one thing I have noticed is that many databases have fields combined that are separated in TntMPD. For example, it is very common for a person to have a “Mr. & Mrs.” field in their current database while TntMPD has a separate field for the husband and the wife.



Grouping	Field Name	Value	Comments
<b>Name</b>	IsOrganization .....	TRUE .....	churches, companies, organizations
		FALSE .....	individuals
<b>Name</b> (if Organization is "False")	Title		
	FirstName		
	MiddleName		
	LastName		
	Suffix.....	.....	ex. Jr., Sr., II., III.
	SpouseTitle		
	Spouse .....	.....	spouse first name
	SpouseMiddleName		
	SpouseLastName.....	.....	only if different than LastName
<b>Name</b>	CompanyName		
<i>If IsOrganization = "False" then "CompanyName" refers to where the individual works.</i>			
<b>Address</b>	SelectedMailingAddress.....	1 .....	Home
		2 .....	Business
		3 .....	Other
<b>Home Address</b>	HomeAddress		
	HomeCity		
	HomeState		
	HomeZip		
	HomeCountry		
<b>Business Address</b>	BusinessAddress		
	BusinessCity		
	BusinessState		
	BusinessZip		
	BusinessCountry		
<b>Other Address</b>	OtherAddress		
	OtherCity		
	OtherState		
	OtherZip		
	OtherCountry		

Grouping	Field Name	Value	Comments
<b>Phone</b>	AssistantPhone		
	BusinessPhone		
	BusinessPhone2		
	BusinessFax		
	CallbackPhone		
	CarPhone		
	CompanyMainPhone		
	HomePhone		
	HomePhone2		
	HomeFax		
	ISDNPhone		
	MobilePhone		
	OtherPhone		
	OtherFax		
	PagerNumber		
	PrimaryPhone		
	RadioPhone		
	TelexPhone		
	TTYTDDPhone		
<b>Internet</b>	Email1		
	Email2		
	Email3		
	UserCertificate		
	PersonalHomePage		
	BusinessHomePage		
	NetMeetingAlias		
	NetMeetingServer		
	ComputerNetworkName		
	FTPSite		
	InternetFreeBusyAddress		
<b>Notes</b>	Notes		
<b>Greetings</b>	FullName .....	.....	Formal greeting used to address envelopes
	Greeting .....	.....	Greeting used inside letters
	ShortName .....	<i>Formatted:</i> .....	FirstName and Spouse LastName

Grouping	Field Name	Value	Comments
<b>MPD</b>	CreatedDate .....		When the contact was first added to the database
	OrgAccountIDs .....		Account ids associated with this contact by the organization. Multiple IDs can be separated by a comma. Example: 12345678, 87654321, 1827364
	Deceased .....	TRUE/FALSE	
	DirectDeposit .....	TRUE/FALSE	(This box will not check automatically from your org.)
	MPDPhaseID .....	0	n/a
		10	Never Contacted
		20	Ask in Future
		30	Call for Appt
		40	Appt Scheduled
		50	Call for Decision
		60	PARTNER-Financial
		70	PARTNER-Special
		80	PARTNER-Pray
		90	Not Interested
		100	Never Ask
	NeverAsk .....	TRUE	Never ask this contact for support
		FALSE	Allow asking this contact for support
	NextAsk .....	Date	When you should ask this contact for support
	PledgeAmount .....		If amount is greater than zero, PledgeFrequency must be greater than zero.
	PledgeFrequency .....	0	<none>
		1	monthly
		2	bi-monthly
		3	quarterly
		4	quad-monthly
		6	semi-annual
		12	annual
		24	biannual

Grouping	Field Name	Value	Comments
<b>MPD</b> <b>(continued)</b>	PledgeReceived .....	TRUE .....	First check has been received for this pledge
		FALSE .....	First check has not been received for this pledge
	PledgeStartDate .....	Date .....	when the pledge started
	ReferredBy .....		Primary referrer
	ReferredByList.....		All those who have referred you to this contact. Each referrer should be on their own line (separated by a carriage return).
	Region		
	SendNewsletter .....	TRUE .....	Send this contact a prayer letter
		FALSE .....	Don't send this contact a prayer letter
	Magazine .....	True/False	
	LikelyToGive .....	0 .....	Unassigned
		1 .....	Least Likely
		2 .....	Likely
		3 .....	Most Likely
<b>Personal /</b> <b>Professional</b>	AssistantName		
	Children		
	ChurchName		
	Department		
	FamilyLevel .....	0 .....	<None>
		10 .....	Very Extended
		20 .....	Cousin
		30 .....	Uncle/Aunt
		40 .....	Grandparent
		50 .....	Nephew/Niece
		60 .....	Sibling
		70 .....	Parent
		80 .....	Grandchild
		90 .....	Son/Daughter
		100 .....	Immediate
	FamilySide .....	0 .....	<none>
		1 .....	His
		2 .....	Hers

Grouping	Field Name	Value	Comments
<b>Personal / Professional (continued)</b>	Hobby		
	JobTitle		
	ManagerName		
	NickName		
	OfficeLocation		
	Profession		
	SpouseCompanyName		
	SpouseHobby		
	SpouseNickName		
	SpouseProfession		
<b>Anniversary / Birthday</b>	AnniversaryDay		
	AnniversaryMonth		
	AnniversaryYear .....		(can be 2 digits or 4 digits)
	BirthdayDay		
	BirthdayMonth		
	BirthdayYear .....		(can be 2 digits or 4 digits)
	SpouseBirthdayDay		
	SpouseBirthdayMonth		
	SpouseBirthdayYear .....		(can be 2 digits or 4 digits)
<b>User</b>	User1		
	User2		
	User3		
	User4		
	Categories		
	UserStatus		

When we created the Toontown database for this manual, we imported approximately 50 contacts, and about 31 fields (mostly name, address, phone, and personal information fields). Here's an example of what our Excel file looked like before we imported it:

	A	B	C	D	E	F	G	H	I	J	K
1	Title	First Name	Middle Name	Last Name	Suffix	Spouse Title	Spouse First Name	Spouse Middle Name	Spouse Last Name	Full Name	Greeting
2	Mr.	Mickey	Walter	Mouse		Mrs.	Minnie		Mouse	Mickey & Minnie Mouse	Mickey & Minnie
3	Mr.	Bugs		Bunny		Mrs.	Babs		Bunny	Bugs and Babs Bunny	Bugs & Babs
4	Mr.	Donald	Q	Duck		Mrs.	Daisy		Duck	Donald and Daisy Duck	Donald & Daisy
5	Mr.	Fred		Flintstone		Mrs.	Wilma		Flintstone	Fred and Wilma Flintstone	Fred & Wilma
6	Mr.	Tweety		Bird		Mrs.	Tweetilee		Bird	Tweety and Tweetilee Bird	Tweety & Tweetilee
7	Mr.	Peter		Pan		Mrs.	Wendy		Pan	Peter and Wendy Pan	Peter & Wendy

This is a list of each column and the TntMPD field name.

*Note that the field names are not EXACTLY as shown in the table on the previous pages. In the table below, for example, "First Name" has a space. The table on the previous pages shows the data field names as they appear to the TntMPD database. The field names shown below reflect how they appear in the TntMPD import feature... they are slightly different. BUT... either one will work!*

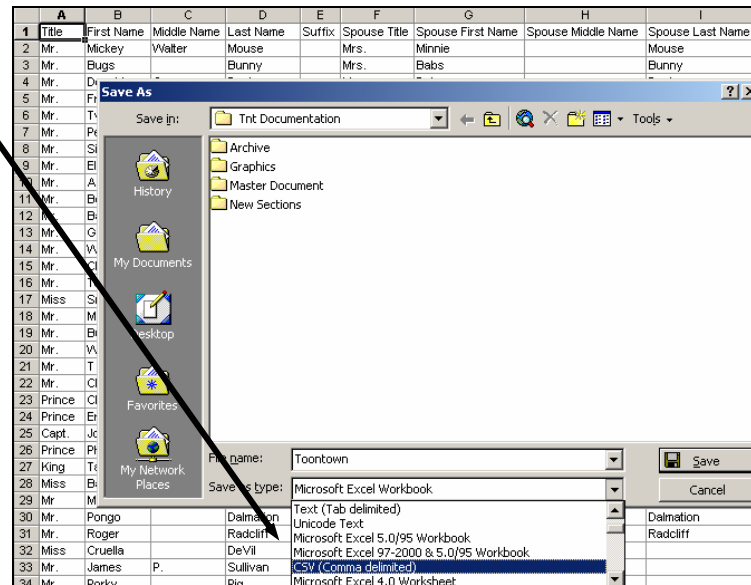
A: Title	I: Spouse Last Name	P: Home City	Y: Anniversary Year
B: First Name	J: Full Name	Q: Home State/Province	Z: Birthday Month
C: Middle Name	K: Greeting	R: Home ZIP/Postal Code	AA: Birthday Day
D: Last Name	L: Short Name	U: Mobile Phone	AB: Birthday Year
E: Suffix	M: Home Phone	V: Referred By	AC: Spouse Birthday Month
F: Spouse Title	N: Email1	W: Anniversary Month	AD: Spouse Birthday Day
G: Spouse First Name	O: Home Street Address	X: Anniversary Day	AE: Spouse Birthday Year
H: Spouse Middle Name			

**Note:** TntMPD automatically customizes the Full Name, Short Name, and Greeting based upon the first and last names you keyed. (This is covered more fully in Chapter 3: Managing Contacts.) You can load your own Greetings only if you do not want them to appear in the default TntMPD format.

## STEP 2: PREPARE YOUR FILE

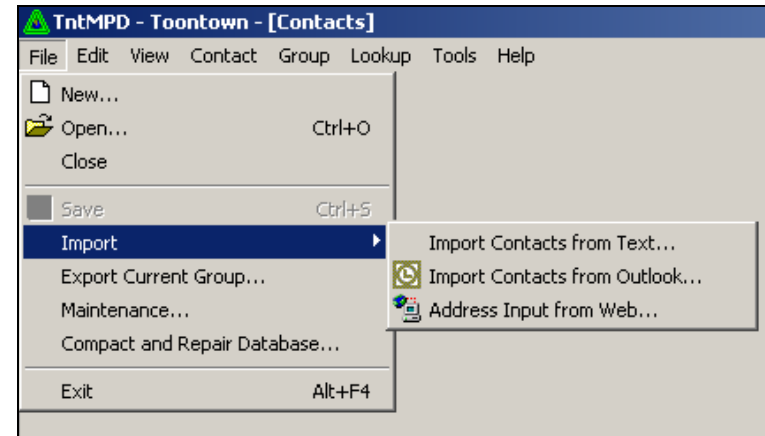
Again, because of the variety of database files out there, this chapter only covers files prepared in Excel.

- Save your file as a CSV (Comma Delimited) file.

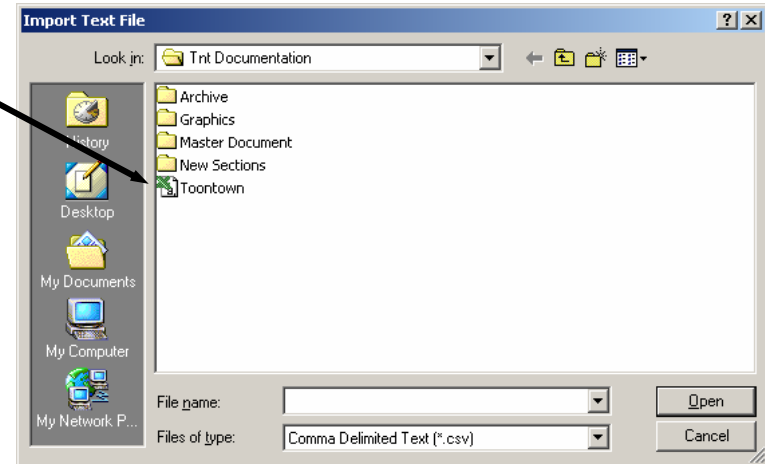


### STEP 3: IMPORT YOUR FILE INTO TNTMPD.

- Open TntMPD.
- Select **File | Import | Import Contacts from Text.**



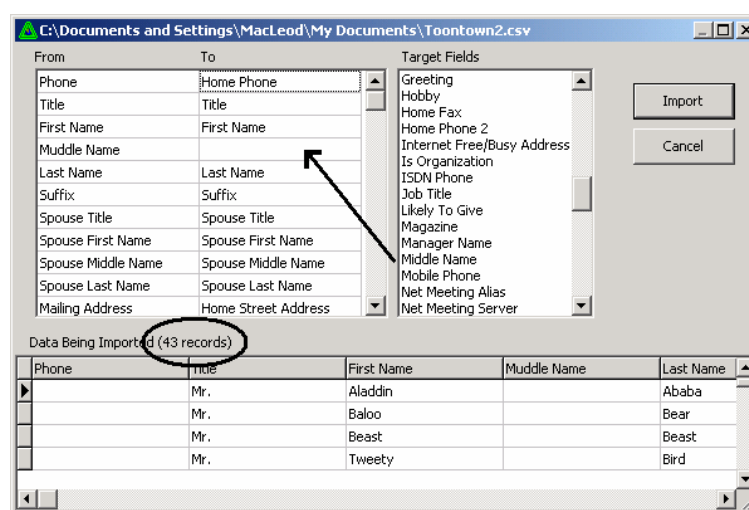
- Select your .csv file
- Click **Open**.





TntMPD attempts to match the field names in your .csv file with the official TntMPD field names. (This is why I mentioned on page 7-8 that it is okay if your .csv field names do not need to match the TntMPD field names exactly.)

- TntMPD will show you a sample of what it is attempting to import and the number of total records.
- If a field in the **To** column is blank, that means TntMPD was not able to identify what field you wanted. In this example, I mistyped “Middle Name” as “Muddle Name”. The solution is to scroll down the list of **Target Fields**, then click and drag the intended field to the blank field.
- Click **Import**.

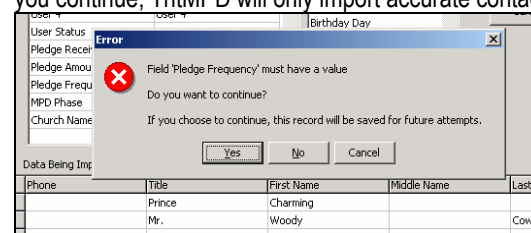


## Author's Note about Importing:

In addition to assorted biographical information, you can also import your contacts' giving information such as pledge amount, pledge frequency, and MPD Phase (among many others). However, TntMPD is pretty particular about how that information must appear. For example, if you choose MPD phase as an import column, you must put an MPD phase for ALL contacts you are importing. You can't just put some and leave the others blank. I am not familiar enough with every import issue to list them here, so I encourage trial and error.

When you load your .csv file, TntMPD will automatically count the records. This will help you ensure that you loaded the correct number of contacts.

If a record has an error, TntMPD will display an error message with the offending field (but not tell you which contact). I recommend you “Cancel”, return to your list and fix the problem rather than continue. If you continue, TntMPD will only import accurate contacts.



## Backing Up Your Data

### ★ BACK UP YOUR DATA. BACK UP YOUR DATA. BACK UP YOUR DATA. ★

There is nothing I stress more strongly in this manual than the importance of backing up your TntMPD database. Because my MPD work is so central to my work as a missionary, my TntMPD database is my core volume of data. I want to protect it to the best of my ability.

I backup my data in two different ways, for two different reasons (these are explained in detail on the following pages):

**1. Off-computer backup.** I regularly create a CD with my TntMPD database on it, in case of a catastrophic failure to my computer. I was already doing this for my personal finance files, so it was easy for me just to add my TntMPD file to the CD. *Because I also use my TntMPD in my office location, I know there is always a backup copy on my office network as well.*

Some people prefer to keep a few historical backup copies, which they keep with separate dates.

**2. On-computer backup.** I often will work on MPD for 1-2 hours in a single evening, which could mean a lot of phone calls. I live in a rural area where brief power outages are common (multiple times a day during the rainy season). And my computer is five years old and periodically just locks up for no apparent reason. These three factors have compelled me to develop a process for backing up my TntMPD during the evening while I am working on it. I simply

close the file every 30 minutes or so, copy the database to another folder on my hard drive, then reopen the database and keep calling.

I developed this method from experience: One night after making calls for 90 minutes, my computer locked up. When I rebooted, my TntMPD file was corrupt and unusable—even though I had “saved” many times. I had to load my backup copy from the night before, but I lost all the phone call and task data from my 90 minutes of work. Some I could remember, but others I actually had to call back, apologize, and re-create the conversation.

**Tip: Get a CD writer for your computer if you do not already have one. An empty TntMPD database is almost as big as a single floppy disk, and a well-used TntMPD database can be many times that size. There are software programs that will backup a file to many floppies, but if you are planning on backing up your TntMPD database regularly, a CD writer will make that process quick and easy.**

## OFF-COMPUTER BACKUP.

Your TntMPD database is a single file.

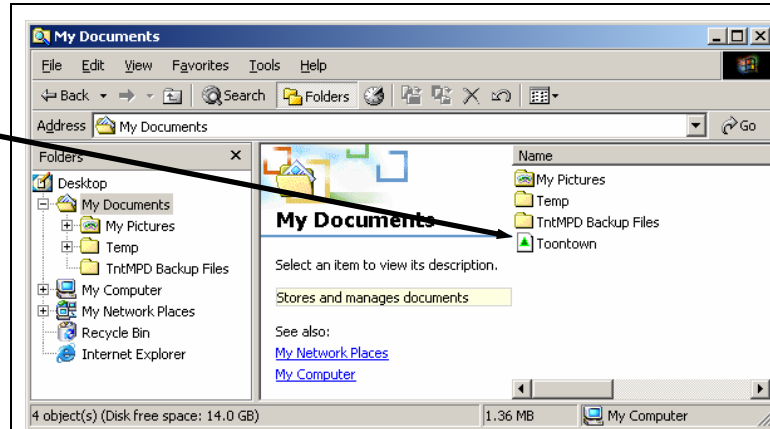
Backing it up is as simple as copying that single file onto a CD or a network.

*If you have a CD writer with your computer, follow the instructions that came with the CD writer's software.*

*Another alternative is to email the file to yourself, if your email provider allows you to send large files. Then you have a 'backup' copy in your email box.*

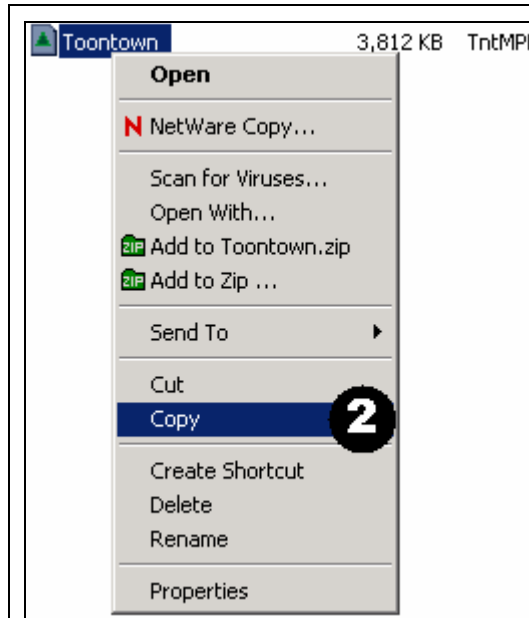
If you keep several historical copies, you might want to include a date in the filename:

- Racers TntMPD backup 2003-08-01
- Racers TntMPD backup 2003-08-15
- Racers TntMPD backup 2003-08-30



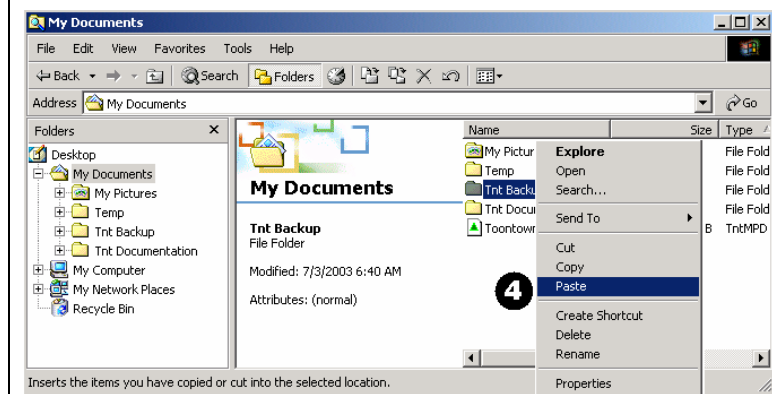
### ON-COMPUTER BACKUP.

1. Find your database file in your Windows Explorer.
2. Right-click on the file name and select **Copy**.



3. Go to your backup directory (or make one if you do not have one already).
4. Right-click in that folder and select **Paste**.

*Notice in this example that my Toontown database is in the folder **My Documents**, while the on-computer backup file is in the folder **Tnt Backup**.*



## Using TntMPD with multiple computers

It's not uncommon for someone to have multiple copies of their TntMPD database in use at the same time. For example, you may use TntMPD both at your office and at home. Or, you may use one file on your computer at the office while your spouse could be (simultaneously) using the file at home.

On the TntMPD web site, Troy Wolbrink has written two thorough descriptions of how to keep two copies of TntMPD in sync, and I recommend you go there for more information. But, in brief, there are two primary ways to manage multiple TntMPD database files:

1. **Copy the file to the remote location.** This process works well if you are the only person using the file, or you are at least keeping the master file. For example, if you use the file at your office and your spouse uses it at home, primarily for looking up names and addresses.

This is the method that I use. I have a high-speed internet connection at my house, and each evening before I begin my MPD work I log in to my office

network and upload the file to my home computer. At the end of the evening when I am finished, I transfer the updated file back to my office folder.

There are two big advantages to this method:

- a. Keeping my file on my office network ensures that it is being backed up consistently.
- b. I always have an almost-current back-up file on my home computer.

However, there are also disadvantages to this method, the biggest being that the file size (over 3 meg) would make this impossible without a high-speed connection.

2. **Use TntSync.**

TntSync is a database feature that allows you to synchronize two separate copies of your TntMPD database. This feature is covered in detail on the TntMPD web-site, on the Frequently Asked Questions page. (*See "How do I keep two copies of my database in sync with TntSync?"*)

## Technical Menu Items

### FILE | MAINTENANCE

**Developer's Note:** “The **Recalculate** section (first four buttons) should (in theory) never need to be pressed. There are many calculated fields which TntMPD should normally keep up to date automatically. Some examples would be:

MailingCity (based on SelectedMailingAddress + HomeCity, BusinessCity or OtherCity)

LastGiftDate (based on gifts)

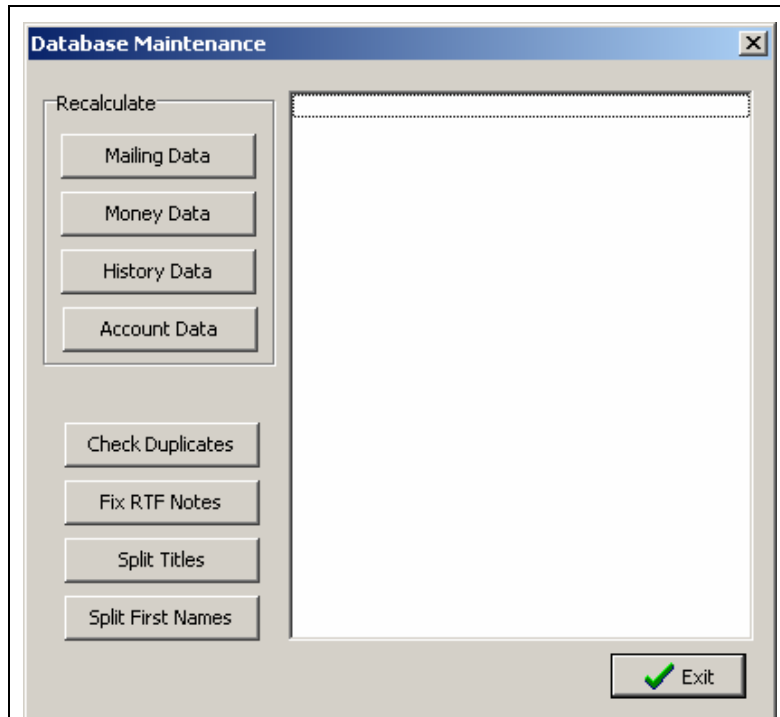
LastThank (based on history)

OrgAccountIDs (based on donor accounts).

If one were to alter data in the database directly (via Access), or if one were to run into any other problems (e.g., unresolved TntSync conflicts) then it would be recommended to run these buttons. They will NEVER do any harm, if anything at all.

Check Duplicates will scan all your contacts and look for contacts who might be duplicates. In our database, we have two (unrelated) people whose last names are the same and first names start with the same letter. When I pressed Check Duplicates, TntMPD flagged those two as potential duplicates.

Fix RTF Notes resolves a known bug where a contact's notes come over as RTF instead of plain text.”

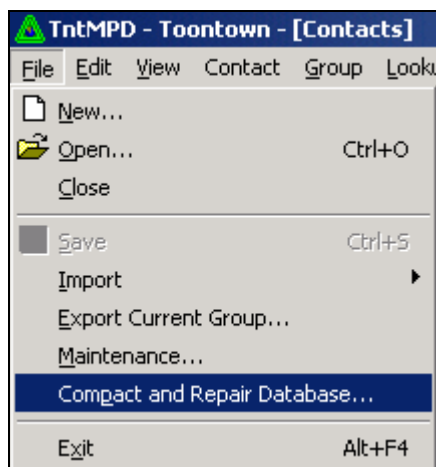


**Split Titles** and **Split First Names** can help repair a contact list where the titles came over as Mr. & Mrs. or the first names as Mickey & Minnie. This is more likely to happen if you load your list directly from Outlook.

## FILE | COMPACT & REPAIR DATABASE

Keep your file as lean as possible by compacting and repairing your database frequently, especially if you download address and gift information from your ministry's web site.

- Select **File | Compact and Repair Database....**
- TntMPD will close your file, perform some maintenance on it, then reopen it.
- If you do not perform this step manually, TntMPD will automatically perform it every 30 days (that is, when you use it and it has been 30 days since it was last repaired).



## Tools on the Help Menu

### HELP | VISIT TNTMPD BULLETIN BOARD

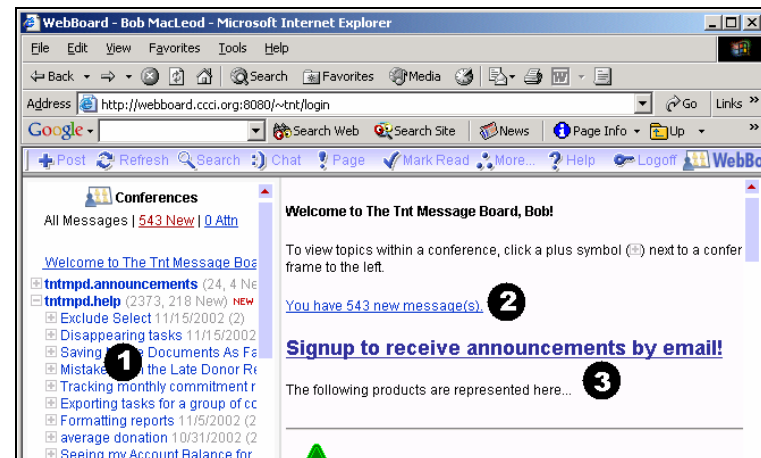
The TntMPD Bulletin Board is a place where you can go to find out more about specific topics, or post questions for others to answer.

*This manual does not cover all the steps involved in using the Bulletin Board.*

- Select **Help | Visit TntMPD Bulletin Board**. *TntMPD will automatically open your Internet browser. If you are not connected to the Internet, it will open your dial-up/login box.*
- Press **New User** or **Guest** to enter the site.



1. You can see threads of discussions for various topics
2. You can see all the messages posted since you last logged in
3. You can sign up to receive announcements by email.



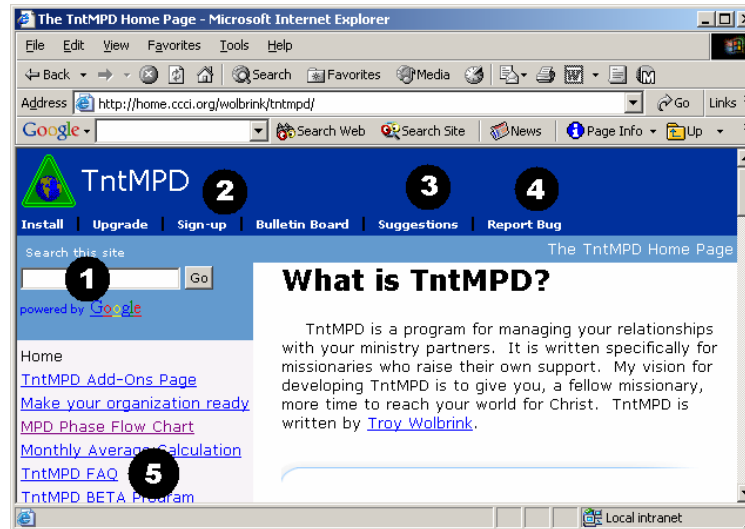


## HELP | VISIT TntMPD WEBSITE

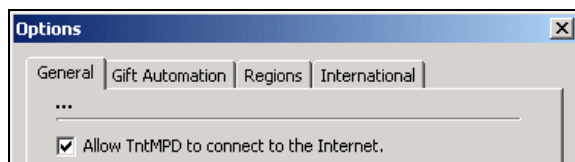
This is the site from which you downloaded TntMPD initially.

**TntMPD website features** (this is not an exhaustive list).

1. **Search** the entire site for any reference you key in.
2. **Sign-up** to message postings (also accessible through the Bulletin Board).
3. Make a **Suggestion** to Troy Wolbrink for a future enhancement to TntMPD.
4. **Report a Bug** to Troy to repair in a future release.
5. See some of the most **Frequently Asked Questions**.

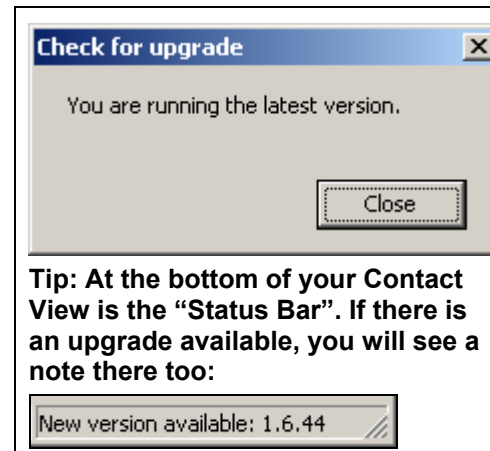


## HELP | CHECK WEB FOR UPGRADE



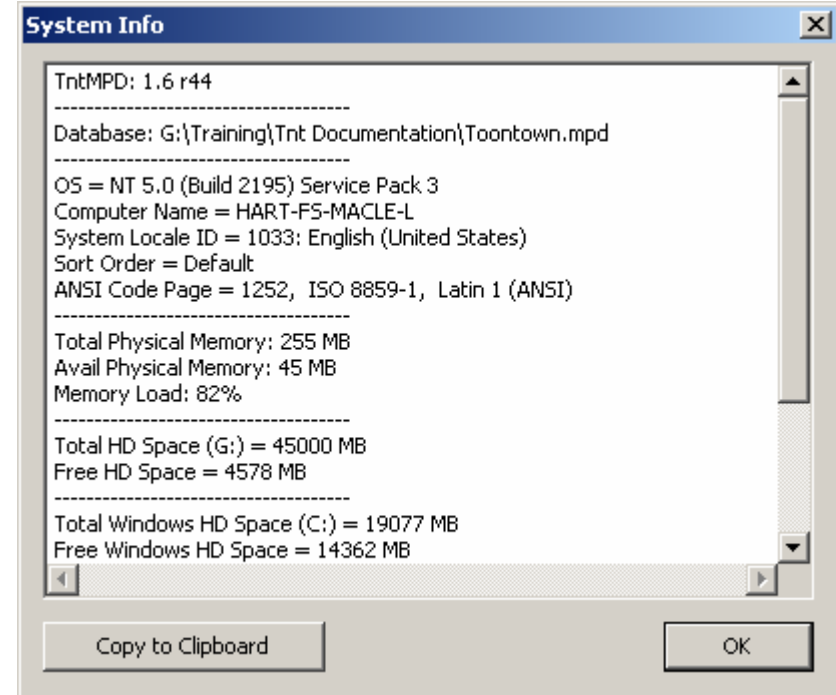
### The Tools | Options box.

If you have the above box checked, TntMPD will automatically connect to the Internet and check for available upgrades and notify you when an upgrade is available. Alternatively, you can select **Help | Check Web for Upgrade** and TntMPD will tell you if an upgrade is available or not (if not, the box at right will show).



## HELP | VIEW SYSTEM INFO

- See fascinating information not only about the software, but also about your computer.



## HELP | ABOUT

1. See the version number (in this example, "Version 1.6, release #44").
2. TntMPD been useful to you? You can make a contribution to Troy and Tammy Wolbrink's ministry with Campus Crusade for Christ.
3. This box will also show you the exact file directory where your database is stored.

