



## Task View & History Tabs

A **History** event is simply a **Task** that has been completed. For that reason, they are best addressed together. **Tasks** are often viewed as a group for all contacts while **History** is typically managed or viewed for individual contacts. Task/History tips:

- 1 Filter tasks to focus on one thing at a time; for example, uncheck all but **Thank** to show you a list of all pending Thank You's.
- 2 When you  a task, TntMPD asks if you want to log a history event. You may not always want to log an event.
- 3 Save history Descriptions for commonly-repeated tasks.
- 4 Export tasks to Excel to print them and take with you.

### The Task View

View all pending tasks by clicking the **Tasks** button on the button bar. View tasks for an individual contact by clicking on the contact's **Tasks** tab. You can **Lookup** the contacts.

### Saved Descriptions

## Gift Automation

TntMPD automatically creates tasks based on a contact's giving activity compared to their **Pledge**. You "enable" or disable Gift Automation in the **Tools | Options** box on the **Gift Automation** tab. Gift Automation works whether you enter the gifts manually or they are downloaded from your organization.

Gift type	When TntMPD creates this task
<b>RECONTINUING</b>	Gift is received from a financial partner ("PARTNER-Financial") who gives a gift equal to their pledge after missing the number of months you select (default: 2).
<b>SPECIAL</b>	Gift of any amount is received from a non- financial partner.
<b>EXTRA</b>	Gift is received from a financial partner who is current on their pledge and gives a gift <i>greater</i> than their normal pledge. A gift of the same <u>or lower</u> amount will simply be viewed as all or part of the next scheduled gift.
<b>LARGE TIME FRAME</b>	If a financial partner's pledge is infrequent, you may want to send a special thank you each time they give. You can define how frequent on the Gift Automation tab.
<b>FIRST</b>	When a contact pledges to become a regular giver OR changes their pledge amount, uncheck the "Pledge" box on their MPD tab. TntMPD will then alert you when their first pledged gift arrives and automatically check the Pledge box.

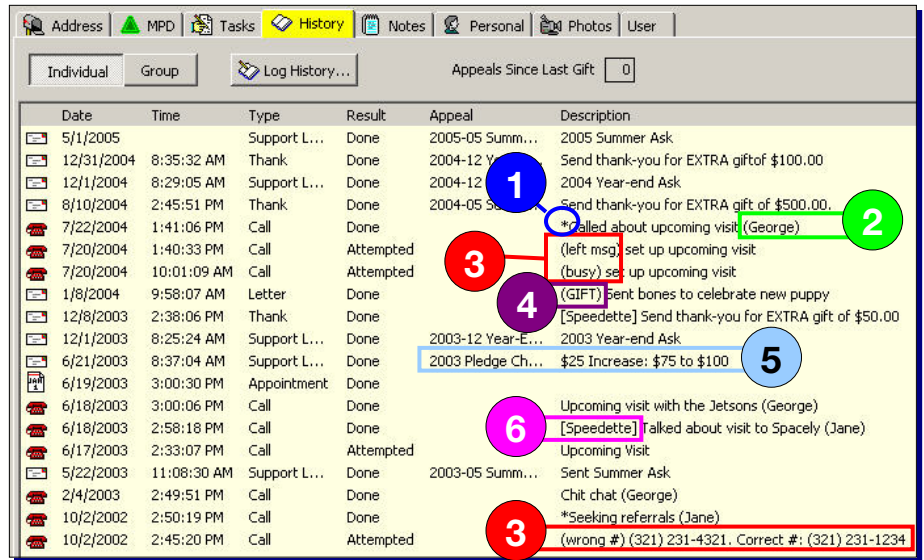
Pledge  \$100.00 monthly

*Note: Gift Automation is driven by each partner's **pledge**. Without a pledge, every gift will create a Special thank-you. Also, the pledge amount determines whether TntMPD views a gift as First, Extra, Recontinuing, etc.*

# Writing Meaningful Descriptions

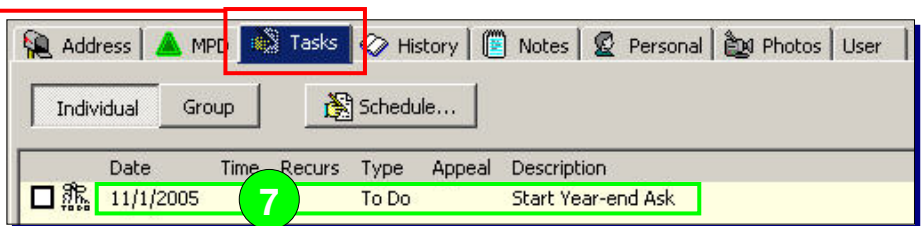
Over the years, you could easily complete hundreds, even thousands, of tasks related to your ministry partner development. Don't rely on your memory to keep track of what you have done and conversations you have had—let the power of TntMPD work for you.

Writing **meaningful descriptions** will help you quickly and easily review the history of your relationship-building activities with each partner so you can spend **more** time building that relationship and **less** time wondering what you have done.



	History Tip	Sample description
1	Put an asterisk (*) in front of a description if you have written a note. This will save time in the future when reviewing history for a contact as you will always know exactly which history events have an extra "note". Also, if they made some commitment (to join team, give a gift, increase support), note in descr.	*Initial phone call—wants to meet! *Challenged to join monthly *Challenged for summer outreach request: pledged \$500
2	If your contact is married, put the name of the spouse you talked to on a call.	Called to touch base (George) Called about upcoming visit (Jane)
3	If your call attempt is unsuccessful, you may want to indicate why, especially if you have frequent unsuccessful attempts. If the attempt was a wrong #, record both the wrong # and the new # you look up or locate.	(busy) Called to set up initial appt (left msg) Called to set up initial appt (left msg w/daughter) Called to set up initial appt (wrong #: 951-555-8734) Correct #: 951-555-8374
4	If you <b>send</b> a gift of some kind to a ministry partner, indicate that (using Letter/Sent). If you <b>receive</b> a non-financial gift, indicate that (using Letter/Received).	(GIFT) Sent Christmas CD (REC'D GIFT) Baby outfit
5	When a ministry partner changes their pledge amount, use your Pledge Change appeal and record the amount in the description. This will help you review their ongoing pledge changes over the years. <i>See Appeals Ref. Guide for more info.</i>	\$25 Increase: \$75 to \$100 \$50 Decrease: \$50 to \$0 (lost job)
6	If your spouse periodically works on MPD, it may be helpful to record who performs the task by putting her/his name or initials in brackets at the beginning.  <i>If one of you does most of the MPD work, you may want to assume that no name means the primary person did the task. ▶</i>	[MIKE] Called to set up appt [MARCY] Send thank-you for EXTRA gift of \$x. [MIKE] Lunch with George  Called to set up appt [MARCY] Send thank-you for EXTRA gift of \$x. Lunch with George

When the **Tasks** tab is highlighted **BLUE**, that indicates you have a pending task for this contact.



## Recording Your Own Activities

A good way to track your MPD activity as it relates to *all* your partners is to record tasks and history on your own contact. (From the menu: **Lookup | Me.**)

- Need to remind yourself to do something in the future, such as start a brochure or write a special ask letter? Create a task for yourself—and forget about it!
- Record the date and topic for each newsletter and appeal you send.
- Record the dates of MPD trips or when you attend special events at your sending church(es).

