The MPD Tab

#4

Overview

The MPD tab is the user favorite of the eight tabs on the **Contact View**, and is the one tab on which all of the financial information about a contact is stored. See chapter 3 of *Exploding TntMPD* for more details.

MPD Tab fields

MPD Phase—The point your contact is at on the cycle of MPD for your team. *See next page.*

Next Ask—To schedule a future “ask” time. (This field is not commonly used.)

Pledge—Dollar amount and frequency of pledge. Check box indicates they have given pledge at least once. *Tip: Do not check the box when you record the pledge. TntMPD will check the box when you receive/download the next gift.*

Region—Geographically combine your contacts. Useful for lookups and future MPD maintenance. You define regions that work for you.

Referred by—Type the name of the person who gave you their name. If “Referred by” is bold, that indicates this contact has several referrers; click on the bold letters to see the whole list.

Likely to Give—To assist in future fund-raising, you can assign one of three likely-to-give levels.

There are four check boxes for doing future lookups and analysis of your team:

Send Newsletter. *Tip: Create a favorite. Use a **User** field for those who receive an e-newsletter.*

Deceased—To avoid the loss of financial history, do not delete a donor who is deceased. *Tip: Erase their address to prevent accidentally sending a letter.*

Direct Deposit.

Magazine. If your org. has one.

Status Report tells you…

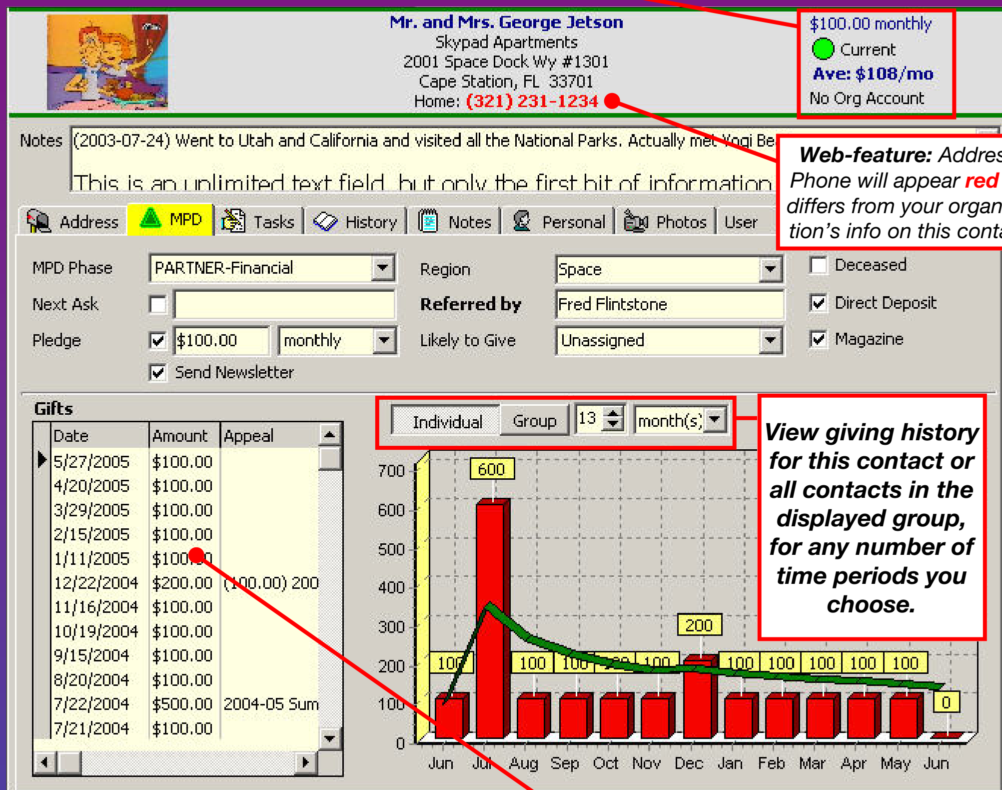
- Pledge info, if any.
- Status of contact’s giving (dot).
- Monthly average (whether they are a financial partner or not).
- Organization account number(s), if you download gifts from the web.

Contacts who are PARTNER-Financial:
(Categories match **Late Donor Report.***)*

- No Gifts Yet .... TURQUOISE
- Current .... GREEN
- Behind (30-60 days) ...... YELLOW
- Behind (over 60 days).... RED

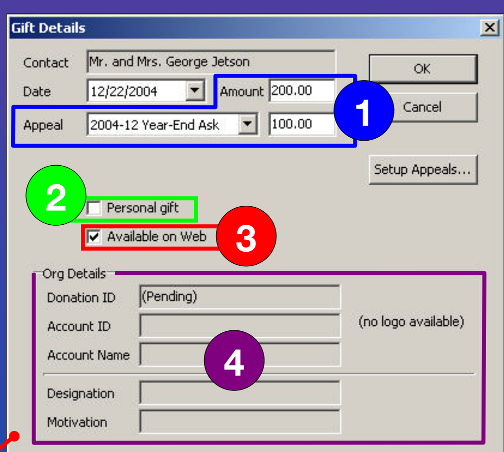
Contacts who are not PARTNER-Financial:

- Recent Gift .... PURPLE
- No Current Gifts .... GRAY

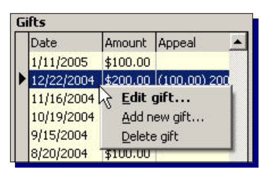


***Web-feature:** Address/ Phone will appear **red** if it differs from your organization’s info on this contact.*

View giving history for this contact or all contacts in the displayed group, for any number of time periods you choose.



Managing Gifts.



Right-click to:

- ▲ **Edit** a gift (e.g., to assign a portion of the gift to an appeal) You can also double-click on a gift to edit.
- ▲ **Add** a new gift. You might do this if you received the check and are forwarding it to your organization.
- ▲ **Delete** a non-web gift for whatever reason. Web gifts need to be corrected by your organization.

Gift Details box.

1. Designate some or all of a gift to an appeal.
2. Input a personal gift not receipted by your organization (such as a cash gift or an internal transfer from another missionary in your organization).
3. Add a gift you are sending in to your organization to ensure it is credited to you—good for getting that thank-you on your task list.
4. View organization donation data for downloaded gifts.
5. (not shown) Create a negative donation to reduce all or part of a church’s gift and re-assign manually to actual givers.

MPD Phase

TntMPD's ability to connect financial gifts with a contact—and then to take action based on financial activity—is what makes TntMPD such a powerful tool. Of the more than 150 data fields in the TntMPD database, the **MPD Phase** and the **Pledge** amount/ frequency are the two most important.

The **MPD Phase** determines how each contact is handled in lookups and analysis tools, and how your financial statistics are calculated.

Each contact will move through the MPD Phases from top to bottom, although each contact may skip some.

Your goal in MPD should be to have each contact **Make a Decision.** Whether that decision is **Yes**, to become a partner of some kind (regular **financial** partner, periodic **special** partner, or **prayer** partner), or **No**, not become a partner, seek to have each person or couple make a decision.

The MPD Phase has an unwritten "decision line" that separates those contacts who have made a decision from those who have yet to. *Why?* Because the "**Contacts and Referral Pool**" (below) on the **Analysis View** counts only those contacts whose phase is above the decision line.

Pledge Amount.
If a contact's MPD Phase indicates they are a regular financial giver ("PARTNER-Financial"), then TntMPD compares their giving to their pledge commitment and offers assorted features: **Gift Automation** (auto-tasks), *Late Donor Report,* the colored status dot on the Contact View, and **Support Progress** box on the Analysis View.

MPD Phase FAQs

Do I really need to use the MPD Phase? Can I just make all of my contacts the same MPD Phase?

It matters. The MPD Phase—in combination with the Pledge amount and frequency—are the cornerstone of the lookups and analysis tools.

I'm just starting out with a bunch of names, or I have just received several referrals. What phase do I use for them?

By default, new contacts are assigned "**n/a**" as their MPD Phase. You should change them to "**Never Contacted**" until you make the initial contact, at which point you would begin moving them down the list.

What phase do I assign to family members who I want to send my newsletter to but do not intend to ask for support?

Either **PARTNER-Pray** or **Never Ask**.

I just added 100 contacts. Do I have to go to each contact individually to change them from "n/a" to "Never Contacted"?

No. Use a lookup to find the people you want to change, then select **Group | Field Change** from the Group menu. Select "MPD Phase" from the drop-down list, then select "Never Contacted" from the right drop-down list and press "OK". TntMPD will ask for confirmation, and then change all of them. *Tip: Group | Field Change is a useful menu item for any time you want to change a certain data field for a large group of contacts.*

Do I have to change the MPD Phase for each contact every time they change categories?

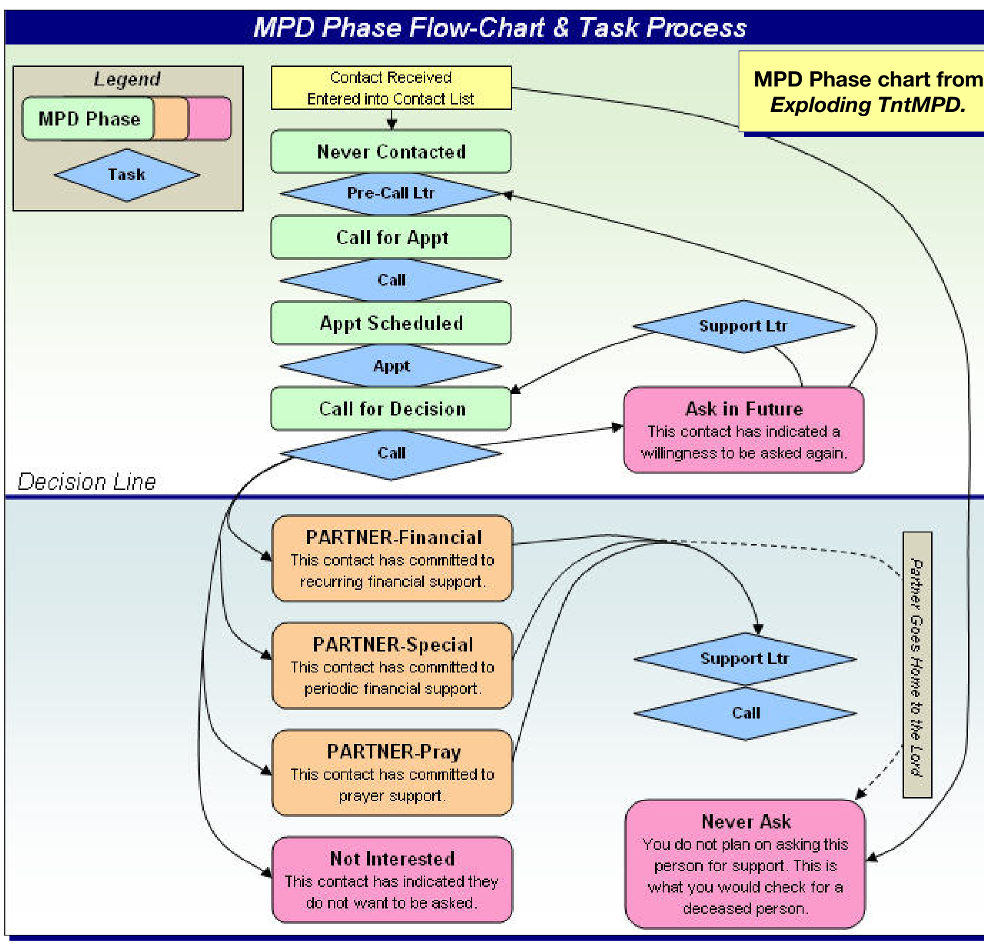
Keep in mind the most important change a contact makes is when they **make a decision.** The phases above the decision line are more for your own reference and for doing lookups. Ultimately it does not really matter what their phase is if it is above the decision line, because you want to move them over that decision line.

TntMPD has a special feature that will sometimes prompt you to change a contact's phase based upon a certain task you perform. For example, if their phase is "Never Contacted" and you record a task of some kind (such as sending a letter), TntMPD will prompt you to change their phase (at right ►).

If you assign a pledge amount to a contact, TntMPD will automatically change their phase to PARTNER-Financial because that is the only phase allowed if a contact has a pledge amount.

When would I move a committed partner back above the decision line?

The only time you would likely move a person back above the decision line is if they choose to leave your team temporarily. For example, a regular donor informs you they need to stop giving for a while due to job concerns, but wants you to call back in a year. Keep sending your newsletter, but change their phase to **Ask in Future.** (Another, perhaps better option would be to change their phase to PARTNER-Pray and create a **Call** task for that future date.)



MPD Phase chart from *Exploding TntMPD.*