Importing Contacts

Overview

Many missionaries who begin using TntMPD have been serving the Lord for years in the mission field. Naturally they have had to maintain a list of ministry partners in some way. Some have kept meticulous, paper records. Others created their own databases in Microsoft Word, Excel, or Access (and some have even maintained giving records in those files as well).

These days, many people keep their contacts in Outlook and Palm Desktop also. For those who already have a reliable database of their partners, the transition to TntMPD can be much shorter than alternative methods such as downloading from your organization's donor database or manually entering all your contacts.

Note: Importing contacts from an existing database—via a text file—should not be construed as "easy". This reference guide is intended to guide you through the process. However, the ease of this will be dependent in part on your own comfort level with your existing database, as well as how detailed your current list is.

If you find that this import method does not work for you, do not become unduly frustrated but try an alternative method.

TntMPD has over 150 data fields in the database. The more data you have on your ministry partners (such as pledge amount, church, children, birthdays and anniversaries, referrer, etc.), the more you will benefit from importing your contacts.

Importing your contacts from a file is a better solution than other methods because it allows you to pre-populate the most data. Even if you can download your partners' names and addresses from your organization, you could still save many hours (that is, days or weeks) of work getting your TntMPD database to a good working point.

This reference guide focuses specifically on the steps necessary to convert an existing database to a file that can easily be imported into TntMPD.

Q: I already have a system that works for me. Why should I switch to using TntMPD?

A: Missionaries who have their own system find switching to TntMPD easy because of the powerful features of TntMPD. For most users, TntMPD embodies the features they only dreamed about when developing their own systems. Fortunately, the more complex the system you have, the easier it will be to convert your existing database and importing it into a new TntMPD database.

Steps to importing your database

Step 1: Determine how much information you have already.

Look at the list on the back side of this guide and check off the fields you already have (such as name, address, phone, pledge amount/frequency, church name, etc.).

Step 2: Convert your data into a format TntMPD will recognize.

If you have an existing database, it is very likely you have data fields combined when TntMPD wants them separated. This will probably be the most time-consuming step in the conversion process.

Here are the most commonly combined fields:

Title & Spouse Title (Mr. and Mrs.)
Firstname, Spouse Firstname, Lastname and Suffix
City, State, Zip

There are several different ways to do this. You could save your file as a text file, then open it in Microsoft Word and use *Search & Replace* to convert "&" or commas to tabs. See the box below to learn more about using Word to convert your data. You could also use "Text to Columns" on Excel's data menu (don't try this unless you have experience or want to learn).

Step 3: Add information you do not currently have in your database.

There are several fields in TntMPD, especially on the MPD Tab, that you can add to your file before loading. Doing it in advance saves you from updating common fields one-at-a-time later.

Some common data you may have—maybe in your head but not in your database—include: **MPD Phase** (type of ministry partner), **Pledge Amount** and **Pledge Frequency** (e.g., $75 monthly), referrer, church name, birthdays and anniversaries, and children information.

Step 4: Import.

Save your file as a .csv (comma-separated values) file. In TntMPD, select **File | Import | Import Contacts from Text.** Match the field names and click ok.

When you import, you may have to try several times and correct errors in the text file between tries.

Database in Microsoft Word?

While Excel is probably the easiest software to use for preparing a database for import into TntMPD, you can use Word.

Make sure none of your fields has a comma in it, as a comma is the delimiter that separates each field.

Your **first row** should define the field as shown here, with no spaces after commas. (Bold added to make it easier to read.)

Title,**SpouseTitle**,FirstName,**LastName**, SpouseFirstName,**Greeting**,HomeAddress, **HomeCity**,HomeState,**HomeZip**, HomePhone,**Referrer**,ChurchName, **MPDPhase**,PledgeAmount, **PledgeFrequency**,SendNewsletter,**etc.**

Your **data rows** would look like this example. In cases where a specific contact has no data—such as if you do not have their phone number—you would just put the next comma.

Mr.,Mrs.,Roger,Rabbit,Jessica,Roger & Jessica,24 Gooey Ave,Toontown,CA, 99999,123-234-8262,Fred Flinstone,First Baptist Church of Toontown,60,75,1,TRUE.

These last four items indicate:
- The MPD Phase is 60 ("PARTNER-Financial")
- Pledge amount is $75
- Pledge frequency is monthly ("1"),
- They should receive the newsletter ("TRUE").

TntMPD Fields

This is not an exhaustive list, but only the most common for those converting existing databases. For a complete list, see Chapter 7 of *Exploding TntMPD.*

Notes:

(1) For any column in your text file that has a TRUE/FALSE value, you must enter a TRUE or FALSE for each entry (such as Send Newsletter, Next Ask, Pledge Received, etc.).

(2) If you use PLEDGE AMOUNT as a column, you also need PLEDGE FREQUENCY as a column. Pledge does not need a value if it is zero.

(3) Conversely, If you have PLEDGE FREQUENCY and MPD PHASE as columns, you must have a value in each row even if it is zero.

(4) If a partner has a pledge, their MPD Phase must be 60 "PARTNER-Financial."

Name

Title *(e.g., Mr., Dr., Rev., Mrs., Ms.)*
FirstName
MiddleName
LastName
Suffix *(e.g., Jr., Sr., II, III)*
SpouseTitle
Spouse *first name*
SpouseMiddleName
SpouseLastName *(Only if different than LastName.)*

Home Address

HomeAddress
HomeCity
HomeState/Province
HomeZip/Postal Code
HomeCountry

Phone

BusinessPhone
HomePhone
MobilePhone
OtherPhone

Internet

Email1
Email2 *(For the spouse, if different.)*

Notes

Notes *(Can be a longer text field.)*

Greetings

FullName *(Formal greeting for env.)*
Greeting *(Used inside letters.)*
ShortName

MPD

MPDPhaseID *(From this list.)*

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

PledgeAmount *(If amount is greater than zero, PledgeFrequency must also be greater than zero.)*

PledgeFrequency *(From this list.)*

0	<none>
1	monthly
2	bi-monthly
3	quarterly
4	quad-monthly
6	semi-annual
12	annual
24	biennial

PledgeReceived TRUE/FALSE *(First check has/has not been received for this pledge.)*
ReferredBy *(Primary referrer.)*
Region *(To group contacts geographically.)*
SendNewsletter TRUE/FALSE
Magazine TRUE/FALSE

Personal/Professional

Children
ChurchName

User

User1
User2
User3
User4
Categories
UserStatus

> *"User" fields allow you to create custom data types for your contacts.*

> *Most missionaries have many "people" contacts but only a few organizations such as churches or businesses. Organizations require different fields, so it may be easier to enter manually any organizations that give to your work.*

Sample of a text file ready to import:

Bottom picture is an extension of the right side of the top picture.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	*Title*	*First Name*	*Middle Name*	*Last Name*	*Suffix*	*Spouse Title*	*Spouse First Name*	*Spouse Middle Name*	*Spouse Last Name*	*Greeting*	*Short Name*	*Home Street Address*	*Home City*
2	Mr.	Mickey	Walter	Mouse		Mrs.	Minnie			Mickey & Minnie	Mickey & Minnie Mouse	1 Walt Disney Way	Orlando
3	Mr	Dopey		Dwarf						Dopey	Dopey Dwarf	17 Gnarled Tree Dr	Enchanted For
4	Mr.	Woody		Cowboy		Mrs.	Bo		Peep	Woody & Bo	Woody and Bo Peep		
5	Mr.	Donald	Q	Duck		Mrs.	Daisy			Donald & Daisy	Donald and Daisy Duck	2 Walt Disney Way	Orlando
6	Mr	Roger		Rabbit		Mrs	Jessica			Roger and Jessica	Roger and Jessica Rabbit	24 Gooey Ave	Toontown
7	Mr.	Fred		Flintstone		Mrs.	Wilma			Fred & Wilma	Fred and Wilma Flintstone	341 Rocky Road	Pebble Beach
8	Mr.	Bugs		Bunny		Mrs.	Babs			Bugs & Babs	Bugs and Babs Bunny	5000 Carrot Drive	Winter Garden
9		Nemo		Rainbowfish						Nemo	Nemo Rainbowfish	73 Undersea Way	Atlantis
10	Mr.	Winnie	the	Pooh						Pooh	Winnie the Pooh	c/o Christopher Robin Under the Oak Tree	Hundred Akre
11	Mr.	George		Jetson		Mrs.	Jane			George and Jane	George and Jane Jetson	2001 Space Dock Wy	Cape Station
12	King	Tarzan	of the	Jungle		Mrs.	Jane		of the	Tarzan & Jane	Tarzan and Jane Jungle	423 Vine St	Everglades

	D	N	O	P	Q	R	S	AC	AD	AE	AG	AI	AJ	AK
1	*Last Name*	*Home State/Province*	*Home ZIP/Postal*	*Home Phone*	*Email 1*	*Referred By*	*User 1*	*Pledge Received*	*Pledge Amount*	*Pledge Frequency*	*MPD Phase*	*Send Newsletter*	*Direct Deposit*	*Magazine*
2	Mouse	FL	32899	(763) 261-5	mickey@disney.	Bugs Bunny	We	TRUE	60	1	60	TRUE	FALSE	TRUE
3	Dwarf	VT	03001					FALSE		0	0	FALSE	FALSE	FALSE
4	Cowboy	FL				Buzz Lightyear	We	FALSE		0	70	TRUE	FALSE	FALSE
5	Duck	FL	32899	407895315	dduck@disney.o	Mickey Mouse	We	TRUE	50	1	60	TRUE	FALSE	TRUE
6	Rabbit	CA	99999	(314) 234-8262		Fred Flintstone		FALSE	75	1	60	FALSE	FALSE	TRUE
7	Flintstone	FL	37584	(576) 984-1	fred.flinstone@h	Bugs Bunn			145	1	60	TRUE	FALSE	TRUE
8	Bunny	FL	37841	(575) 898-4	bugs_bunny@w	Mickey & M				0	70	TRUE	TRUE	TRUE
9	Rainbowfish	FL	33456			Arial (Merr			20	1	60	TRUE	FALSE	TRUE
10	Pooh	VT	01402			Mickey Mo				0	80	TRUE	FALSE	FALSE
11	Jetson	FL	33701	(321) 231-1	gjetson@spacen	Fred Flints			100	1	60	TRUE	TRUE	TRUE
12	Jungle	FL	35433	123-427-2800		Prince Cha				0	70	TRUE	FALSE	FALSE

> *Pledge Frequency and MPD Phase must have a value on each row, but Pledge Amount can be blank if it is zero.*