Partner Essentials

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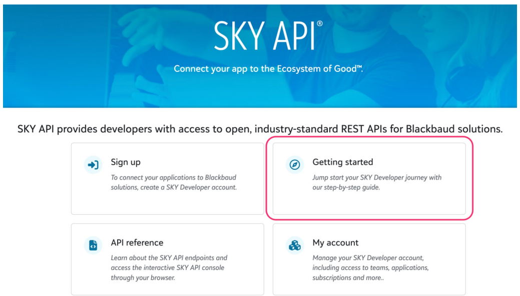
Integrations

Blackbaud: All Donations, Contacts, & Account Activity

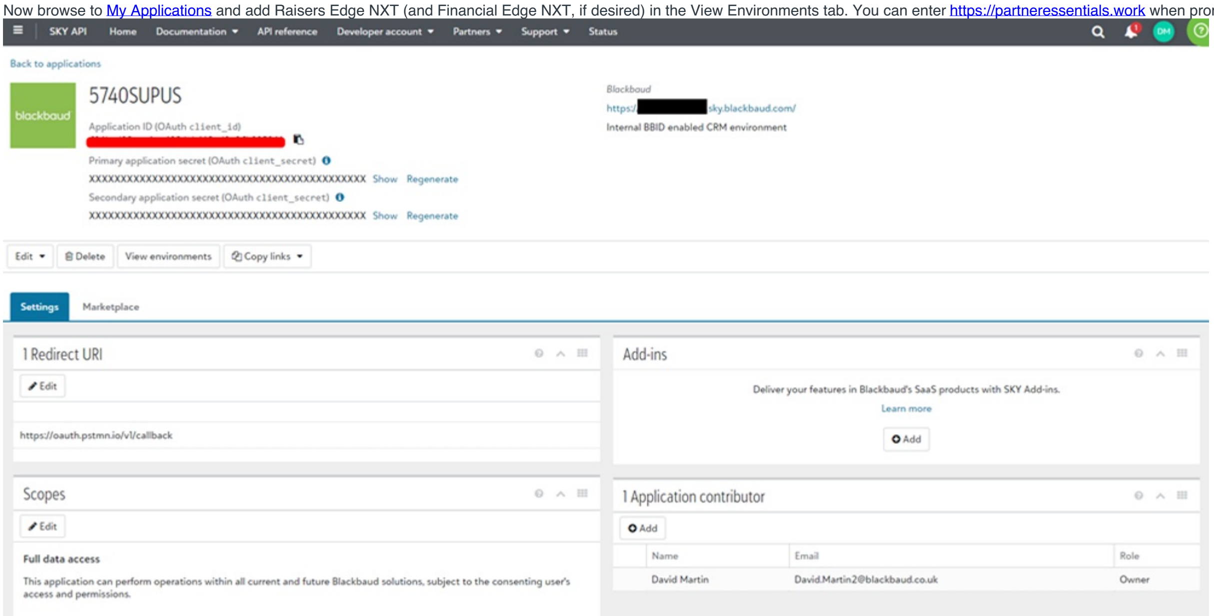
Partner Essentials uses the SKY API to query configured lists for relevant data. The SKY API is an interface tool that allows Blackbaud clients to connect and integrate Blackbaud solutions with other applications and services.

Steps to Complete in Blackbaud:

- Visit https://developer.blackbaud.com/skyapi/ and create an account by following the Getting Started option. This gives you access to the APIs you will need.



- Now browse to [My Applications]() and add Raisers Edge NXT (and Financial Edge NXT, if desired) in the View Environments tab. You can enter [https://partneressentials.work]() when prompted for Callback URL.



- Please deliver the following connection information to Solertiae for implementation. In our implementation, we will use Grant Type of Authorization Code, Auth URL of [https://oauth2.sky.blackbaud.com/authorization,]() and will generate the Access Token via [https://oauth2.sky.blackbaud.com/token](). These will all be sent as Basic Auth Header per Sky API documentation.
  - Username (please limit scope of privileges to READ only)
  - Password
  - Client ID
  - Client Key

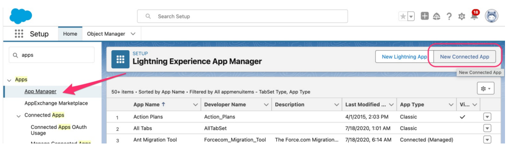
Solertiae recommends [BitWarden]() as a service to securely deliver this connection information. Please do not share them via email.

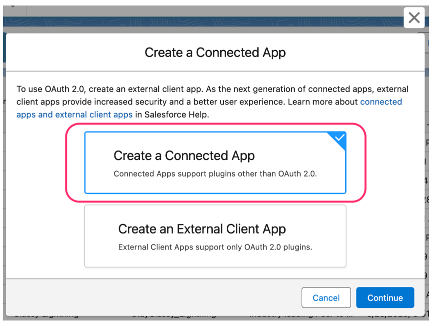
Salesforce: All Donations & Contacts

Partner Essentials uses the Salesforce REST API to run SOQL queries against your instances for relevant GAU Allocations (within a certain time range), General Accounting Units (for activated users based on a WorkerID), and Opportunities (to identify Primary Contacts/donors). This is based on the standard Salesforce data model. Adaptations can be made to consider any distinct implementations.

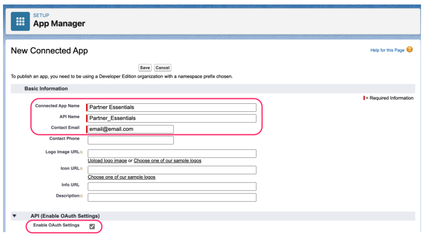
Steps to Complete in Salesforce:

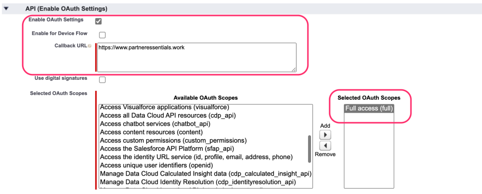
- Create a Connected App



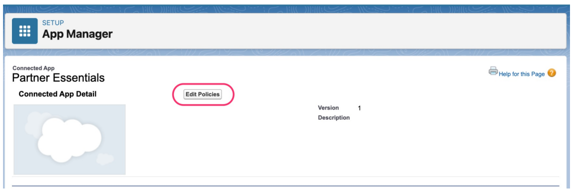


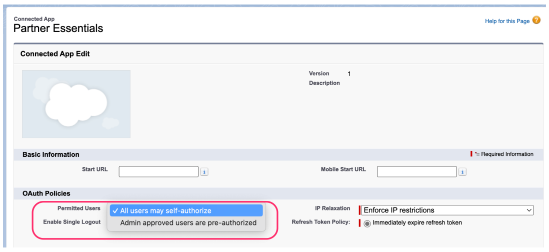
- Enter App Name, API Name, Contact Email, and enable OAuth Settings. With OAuth Settings enabled, add the Callback URL and OAuth Scopes of Full access (full). Remaining settings can be left as default.



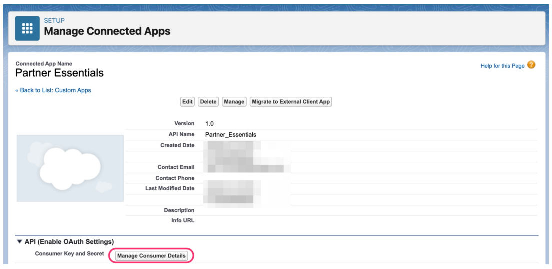


- After you save the app, look for it in your list and select Manage. Then select Edit Policies and set All users may self-authorize.

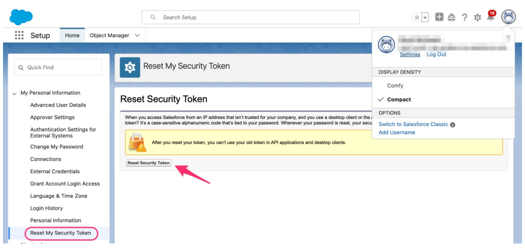




- Now return to this list and click View. Then select Manage Consumer details and copy your Client ID and Client Secret.



- Lastly, browse to user settings for the user that you want authorizing the API. Select Reset My Security Token. And then note the security token delivered to the corresponding user email address.



- Please deliver the following connection information to Solertiae for implementation:
  - Salesforce domain
  - Username (please limit scope of privileges to READ only)
  - Password
  - Client ID
  - Client Key
  - Security Token

Solertiae recommends BitWarden as a service to securely deliver this connection information. Please do not share them via email.

Start Here: Connect Services

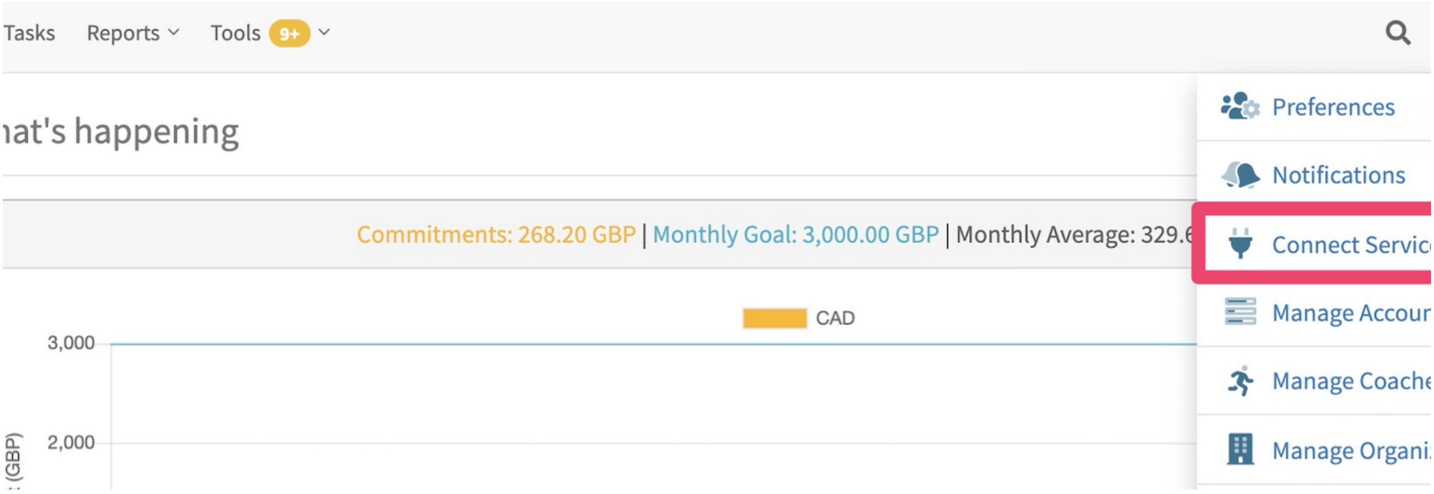
** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

Connect Services facilitates how you connect to MPDX and connect other external services to MPDX. This integration allows you to manage multiple applications in one place to simplify your MPD process.

Connect Services

To locate or modify any of your *Connect Services*:

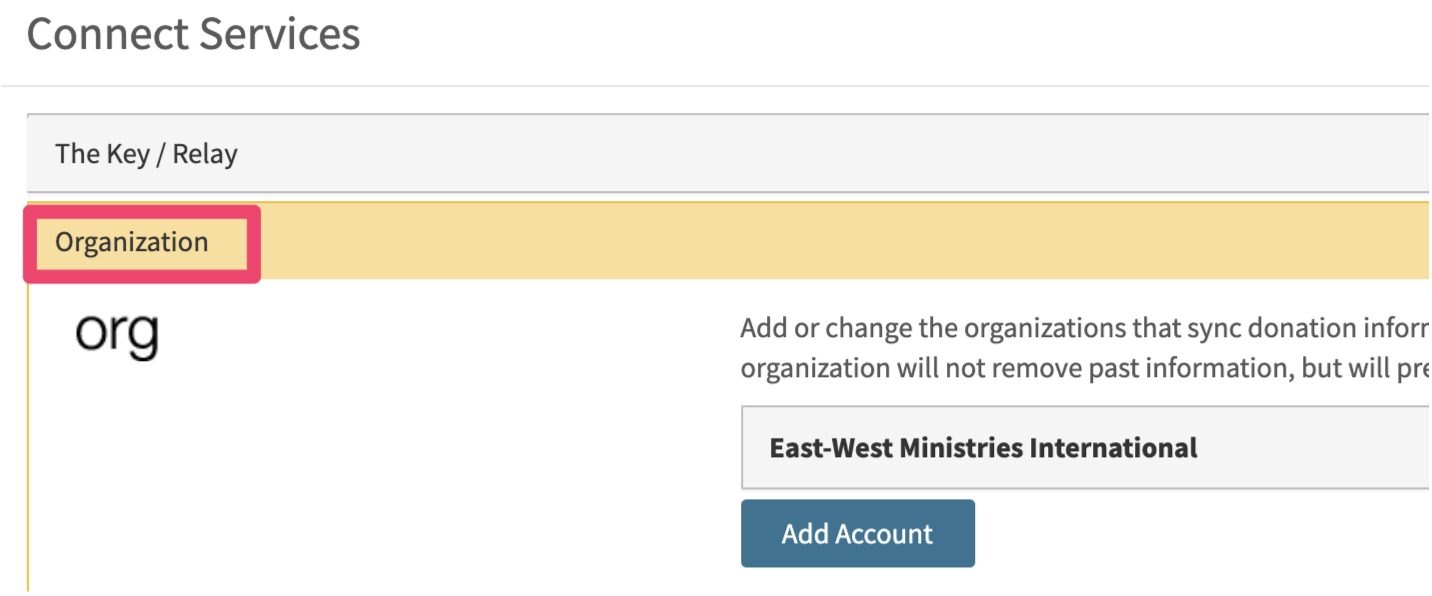
- Click on the gear icon (**Settings)** button (top right) and select **Connect Services**.



Organization

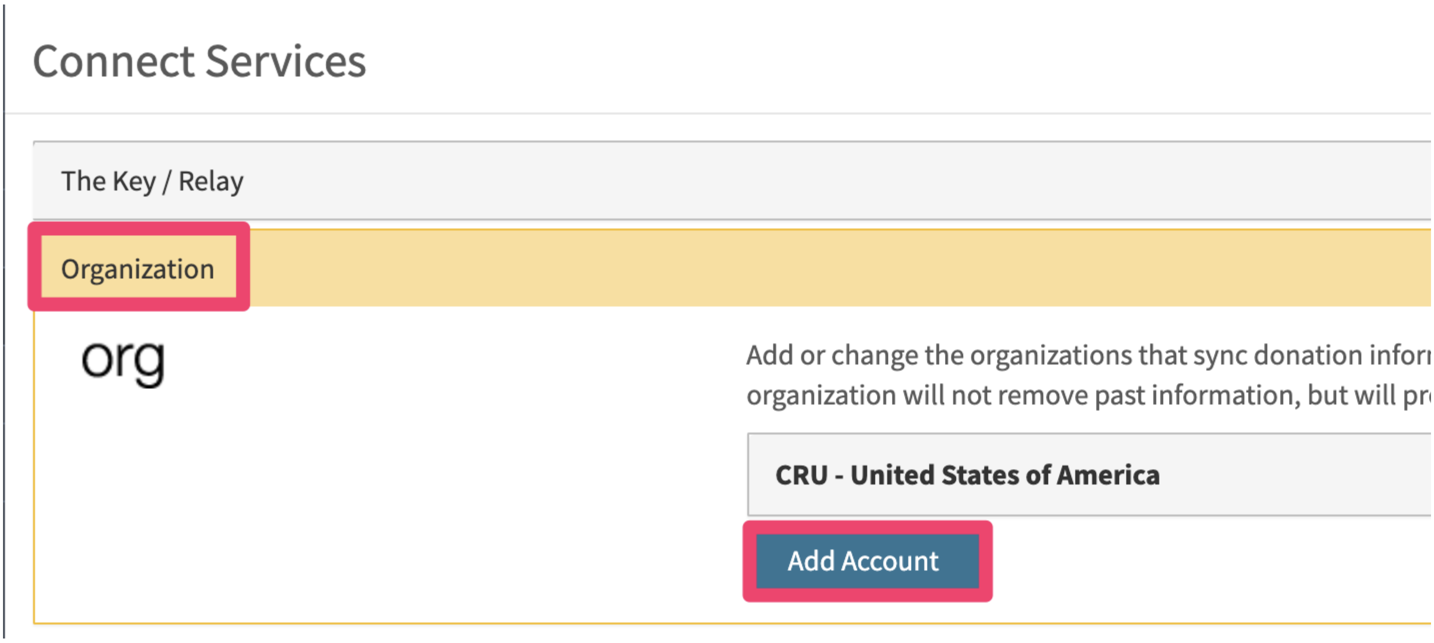
The primary organization for your MPDX account was selected during setup. However, if you need to add a new or remove an existing organization, this option is located as shown below.

- Click the **Dropdown Arrow** to the right of Organization.
- Click **Refresh**, if needed, to sync MPDX with your ministry services.
- Click on the **Trash** icon to remove any unwanted organization.

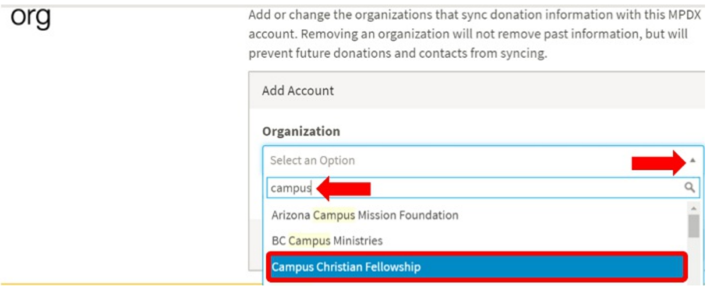


Add Organization

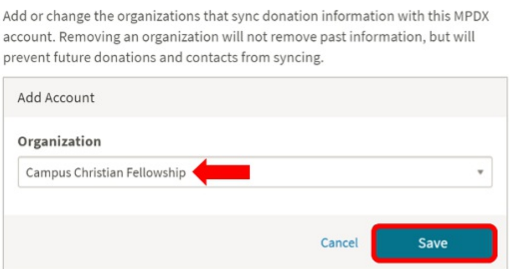
- Scroll down and click on the **Add Account** button.



- Click on the **Drop-down** on the right.
- Type the first few letters of the organization.
- Then select the correct **Organization**.



- The **Name of the Organization** you've selected will be displayed.
- Click on **Save**.



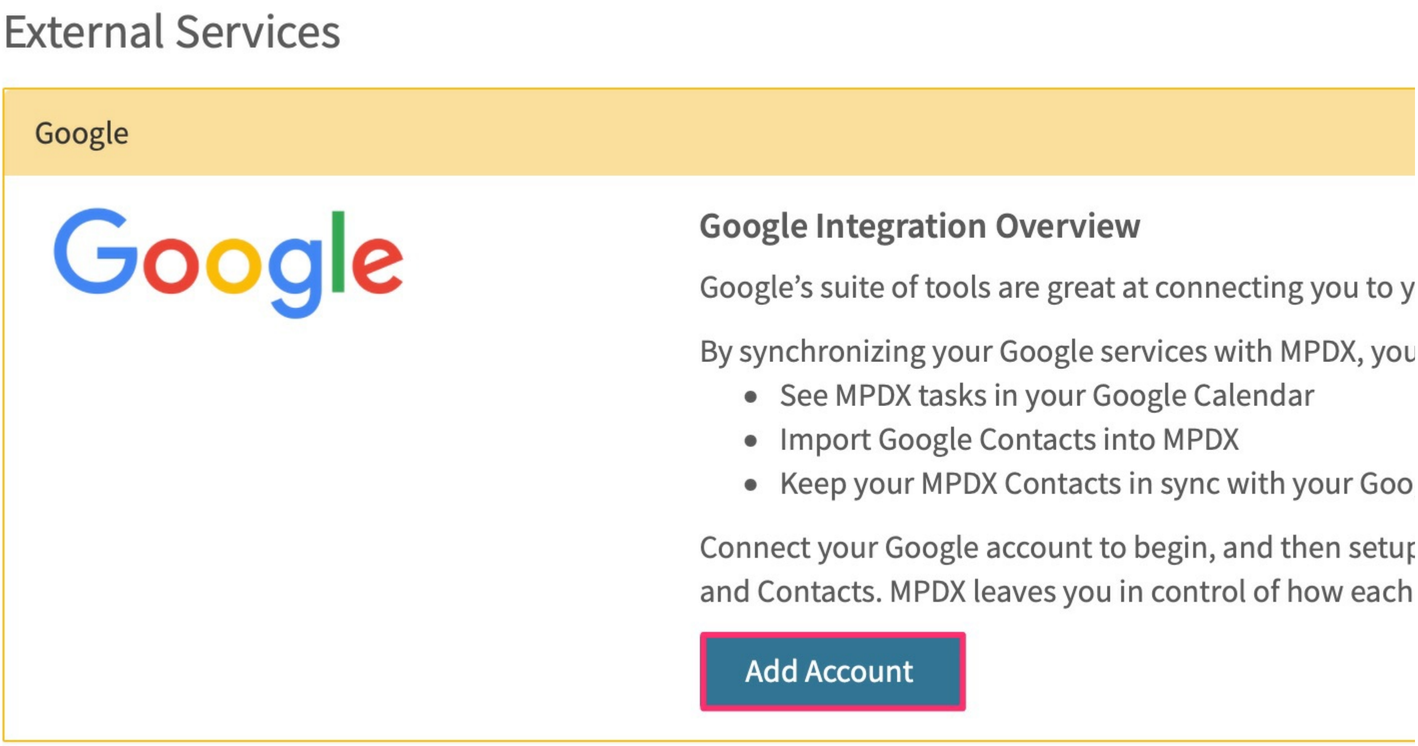
External Services

There are 4 external applications you can connect to MPDX: **Google**, **MailChimp**, **prayerletters.com**, and **ChalkLine**. Integrating one or more of these applications allows you to keep up with MPDX on the go.

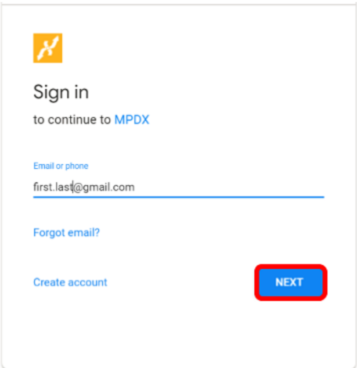
Google

If you have a Gmail account and would like to connect MPDX to your Google Calendar:

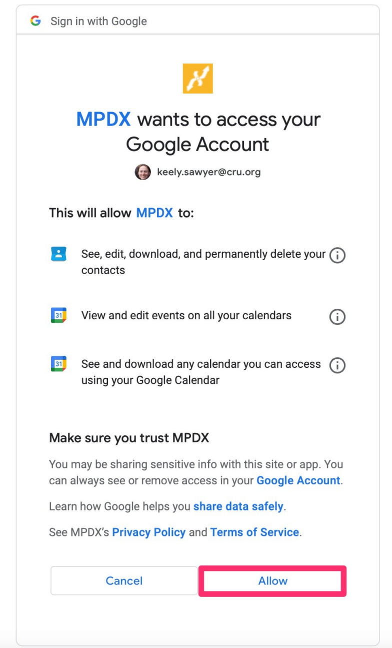
- Click on the *drop-down arrow* to the right.
- The click on **Add Account**.



- **Sign in** to your Google account with the email of your choice.

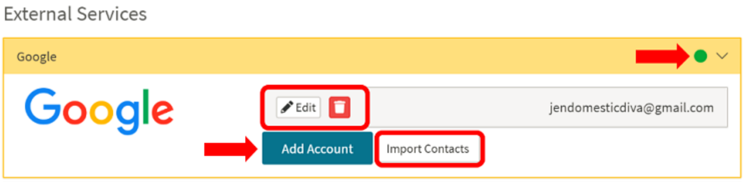


After you login, click on **Allow** to grant MPDX to access your Google Account.



Your Google email address will be displayed in MPDX, External Services - Google.

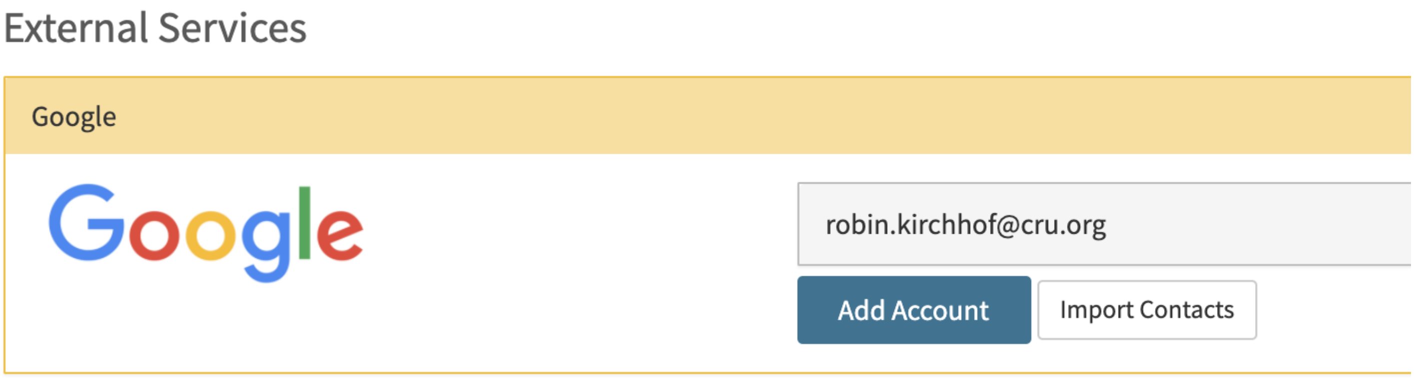
- The **Green Dot** on the right indicates a proper connection.
- The **Import Contacts** button allows you to import your Gmail account address book.
  - First, Create Groups in Google Contacts to import ministry partners only.
- The **Add Account** button allows you to add any additional Google email addresses.
- Click the **Edit** button to make changes to the email address listed.
- Click the **Trash** icon to delete the email address listed.



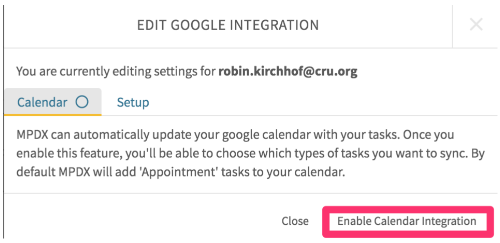
Google Calendar Integration

Once you grant MPDX access to your Google Account:

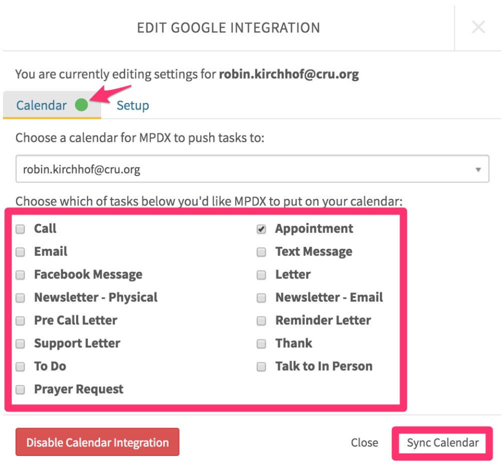
- You will see your *Gmail Address* listed.
- An Account Sync Dot will appear in green at the top right.
- To integrate your calendar select the Edit button.



- Click on Enable Calendar Integration.



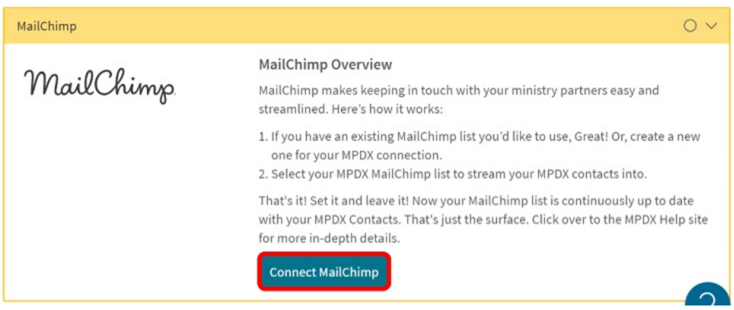
- The Calendar tab will have a green dot to indicate the sync was successful.
- Select the Tasks you want to allow MPDX to display on your Google Calendar.
- Click the Sync Calendar button.



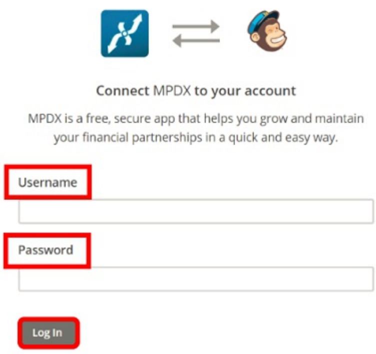
MailChimp

You can sync MailChimp with MPDX by using your existing email list or by creating a new list.

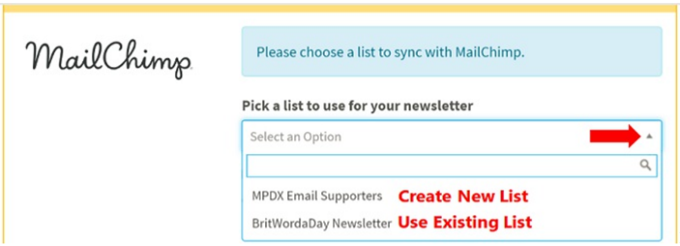
- Click on the *drop-down arrow* to the right then click **Connect MailChimp**.



- Type in your **Username** and **Password**, then click the **Log In** button.



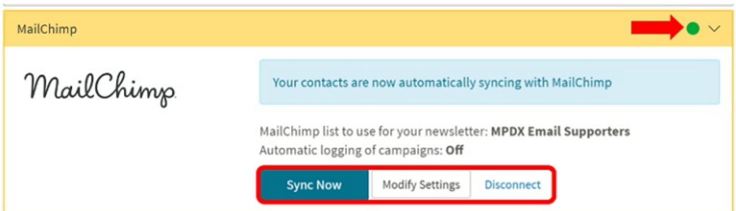
- Click on the **Drop-down Arrow** on the right.
- Select either *MPDX Email Supporters* to **Create a New List**.
- Or select an **Existing List** to sync with MPDX.



Before you sync, you have the option to:

- **Automatically log sent MailChimp campaigns in contact task history**.
- Then click **Save**.

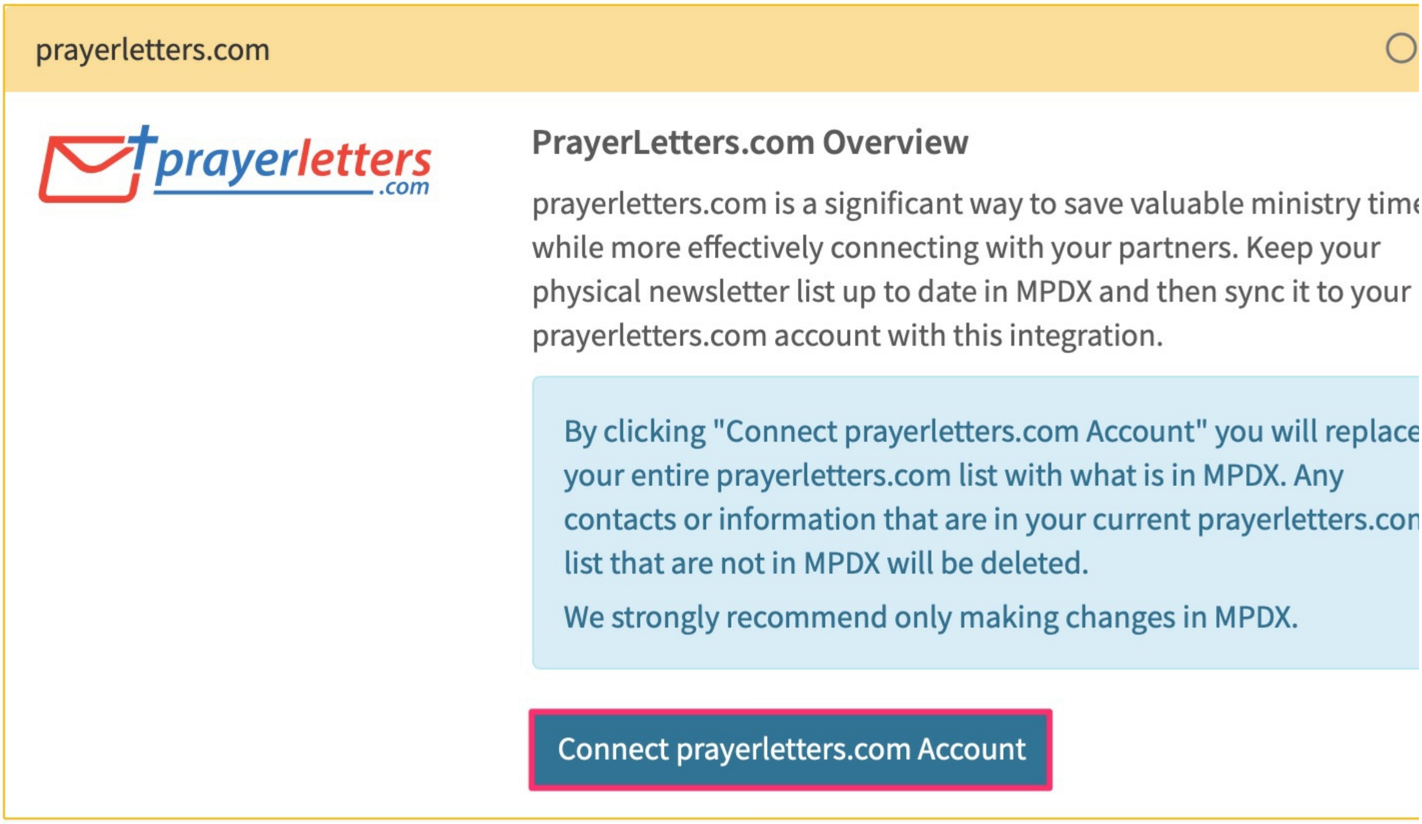
- The **Green Dot** indicates a proper connection between MailChimp and MPDX.
- You can either **Sync Now** to update your MailChimp list,
  - This is not necessary the first time you connect.
- Click **Modify Settings** to make any changes to the connection,
- Or click **Disconnect** to remove the connection from MPDX.



prayerletters.com

For those who prefer physical newsletters, **prayerletters.com** is an application that syncs with MPDX.

- Click on the *drop-down arrow* to the right.
- Click on **Connect prayerletters.com Account**.



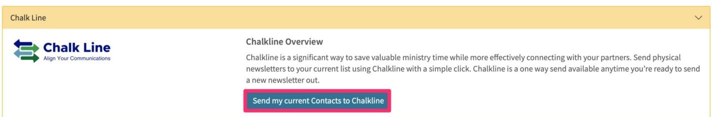
- **Sign in** to your existing prayerletters.com account by using the correct **Email** and **Password**.
- Or you can **Sign in with Google** to connect your account.

Note: Connecting your account will replace your current prayerletters.com list.

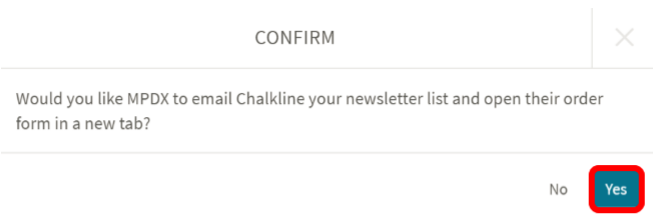
Chalk Line

Another physical prayer letter tool that syncs with MPDX is Chalk Line.

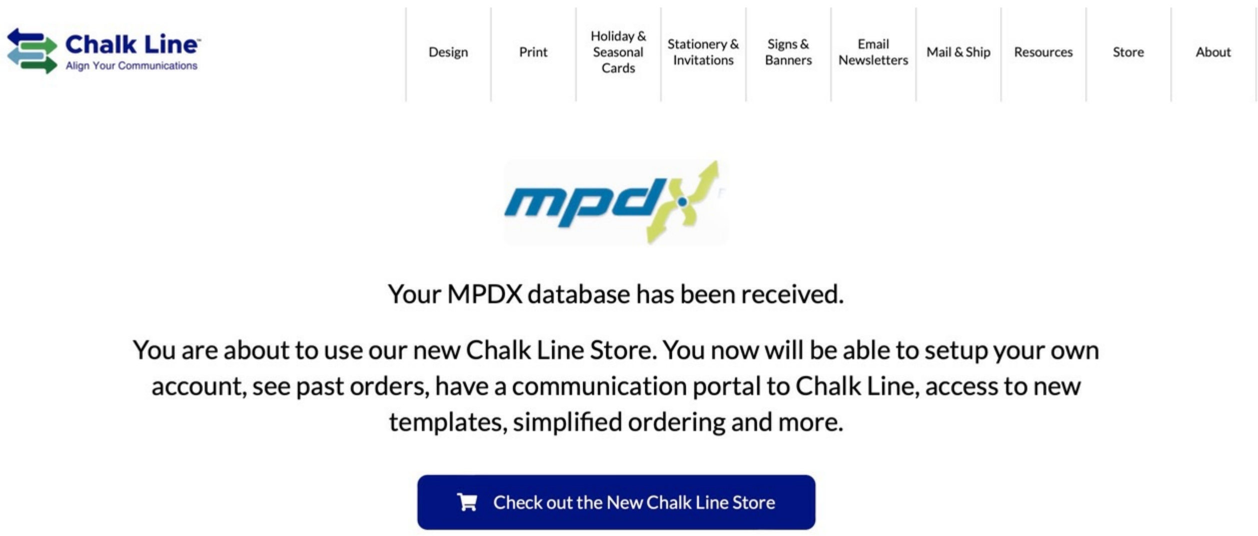
- Click on the *drop-down arrow* to the right.
- Then click on **Send my current Contacts to Chalkline**.



- Confirm sending your MPDX newsletter contacts to your Chalkline account by clicking **Yes**.



- After you confirm, click on in the Chalk Line site to create your order or sign in to your Chalkline account.



DonorHub: All Donations & Contacts

If you are looking for an integration with your accounting or contribution software not directly supported by Partner Essentials, you will probably find it is supported by DonorHub® by TntWare - https://www.tntware.com/donorhub/.

DonorHub® is a cloud service, fully managed by TntWare, that delivers information from your church's or mission organization's donation and accounting systems to your staff. This way your staff can take full advantage of great support raising tools like TntConnect and Partner Essentials without having to manually enter donations. The data flows from your organization's systems automatically so for all this benefit, you add zero work to your office staff.

AND DonorHub® by TntWare also integrations with MANY accounting systems! If you prefer to start with just a contributions integration, you can always update account balances in bulk as needed. Please see Import: Account Ending Balance.

Steps to Complete in DonorHub® by TntWare:

- Establish service via https://www.tntware.com/donorhub/.

Steps to Launch:

- Signup for a Partner Essentials integration service and select DonorHub® by TntWare.

Considerations:

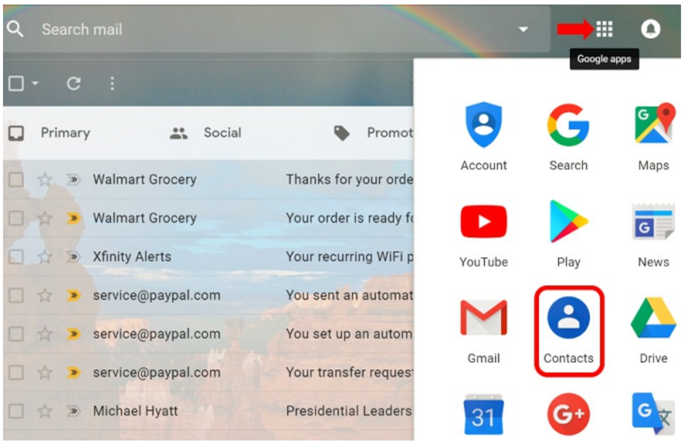
- It is possible to share accounts with other Partner Essentials users.
  - How to manage this as an Org Admin via DonorHub® by TntWare:
    - **Option 1:** I want to setup a field worker to be able to see more than 1 designation on the PE Dashboard. In DonorHub® by TntWare, please create and link the desired designations against a single profile. This profile will appear as an account in Partner Essentials. BUT warning, IF the same designation set appears on any other DonorHub® by TntWare profile - regardless of the profile's name, they will automatically behave per Option 3 below.
    - **Option 2:** I want to setup a field worker to be able to see designations on separate PE Dashboards. In DonorHub® by TntWare please create Option 1 for as many profile/account sets as you desire. BUT warning, IF the same designation set appears on any other DonorHub® by TntWare profile - regardless of the profile's name, they will automatically behave per Option 3 below.
    - **Option 3:** I want a team of field workers to be able to collaborate and manage notes and tasks for a common shared PE account. This will automatically happen for any DonorHub® by TntWare profiles that have a common set of designations selected.
  - How to empower your users to manage this via Partner Essentials:
    - **Option 1:** User can share a Partner Essentials account with another Partner Essentials user - and revoke at anytime. Please see Setup: Manage Accounts.
    - **Option 2:** User can provide limited coaching access to any Partner Essentials user - and revoke at anytime. Please see For MPD Coaches, Team Leads and Supervisors. **THIS IS THE RECOMMENDED APPROACH FOR SHARING.**

Google: Create Groups in Contacts

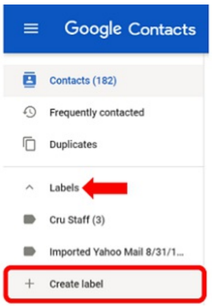
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Creating Groups (Labels) in Google Contacts

- Log into your **Gmail Account**.
- Click on the **Google Apps** icon
- Click on the **Contacts** icon.
- Your **Google Contacts** should open in a separate window or tab.

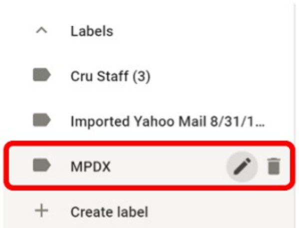


- On the left, locate the **Labels** section and click on **Create Label**.

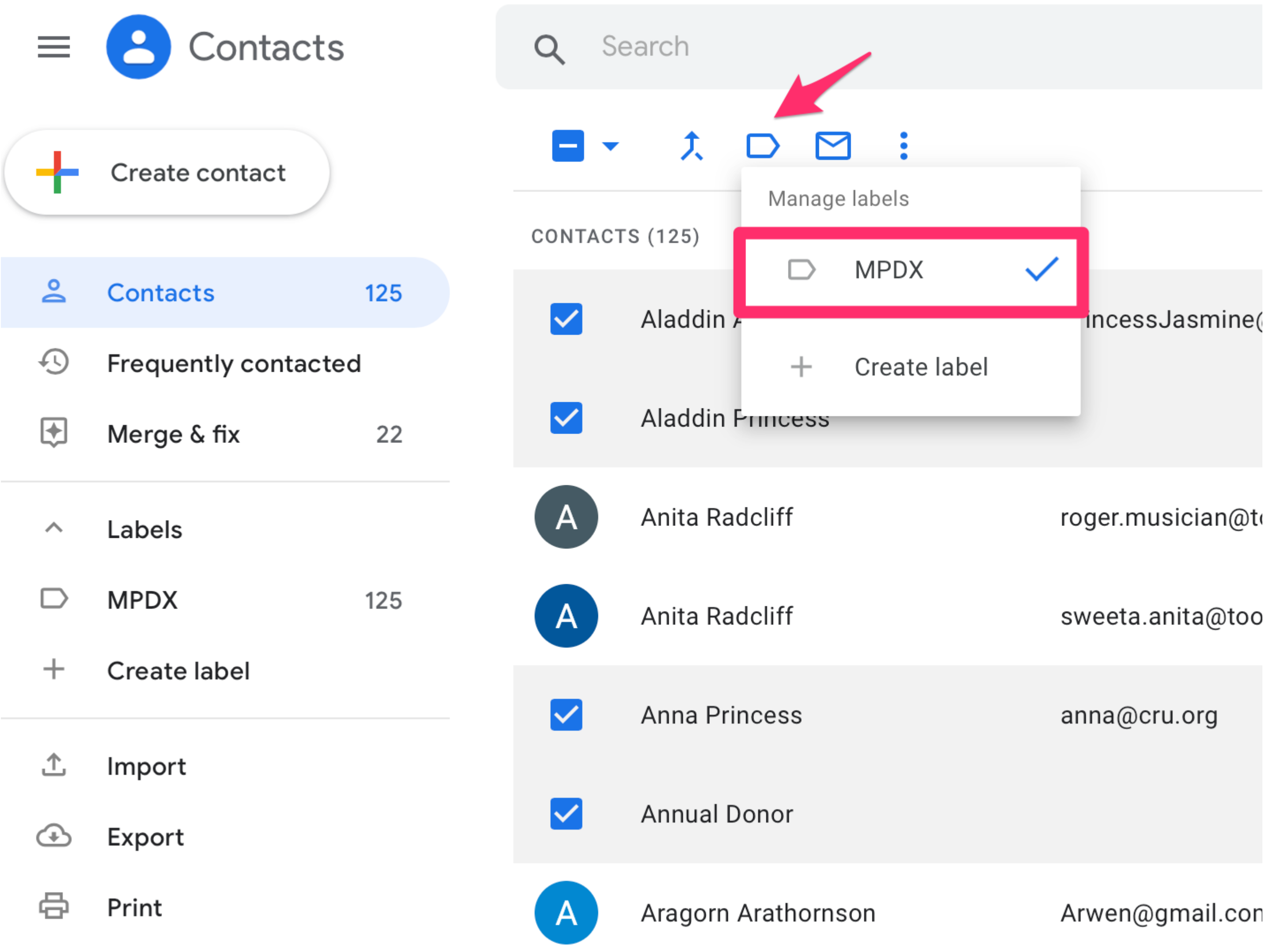


- Type in the **Label Name**, i.e., *MPDX* and click **OK**.

The **MPDX** label will displayed in the **Labels List**.



- Select the **Contacts** you want to add to the label, i.e., *MPDX*.
- Click on the **Manage Labels** menu.
- Select the **New Label**.



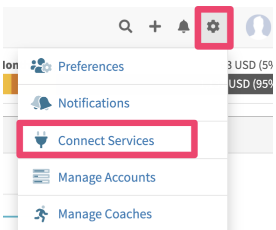
Note: Once you've added the selected Google Contacts to that new group, you are ready to [Import Google Contacts](#) into MPDX.

Google: Sync Calendar

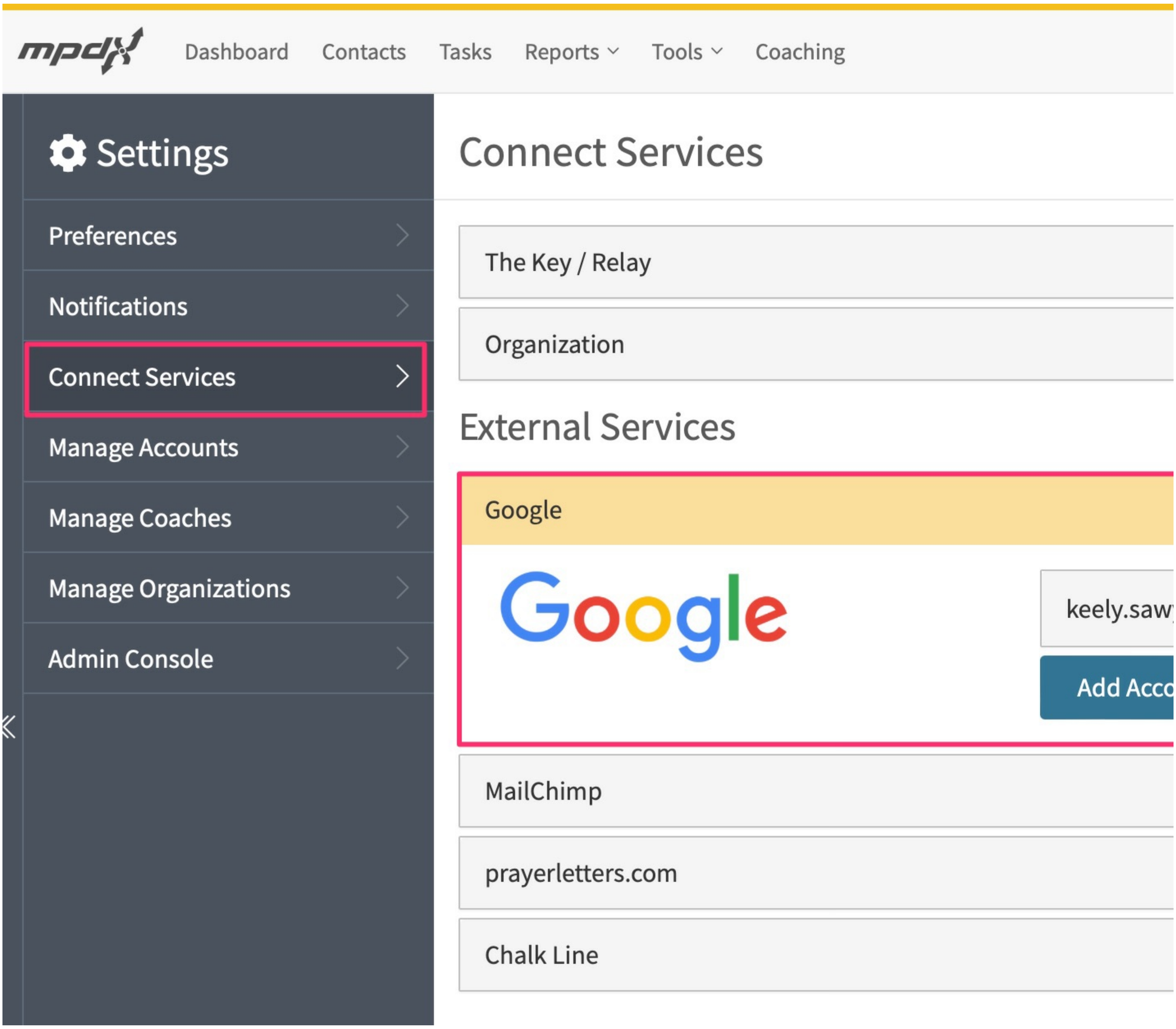
*** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ***

To sync MPDX with your Google calendar:

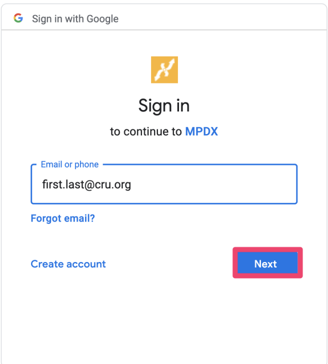
- Click the gear icon (**Settings**) button and select **Connect Services**.



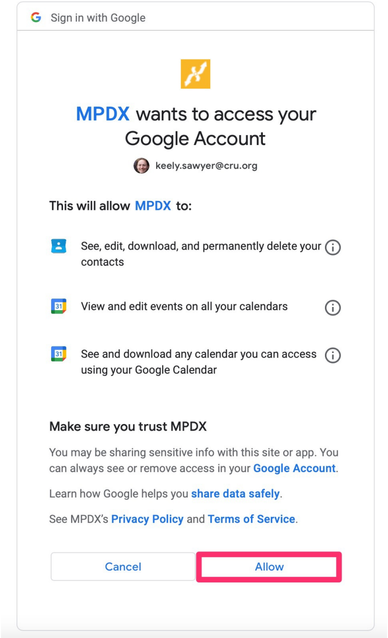
- Scroll down to [External Services](#).
- Click on **Google** and then **Add Account**.



- Sign into your **Google Account** using your Gmail address.
- Click on **Next**.



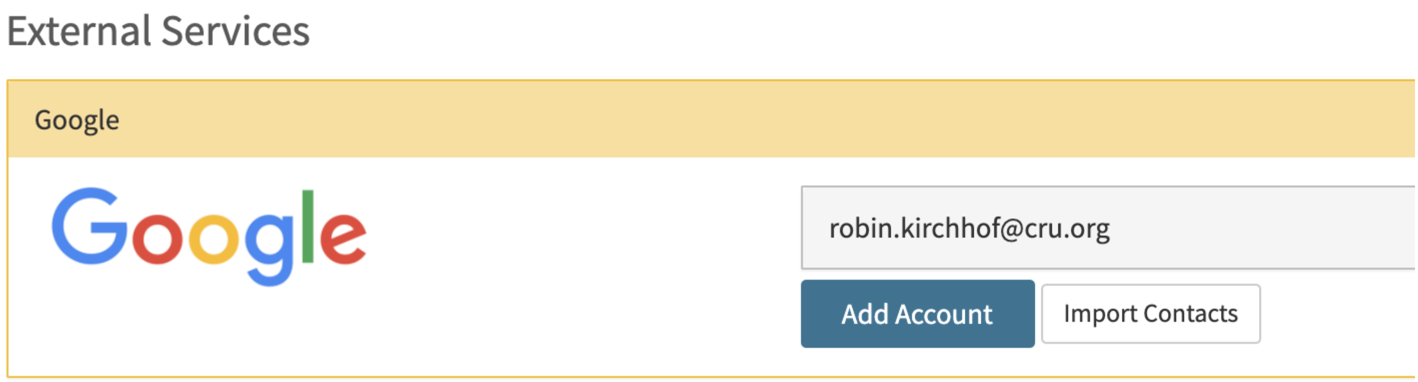
- Click **Allow** to grant **MPDX** access to your Google Account.



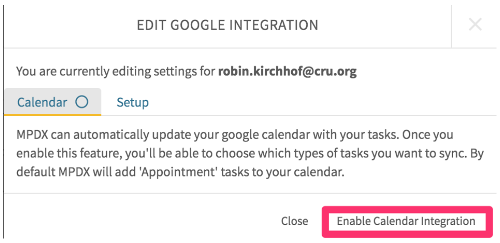
Google Calendar Integration

Once you grant MPDX access to your Google Account:

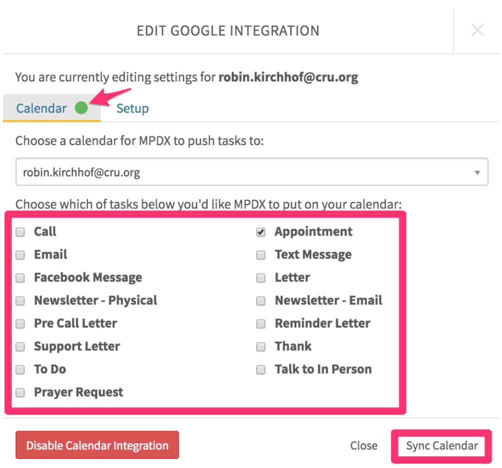
- You will see your *Gmail Address* listed.
- An **Account Sync Dot** will appear in green at the top right.
- To integrate your calendar, click the **Edit** button.



- Click on **Enable Calendar Integration**.



- The **Calendar** tab will have a **green dot** to indicate the sync was successful.
- Select the **Tasks** you want to allow MPDX to display on your Google Calendar.
- Click the **Sync Calendar** button.



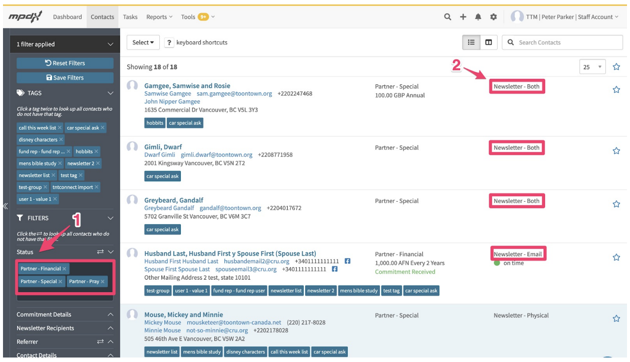
MailChimp: Preparing Your List

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Before you connect your MPDX email list with your MailChimp account, here are a few steps that will save you time later on.

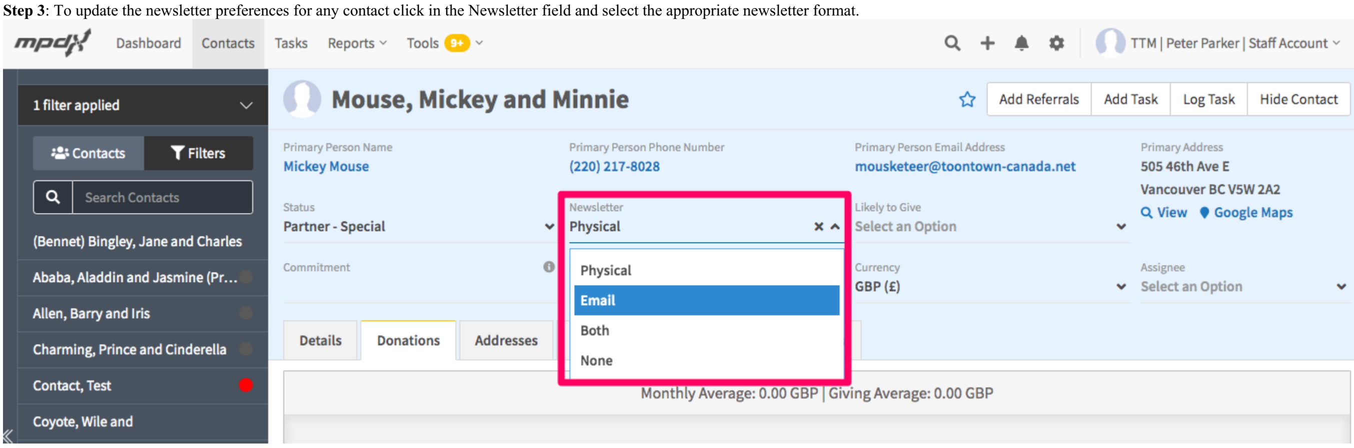
Step 1: Make sure all of your Ministry Partners are set up to receive a Newsletter.

Go to Contacts in MPDX, and Filter your Contacts by Status Partner-Financial, Status Special, and Status Partner-Pray as seen in the screenshot below.

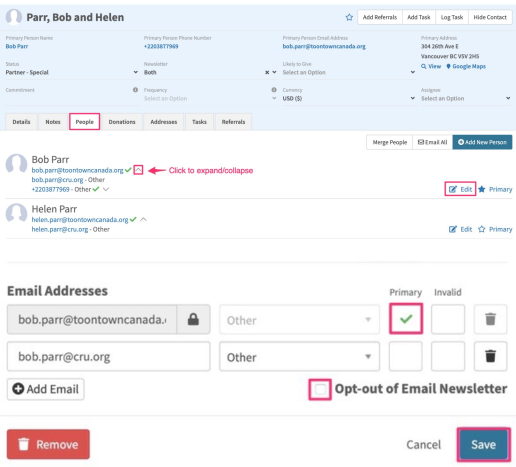


Step 2: Review these Contacts and verify that they are all on your Newsletter List in MPDX. Contacts who are set to receive “Newsletter - Email” or “Newsletter - Both” will be placed on the MailChimp list when MPDX is synced with MailChimp. Changing the email preferences will update or remove a contact from the MailChimp list if the sync is turned on. If your MPDX account is not connected to your MailChimp account, your list will not sync and you will need to manually update your list in MailChimp.

Step 3: To update the newsletter preferences for any contact click in the Newsletter field and select the appropriate newsletter format.



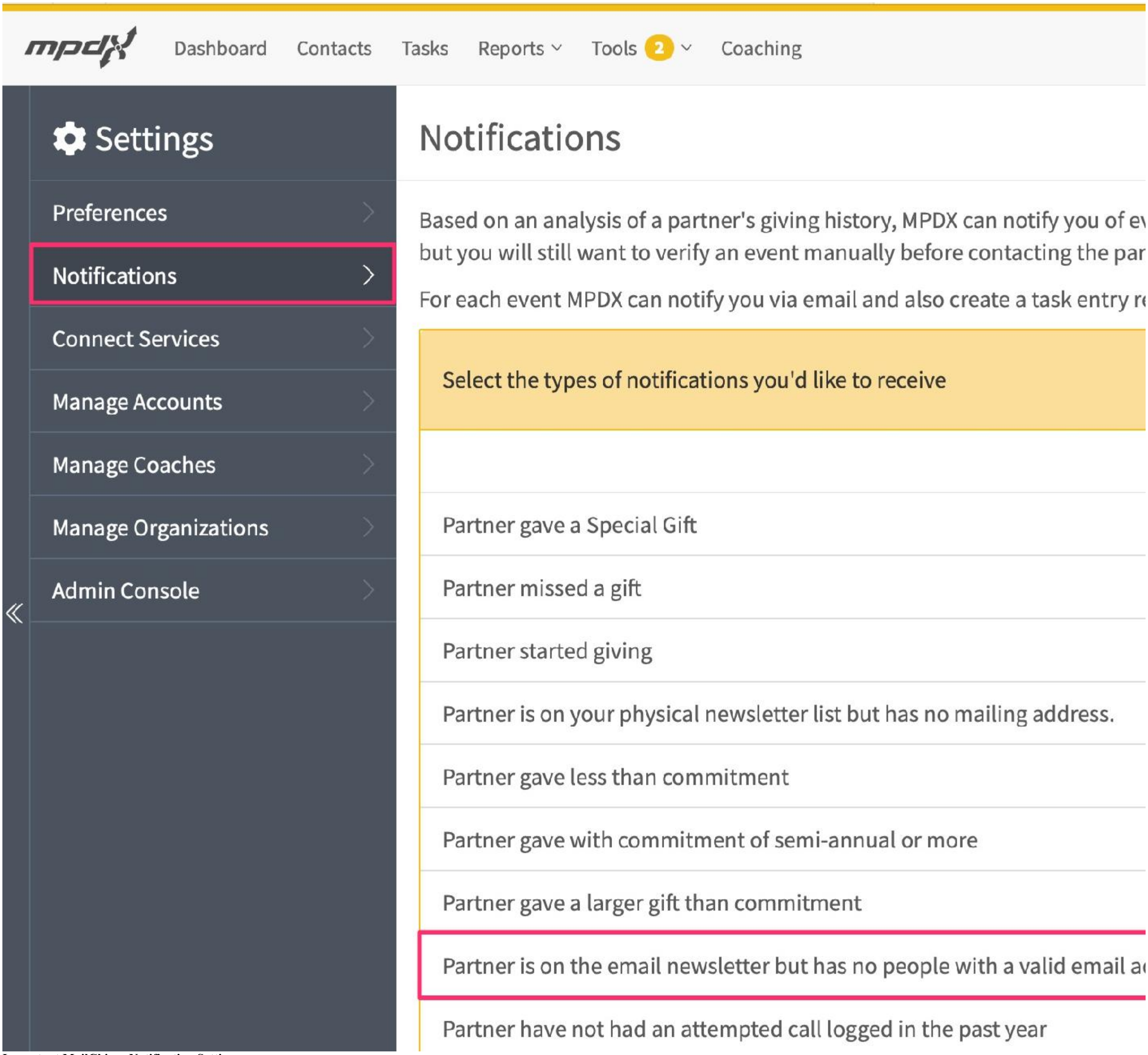
- If you have a contact that has multiple people listed and each have a valid email address marked as primary, then both of them will get synced over to MailChimp
- When individuals within the same contact have different newsletter preferences, you will need to edit each person's preferences. To specify the newsletter preferences for an individual within a contact go to the People tab within that contact and select "edit."
- You can only have one person marked primary in a contact, but each person can have a Primary email selected.



Step 4: Once you have confirmed your list, you are ready to [connect your MPDX account with your MailChimp account.](#)

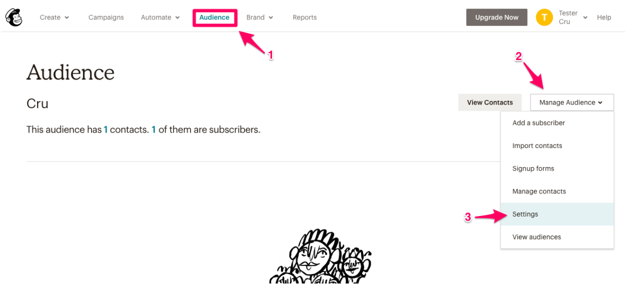
Important MPDX Notification Settings

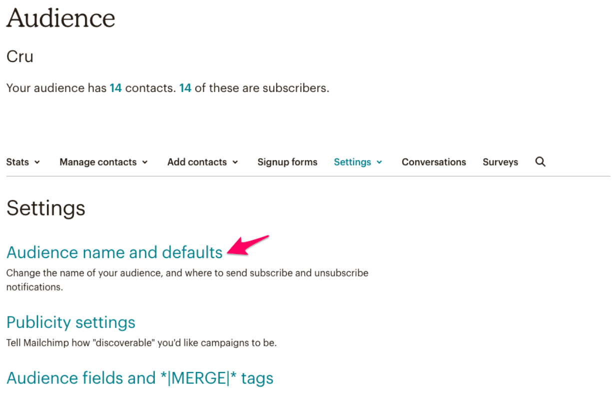
In MPDX, you will want to set up the **"Partner is on the email newsletter but has no people with a valid email address"** Notification. To do so, visit **Settings, Notifications**. When you **select** and **Save** your preferences for this notification, MPDX will notify you when you have a partner on your email newsletter list, but they do not have a valid email saved.



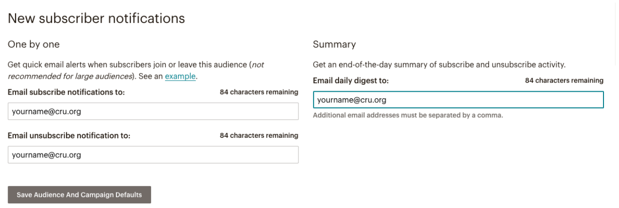
Important MailChimp Notification Settings

In MailChimp, whether you have set up a new account or have an existing account, you will want to set up MailChimp notifications. MailChimp will notify you if anyone subscribes or unsubscribes from your list.





Scroll down to the “New subscriber notifications” section. Enter your email address to receive the notifications you would like, and save.



When you receive a notification from MailChimp, you should confirm that your information in MPDX is up to date.

Now you are ready to connect your MPDX list to your MailChimp account!

MailChimp: Start Sync

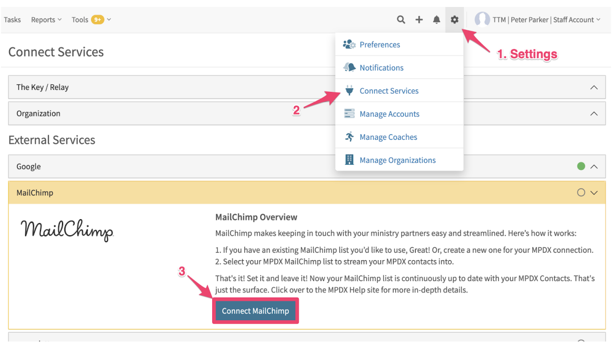
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

MailChimp is a great way to send regular email updates to your contacts. MPDX syncs to MailChimp so that you only have to keep your list up-to-date in one place.

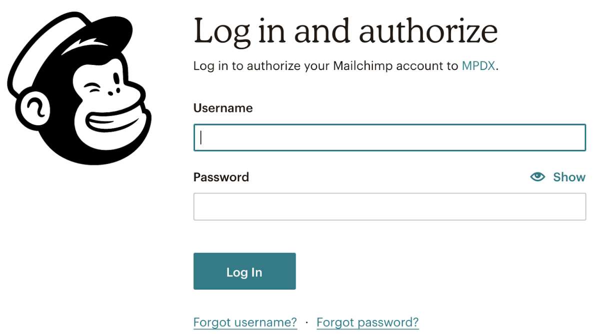
Setting up the MailChimp sync:

Step 1: If you haven't set up MailChimp, you need to go to mailchimp.com, create your account, then create a blank list. (Click on Lists, then the Create List button.) Name the list whatever you choose.

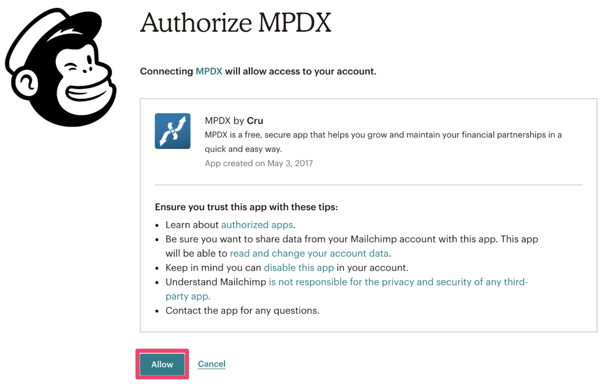
Step 2: Go to the gear icon (Settings) and click on 'Connect Services.' Click the arrow on the right to expand the MailChimp section and click **Connect MailChimp**.



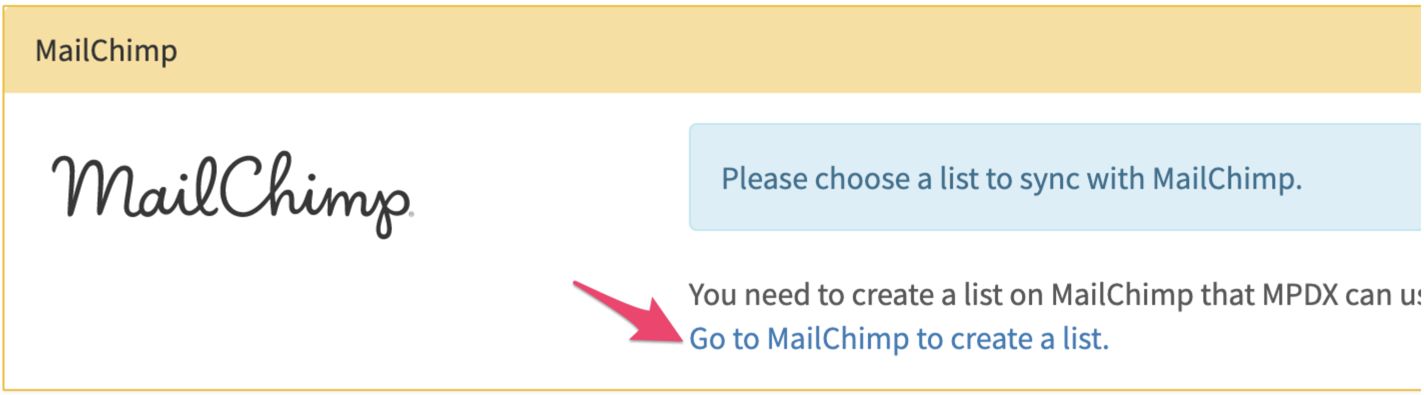
Step 3: You will then be asked to log into MailChimp. Use your MailChimp username and password to log in here:



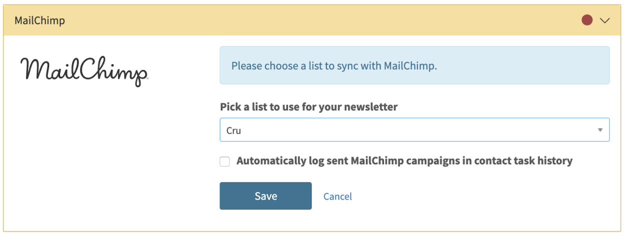
Click **Allow.**



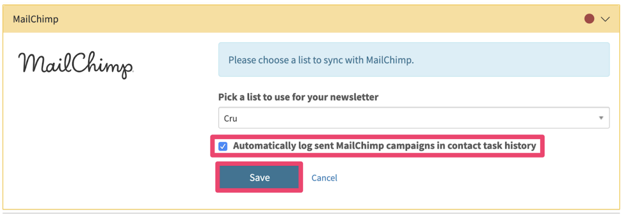
Step 4 : If you don't have an Audience list in MailChimp yet, click on the 'Go to MailChimp to create a list' link to set up your Audience.



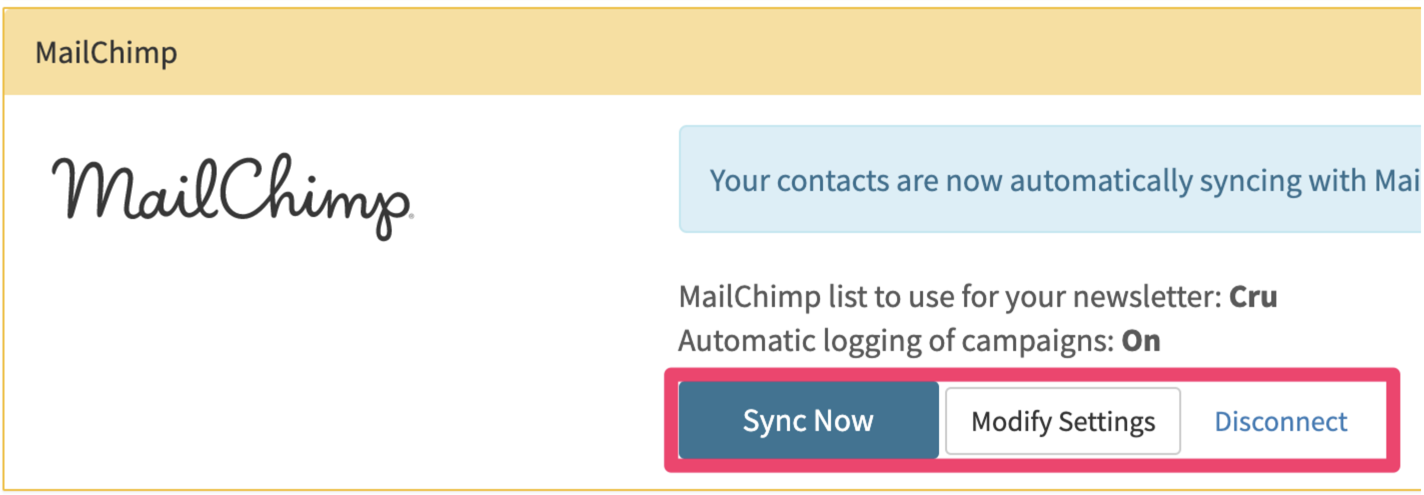
If you already have an Audience list in Mailchimp, pick the list from the dropdown menu. If you have MailChimp set up, understand that you can only sync one list to MPDX. (If you are tracking separate ministry accounts, you can sync to MailChimp with those MPDX accounts as well.)



You also have the option to **Automatically log sent MailChimp campaigns in contact task history**. Check this option if you would like, and click Save.

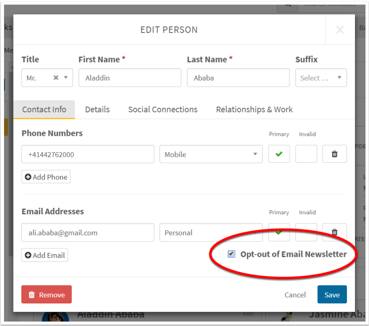


- The Green Dot indicates a proper connection between Mailchimp and MPDX.
- You can click **Sync Now** to update your MailChimp list. (This is not necessary the first time you connect.)
- Click **Modify Settings** to make any changes to the connection or click **Disconnect** to remove the connection from MPDX.



A few points of note with MailChimp

- MPDX will send to MailChimp all your contacts who have the Newsletter type set to "Email" or "Both" and have the email selected as 'Primary'. MailChimp will then turn the primary email address of each individual in those contacts into a contact in your MailChimp list.
    - **The 'Primary' email and the Preferred Contact Method are different. The MailChimp sync uses the contact's email that is set 'Primary' for each person within a contact not marked "Opt Out of Newsletter." The Preferred Contact Method has no impact on the MailChimp sync.** A ministry partner's 'Preferred Contact Method' is simply how they like to be regularly contacted (i.e. text message, email, or phone call).
- MPDX counts multiple people in a household as one contact, but MailChimp counts each email address as a contact. This means your contact numbers may not match.
- The MPDX fields sent to Mailchimp are: [Email Address], [First Name], [Last Name], [Partner Status], [Tags (max of 46)], [Greeting]
- MailChimp does not sync to MPDX, so if you already have a Prayer Letter list in MailChimp, anyone on that list who is not in MPDX will need to be manually added to MPDX. You may also export your list as a CSV and import them into MPDX. You can find more articles on how to use the CSV Contact import tool [here on our help site](#).
- If an individual doesn't want to get your email updates, be sure to check the box that says, "Opt out of Email Newsletter" in his/her information card.
- If a contact is in a 'Hidden' status the "Opt-out of Email Newsletter" must be checked if you do not want the contact to be included in your MailChimp list.



Keeping MPDX and MailChimp in Sync:

- If an email bounces, MailChimp will tell MPDX. MPDX will mark the Contact's email 'Invalid' and send you an email notification. Follow the link in the email to the Contact in MPDX and verify the Primary email address or make the necessary changes.
- If someone unsubscribes from MailChimp, MailChimp will let MPDX know, and if you are set to receive notifications, MPDX will let you know as well. MPDX will mark the individual with the email address as "Opt Out of Email Newsletter."

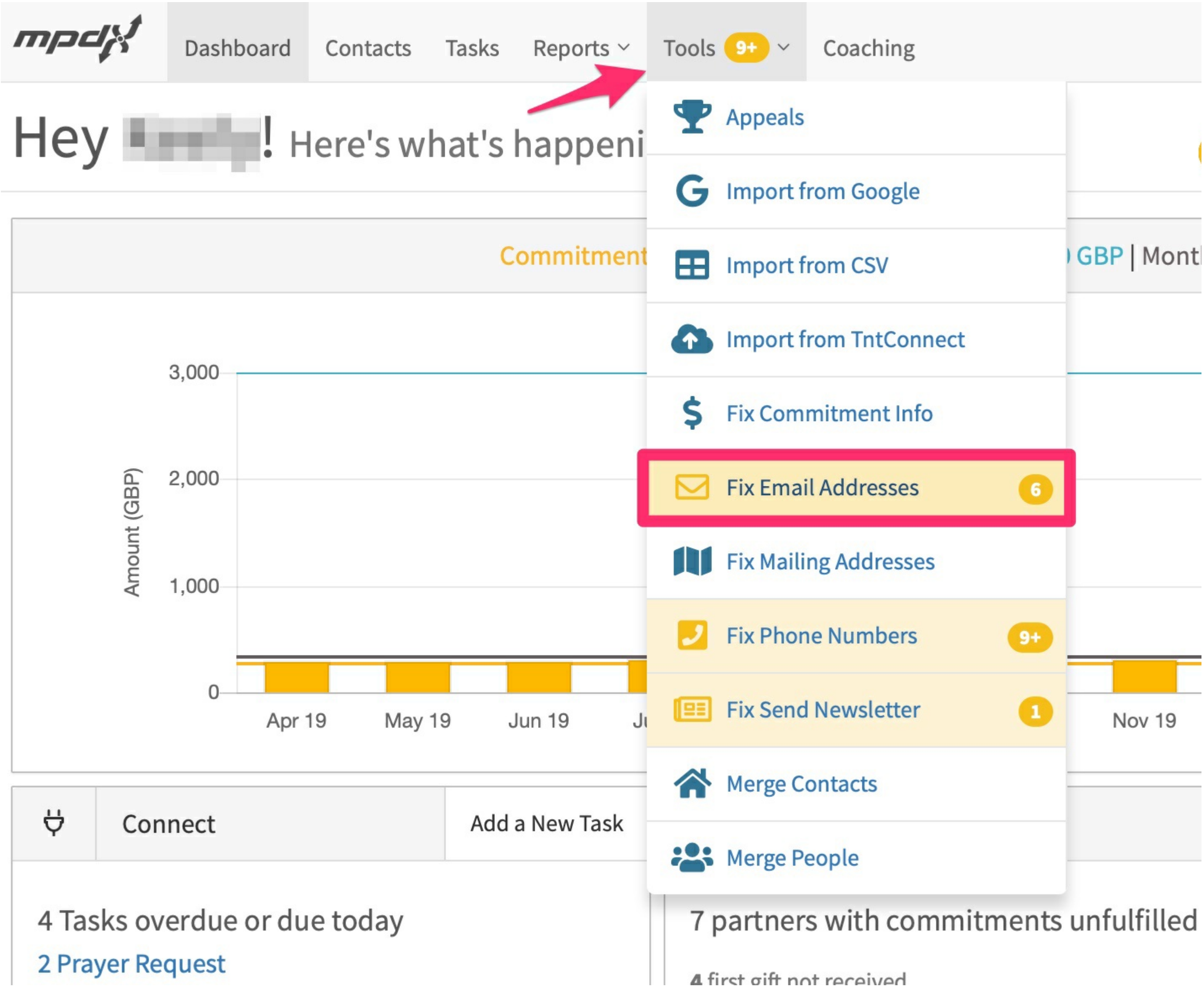
MailChimp: Maintaining Your List

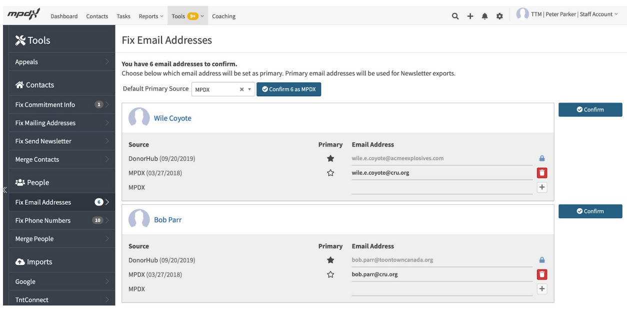
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Because the sync of information between MailChimp and MPDX is only one-way, from MPDX to MailChimp, you need to update MPDX with changes. Here are some routine things you can do to keep your email list to ministry partners current.

Check Tools for “Fix Email Addresses” Notifications

Look at the MPDX top Navigation bar under Tools for any "Fix Email Addresses" Notifications. Select and 'Confirm' which email address is correct (MPDX vs. Donation Services or DonorHub).

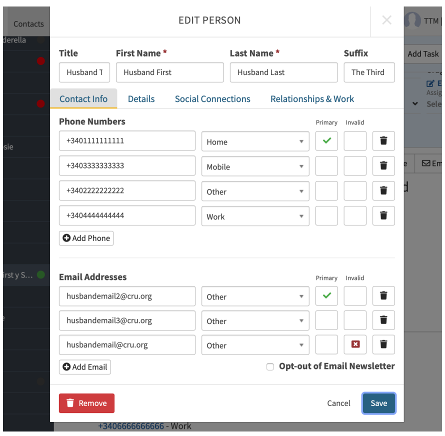




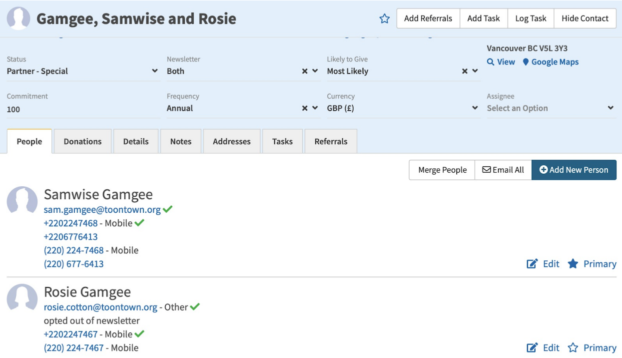
Update Your Contact in MPDX

If you need to update a Contact's email address, make sure to do it in MPDX. If you update a Contact in MailChimp, that information will NOT sync back to MPDX. Additionally, if you add people in MailChimp, MPDX will NOT automatically create a new contact in MPDX. You will need to also create them manually in MPDX.

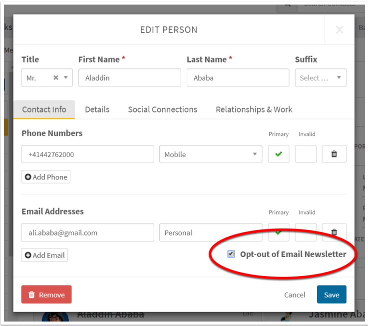
You can 'Edit' a Contact's email address and mark an email address 'Primary' under the People tab.



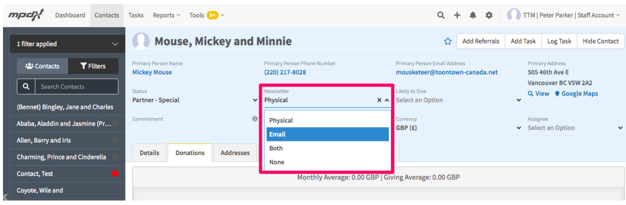
If your MPDX contact has multiple people, each can be independently subscribed to receive MailChimp updates when an email address is entered and marked Primary.



If one person within a contact does not wish to be included in the email list they can be marked "Opt Out of Newsletter."



This is what happens in MailChimp when you make changes to a Contact within MPDX and have the sync with MailChimp turned on:

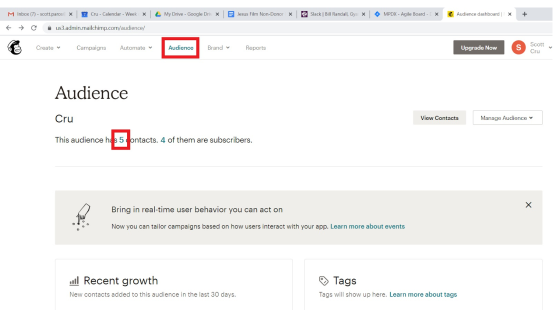


- Contacts who are set to receive "Newsletter - Email" or "Newsletter - Both" in MPDX will be placed on the MailChimp list. Changing the Newsletter preferences within a Contact in MPDX will update or remove a contact from the MailChimp list.
- Deleting a Contact in MPDX who was marked "Newsletter-Email" or "Newsletter-Both" (and therefore subscribed to your MailChimp list) will automatically unsubscribe this contact from MailChimp.
- Hiding a Contact in MPDX who was marked "Newsletter-Email" or "Newsletter-Both" will NOT automatically unsubscribe this contact from MailChimp. To unsubscribe the Contact, change the Newsletter preferences to "None" or check "Opt Out of Email Newsletter" within the person's Contact card.

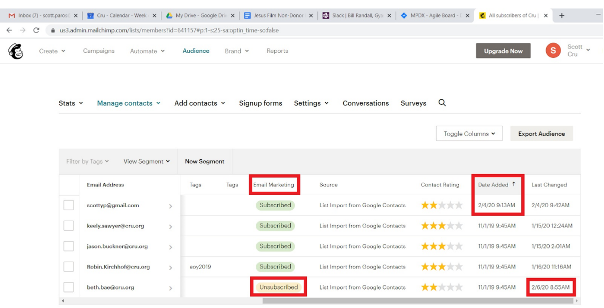
- If you change a Contact's Newsletter status in MPDX from Email or Both to Physical or None, MPDX will mark all people within that contact as Unsubscribed by Admin in MailChimp. If this happens, MPDX will now add a note to the contact in MailChimp explaining why it was unsubscribed. For more information about where to find this note, please read this article. If this happens, go and check their newsletter status in MPDX to make sure it is email or both. Once you change it in MPDX, it should resubscribe them in MailChimp.
- If you **accidentally unsubscribed a contact from your MailChimp list, or a contact who had formerly unsubscribed has changed their mind and wants to be resubscribed** , you will need to uncheck the "Opt-out of Email Newsletter" box and click "Save" on that contact's page in MPDX. You will also need to visit MailChimp and follow their how-to process of how to Resubscribe a Contact. This process includes sending an email link from MailChimp that indicates their desire to be resubscribed to your email "Audience."

Look for Unsubscribes in MailChimp

After logging into MailChimp, click on the Audience menu option at the top. Then click the hyperlink of the numbers of contacts you have in your audience. If you have and maintain multiple lists, make sure you are looking at the MailChimp Audience related to your prayer letter (or other ministry partner communications).



Here you can sort the 'Email Marketing' column to see who (and when) a partner unsubscribed from the email newsletter. You can also sort the 'Created Date' column to see updated (or brand new) email addresses.

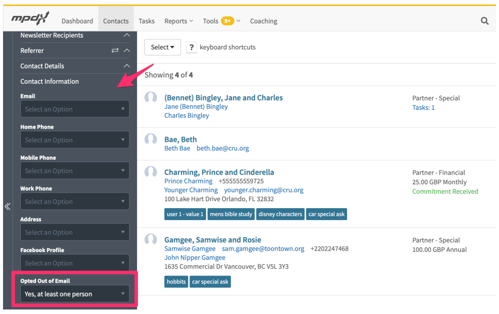


Most changes in MailChimp will not show up in MPDX except in these cases:

- If a ministry partner unsubscribes through MailChimp and you [have MailChimp notifications set up](), MailChimp will email you. MPDX will also receive this information and mark the individual person as "Opt Out of Newsletter." A spouse under the same contact with a subscribed email address will continue receiving the letter unless they also unsubscribe.
- If an email address is no longer valid, your newsletter will bounce and MailChimp will change the email address status to "cleaned." MPDX will receive this information and will mark the email address as "invalid." MPDX will also send you an email notification of this change and prompt you to update the email address.
- If you aren't receiving notifications from MailChimp about unsubscribes or bounces, you may need to update your notification settings from their site.

Find and Cross-Check Your Email Lists

- Do a Filter search of your Contacts with the criteria: "Newsletter-Email and Both"
- Do a Filter search of your Contacts marked "Opt out of Email Newsletter" to see those who do not want to be included on your email updates list
  - To do this, go to the Contacts Tab, and add the Filter under "Contact Information" Opted Out of Email "Yes, at least one person" from the dropdown.



Be aware that MPDX counts multiple people in a household as one Contact, but MailChimp counts each email address as a Contact. This means your Contact numbers may not match.

MailChimp and MPDX Tags

MPDX tags don't go to the place that Mailchimp calls tags. MPDX tags go into Mailchimp's Groups then subcategory of Tags.

To see MailChimp's Groups go to **Audience All Contacts Manage Contacts Groups**

- You should see "Partner Status" and "Tags". These are the tags from MPDX. On far right of "Tags" choose "View Groups" and you will see your tags listed.
- You might want to count how many groups are in both "Partner Status" and "Tags" to make sure that you have less than 60. There might be as many as 15 in "Partner Status" which leaves about 45 for "Groups/Tags"
- **If your count of "Partner Status" and "Tags" is over 60 then you have a problem with MPDX push to Mailchimp. No error is given for this situation. To fix the problem, you will need to do two things:**
  - **First:** Delete unneeded tags in MPDX to get yourself below 45.
  - **Second:** Go to your list in MailChimp, click on Manage Contacts, then Groups. Click "View Groups" for Tags, then delete any tags you are no longer using. Once the total for "Partner Status" and "Tags" is under 60 then the system should fix itself.

MailChimp and Segmented Lists

To create a Segmented List of your contacts go to **Audience All Contacts Manage Contacts Segments**

On far right, click "Create Segment" and select which contacts to add using the drop-down Groups / Tags. Then preview, select a name and save the segment.

Mail Merge: Letters, Labels, and Envelopes

Partner Essentials allows you to create, then Export, a CSV file of your Contacts with their mailing information for use in large-scale mailings. Once exported, this list can be used to create letters, labels, and envelopes for an external Mail Merge document.

There are several places from which you can Export a list of Contacts:

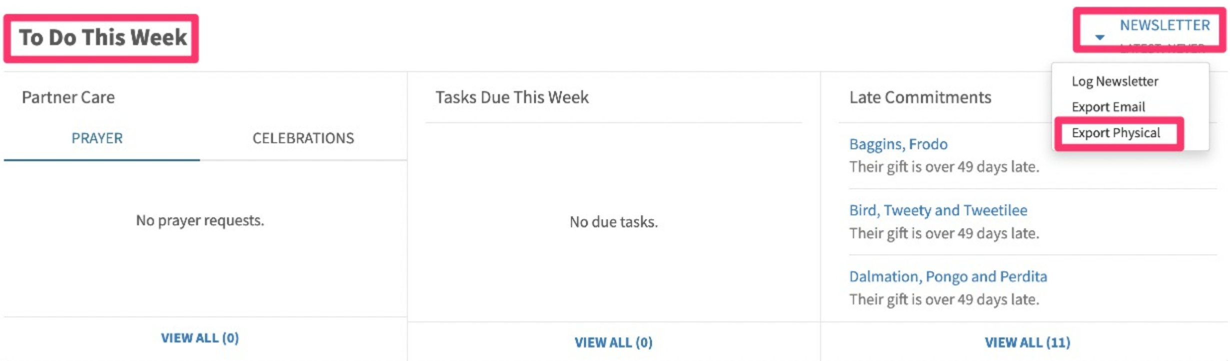
- Export from the Dashboard
- Export from the Contacts Tab

Export From the Dashboard

This option is the easiest way to export a mail merge list of your "Newsletter Recipient" contacts. **Follow these steps each time you wish to export your list of contacts to send your "Newsletter," or prayer update.** Mail Merge is helpful for contacts who have opted to receive "Physical" or "Both" (Physical AND Email) versions of your Newsletter.

NOTE: You can set a Contact's "Newsletter" preference by visiting the Contacts tab. To do this, go to the Contacts tab and select a specific Contact. Within A Contact's Page, look in the top section of information. Select the pencil icon to make changes to this contact's "Newsletter" preferences (i.e. Both, Email, None, Physical).

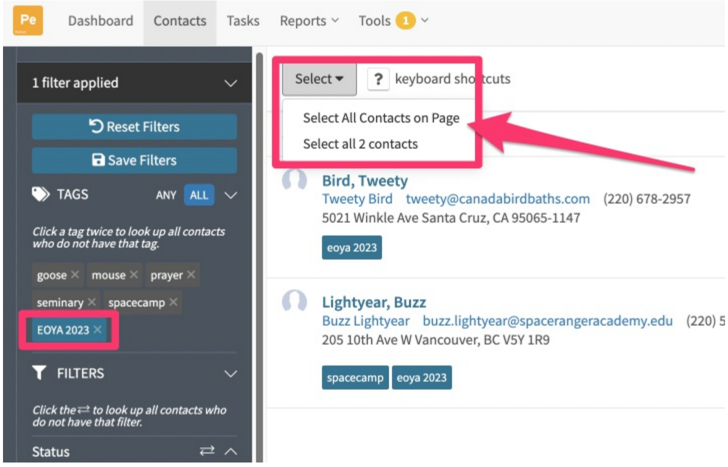
- Go to the **Dashboard**
- Scroll to the "**To Do This Week**" section.
- In the top right corner or this section is the "**NEWSLETTER**" dropdown menu.
- Click on "**NEWSLETTER**", and then select "**Export Physical**."
- This action will prompt a pop-up box of Export options.
- **Partner Essentials will generate a CSV file** of the selected contacts that can be saved to your computer.



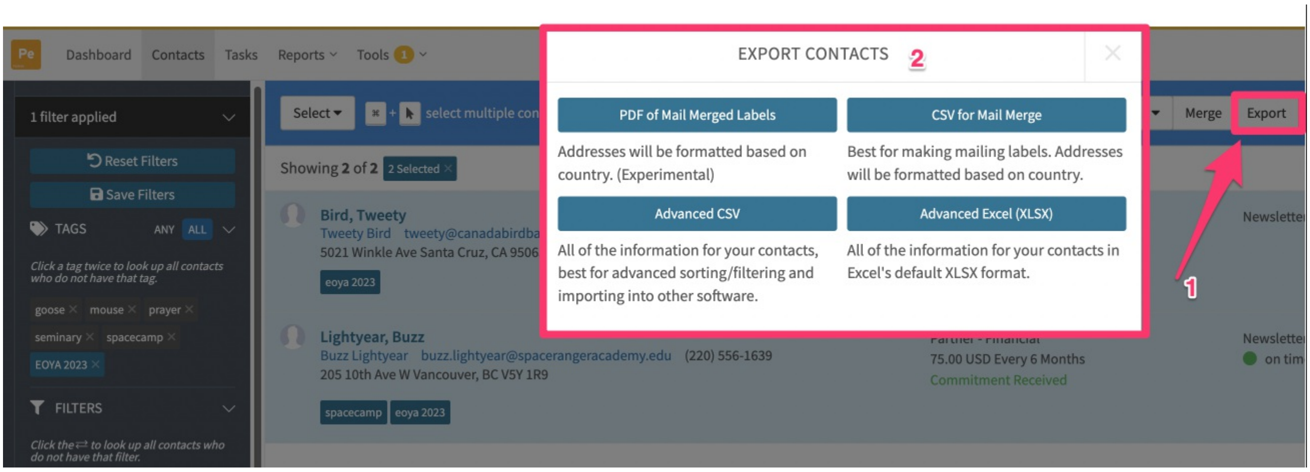
Export From the Contacts Tab

This option is the easiest way to export a mail merge list of ALL Contacts or a subset of your Contacts. **Follow the steps below each time you wish to filter and export a list of contacts. This may be helpful when sending a special mailing** (i.e. an End of Year Ask, Christmas Letter, Support Letter, etc).

- Go to the **Contacts** tab.
- Unhide the **Filters** menu and add any desired filters. For this example we selected the Tag "EOYA 2023".
- Then "**Select All**" Contacts in this list by clicking to check the topmost box.



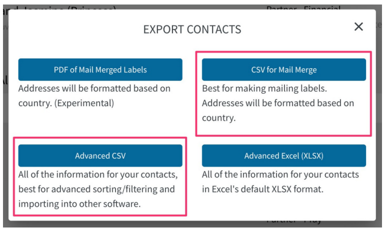
- Once you have the desired contacts selected, visit the "**Actions" dropdown menu**.
- Click "**Export**" and select the option that best fits your situation. This will download a CSV file of your Contact list to your computer.



For more information on Contacts Filters, visit the **[Contacts: Lookup with Filters and Tags]** article within Partner Essentials.

Understanding Your Export Options

- PDF of Mail Merged Labels. This experimental option allows you to pick from two commonly used Avery templates of labels (a common software option for Mail Merged labels). You can then format your exported addresses within the chosen template.
- CSV for Mail Merge. This option is best for making mailing labels. The addresses will be formatted based on the "Home Country" you've selected in your Partner Essentials Preferences.
- Advanced CSV. This option creates a CSV file with information for your contacts. It is best for advanced sorting/filtering and importing into other software.
- Advanced Excel. This option creates an XLSX file with information for your contacts. It is best for advanced sorting/filtering and importing into other software that does not work with a CSV file.



Creating Address Labels for Avery Label Templates

Avery labels are the most common type of envelope label. They also offer a very helpful tool for taking addresses, merging them to labels, and printing at home.

[Give Avery a try for printing your address labels]

Mail Merge in Word and Pages

Use the links below to learn how to perform a Mail Merge in the word processor you are using.

- [Learn to Mail Merge in Word]
- [Learn to Mail Merge in Pages]

Mail Merge using Google

Use the links below to learn how to perform a Mail Merge using Google Sheets or Google Docs.

- Learn how to [Open a CSV File in Google Sheets]
- [Add Mail Merge for Google Docs] from Google Workspace Marketplace. (Mail merge is currently a free mail merge for Google Docs).

  NOTE: Other add-on Mail Merge tools are available, but there may be a software fee associated depending on the tool you choose.
- Learn to Mail Merge Letters, Labels, and Envelopes for printed mailings:
  - **Scroll down midway on the** [Add Mail Merge for Google Docs] **linked page for step-by-step instructions about How to Create a Mail Merge Document in Google Docs and How to Create a Mail Merge from a Google Sheets.**
- Learn to Mail Merge in Gmail:
  - (video) [Gmail Introduces Mail Merge]
  - (article) [Send Personalized emails with Mail Merge]

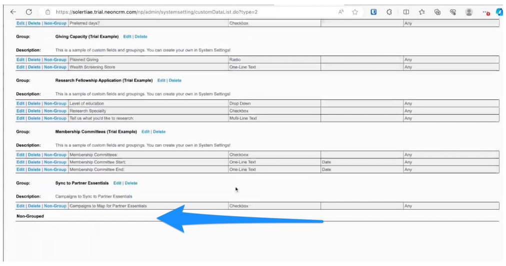
Protecting Sensitive Information

Once you have printed your envelopes and completed your Mail Merges, the best practice is to **delete the files you've downloaded from Partner Essentials**. This protects your donors' financial information should someone gain unauthorized access to your computer.

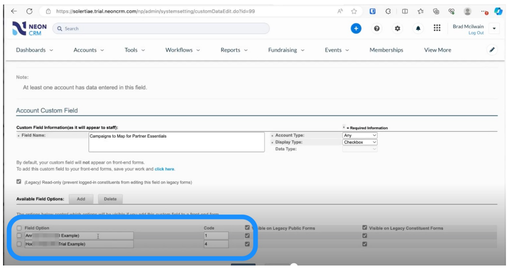
NeonCRM: All Donations & Contacts

Steps to Complete in NeonCRM:

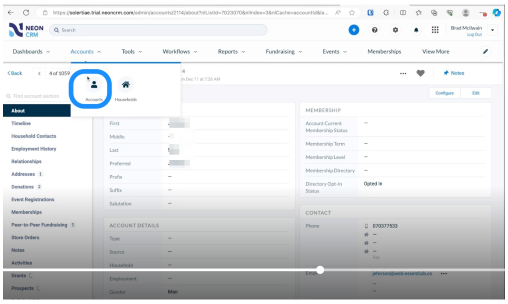
- Create custom campaign group.

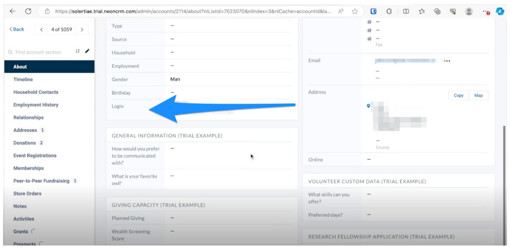


- Add campaigns to the group. Please note the CODE is the Campaign ID.

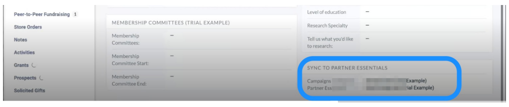


- Add individual user to Individual Account.

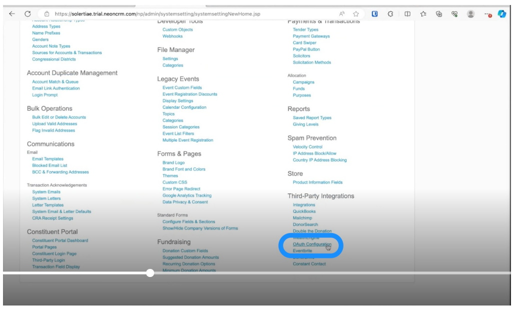


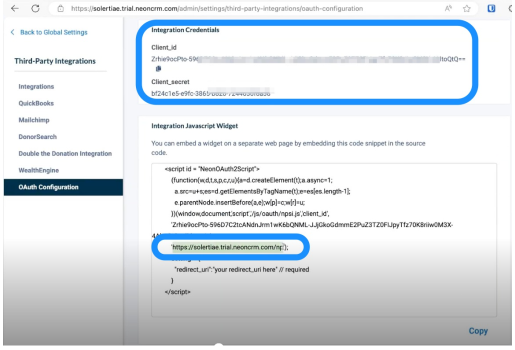


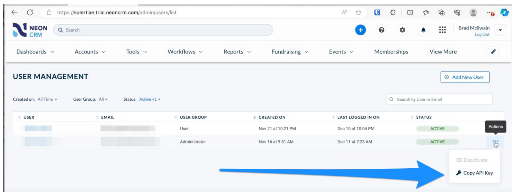
- Assign applicable campaigns.



- Share individual user information with the intended recipient.
- Identify Client_id, Client_secret, Domain URL, and API Key.





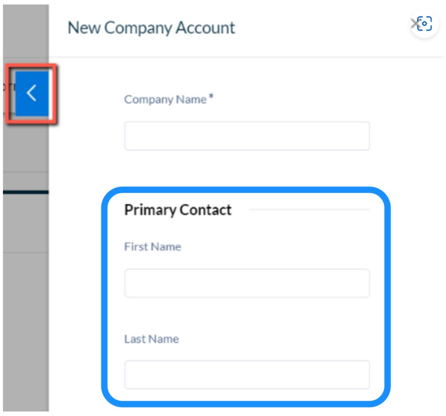


Steps to Launch:

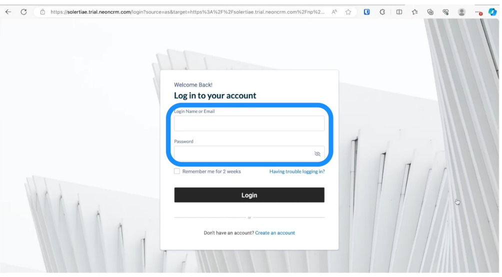
- Via MissionPipe, share Client_id, Client_secret, Domain URL, and API Key with Solertiae.
  - Access to a MissionPipe Zone was provided at the time of subscribing.

Considerations

- If a company is missing a first/last name, neither it nor its donations will sync.



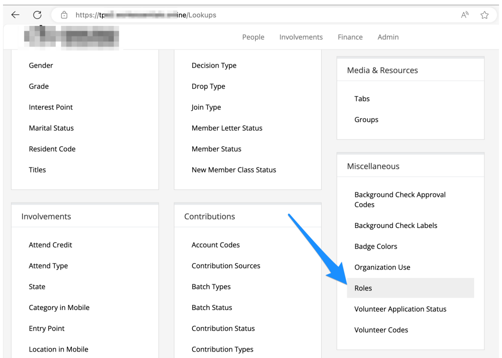
- Anonymous Donor flag will determine whether the donor name and contact details is shared. [Anonymous Donations – Neon One]()
- User will need to enter the Individual Account username/password when connecting from Partner Essentials.



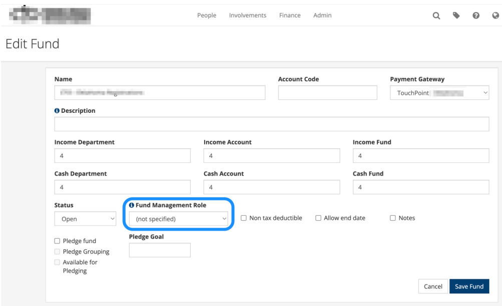
TouchPoint: All Donations & Contacts

Steps to Complete in TouchPoint:

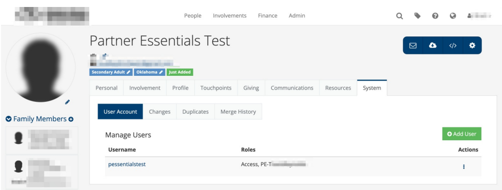
- Create Role lookup codes for each Designation/Set to share.



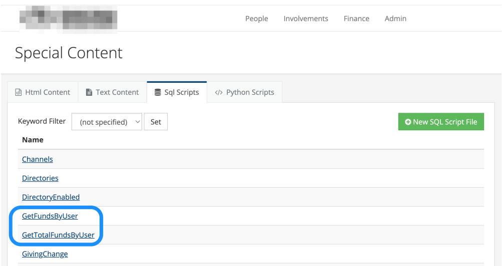
- Apply the role created in the prior step to the matching Fund.



- Apply the role to the relevant users. Be sure the user also has at least FinanceViewOnlyDetail and ViewTransactions.



- Add supplied SQL content to Special Content.



GetFundsByUser

```
--API
DECLARE @user_role_ids TABLE (RoleId INT)
INSERT INTO @user_role_ids (RoleId)
SELECT ur.RoleId
FROM dbo.UserRole AS ur
JOIN dbo.Users AS u ON u.UserId = ur.UserId
WHERE u.Username = @username

SELECT
c.ContributionId,
c.ContributionAmount,
c.ContributionDate,
c.TranId,
t.TransactionGateway,
cf.FundId,
cf.FundName,
p.PeopleId,
p.GenderId,
p.TitleCode,
p.FirstName,
p.MiddleName,
p.LastName,
p.SuffixCode,
p.CellPhone,
p.WorkPhone,
p.EmailAddress,
p.ModifiedDate,
p.PrimaryCity,
p.PrimaryZip,
p.PrimaryAddress,
p.PrimaryAddress2,
p.PrimaryState,
p.HomePhone,
p.PrimaryCountry,
p.Name

FROM [dbo].[Contribution] AS c

JOIN [dbo].[People] AS p on p.PeopleId = c.PeopleId
JOIN [dbo].[ContributionFund] AS cf on cf.FundId = c.FundId
JOIN [dbo].[Transaction] AS t ON t.Id = c.TranId
WHERE (cf.FundManagerRoleId IN (0, -1) OR cf.FundManagerRoleId IN (SELECT * FROM @user_role_ids)) AND cf.FundStatusId = 1 AND c.TranId IS NOT NULL
ORDER BY c.ContributionId
OFFSET CONVERT(INT, @skip_number) ROWS FETCH NEXT 1000 ROWS ONLY;
```

GetTotalFundsByUser

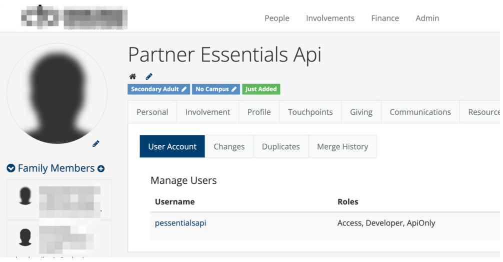
```
--API
DECLARE @user_role_ids TABLE (RoleId INT)
```

```
INSERT INTO @user_role_ids (RoleId)
SELECT ur.RoleId
FROM dbo.UserRole AS ur
JOIN dbo.Users AS u ON u.UserId = ur.UserId
WHERE u.Username = @username

SELECT Count(*) As total
FROM [dbo].[Contribution] AS c

JOIN [dbo].[People] AS p on p.PeopleId = c.PeopleId
JOIN [dbo].[ContributionFund] AS cf on cf.FundId = c.FundId
JOIN [dbo].[Transaction] AS t ON t.Id = c.TranId
WHERE (cf.FundManagerRoleId IN (0, -1) OR cf.FundManagerRoleId IN (SELECT * FROM @user_role_ids)) AND cf.FundStatusId = 1 AND c.TranId IS NOT NULL;
```

- Create the integration user with API Only & Developer role.

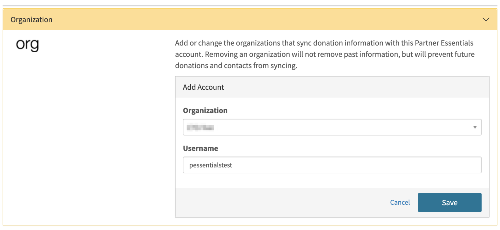


Steps to Launch:

- Via MissionPipe, share integration user and password with Solertiae.
  - Access to a MissionPipe Zone was provided at the time of subscribing.

Considerations:

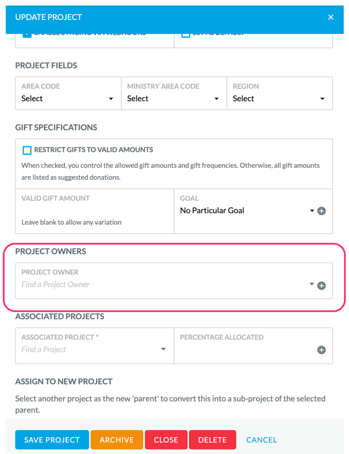
- User will need to enter the TouchPoint username when connecting from Partner Essentials.



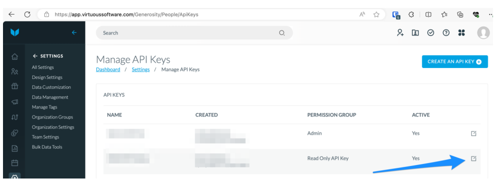
VirtuousCRM: All Donations & Contacts

Steps to Complete in Virtuous:

- Assign a Project Owner(s) to each Project to identify what Partner Essentials users should see. *Please note that Partner Essentials will query Virtuous contacts based on email address to find what projects are relevant based on project ownership.*
  - **[From Virtuous Support Library]** You may choose to assign one or more users from your organization as Project Owners. Assigning a user as an Owner allows that user to be restricted to seeing ONLY gifts made to Projects they own if their Permission Group profile includes the "Restrict by Owner" option for Gifts.



- Create API Key.



Steps to Launch:

- Share API Key with Solertiae.

Considerations

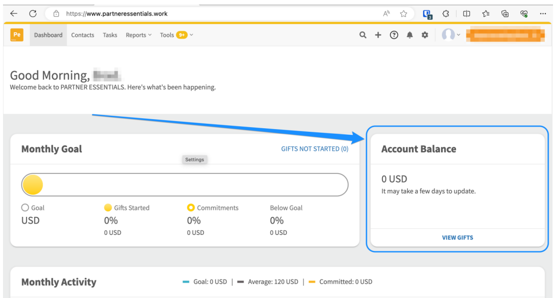
- Your users in Partner Essentials will NOT have to enter an additional password here. They will simply select the name of your organization.

Solertiae recommends BitWarden as a service to securely deliver this connection information. Please do not share them via email.

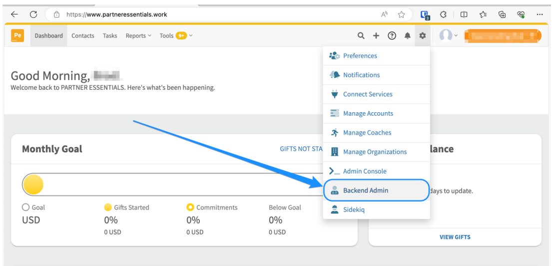
Import: Donations and Contacts

Import: Account Ending Balance

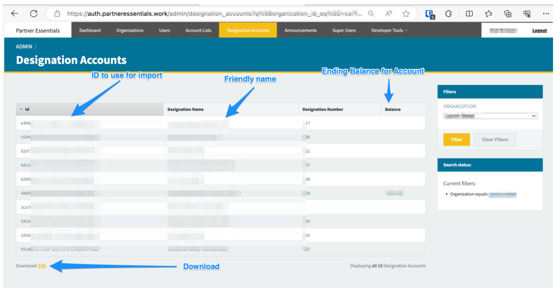
This feature allows Org Administrators to set the Designation Account Ending Balances for all Designations in their organization. This is intended as a middle option for those administrators that do not currently have an accounting integration.



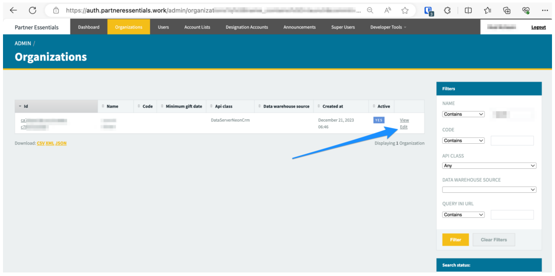
Step 1: Browse to Backend Admin



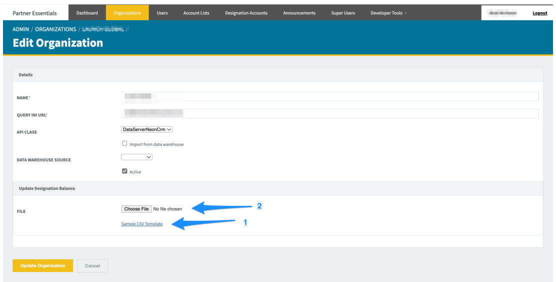
Step 2: Download your organization's list of Designation IDs for the import file.



Step 3: Edit your Organization's details.

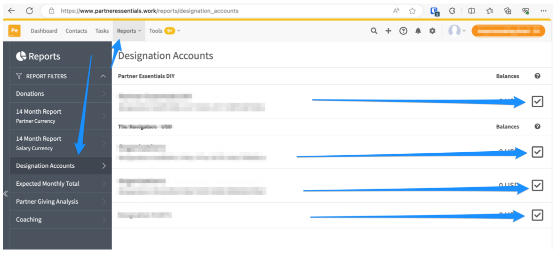


Step 4: Download a sample template and note the column headers (1). After you have prepared your import file using the Designation IDs from the prior step AND setting the balance accordingly, upload the file (2). *You can then return to the screen in Step 2 and review all the account balances you just set.*



Important Notes

#1: If a user has more than one designation for the account profile, they can deselect any designation they want removed from the calculation for the Dashboard.



#2: If your organization has an active accounting integration, you should not complete this import. If you do, your changes will be overwritten during the overnight syncing process.

Guided Workflow: Bulk Donation Import

This tool is used for importing donations into an offline organization. Please see the [Organizations- new, offline] article for information on the different between offline organizations and ones with automated donation syncing.

Please note that you'll need to import the csv file into a specific offline organization in your account.

Click on the "Import CSV File" link to expand the section and use the tool.

Click on the "Donation Import CSV Template" link to download a template for this CSV import. Using the provided template will make the upload process simpler and ensure that your data gets imported into the correct fields.

We recommend using as much data from your organization's donation management software and reporting as possible including the Donor ID and Donation ID.

Preparing the CSV File:

Open the downloaded CSV file using spreadsheet software such as Microsoft Excel or Google Sheets and then populate it with data from your organization. Please note the following for each column:

- **Account Name** - We recommend using the Donor's name as shown below.
- **Account Number** - This can be found at the bottom of the "Details" tab on your Contact's page. If a Partner Account Number doesn't exist, please add one. This must be unique to that donor and we recommend using the same ID as your organization does in the report you get from them.

- **Donation ID** - This must be unique. Two different donations can never have the same Donation ID.
  - If your organization's report has one, we recommend using that.
  - If one doesn't already exist, then you need to make sure to always be using a unique number. Here are two suggestions:
    - 1.) Long Number. You could start with 100001 and keep going from there. Please keep a record of what the last donation ID used was from the last CSV donation import. (letters can also be used if desired: PE100001, PE100002, ...)
        - 100001, 100002, ...)
    - 2.) Component Method. You may find it helpful to use a format like the one below (just an example) where it's comprised of multiple elements:
      - [today's date, MMDDYYYY]
      - ["d" as a separating value]
      - [4 digit number for unique donation]
        - 03152024d0001,03152024d0002, 03152024d0003, ...

- **Designation Account** - This is optional and can be used for different funds or accounts you might have. Examples would be "Support", "Project", etc. This depends upon your organization.

- **Donation Date** - This should be the date your organization received the donation.
  - Please note that the format of this date MUST be MM-DD-YYYY for it to import from the CSV. See below for how to accomplish this formatting of the date. If the date is not saved in that exact format, the import process explained below will require you to select each date using a calendar selection tool.
- **Currency** - Partner Essentials uses standard 3-letter abbreviations for different currencies. You will be able to select the currency from a drop down. This donation import tool allows a user to import donations received in multiple currencies if needed.
- **Amount** - Enter the amount in that currency.
- **Payment Method -**
- Appeal -
- Appeal Amount -
- Memo -

Click **File**, **Save As**, and choose **CSV** as the file type or save as type.

Saving the Donation Date with the Needed Format:

- Microsoft Excel
- Google Sheets

Here is an example of a csv file for importing. Please note that the dates are formatted as month/day/year, but they are **not** MM/DD/YYYY. In order to change this, please see below:

Microsoft Excel.

You'll need to work through the following steps to get the date formatted correctly for the import to work optimally. (If you don't do this then during the import process you'll need to select the date from a calendar tool.)

1. Highlight the donation date cells.
2. Format those cells to use "Custom". (right click and choose format cells or find in menu)
3. Change it to be "MM/DD/YYYY" exactly.
4. Click ok.

This will make the date values have the needed format.

Save the file as a CSV format.

**** Please note that if you reopen the csv file after doing this formatting effort, Microsoft Excel will change the format and you'll need to redo this.***

Google Sheets

You'll need to work through the following steps to get the date formatted correctly for the import to work optimally. (If you don't do this then during the import process you'll need to select the date from a calendar tool.)

1. Highlight the donation date cells.
2. Format those cells to use "Custom". (right click and choose format cells or find in menu)
3. Change it to be "MM/DD/YYYY" exactly.
4. Click ok.

Highlight dates:

Give them a Custom Date Format

Like:

Your Google Sheet file should look like this after formatting the donation date:

Then download the Google Sheets file as a csv:

Importing Your CSV File

Click the "Choose File" button to begin the process of importing one csv file of donations for a specific offline organization.

Select the csv file from your Finder or Windows Explorer menu.

Click Upload.

Step 1: Map Your Headers

Please make sure that your CSV Header values match up with the Partner Essentials destination field.

- If you downloaded and used the CSV Import Template then nothing should need done here.
- If they do not match, you can use the drop downs to match them up.

- Once this is complete, click "Next".
- If needed, please back out of the import tool using the "Back" button.

Step 2: Map Your Values

Each value for each donation record will be worked through as needed in this step. See below for each section:

NEED TO REPLACE THIS SCREENSHOT. SHOWING WRONG MATCH FOR DONOR.

- **Donor Accounts**
- **Designation Accounts**
- **Donation Date**
- **Appeals**
- **Payment Method**
- **Currency**

- **Donor Accounts**
    - If an existing donor is found in your account then you'll see a green check mark.
    - If the donor isn't found (Partner Account # doesn't exist) then you'll see a red "X". Click on the blue edit button (to the right of the red "x") for options.

        - **Add/Update New Donor Account.** Create a new Partner / Donor by entering an Account Number and Name. *Please note you can use the 3rd option, Choose from CSV, to use what you entered into your CSV.*
        - **Choose Existing Donor Account.** Search for an existing account. As you type, you'll see possible matches to select.
        - **Choose From CSV** - Use the values in the CSV file to create a new Partner / Donor.

- **Designation Accounts**
    - If an existing designation account found in your account then you'll see a green check mark.
    - If the designation account isn't found then you'll see a red "X". Click on the blue edit button (to the right of the red "x") for options.

        - **Add New Designation Account.** Create a new account. *Please note you can use the 3rd option, Choose from CSV, to use what you entered into your CSV.*
        - **Choose Existing Designation Account.** Search for an existing account. As you type, you'll see possible matches to select.
        - **Choose From CSV** - Use the values in the CSV file to create a new Partner / Donor.

- **Donation Date**
    - If the dates were formatted properly for this tool then there is nothing to do here.
    - If the dates were not formatted properly then you can use the calendar tool to choose the correct date or type it using the needed format:

- **Appeals**
    - If an existing designation account found in your account then you'll see a green check mark.
    - If the designation account isn't found then you'll see a red "X". Click on the blue edit button (to the right of the red "x") to choose an existing Appeal. If one doesn't exist then you can back out of the import and create it first. Click here to see more about Appeals.

- **Payment Method**
    - Use the drop down if needed to match your CSV's value with an option.
    - Options:
        - ACH
        - Credit Card
        - Check
        - Cash
        - Other

- **Currency**
    - Use the drop down if needed to match your CSV's value with an option.

- Once this is complete, click "Next".
- If needed, please back out of the import tool using the "Back" button.

Step 3: Check for Duplicates

Donations must always have a unique Donation ID. In this step the tool checks all the Donation ID values in the csv file against existing donations in the user's account.

No Duplicates Found (no donation exists with same Donation ID):

Duplicates Found (donation already exist with the same Donation ID):

In the example below, some rows were populated with Donation IDs that have already been imported previously.

If any duplicates (the same donation ID) are found, then the user will be presented with options for how to proceed:

In the example shown above, there are 3 donations from the CSV file that might be duplicates (the tool identifies this by the Donation ID)

- The first one appears to be a duplicate. It's the same donor, designation account, amount and date. The user should NOT generate a new Donation ID for this as it's a duplicate.
- The second does have an existing Donation ID (with a previously imported donation and even the first one above), but it does not look like a duplicate. It's for a different amount on a different date. The user should click the "Generate New ID" button for the tool to create a unique ID.
- The third does have an existing Donation ID (with a previously imported donation), but it does not look like a duplicate. It's for a different amount on a different date. The user should click the "Generate New ID" button for the tool to create a unique ID.

After generating the 2 new ID's the user sees:

Step 4: Preview Donations to be Imported

In this final step the user will see all the donations about to be imported into their account.

Please note:

- A **tag** can be added to any Contact records that are part of this import (the Account Name is the name of the Primary Person of a Contact). We suggest using this to find any newly created contacts from this import (i.e. "newdonor") in order to update the record. Click here to learn more about tags for contacts.
- The user should review this carefully to confirm as importing the donations in bulk cannot be done (user needs to check the box accepting this).
- Import Status for each donation (examples shown below):
  - Green check mark means that the donation will be imported.
  - Red "x" means that the donation will not be imported.

After clicking the check box and then the import button, the user will see a confirmation pop up:

Example 1. All donations will be imported:

Example 2.

NEED TO REPLACE THIS SCREENSHOT. SHOWING 1st and 2nd donations about to be imported, but the 1st one should be a red X.

> *Note: Typically, the CSV data will populate MPDX quickly, however, it may take up to 24 hours for the import to finish. You will receive an email when your import is complete.*

Guided Workflow: Bulk Contact Import

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated where needed to provide help for you and your Partner Essentials account.***

Importing From a CSV File into MPDX;

To import contact information into MPDX, it must be saved as a .csv file.

- Open your **Spreadsheet** in Excel (or other spreadsheet program)
- Click **File**, **Save As**, and choose **CSV** as the file type or save as type.

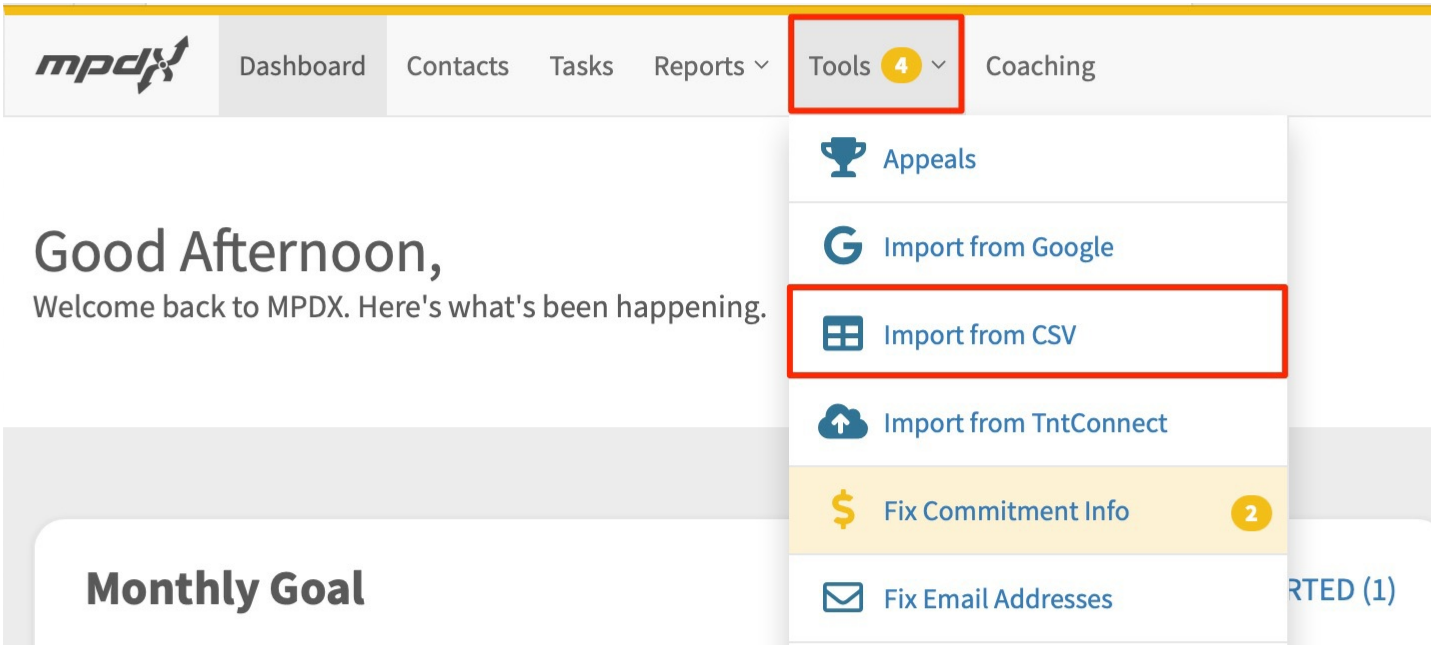
Organizing Your Spreadsheet

- Add a header row, one for each column (i.e., First Name, Last Name, Spouse Name, Street Address, City, State, Husband phone number, Wife phone number, Husband email address, Wife email address.
- Add other headers such as Commitment Amount, Commitment Frequency, Church.

  Note: Use these specific headers to correctly assign the data to MPDX designations. Read the article: Field Names for CSV Contact Imports.

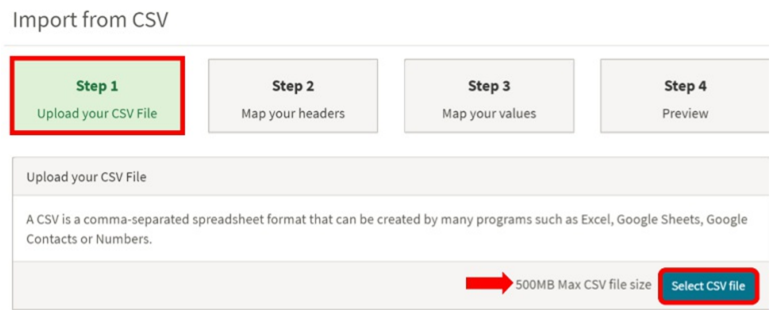
Uploading Your CSV File

- Log into your account (partneressentials.work).
- Go to the **Tools** dropdown menu and click on **Import from CSV**.

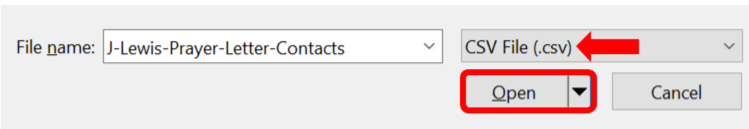


Step 1: Upload Your CSV File

- Click **Select CSV file** then locate the file CSV file on your computer.



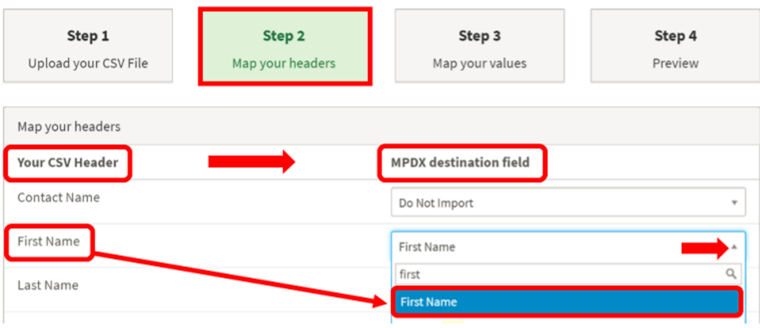
- Once you've found your file click **Open**.



Note: The max file size of a CSV is 500MB. If your CSV file is larger or you are in need of assistance, email techhelp@cru.org with your CSV file attached.

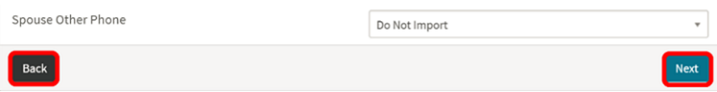
Step2: Map Your Headers

- Choose the **MPDX Destination Field** that best matches with **Your CSV Headers** field (i.e., First Name to First Name).
- Scroll down and do this for each of your CSV headers.



- At the very bottom, locate the **Next** button.
- Or click **Back** if necessary.;

Note: The Next and Back buttons will be at the bottom of each screen during the import process.

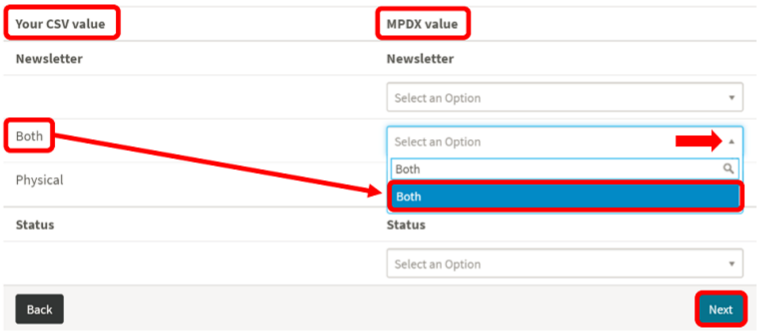


Step 3: Map Your Values

Values for some fields in MPDX might be different from the values in your CSV. For example, you might have a column called “supporter” in your CSV file. In MPDX, that field needs to be called *Partner- Financial*.

- Select **MPDX Values** that best match **Your CSV Value**, i.e. *Newsletter* **- Both to Both**.
- Do this for both *Newsletter* and *Status*.
- Click **Next** to proceed to the next step.

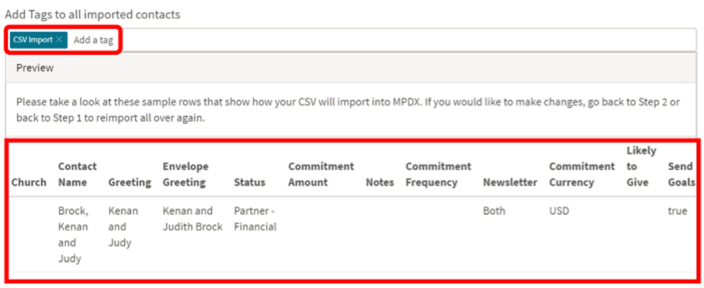
Note: This step will be skipped automatically if MPDX requires more information to match the fields.



Step 4: Review Your Import

You can preview your import to make sure the field names are mapped correctly.

- Add a **Tag** for this CSV import, i.e. *CSV Import*.
- Review each field and verify the information is correct.



- Click the **Back** button to make changes.
- Click the **Checkbox**: "I accept that this import cannot be undone"
- Then click on **Import**.

Note: Typically, the CSV data will populate MPDX quickly, however, it may take up to 24 hours for the import to finish. You will receive an email when your import is complete.

Guided Workflow: Bulk Contact Import Field Settings

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Use the field names listed below for the column headers to import your CSV File for **Contacts** correctly and easily.

Church
City
Commitment Amount
Commitment Currency
Commitment Frequency
Country
Email 1
Email 2
Envelope Greeting
First Name
Full Name
Greeting
Last Name
Likely To Give
Metro Area
Newsletter
Notes
Phone 1
Phone 2
Phone 3
Referred By
Region
Send Appeals?
Spouse Email
Spouse First Name
Spouse Last Name
Spouse Phone
State
Status
Street
Tags

Website
Zip

Guided Workflow: Manually Add Donations

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

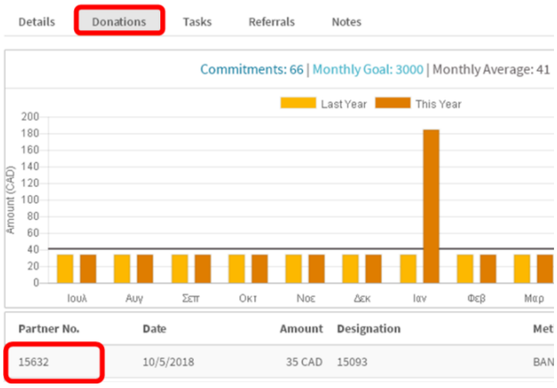
Do Not Add Manually If...

You do not need add donations manually if your MPDX performs a sync. You will end up with duplicates.

Manual Donation Requirements

Locating the Partner Number

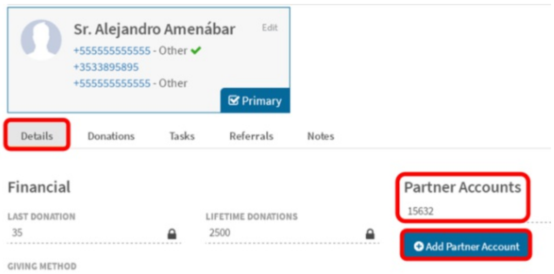
1. Verify the contact has a **Partner No.** before you proceed to add the donation.
    1. On the individual contact page, locate the **Donations** tab
    2. Below the bar graph and to the left is where the **Partner No**. is found



Adding a Partner Number

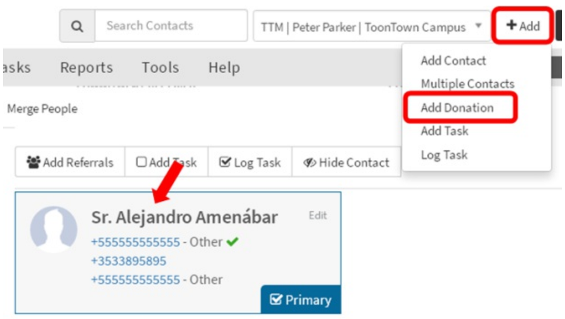
If a contact does not have a **Partner No.** you can add one by adding a **Partner Account**.

- Click on the **Details** tab below the individual contact name.
- On the right hand side, click on the blue **Add Partner Account** button.
- Add a numeric value and MPDX will save it automatically under **Partner Accounts.**



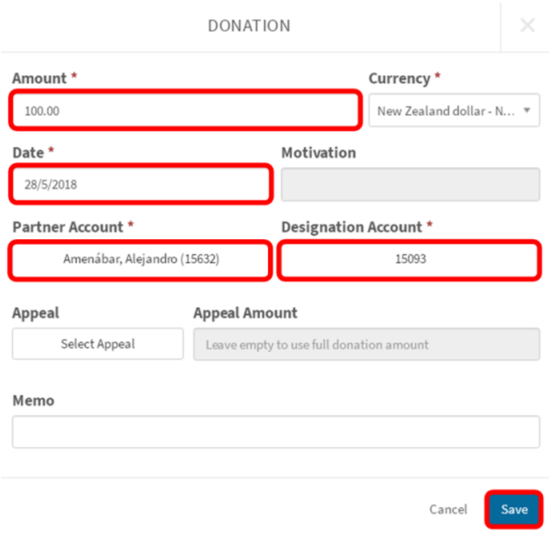
Adding a Donation

- From within the individual contact, click on the **+Add** button on the top right.



Populating the Add Donation Fields

- Fill in the **Amount** of the donation
- **Currency** is determined by Settings | Preferences | Default Currency. Change this ONLY if the donation is a different monetary type.
- Select the **Date** the donation was given
- Add the **Partner Account** and the **Designation Account** (2 different numbers).
- If applicable, you can **Select Appeal**, i.e. *CSU 2018* to track that specific Appeal.
- Add notes in the **Memo** field
- **Verify** that everything is accurate and click **Save**

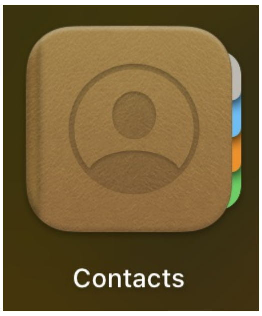


Note: if the donor's name does not appear when you try to add a Partner or Designation Account, it usually means a Partner No. still needs to be created for the donor in question.

Migration: From Apple Contacts

Export Apple Contacts

Click on the **Contacts** icon from either your launch Pad or from a finder window.



There are Two Options:

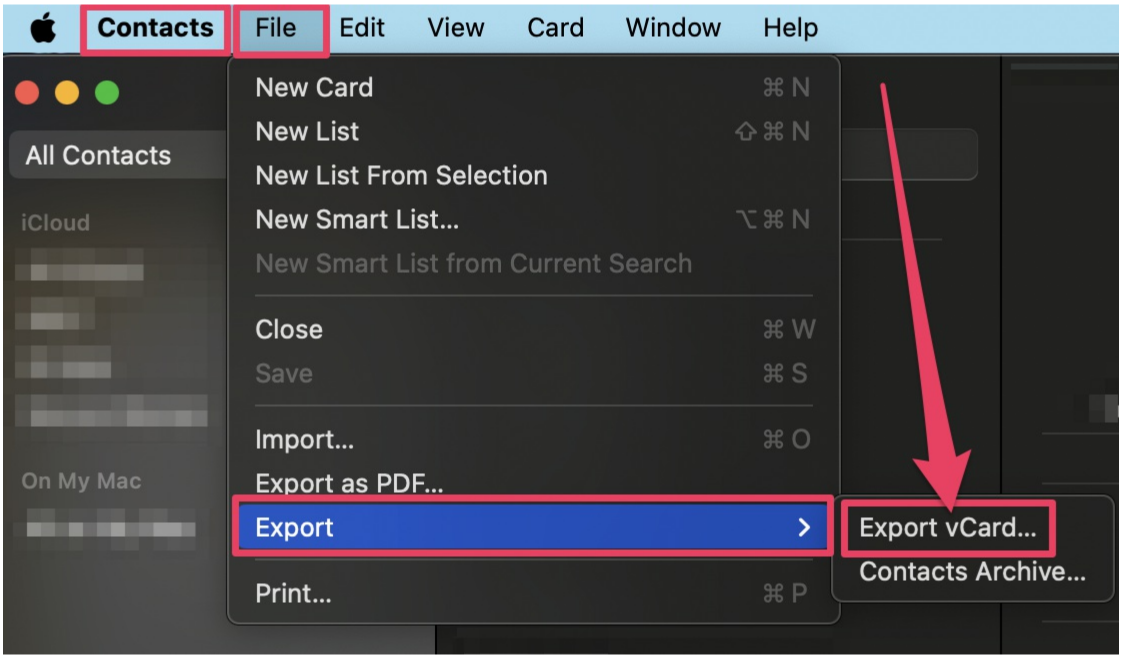
1.) Drag and Drop Desired Contacts from Apple Contacts into Numbers to Create CSV and Import.

This article from Apple's support site explains how to do this with the native software built into your mac. [Export or archive contacts in Contacts on Mac - Apple Support]

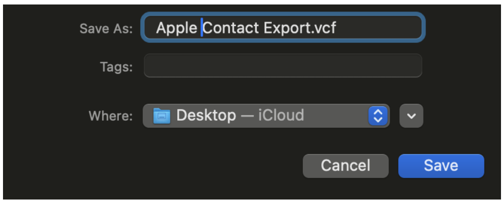
Save the Numbers file as a CSV and then follow the instructions on [Importing contacts from a CSV] to add your desired Apple contacts to Partner Essentials.

2.) Convert VCF File Export from Contacts to CSV Using 3rd Party Tool and Import from CSV

- Select the **Contact List** you would like to export, i.e., *All Contacts.*
- From the **Contacts Menu**, select **File**, **Export**, and then **Export vCard**.



- Name your **Contacts File**
- **Select the Location** where you would like to save it, i.e., *Desktop*.



Note: To convert the contacts' vCard to a Comma Separated Values (.csv) file, you will need to use a third-party converter.

- Once converted, follow the instructions on [Importing contacts from a CSV] to add your Apple contacts to MPDX.

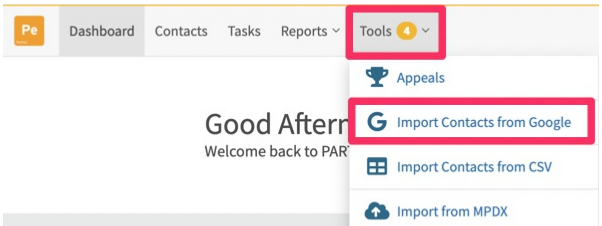
Migration: From Google Contacts

There is an import tool for your Google contacts to help keep your donor information up to date.

Note: This is a one-way import FROM your Google contacts INTO Partner Essentials.

Importing Google Contacts

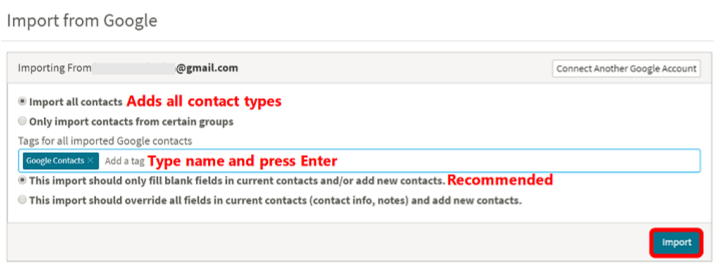
- Go to the **Tools** tab, scroll down and click on **Import from Google**.



Import All Google Contacts

You can choose to import ALL of your Google contacts to add every single contact from your account.

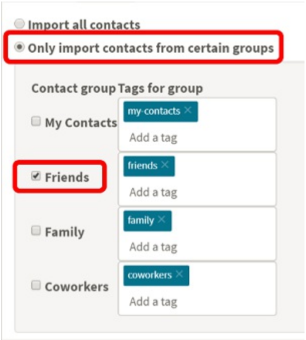
- Click on the **Import All Contacts** radio button.
- Add a **Tag**, i.e., *Google Contacts*, so you can filter on the contacts being imported.
- Select the **This import should only fill blank fields**... option (recommended).
- Then click the **Import** button.



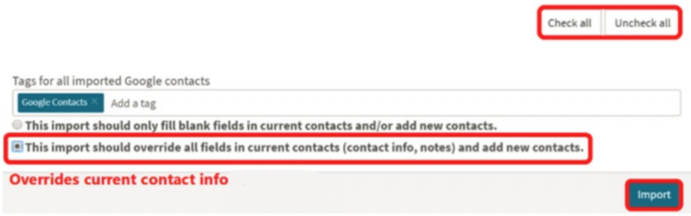
Import Select Google Contacts

You can also choose to import certain groups from your Google contacts.

- Click on the **Only Import Contacts From Certain Groups** radio button.
- Click the **checkbox** next the Group(s) names you want to import.

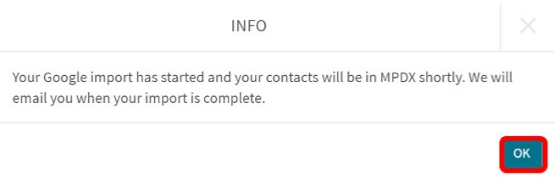


- Create a **Tag** (optional) for the import to filter on these imported contacts.
- Click the **Check All** button to select all Google groups.
- Click the **Uncheck All** button to deselect all Google groups.
- Select the import type of **fill in** or **override fields** in current contacts.
- Click the **Import** button.



Import Confirmation

After you click the **Import** button, Partner Essentials will confirm that the import has begun. You will receive an **email notification** when the import is **complete**.



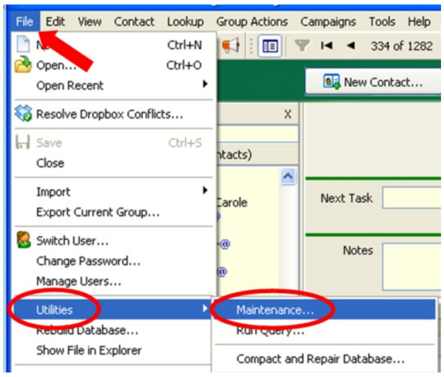
Migration From: TnT Connect

***** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ***

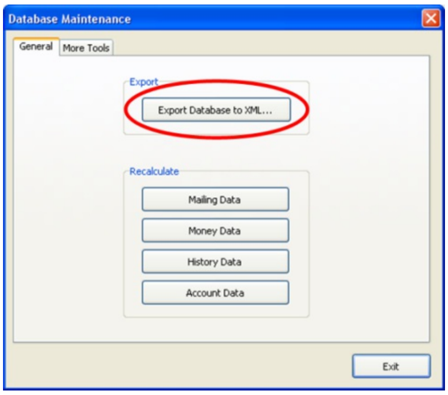
Step One: Export Your TntConnect Database

MPDX requires an XML file of your TntConnect database in order to import all its information. Below are the steps on how to export an XML file from TNTConnect and import it into MPDX.

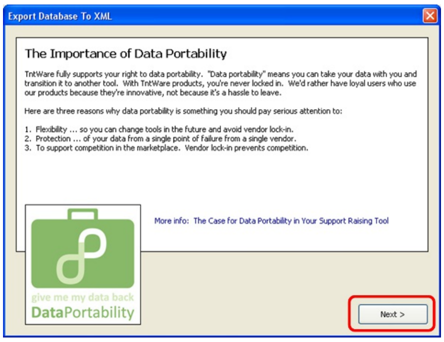
- Click on **File**, choose **Utilities**, then click on **Maintenance**



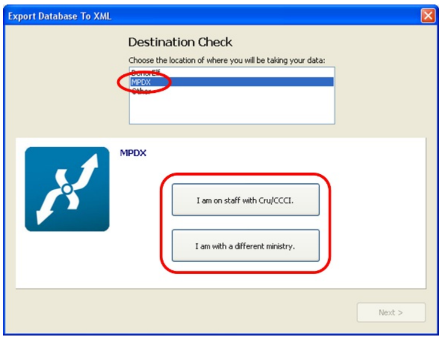
- In the popup box, Click on the button, **Export Database to XML**.



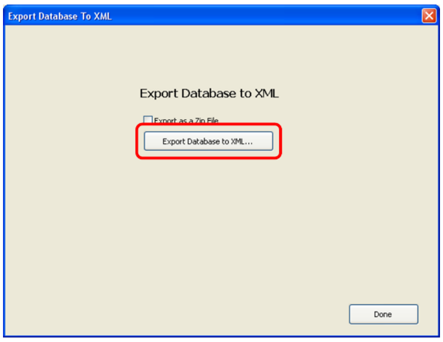
- Click **Next**.



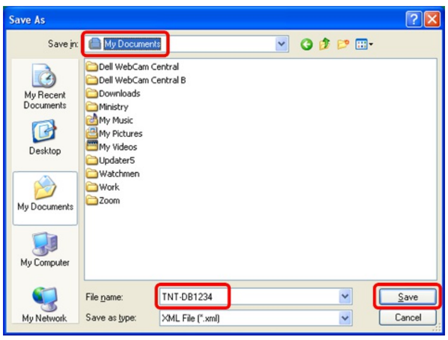
- Choose **MPDX**, click on the correct **ministry option**, and then click on **Next**



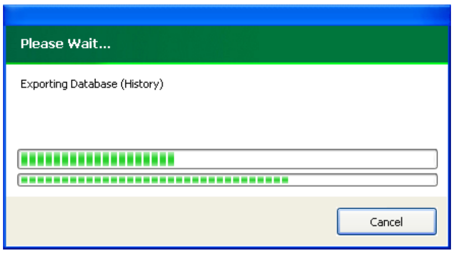
- Click on the **Export Database to XML**



- Pick a **Save File Location**, **Name** your XML file, and then click **Save**



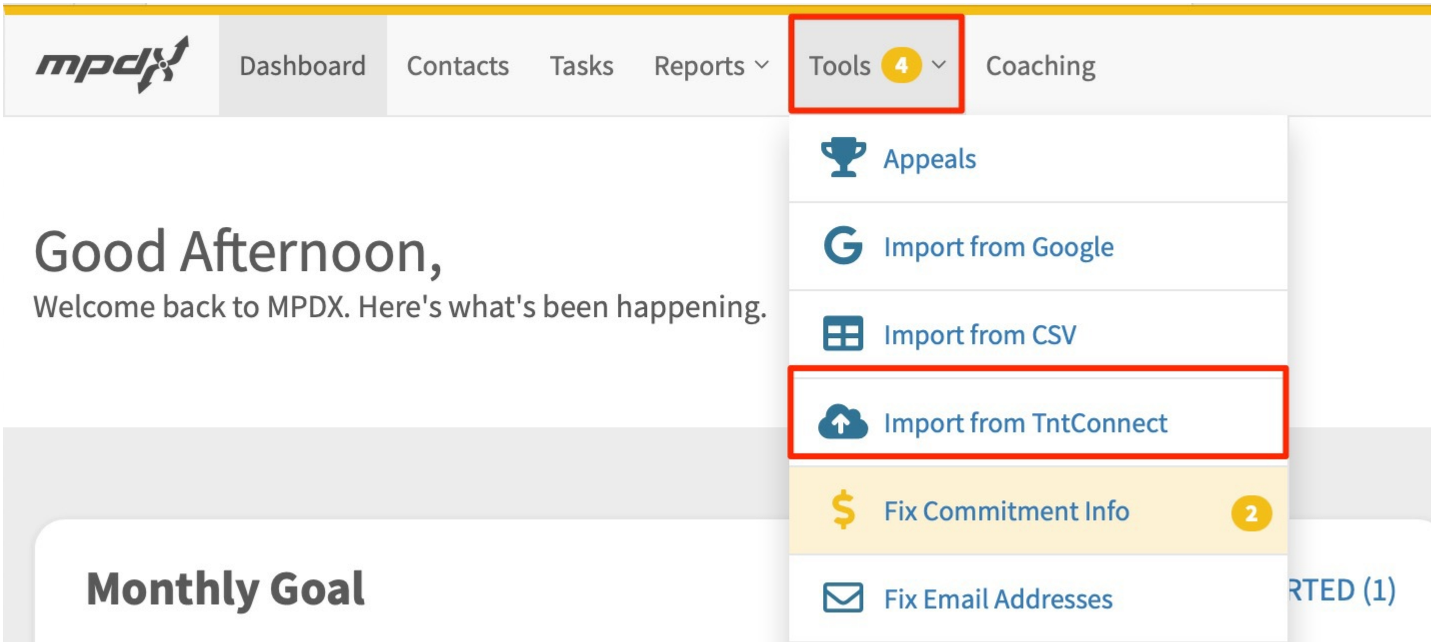
- The **Exporting Database** dialog box will pop up; it will disappear when the export is complete.



- After the export is complete, click on **Done**

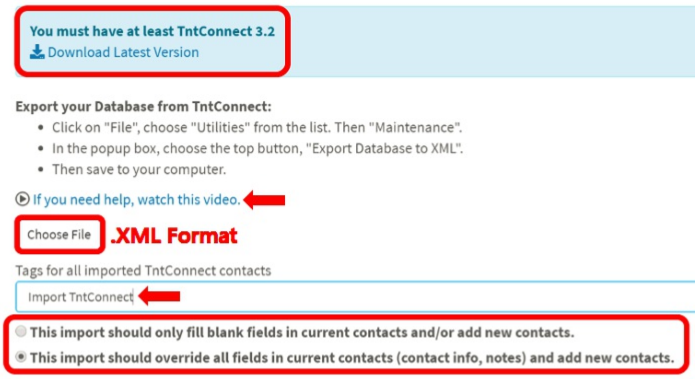
Step 2: Import from TntConnect

- Log into your account (partneressentials.work).
- Click the **Tools dropdown menu**, and then choose **Import from TntConnect**.



Note: You must have at least version TntConnect 3.2. Click the link: download the latest version.

- Click on **Choose File** and select the .XML file you saved to your computer.
- Add a **Tag** i.e., *Import, TnTConnect* (optional)
- Select either **This import should only fill blank fields in...** or **This is import should override all fields in...**based on which platform has the most current information.
- Click **Import**.



Birthday and Anniversary Dates

Birthdays imported from TntConnect will be displayed in MPDX with a **4-digit year *YYYY***. MPDX requires a birth year in order to display a birth date. If a year was not added to your contacts in TnTConnect, MPDX will display 1900 as the default. This same rule applies to anniversary dates, as well.

Note: After the import, it may take up to 24 hours for your TnTConnect data to fully populate MPDX. You will be sent an email notification upon completion .

Migration From: Preparing TntConnect For the Move

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

As you prepare your TNTConnect database for the move to MPDX, there 2 primary things to consider.

1. Do I want to perform data cleanup in TnTConnect before MPDX?
2. Do I want to do the cleanup after the import in MPDX?

You can “pack and ship” your TntConnect database as it is currently. However, if you decide to perform data cleanup on your database prior to the MPDX move, here are a few things to ease the transition:

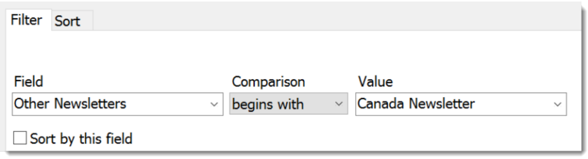
1. Tidy up your Saved Groups and User Fields (they become Tags in MPDX).
2. Delete any email addresses and phone numbers that are no longer valid.

Tidy Up Saved Groups and User Fields in TntConnect

Saved Groups and **User Fields** in TNT allow you to label or group your contacts in more detail than the pre-existing fields, i.e. *Christmas Newsletter* or *French Newsletter*.

You can filter TNT contacts by **Saved Groups** by clicking the **Look up this group** button.

Note: The other options is to click on the **Lookup** menu and choose **User Field**:



Note: Both TNTConnect **Saved Groups** *and* ***User Field*** *will become as* Tags *after import into MPDX.*

Saved Groups will import like this: “Category-Group Name”, like this:

- Other Newsletters-Canada Newsletter
- Other Newsletters-Christmas Newsletter
- Other Newsletters-French Newsletter
- Other Newsletters-Prayer Blast

If you have renamed a field (i.e., from “User 1” to “Other Newsletters”), that field name will import as a **separate Tag**:

- Other Newsletters
- Other Newsletters-Canada Newsletter
- Other Newsletters-Christmas Newsletter
- Other Newsletters-French Newsletter
- Other Newsletters-Prayer Blast

If you have the same data in multiple fields, OR if you have multiple sub-groups with the same name then it will **only import as one Tag**. See the examples below.

If the Value of two **User Fields** are the same (i.e., User 6 is ‘Other Newsletter Type’ while User 7 is ‘Preferred language’), MPDX would **import these values as one Tag**, French.

By contrast, if the names of **User Field** were labeled differently, then each would be **imported as separate Tags**.

MPDX would create these Tags for each contact:

- Other Newsletter
- Other Newsletter-French
- Preferred Language
- Preferred Language-French

Past or Expired Saved Groups and User Fields

If your TNTConnect database has past or expired groups or user fields (i.e. "2017 Christmas Ask"), you may want to remove them prior to import. This will significantly reduce clutter in MPDX.

Bold Orange Contact Info (unreviewed accounts)

In TntConnect, any addresses, phone numbers, or emails in **bold orange** indicate this data does not match the Cru Donation Services database (when it linked to their gift data). In most cases, the difference is just the spelling of a street name such as “Road” vs. “Rd.” or a postal code “84117” vs. “84117-1234”.

Note: TntConnect does not automatically accept Cru’s address when a new donor is downloaded, as you may have a more current address for the contacts in question.

To View or Update Bold Orange Contact Info

- Click on the address, phone number, or email in **bold orange**.
- A dialog box will open that allows you to either **Accept** (change) or **Ignore** (decline) the address, phone number or email listed.

To see ALL contacts with **bold orange** "unreviewed" status, select **Lookup | Unreviewed Account Info**.

Cleaning up all the **Unreviewed Account Info** prior to the import, will save you time and ensure you have the correct contact information for each partner.

> Note: If you have never performed the **Unreviewed Account Info** TntConnect function, then you may have dozens of partners with a **bold orange status**. This effort is helpful if, for example, you have donors who have moved and you are unaware.

Migration From: Finding TntConnect Data After Import

***** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Before You Import Your TNTConnect Data

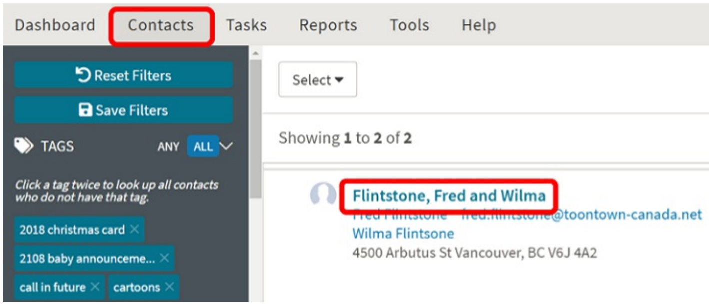
> Important: Follow the instructions for: Preparing your TNTConnect For the Move before you import it to MPDX.

From TNTConnect Fields to MPDX Fields

Below is a guide of how TntConnect fields are populated and their location after it is imported into MPDX. Fields in MPDX are labeled with corresponding TntConnect field name.

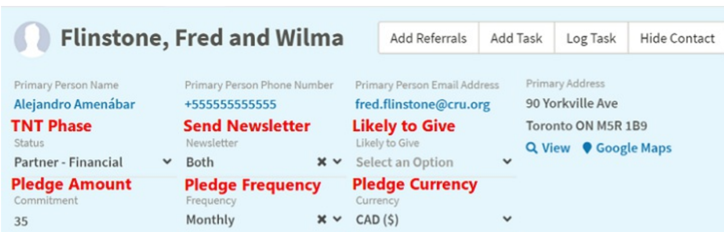
Contacts: Finding Donor Information

Under **Contacts**, click on the name of any partner to view their detailed information.



Contact Summary

- **TNT Phase** in TntConnect imports to **Status** in MPDX (same names)
- **Send Newsletter** in TntConnect imports to **Newsletter** in MPDX
    - TntConnect Newsletter Type - MPDX
        - Paper with Email Backup - Physical
        - Email with Paper Backup - Email
        - Paper Only - Physical
        - Email Only - Email
        - Nothing - None
        - Paper and Email - Both
- **Likely to Give** in TntConnect imports to **Likely to Give** in MPDX.
- **Pledge Amount** in TntConnect imports to **Commitment** field in MPDX
- **Pledge Frequency** in TntConnect imports to **Frequency** field in MPDX.
- **Pledge Currency** in TntConnect imports to **Currency** field in MPDX.

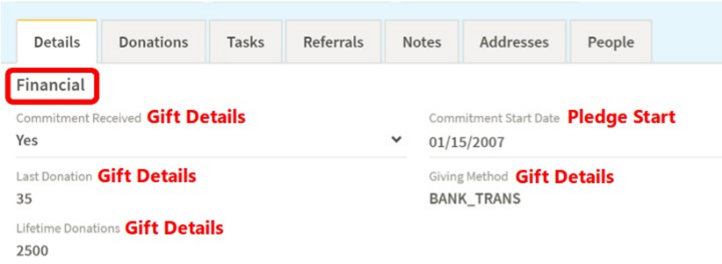


Contacts - Details Tab

The Details Tab consists of 3 sections: **Financial**, **Communication**, and **Other Details**.

Details Tab - Financial

- **Gift Details** in TNTConnect imports to **Last Donation**, **Lifetime Donations**, **Giving Method** in MPDX
- **Pledge Start** (date) in TntConnect imports to **Commitment Start Date**.

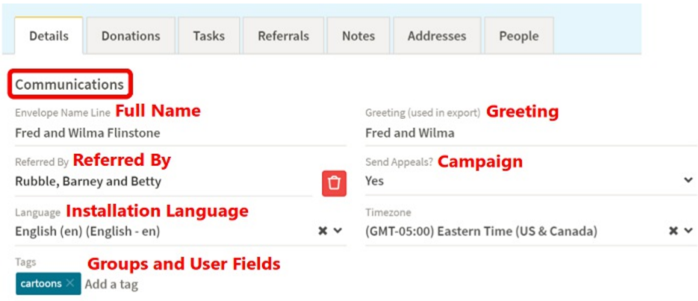


Note: Commitment Received, in MPDX, will be **YES** if there is a TNTConnect Pledge Start Date and **NO** if the TNTConnect Pledge Start Date field is blank.

Details Tab - Communication

- **Full Name** in TntConnect imports to **Envelope Name Line** in MPDX.
- **Greeting** in TntConnect imports to **Greeting** field in MPDX.
- **Referred by** in TNTConnect imports to **Referred By** in MPDX.
  - The Referred by field is populated ONLY if those donors are imported into MPDX or already present in Contacts.
  - If a Referred by name is not listed in Contacts, a **Tag** *missing tnt referred* by is created.
  - The Referred by name is imported into **Notes** for that Contact.
- **Campaign** details in TNTConnect imports to **Send Appeals (Y/N)** in MPDX.
- **Installation Language** in TntConnect imports to **Language** in MPDX.
- **Groups** and **User Fields** in TNTConnect imports to **Tags** in MPDX.
- **Fund Rep** in TntConnect imports to **Tags** in MPDX.

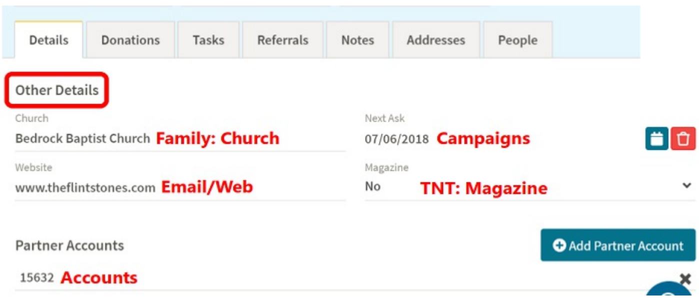
Short Name and **Salutation** in TntConnect does not import into MPDX



Note: You can use Tags to filter specific Contacts into groups, i.e., Cartoons.

Details Tab - Other Details

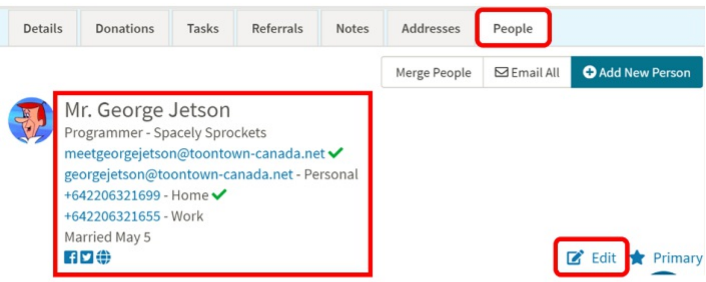
- **Family: Church** in TNTConnect imports to **Church** in MPDX.
- **TNT: Magazine** in TNTConnect imports to **Magazine Yes/No** in MPDX.
- **Email/Web** in TNTConnect imports to **Website** in MPDX,
- **Campaigns** in TNTConnect imports to **Next Ask** in MPDX.
- **Accounts** in TnTConnect imports to **Partner Accounts** in MPDX.



Contacts: People Tab

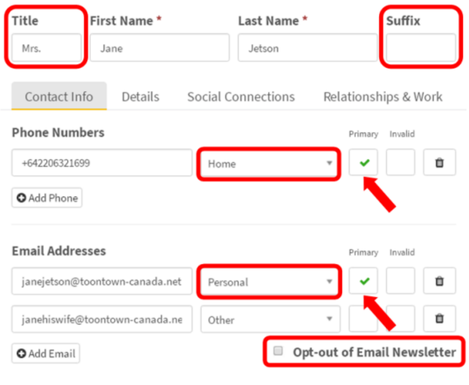
Each **Contact** lists all the individuals via a **People Tab** and displays their contact information.

- To make any changes to an individual, click on the **Edit icon**.



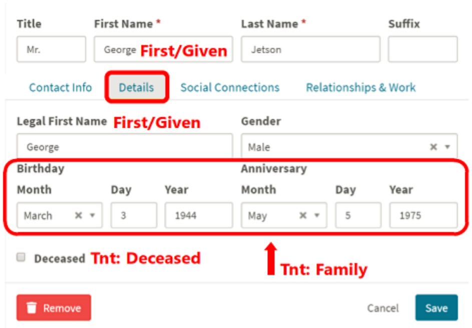
People: Contact Info

- The will display the MPDX fields populated from your TNTConnect import.



- **Title** in TntConnect imports to **Title** in MPDX.
- **Suffix** in TntConnect imports to **Suffix** in MPDX, i.e. *Jr. or III*.
- **Phone Numbers** labeled *Home, Mobile, Business, or Other* in TNTConnect will be labeled the with same values in MPDX.
  - **Preferred Phone** in TntConnect imports as **Primary** with ✔ in MPDX.
- **Email Addresses** labeled *Home, Business, or Other* will be labeled the with same values in MPDX. If no label existed in TNTConnect, it will not have a label in MPDX either.
  - **Preferred Email** in TntConnect imports as **Primary** with ✔ in MPDX.

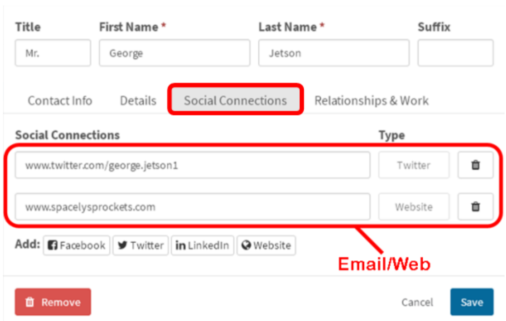
Contacts: Details



- **First/Given** in TntConnect imports to **First Name** and **Legal First Name** in MPDX
  - Hint: Add nickname in **First Name** field and full first name in **Legal First Name** field
- **Deceased** in TntConnect **marks all** individuals listed in a Contact as **Deceased** in MPDX
  - Under **Details**, check the **Deceased Box** for the person whom it actually applies. Uncheck this box for all other individuals for whom this status does not apply.
- **Family: Birthday and Anniversary** in TntConnect imports to **Birthday** and Anniversary in MPDX

Note: This information transferred from TNTConnect *in* the locations specified, applies to both husband and spouse.

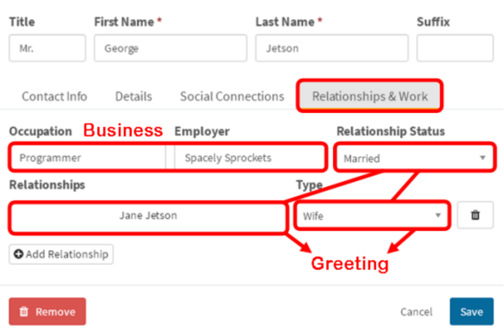
Contacts: Social Connections and Websites



- Website and social media web addresses from **Email/Web** in TntConnect imports to **Social Connections** in MPDX

Note: This information transferred from TNTConnect, in the locations specified, applies to both husband and spouse.

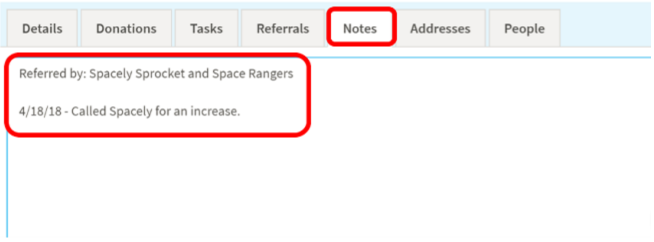
Contacts: Relationships and Work



- **Business Profession in TntConnect** imports as **Occupation** in MPDX
- **Business Name** in TntConnect imports as **Employer** in MPDX
- **Children** in TntConnect import as **Relationships** (name) and **Type** (son or daughter) in MPDX
  - Children field in TntConnect is added to **Notes** for each contact.

Contacts: Notes

- **Referred By** and **Notes** from TntConnect is imported into MPDX, Notes for every contact.



Husband and Spouse Interests

- **Family: Husband Interests** in TntConnect is added to **MPDX, Notes** for each **Contact.**
- **Family: Spouse Interests** in TntConnect is added to **MPDX, Notes** for each **Contact**.

Note: Everything in **Husband and Spouse Interests** TNTConnect fields is imported into MPDX.

Husband and Spouse Nicknames

- **Spouse Nickname** in TntConnect will be added to **Notes** for each Contact in MPDX.

User Status, Categories and Region

- **User Status** in TntConnect will be added to **MPDX, Notes** for each Contact.
- In Notes, MPDX imports everything into **User Status.**

- **Categories** in TntConnect will be added **to MPDX, Notes** for each Contact**.**

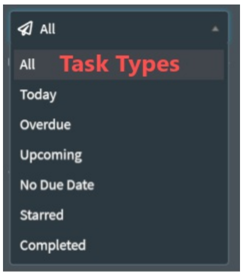
- **Region in TntConnect imports as Timezone on the Details tab of each contact in MPDX.**

Contacts: Stored Information but Not Visible

- **Next Ask Amount** in TNTConnect is not an option for Contacts in MPDX. MPDX stores this information but it is not currently a visible field.
- **Estimated Capacity** in TNTConnect is not an option for Contacts in MPDX. MPDX stores this information but it is not currently a visible field.
- **Direct Deposit** in TNTConnect is not an option for Contacts in MPDX. MPDX stores this information but it is not currently a visible field.
- **Pictures** in TNTConnect do not import into MPDX Contacts. However, you can upload a thumbnail picture, i.e. .png or jpeg.
- If you add any **Social Connections**, i.e., *Facebook*, MPDX will display a thumbnail of their social media profile pic.

Tasks: Completed, Past Due, and Current

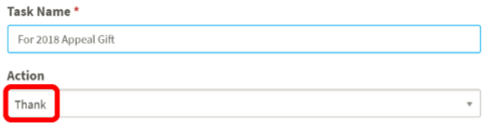
Belows is how MPDX imports TntConnect *Task Status* into *Task Type*.



- **Task: Not Started** in TntConnect imports as a **No Due Date** task in MPDX.
- **Task: In Progress** in TntConnect imports as **Overdue** or **No Due Date** in MPDX based on the date.
- **Task: Waiting** in TntConnect imports as **Upcoming** or **Overdue** in MPDX based on the date.
- **Task: Deferred** in TntConnect imports as **Overdue** or **Upcoming** in MPDX based on the date.
- **Task: Complete** in TntConnect imports as **Completed** in MPDX.

TNTConnect Task Types in MPDX

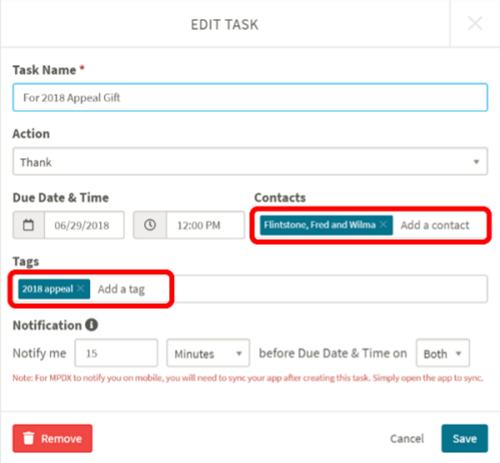
- **Task Type** in TntConnect imports as a task **Action** in MPDX, i.e. *Thank*.



- **Task Type: Present** imports with **No Task Type** into MPDX and adds a comment *Present in TntConnect*.
- **Task Type: WhatsApp** imports as **Text Message** type into MPDX and adds a comment *Text Message in TntConnect.*
- **Task Type: MailChimp** imports **Email** into MPDX and adds a comment *MailChimp in TntConnect*.

Task: TnTConnect Fields That Convert to Tags

- **Task: For** in TntConnect imports into MPDX as a **Tag**, named after the Contact to whom the task is assigned. You can filter your Tasks by the Task Assignee Tag.
- **Task: Category** in TntConnect imports as a **Tag with the Category Name** into MPDX within each task.
- **Task Campaign** in TntConnect imports as a **Tag with the Campaign Name** into MPDX within each Task.
- **Task Notes** in TntConnect are imported into the **Comments** field into MPDX within each Task.



Tasks: Data Not Imported

- **Task Importance** from TntConnect currently does not import into MPDX.
- **Recurring Tasks** from TntConnect is not currently supported in MPDX. However, the next instance of the task will import but no future Tasks will be created.

Migration: From MPDX

Overview

This article combines instructions provided by CRU on 7/17/23 for manually exporting data from MPDX and instructions to import data into Partner Essentials in order to migrate your data from MPDX into Partner Essentials.

This article is intended for Partner Essentials DIY Customers.

Please note the MPDX migration process will only be available until March 31st 2024. After this point CRU will remove all MPDX data for all non-CRU users. CRU's migration team can be reached at migration@mpdx.org. Below is an excerpt from this announcement:

If you do not follow the process and export your data as outlined above, and we have not heard from you, we will remove your ability to access your data on January 30, 2024 but retain your data until March 31, 2024, at which time we will delete all remaining data we hold from non-Cru ministries. If circumstances arise that make you unable to meet this deadline, notify the Cru MPDX Team at migration@mpdx.org.

We are thankful for the opportunity to serve together and hope to hear from you soon.

Thanks,
The Cru MPDX Team
migration@mpdx.org

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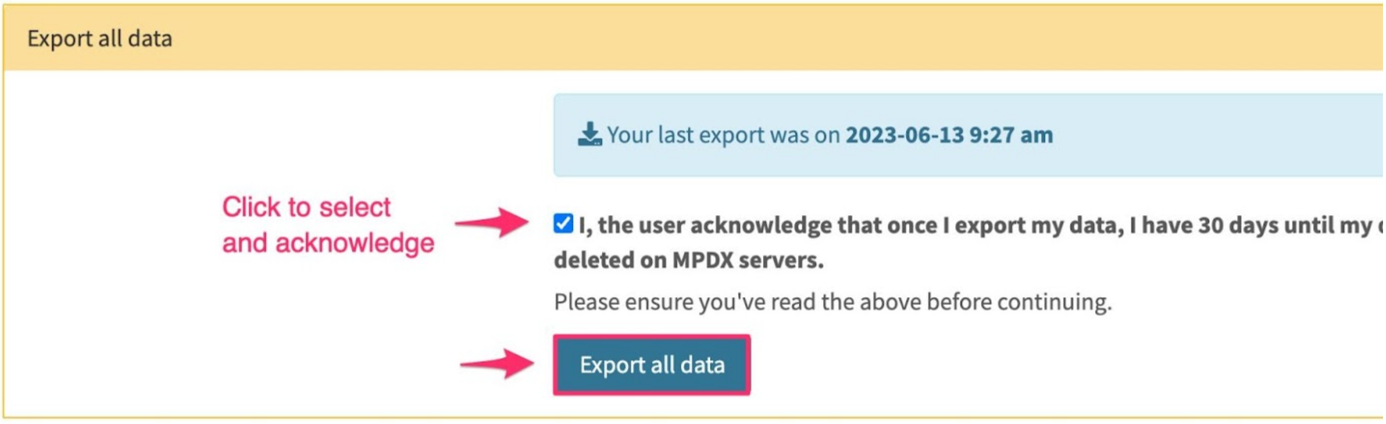
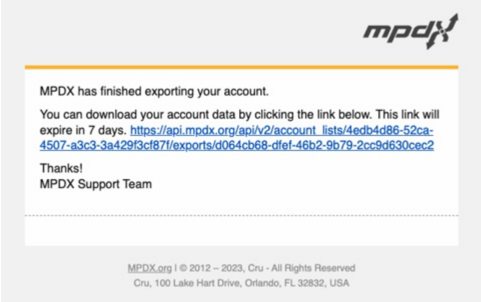
Exporting Data From MPDX

1. Log into your account at https://mpdx.org
2. Go to **Settings**, then **Preferences**. Select the bottom drop-down menu option **"Export all data"**.
3. **Click to check the box and acknowledge**: "I, the user, acknowledge that once I export my data I have 30 days until my data will be deleted from MPDX servers".
4. **Click the button to "Export all Data"**



5. Once you’ve pressed this button, you will receive an email from support@mpdx.org with the link to your exported data.



MPDX has finished exporting your account.

You can download your account data by clicking the link below. This link will expire in 7 days. https://api.mpdx.org/api/v2/account_lists/4edb4d86-52ca-4507-a3c3-3a429f3cf87f/exports/d064cb68-dfef-46b2-9b79-2cc9d630cec2

Thanks!
MPDX Support Team

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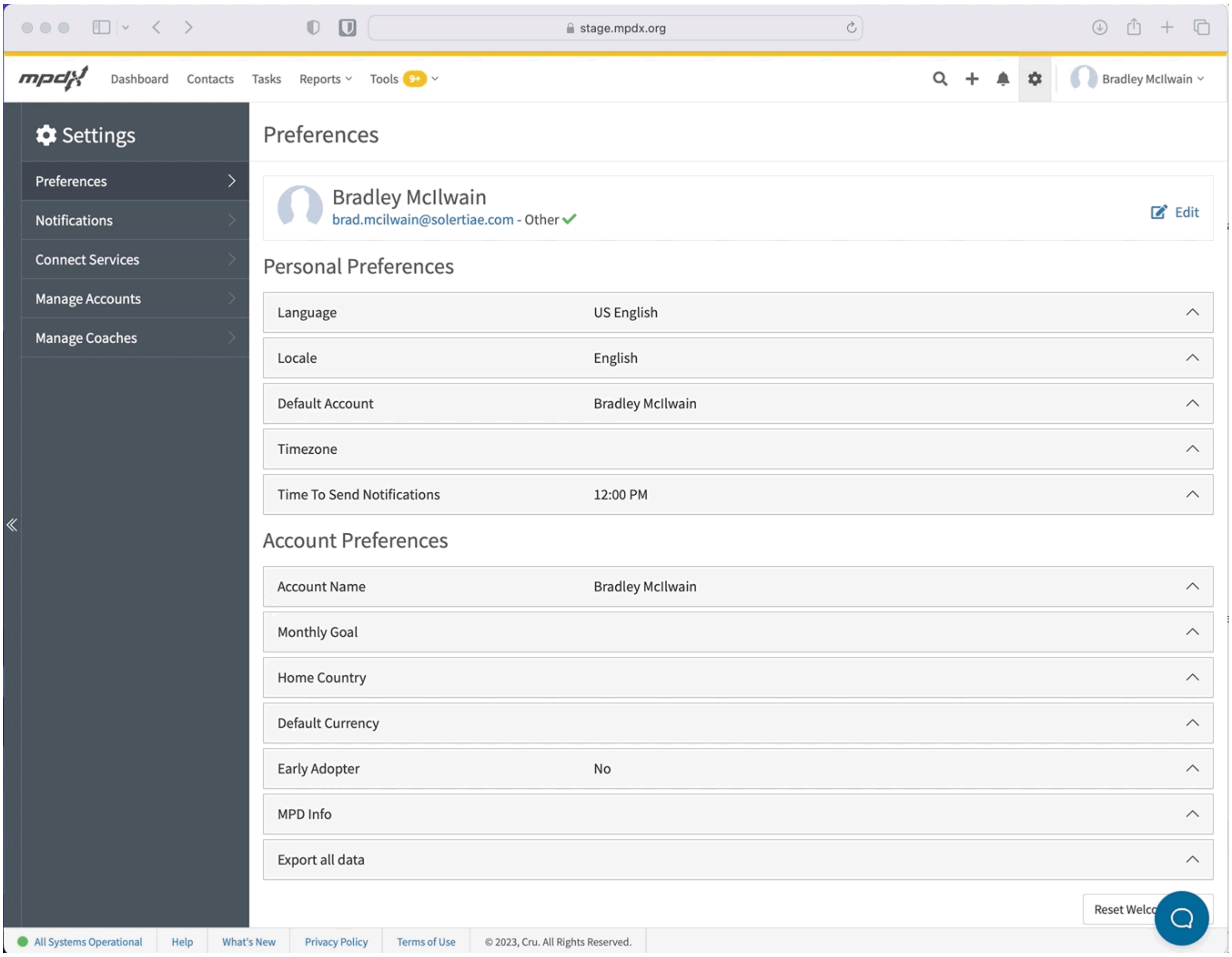
Cru, 100 Lake Hart Drive, Orlando, FL 32832, USA

The link will take you to MPDX to an XML export. For individuals, the file format will be a .xml file, but will likely be compressed into a .zip file.

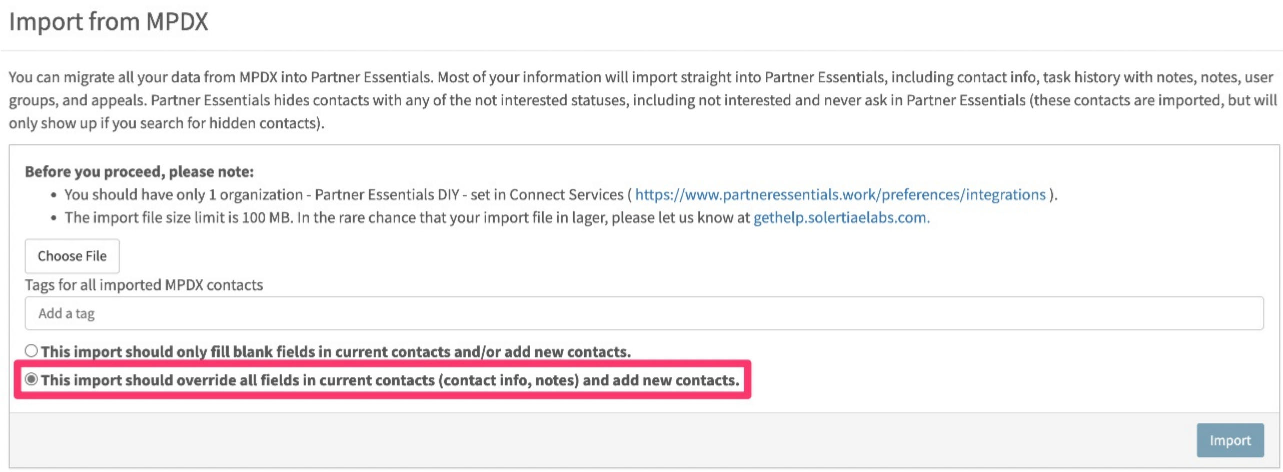
6. Once you begin the export you will see the message **“Your export is downloading, this may take some time.”**



Importing Data Into Partner Essentials

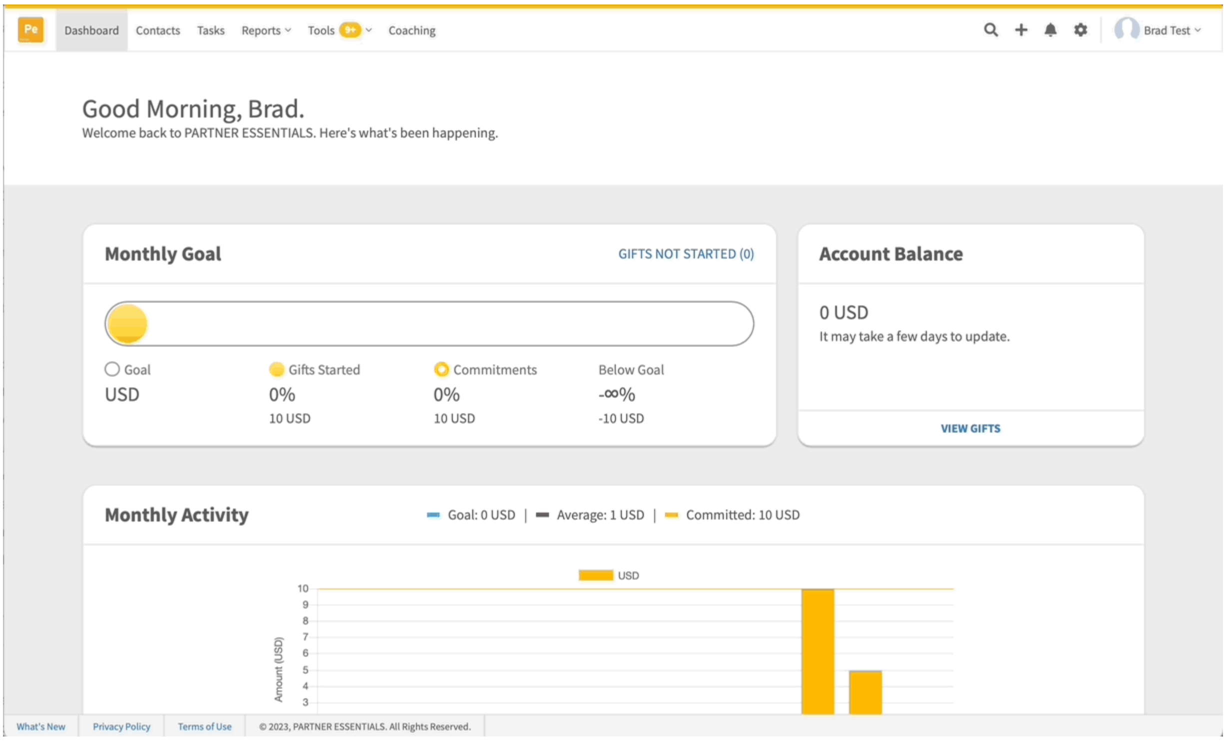
1. Log into your Partner Essentials account at https://www.partneressentials.work/login
2. Click on **Tools** in the top banner
3. Scroll down to the **Imports** section and click on **MPDX**
4. Upload the file XML file found in export email from CRU by clicking **Choose File**

   Use the default option when importing the XML file.



5. Click on **Import**
6. In the popup click "**Yes Import My Stuff!"**

   Note: Imported contacts may take up to 12 hours to appear in your account.



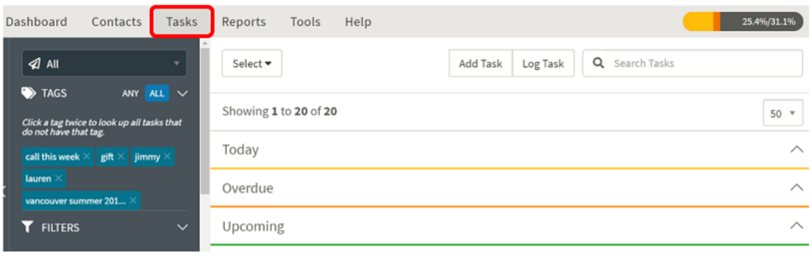
Data Cleansing: Tasks

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Task Cleanup After Import

After a data import from, for example, TntConnect all your tasks are populated in MPDX.

- Go to the the **Tasks** page.

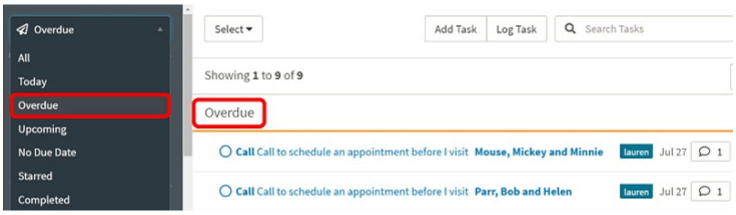


Organizing Overdue Tasks

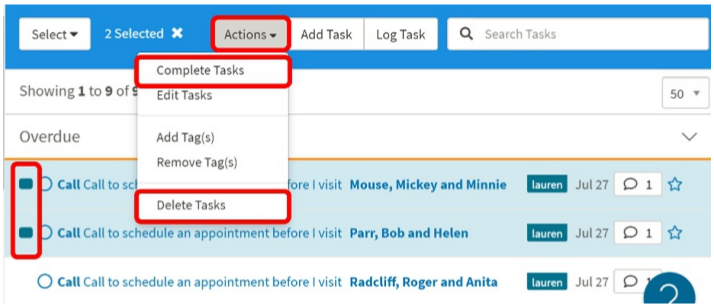
If you have overdue tasks, that are expired, you can mark them complete or delete the tasks.

Specific Overdue Tasks

- Click on the **drop-down** on the top left and select **Overdue**.
- All the **Overdue Tasks** will be displayed on the right.

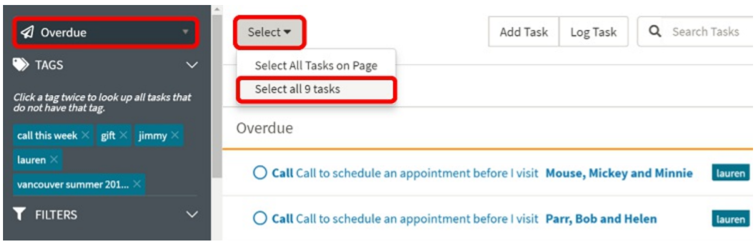


- Click on the **Checkbox** (now dark blue) to **Select Specific Contacts**.
- Click on the **Actions** button, then choose **Complete Tasks** or **Delete Tasks**.



All Overdue Tasks

- Click on the **Select** button and choose **Select All # Tasks**, i.e., *All 9 Tasks*.
- Click on the **Actions** button, then choose **Complete Tasks** or **Delete Tasks** (see above).

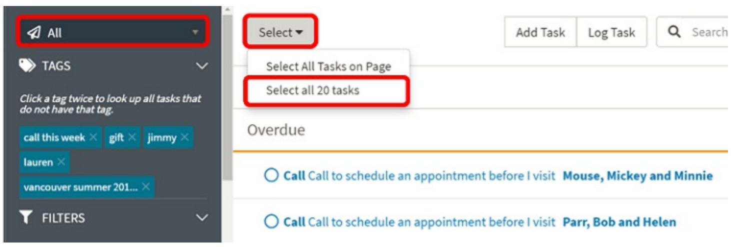


Organizing Tasks with Tags

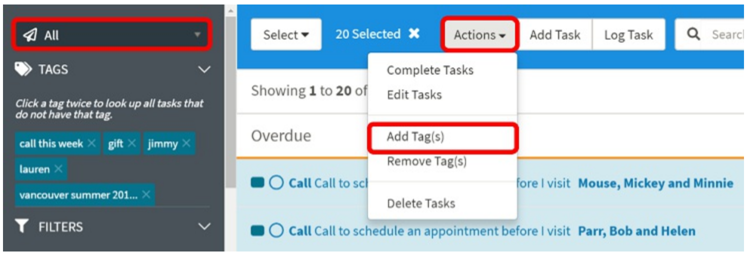
For Tasks that were imported from Google or TntConnect, a Tag can be added to more quickly identify them.

Organizing Imported with Tags

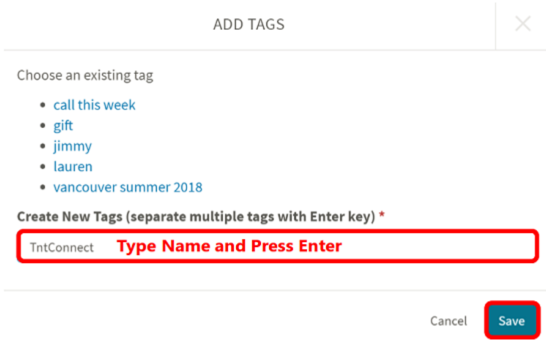
- On the top left, select **All** (left)
- Click the **Select** button and then **Select All # Tasks**, i.e., *20 Tasks*.



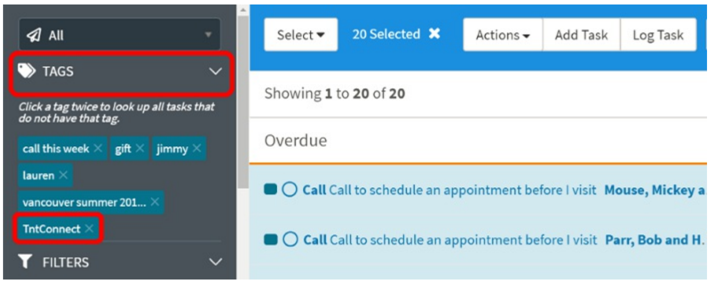
- Click on the **Actions** button.
- Then select **Add Tags**.



- Under **Create New Tags**, type the **Tag Name**, i.e., *TntConnect*.
- Press **Enter** and then click **Save**.



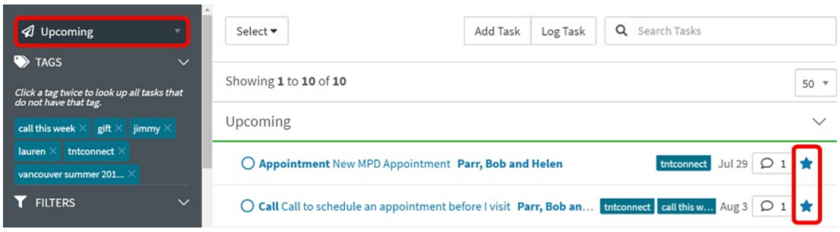
- The tag, i.e., **TntConnect**, will be located under the **Tags** section to the left.



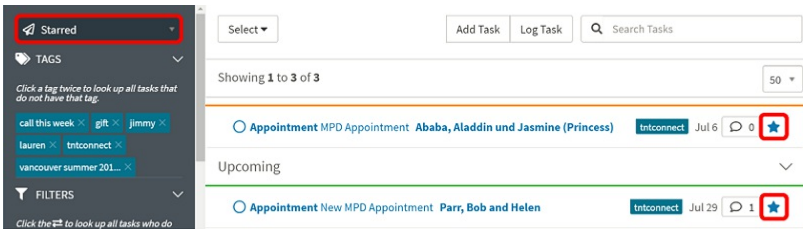
Prioritizing Tasks

Another way to organize tasks is giving them starred status.

- On the top left, select **Upcoming** tasks.
- To the right of any task, click on the **Star icon** to make it a priority (blue star).



- On the top left, select **Starred** to display all starred tasks.
- Note that each task has a blue **Star icon** to the right.



For more information on Tasks, click this link: Create, Edit, and Log Tasks.

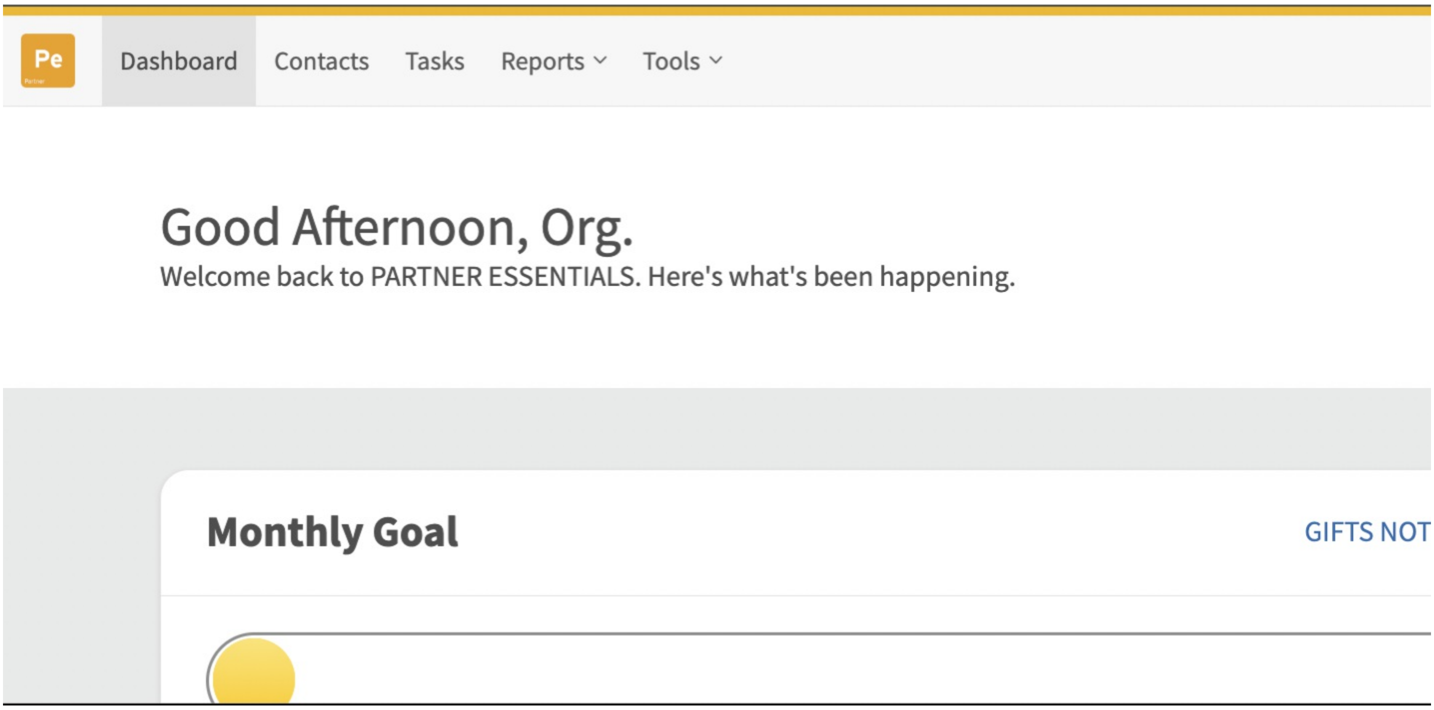
Organization Admin

Org Admin Only: Manage Users

You will only be able to follow the instructions below if you have received an invitation by e-mail to manage an organization and accepted it.

If you would like access either ask an existing administrator or send a request for access.

We've developed some user management and reporting features that are available by selecting "Backend Admin" from the settings icon. This will open a new tab in your browser.

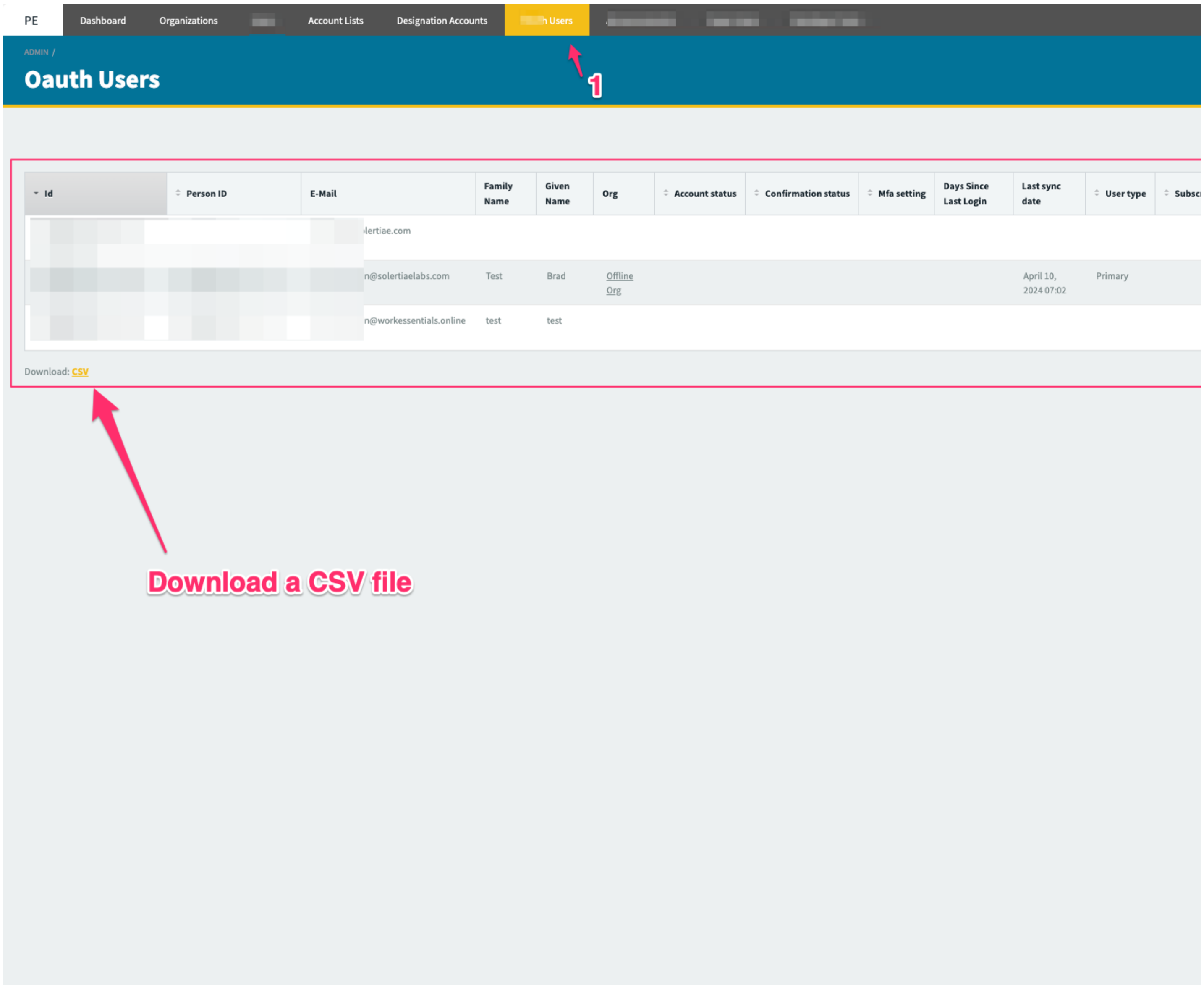


User Management:

The User Management tab allows a user with organization management permission to see all users connected to the organization. A user connects to the organization when [setting up their account].

Please note:

- If the user hasn't connected to your organization yet then you will not see them in the listing of your users. If that user needs help logging into their account, it can be [requested by using our helpdesk].
- This data is updated daily.



1.) User Data Report

User data is displayed here on the screen per filter selection and the displayed user report can be downloaded as a csv file.

See further below for more explanation of the column headings and the meaning for what is reported.

2.) Filters for Reported User Data.

These filters can be used to narrow down the number of users to be displayed.

- Applying the Filter - After making your filter selection click the "Filter" button.
- Clearing the Filter - Click the "Clear Filters" button to remove all filters.

3.) Manage User

Click on the "Manage" link in the row for a specific user to manage that user and see history. See below for more on this.

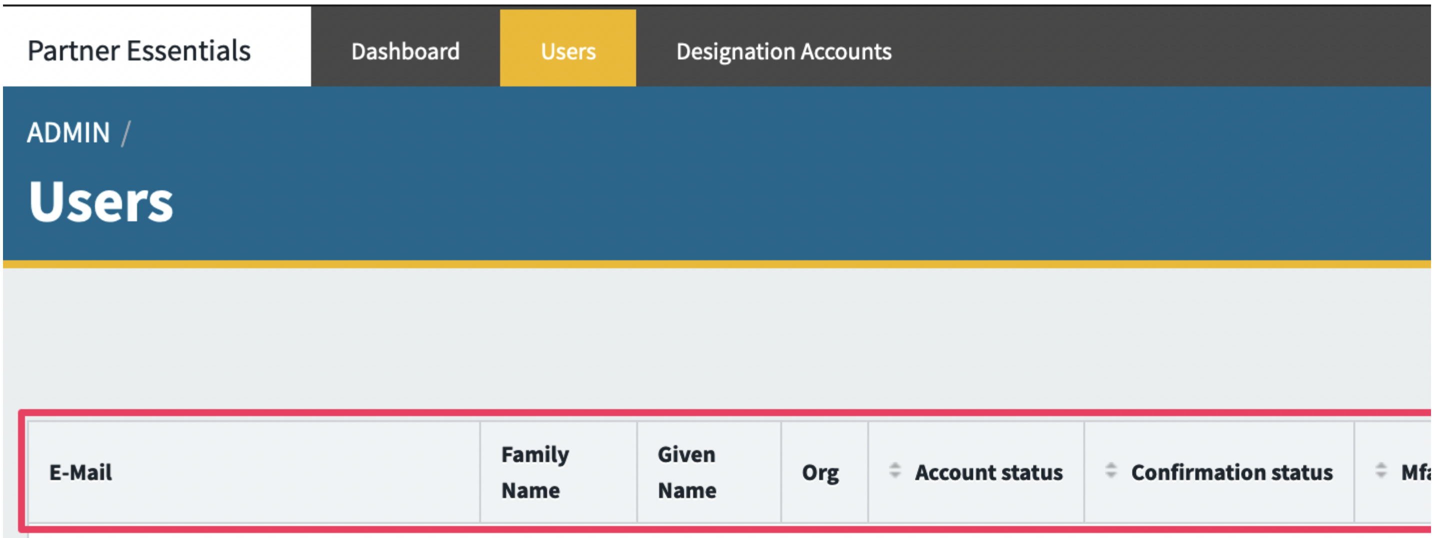
4.) Create New User

A new user can be created using this tool. See below for more.

5.) Refresh

User data displayed here is updated daily. The Refresh button can be used to update the data displayed here as needed.

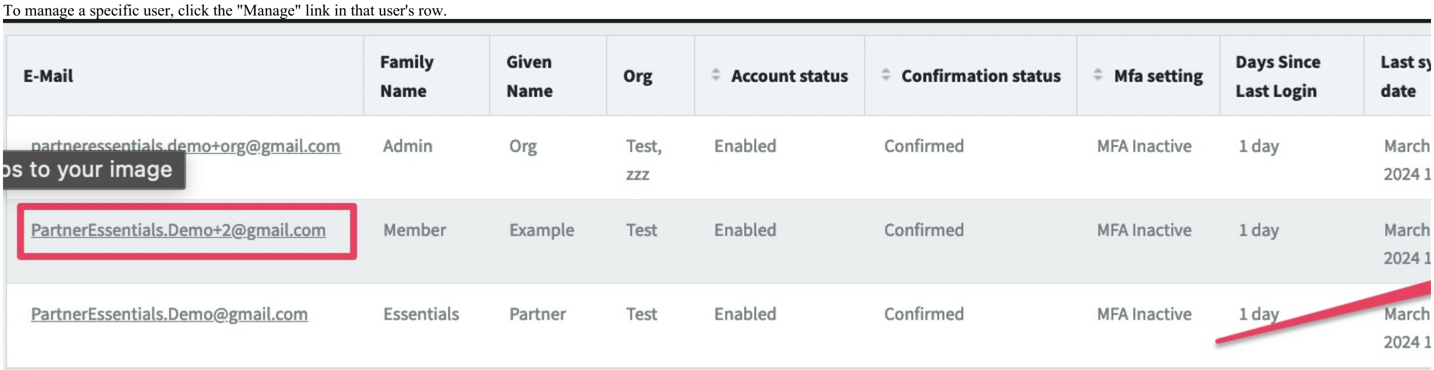
User Reported Headings:



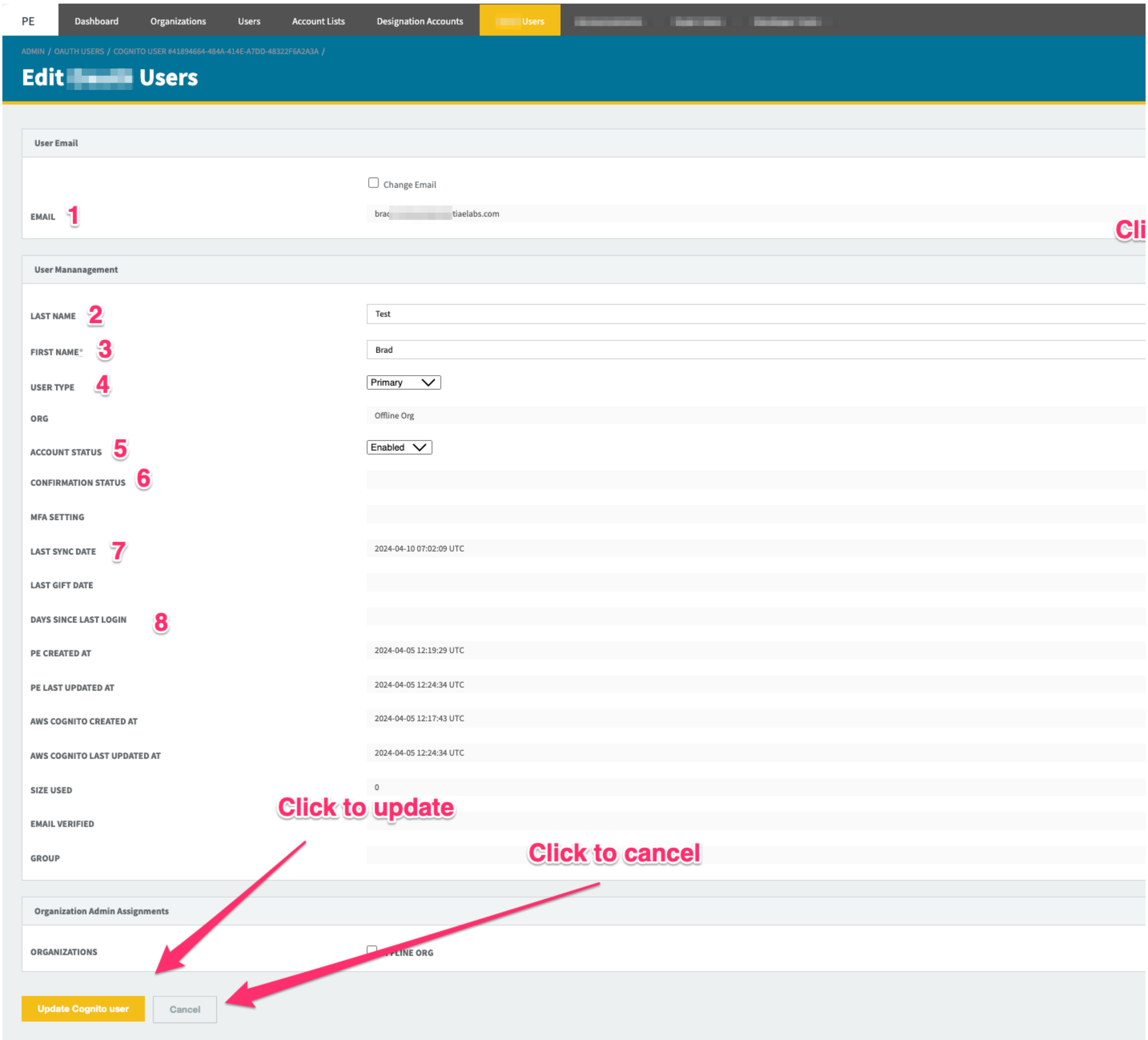
The column headers and their meaning are described below in the section on [managing a user](#):

Manage User:

To manage a specific user, click the "Manage" link in that user's row.



This will bring you to the **Edit Page** for that specific user:



1.) E-mail - This is the e-mail address that the user logs in with

2.)Family Name - Also called "Last Name".

- Can be set at the time of creating the user
- Can be changed here by an Admin
- Can be changed by the user in settings ->preferences->Edit profile (shown below)

4.) Given Name - Also called "First Name"

- Can be set at the time of creating the user
- Can be changed here by an Admin
- Can be changed by the user in settings ->preferences->Edit profile(shown below)

5.) User Type

- **Primary** - This is for the user raising support.
- **Secondary** - This is intended for use by a user who shares access to an account of a primary user. This could be a spouse or an administrative role. (not included in the number of subscriptions for the organization)
- **Test** - This is used for a test account, a common example being training (not included in the number of subscriptions for the organization).

6.) Account Status

- **Enabled** - The user can log into their account.
- **Disabled** - The user cannot log into their account. (The data is not deleted by disabling the account and a disabled account can be set back to enabled.)

7.) Confirmation Status - this status shows if the user has logged into Partner Essentials:

- **Confirmed** - The user has logged into their account.
- **Blank** - Nothing could be listed for a newly created user and this will be updated once the backend report updates (daily).

8.) Last Sync Date - This is the date of the last data pull from the external source (i.e. DonorHub, NeonCRM, TouchPoint, or VirtuousCRM).

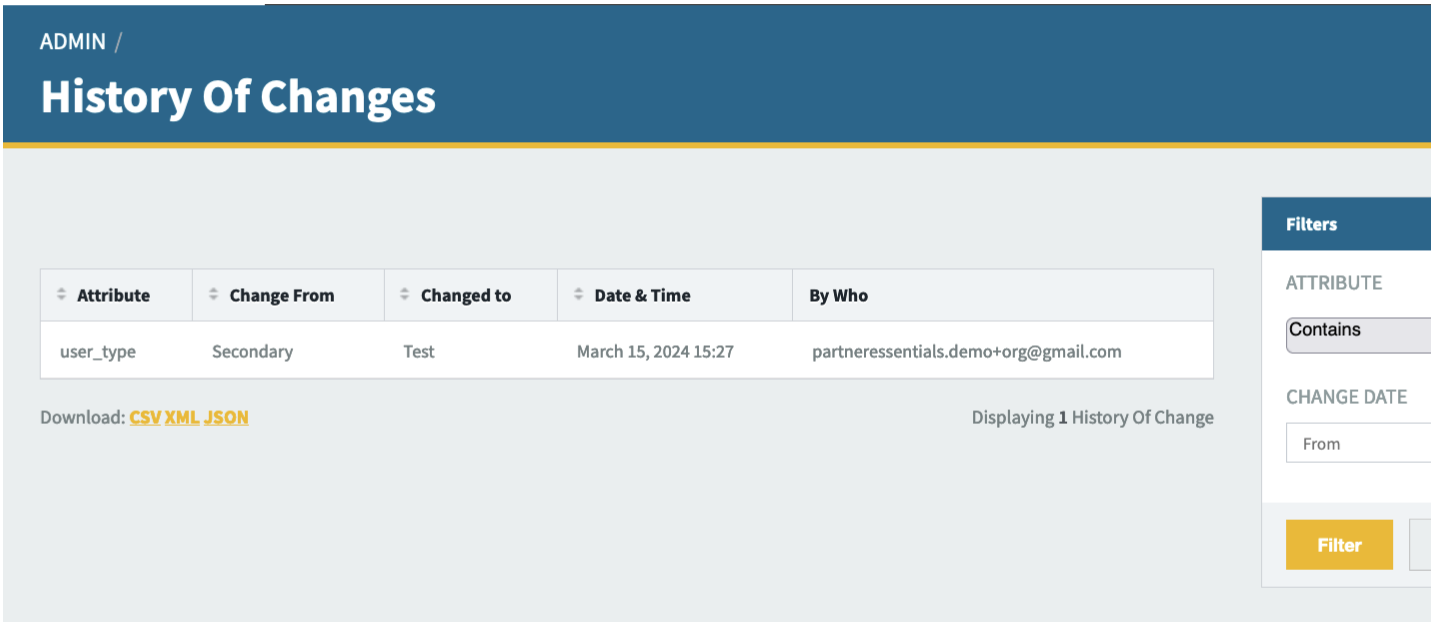
9.) Days Since Last Login - Shows the number of days since the user last accessed their account.

Click on the "**Update Cognito User**" button to make the changes.

Click on "**Users"** in the **navigation** tree in the top left to go back to view all users.

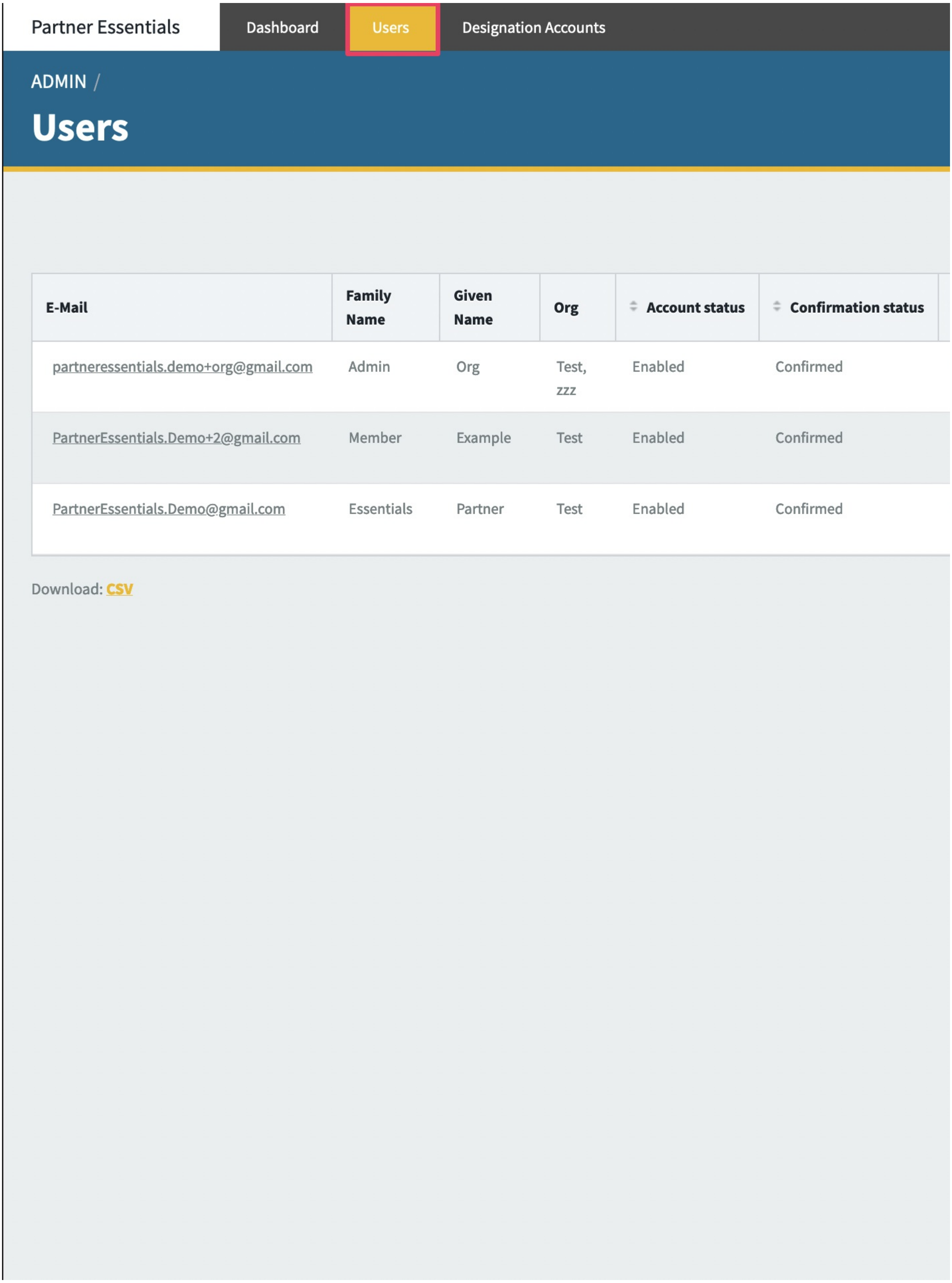
Change history can be viewed for the user by clicking on the "**History of Changes**" button at the top right. If this doesn't show on a specific user's record that means changes haven't been made using this tool yet.

Change History:

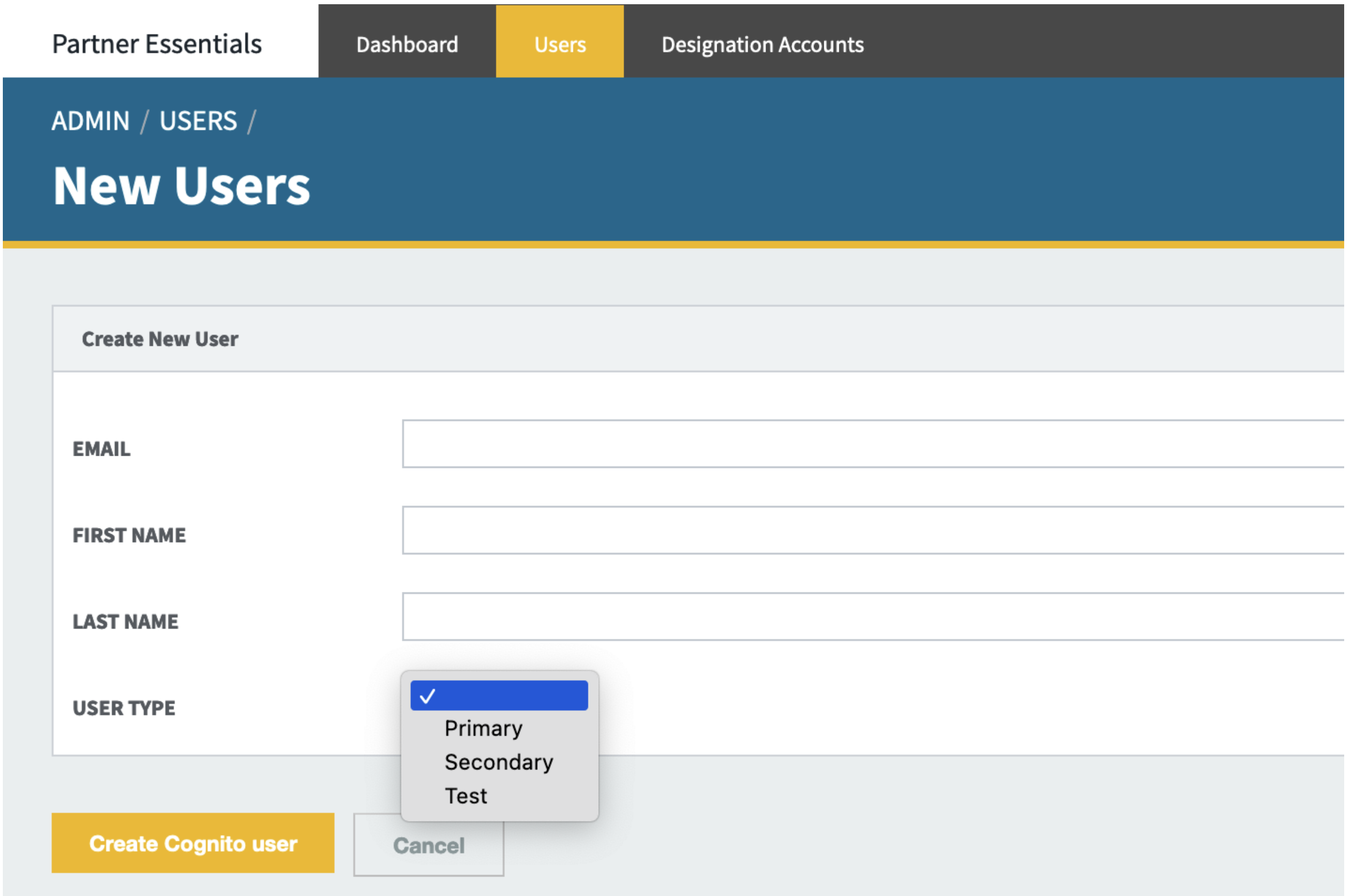


Each changed attribute for a user will be listed here including who made the change and when.

Create New User:



Clicking the "Crete New User" button above will bring you to the New Users Window shown below:



Please make your entries and selections for each field:

- Email: the user will login with this and system generated notifications will go to it as well.
- First and Last Name should be entered at the time of creating the user.
- User Type

Clicking **"Create Cognito user"** will send a Welcome e-mail to that user (to their login e-mail) with instructions how to login.

We recommend letting them know they should:

1.) Look for an e-mail from noreply@solertiaelabs.com and

2.) During setup they should pick your organization.

Please note:

- If your organization has automated donation syncing they will also need to enter their username and password for that portal (Donor Hub Staff Portal, NeonCRM, TouchPoint, and Virtuous).
- If the user hasn't connected to your organization yet then you will not see them in the listing of your users. If that user needs help logging into their account, it can be requested by using our helpdesk.

Org Admin Only: Anonymize Donor

You will only be able to follow the instructions below if you have received an invitation by e-mail to manage an organization and accepted it. If you would like access either ask an existing administrator or send a request for access.

If you have accepted invitations to manage multiple organizations you will need to select the specific organization to manage in the top right of the relevant pages.

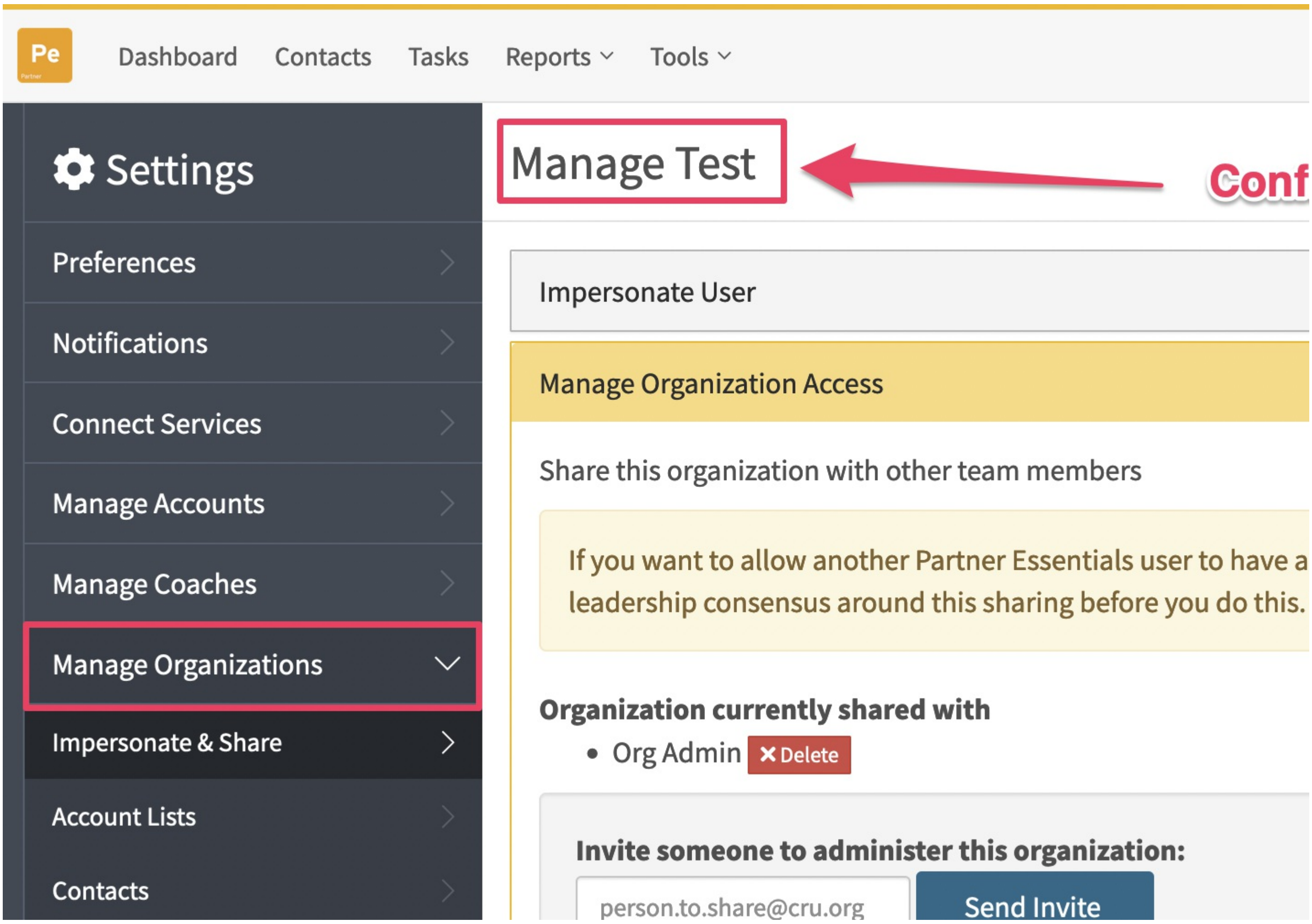
- Click on the **Settings** button and select **Manage Organizations**.
- On the left hand side drawer under Manage Organization click on **Contacts**.
- Add organizations to filter by and type something to search by in the **Search Contacts** field.
- You'll then see a list of contacts that match the search criteria.
- If the contact was added by a donation integration you'll be able to anonymize the contact by clicking on the red **Anonymize** button. This will remove all personally identifiable information from the contact. This is should only be done after receiving a specific request from the donor to remove their information from any system. This is common in the European Union with Right to be forgotten requests organizations can sometimes received. This feature does not remove donation information or donor numbers, rather it just removes email addresses, addresses, phone numbers and anonymizes the contact name. **You will need to inform your user that this has happened.**

The user will still be able to see that donations came in, but each contact record will be stripped of all data except for the donor number as mentioned above and a generic contact description of "DataPrivacy, Deleted [date]".

Org Admin Only: Impersonate a User

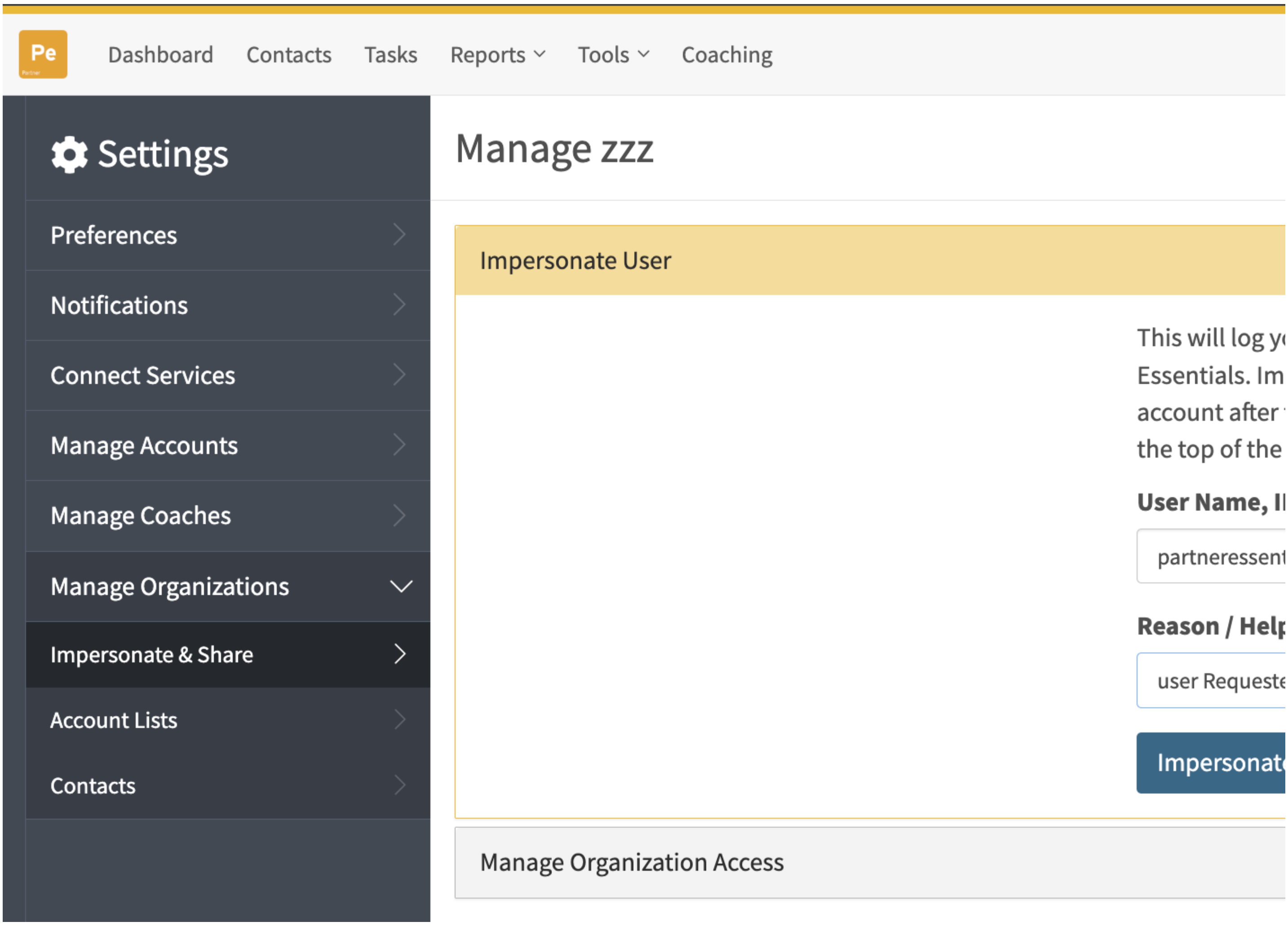
You will only be able to follow the instructions below if you have received an invitation by e-mail to manage an organization and accepted it. If you would like access either ask an existing administrator or [send a request for access](#).

If you have accepted inviations to manage multiple organizations you will need to select the specific organization to manage in the top right of the relevant pages.

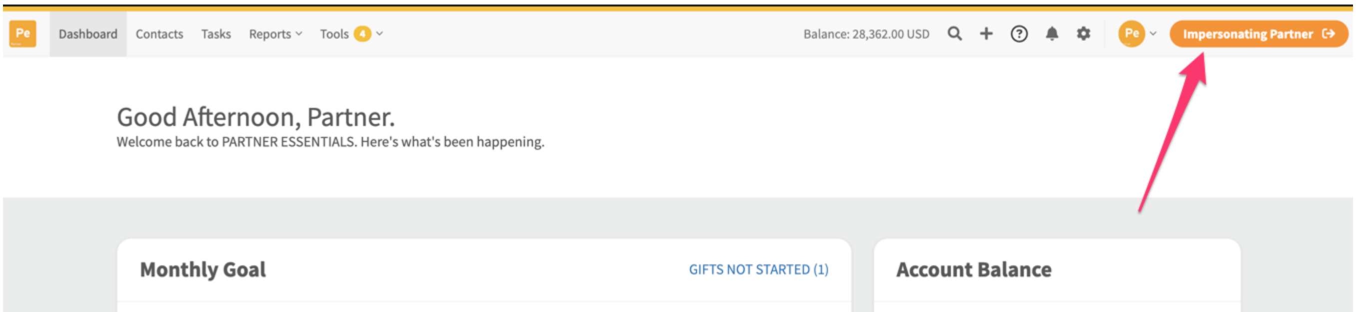


You are able to impersonate any user in your organization. You should use this only to help users tidy up data, inspect their donations to ensure syncing is working or help them troubleshoot issues they are having. You will be able to access their account for limited time and then you will automatically be logged out of their account.

- Click on the **Settings** button and select **Manage Organizations**.
- Enter the **Email address** the user login with.
- Enter a **Reason** (this will be visible and recorded as accessed their account).
- Click **Impersonate User** button.



- You will then be taken to their account and you will be able to access the users account on their behalf
- Once you are done click the **Exit Impersonation Mode** button at the top of the page



Org Admin Only: Invite Another Org Admin

You will only be able to follow the instructions below if you have received an invitation by e-mail to manage an organization and accepted it.

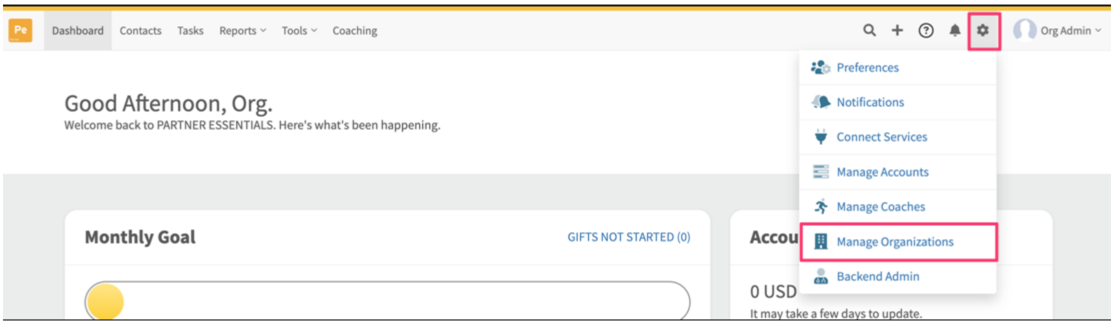
If you would like access either ask an existing administrator or send a request for access.

There are two areas the provide this functionality:

Manage Organizations

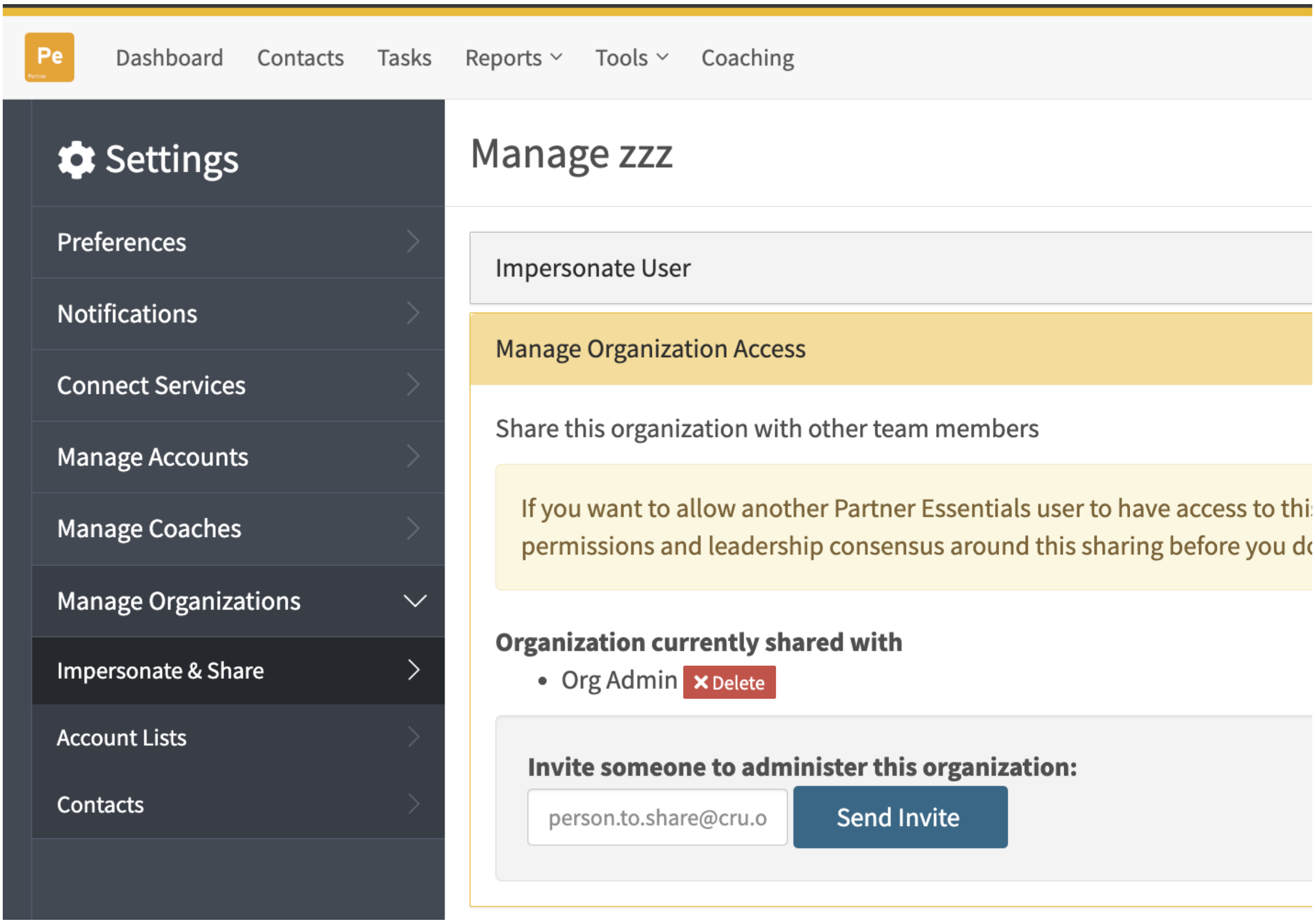
- Click on the **Settings** button and select **Manage Organizations**.
- Click on the **Drop-down Arrow** to the right of the **Manage Organization Access** section to view the relevant section.

Note: If you have accepted multiple organization invitations, you will also be able to select an organization to manage in the top right of the relevant pages.



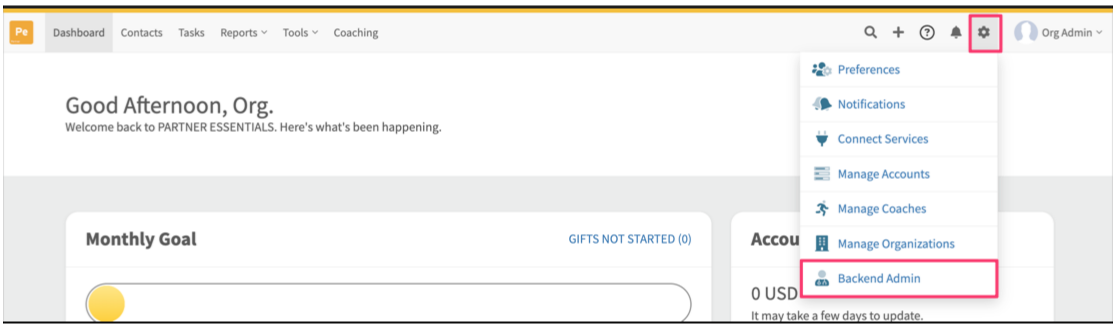
You can share organization account access with other staff such as financial team members, HR personnel, or help staff. If you have already shared organization access, those names will be listed under **Organization currently shared with** section.

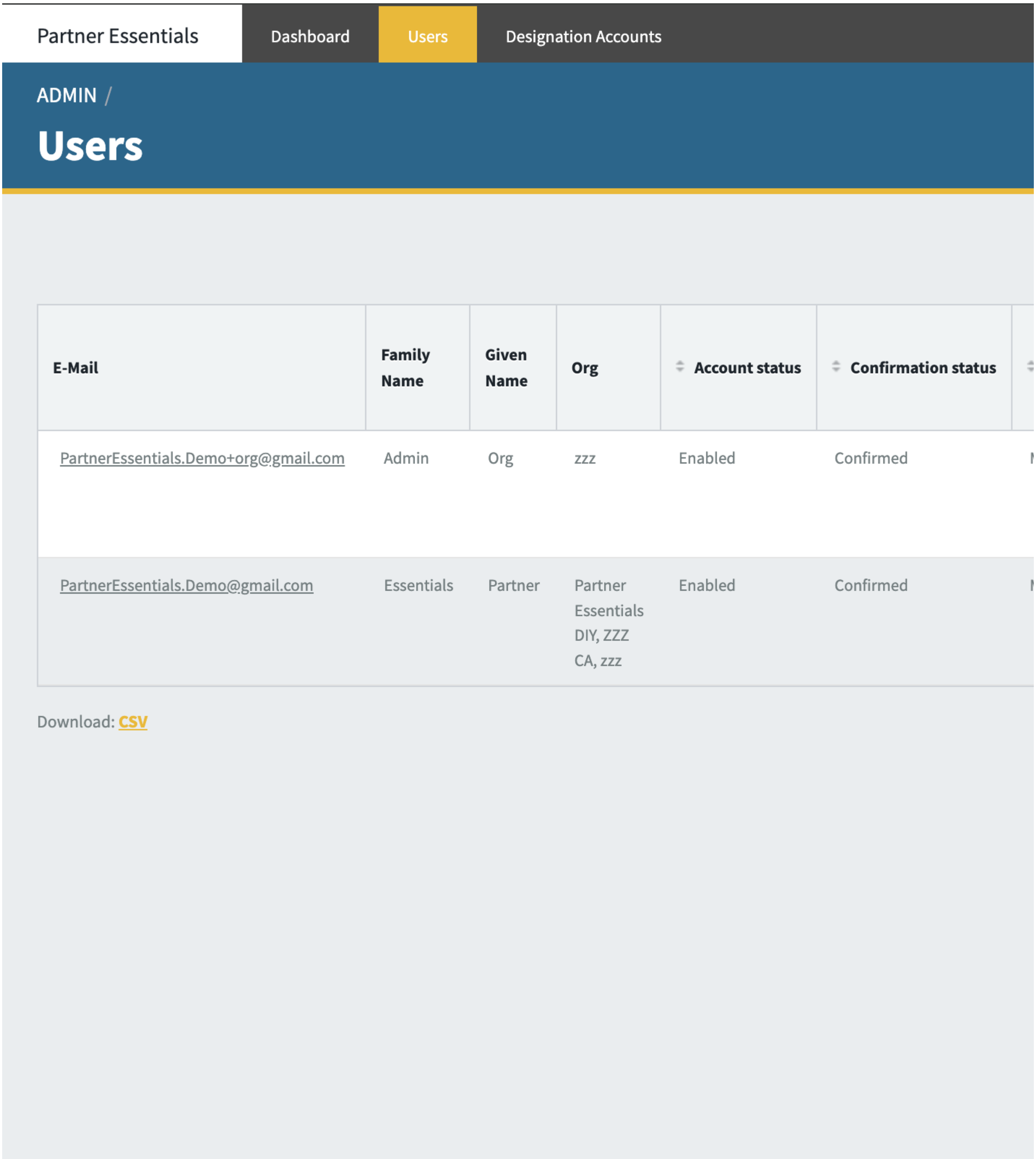
- Click the red **Delete** button to remove a specific person from organization access.
- Type in an **Email Address** and click **Send Invite** to grant access. The user will receive an email with instructions allowing them access to manage the organization.



Backend Admin for Organization Managers

You can manage users and access some additional reporting in the Backend Admin portal with the same Manage Organization Access.

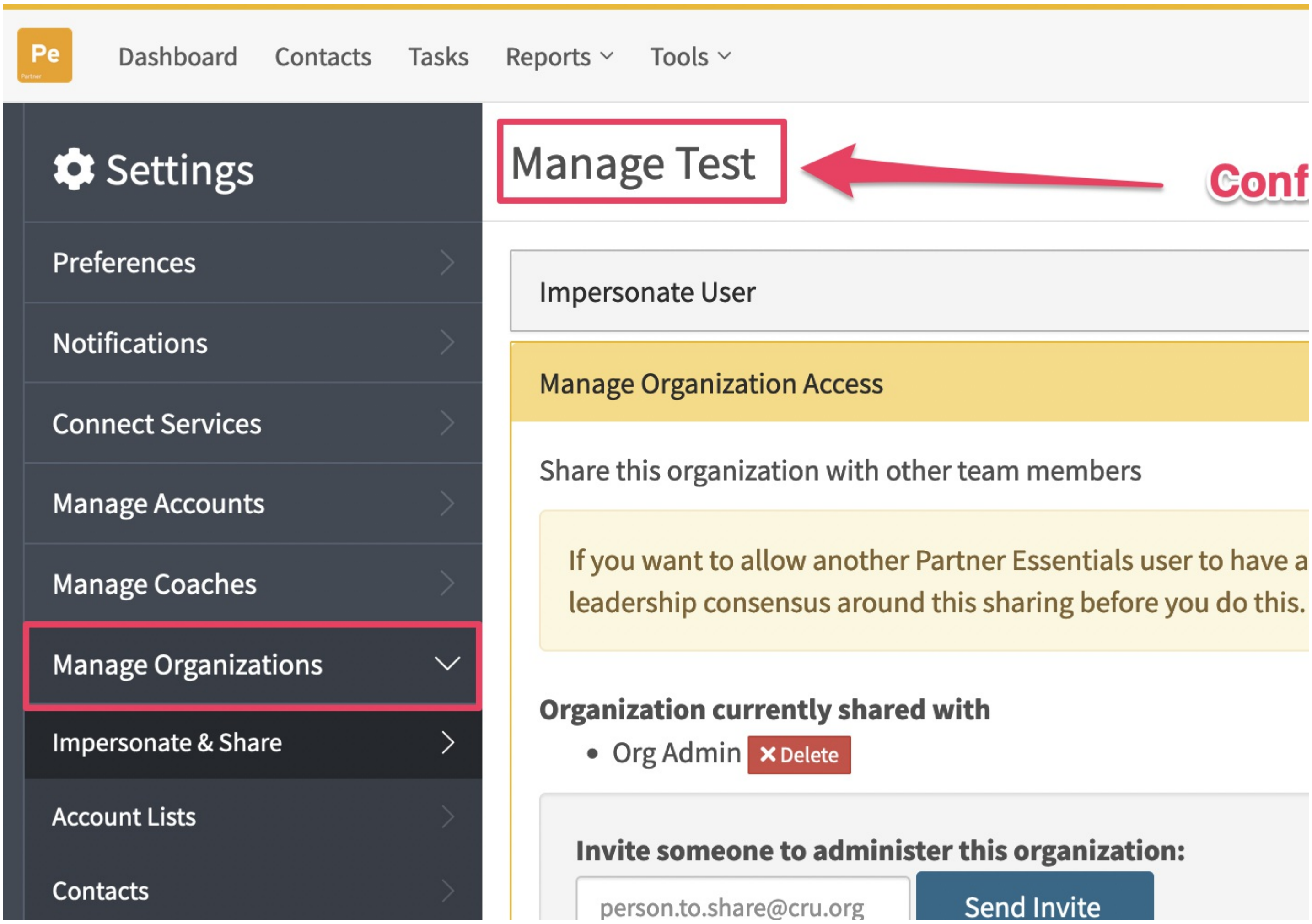




Org Admin Only: Manage Account Lists

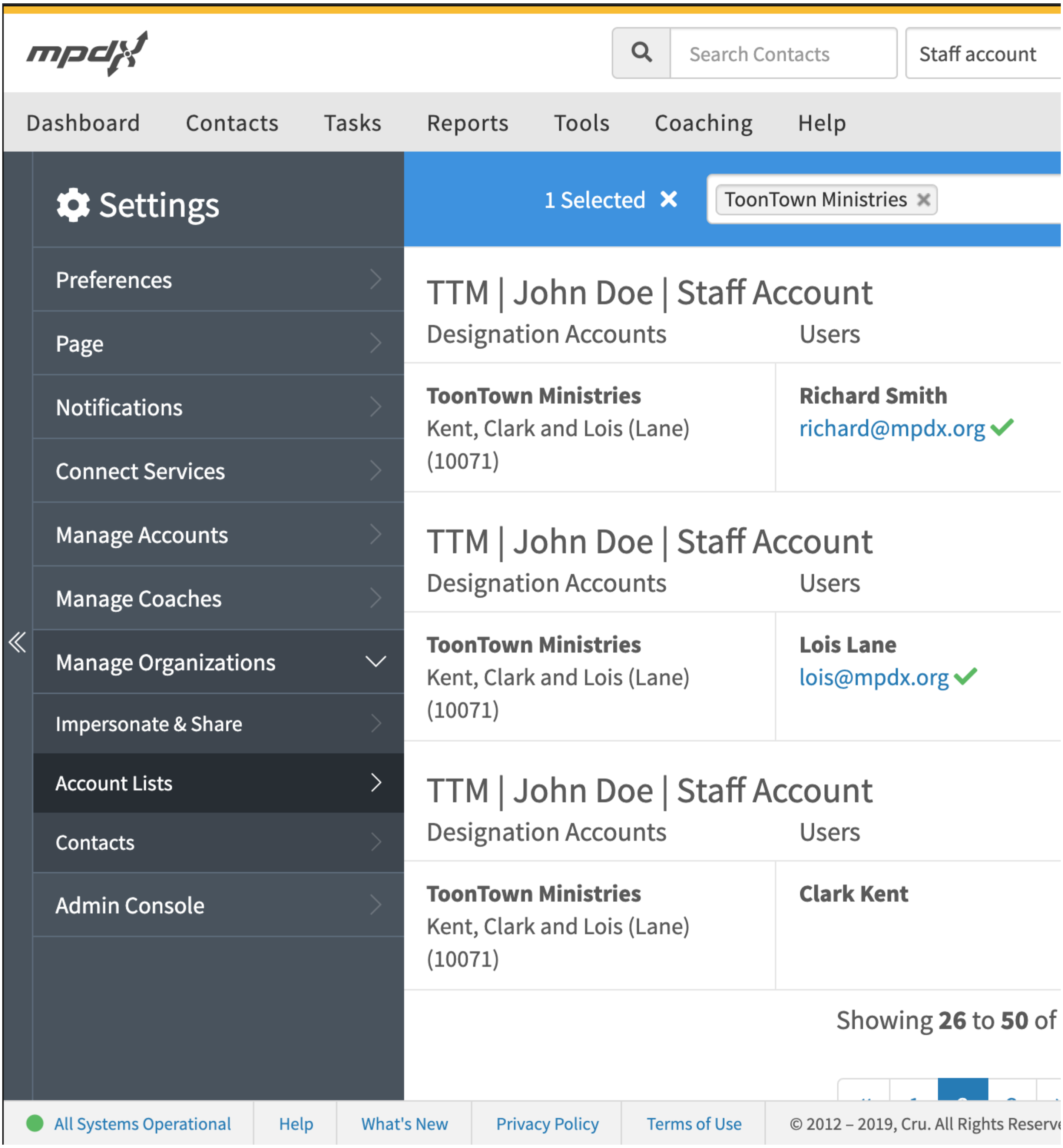
You will only be able to follow the instructions below if you have received an invitation by e-mail to manage an organization and accepted it. If you would like access either ask an existing administrator or [send a request for access](#).

If you have accepted inviations to manage multiple organizations you will need to select the specific organization to manage in the top right of the relevant pages.



** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

- Click on the **Settings** button and select Manage Organizations.
- On the left hand side drawer under **Manage Organization** click on **Account Lists.**
- Add organizations to filter by and type something to search by in the **Search Account Lists** field.
- You'll then see a list of account lists with users and coaches.
- If user or coaching permission was added by users of MPDX you'll be able to remove the permission by clicking on the **red trash can** button on the right of each permission.



Donor Cultivation

Tags for Tasks: Add, Remove, Edit, Delete

** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

To learn about how to filter Contacts using Tags visit the Tags for Contacts: Add, Remove, Delete, Edit article.

The Task and Contact Tags are different from one another:

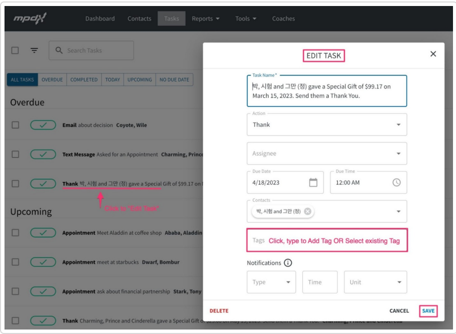
- If you add a tag to a Task it WILL NOT add that tag to any other tasks for that Contact
- If you add a tag to a Task it WILL NOT add that tag to a Contact
- If you add a tag to a Contact it WILL NOT add that tag to any tasks for that Contact

Add a Tag

To organize your tasks into specific groups by tags, you will first need to add tag(s).

Adding a Tag or Tags to a Single Task

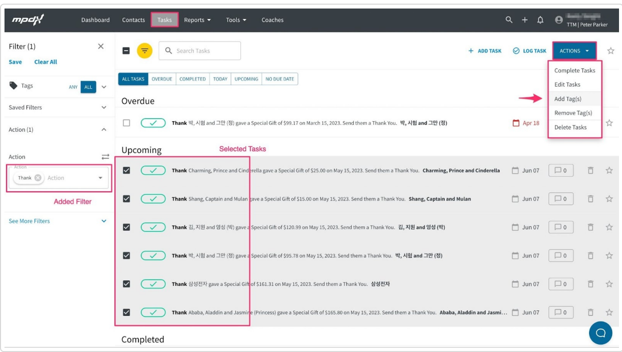
- Go to the Tasks tab and Add Task or Log Task. Or, click on a task to "Edit Task".
- Add or edit any task details to fill the needed fields
- Where it says "Tags", type the name of the tag, and press enter.
- The new tag will appear on the specific listed Task under the Tags section in the Tasks tab of a Contact's Page and on the mini Tasks page. The Tag will also appear under the Tags Filters menu.

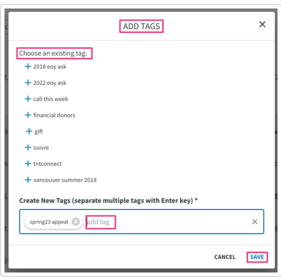


Adding a Tag or Tags to Multiple Tasks

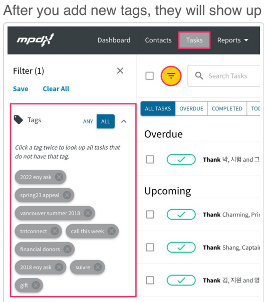
You can also add a tag to multiple tasks at one time. To do this:

- Go to the Tasks tab.
- Apply any Filters needed to narrow your list.
- Click the checkbox to the left of each listed task to which you want to add the Tag
- Click on the Actions button, then Add Tags.





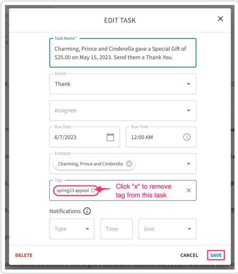
- After you add new tags, they will show up in the Tasks Filters Tag List.



Remove a Tag

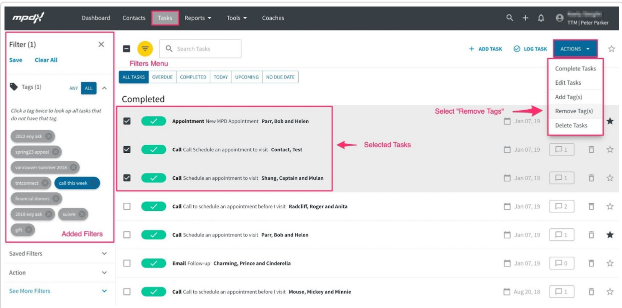
Removing a Tag From an Individual Task

- From the Tasks page, Go to the Tasks tab and click on a task to “Edit Task”.
- Locate the Tag you want to remove and click on the X to the right
- Click “Save”

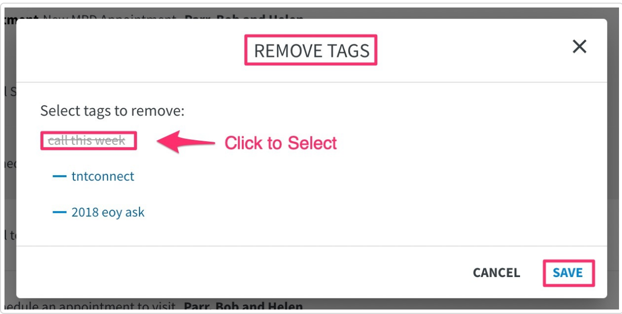


Removing a Tag or Tags from Multiple Tasks

- Select the Tasks from which you want to remove tags (highlighted in gray).
- Click on Actions.
- Select Remove Tag.



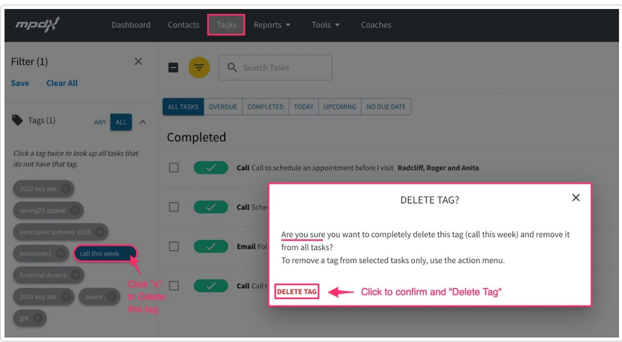
- Click on the Name of the Tag you want to remove.



Delete a Tag

Unlike removing a tag from an individual contact or multiple contacts, deleting a tag from MPDX is permanent and will remove it from all tasks.

- From the Tasks page, unhide Filters and locate the Tags section.
- Click on the X next to the Tag Name you wish to remove.
- The Deleted Tag will be removed from all contacts who had the tag.

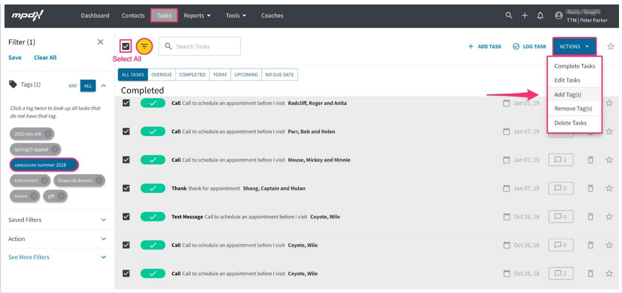


Edit or Rename a Tag

To edit a tag name, you will actually need to add a new tag and then remove or delete the old tag.

- Unhide the Tasks Filters menu.
- Under the Tags Section, click on the Tag Name you want to edit.
- Click the checkbox at the top to Select All.

- Click on the Actions button.
- Select Add Tags.



- Create a New Tag, i.e., vancouver summer 2019, by typing in the Add a tag space.
- After typing the new tag name, press enter and click on Save.
- To delete the Old Tag i.e., vancouver summer 2018, click the "x" to the right.

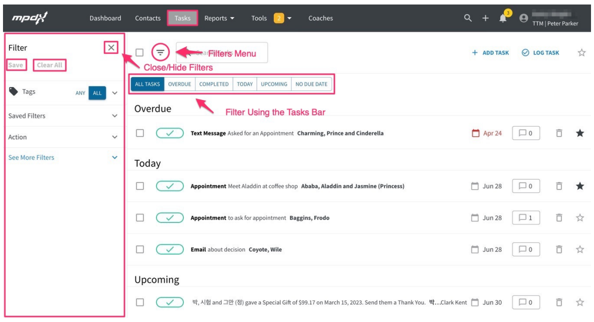
Click to confirm when the Delete Tag pop-up appears to remove it.

Tasks: Lookup with Filters and Tags

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

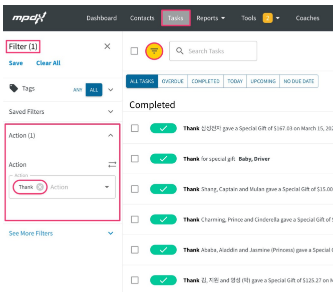
To find the Tasks Filters menu, go to the "Tasks" tab and click the icon to the left of the "Search Tasks" field. Hide the menu again by clicking the "x" in the top right corner.

To filter Tasks by "All Tasks", "Overdue", "Completed", "Today", "Upcoming", or "No Due Date" use the Tasks bag located under the "Search Tasks" field.



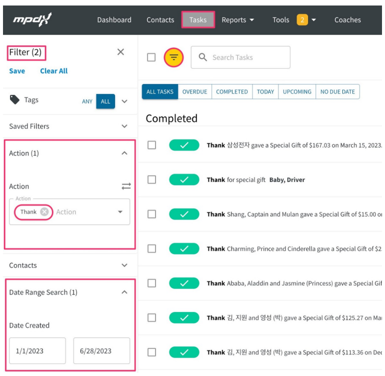
Lookup with a Single Filter

When you add a Filter you will see the number of filters applied appear after the Filter menu title i.e "Filter (1)." For this example, we searched by the **Action** of "Thank."



Lookup with Multiple Filters

When you add multiple Filters you will see the number of filters increase after the Filter menu title i.e. "Filter (2)". For this example, we searched by the **Action**, "Thank" and a **Date Range Search** of 1/1/23 to 6/28/23.



Most Used Filters:

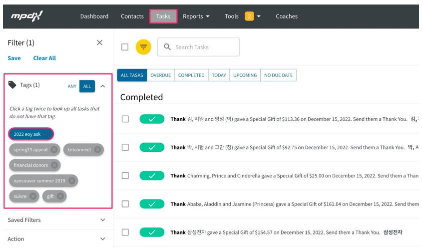
Tags

Tags are one way to narrow down your contact list within MPDX. A single tag or a combination of tags can be used to display a specific group of contacts.

To learn more about how to apply tags to contacts, see the [Tags for Tasks: Add, Remove, Edit, Delete](#) article.

Lookup by a Single Tag

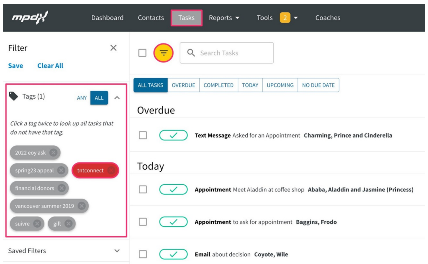
- Under **Tags**, click on a single tag (i.e. 2022 eoy ask). Your list should show only tasks who have this tag.



Lookup by Reverse Tag

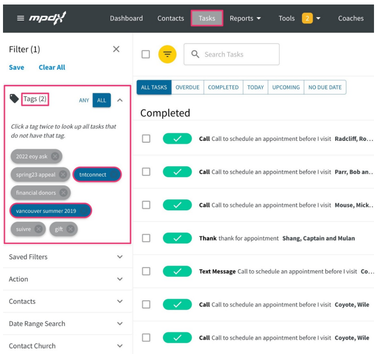
For Tags, searching for all contacts who DO NOT have a tag can be of use. For instance, say you have created a “tntconnect” tag. A reverse search of this tag will pull up a list of all contacts in your MPDX that you HAVE NOT labeled with this tag.

- Under Tags, click on a single tag (i.e. tntconnect). Your list should show only contacts who have this tag.
- Click on this single tag again. It will turn from blue to red. Your list should now show only contacts who DO NOT have this tag.
- Click on this tag a third time to deselect this tag as a filter.



Lookup by Multiple Tags

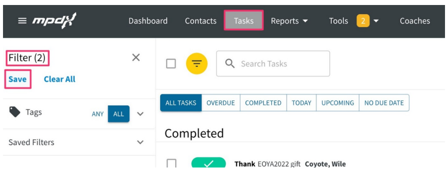
- Choose multiple tags to further narrow your search.
- In the example below two tags are selected: “vancouver summer 2019” and “tntconnect.”



Saved Filters

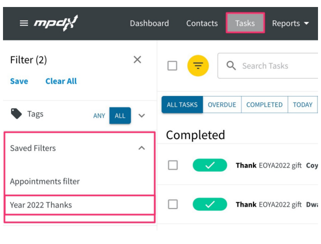
Once the filters have been applied, you can save it for future use.

- On the left, scroll up until you see the number of **Filters Applied**, i.e. Filter (2)
- Below the applied filters, click on **Save Filters** button.



- Type in a **Filter Name** (i.e. Year 2022 Thanks) and click **Save**.

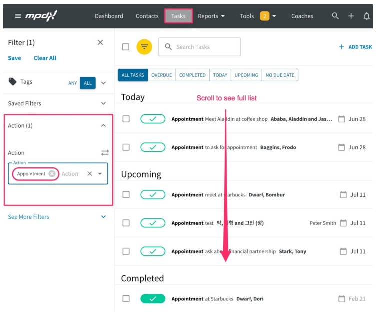
- Refresh your page, then scroll down to see the filter you just saved.



Lookup By Action

When you Add or Log a Task in MPDX, the “Action” is the type of MPD action taken. For example: “Contact for Appointment”, “Appointment”, “Email”, “Talk to in Person”, “Newsletter - Physical”, etc.

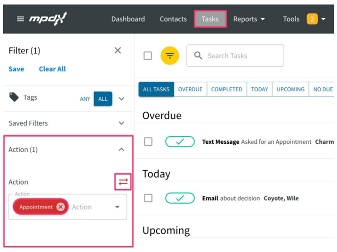
You can filter search by a specific Action type to see a list of ONLY tasks of a certain type. Or select multiple Action types to further filter your list by either clicking and typing another Action or by selecting another from the dropdown menu. For example: filter by Action type “Appointment” to see a list of all current and previous “Appointment” Tasks.



NOTE: Reverse Filters

It can be helpful to search by “Reverse Filter.” Which is a search for all tasks that DO NOT have the selected filter. For instance, say you would like to see a list of all tasks that ARE NOT “Appointment” tasks. A reverse search of this filter will pull up a list of all tasks in your MPDX that DO NOT meet this criteria.

- Click the reverse arrow icon to the right of the selected filter.
- The filter will turn red.
- Click the reverse arrow icon again to turn off the reverse filter.



“See More Filters”

- Click “See More Filters” to expand the filters menu beyond the most used filters.
- Click “See Fewer Filters” to return to the simplified list of the most used filters.

Contacts List View

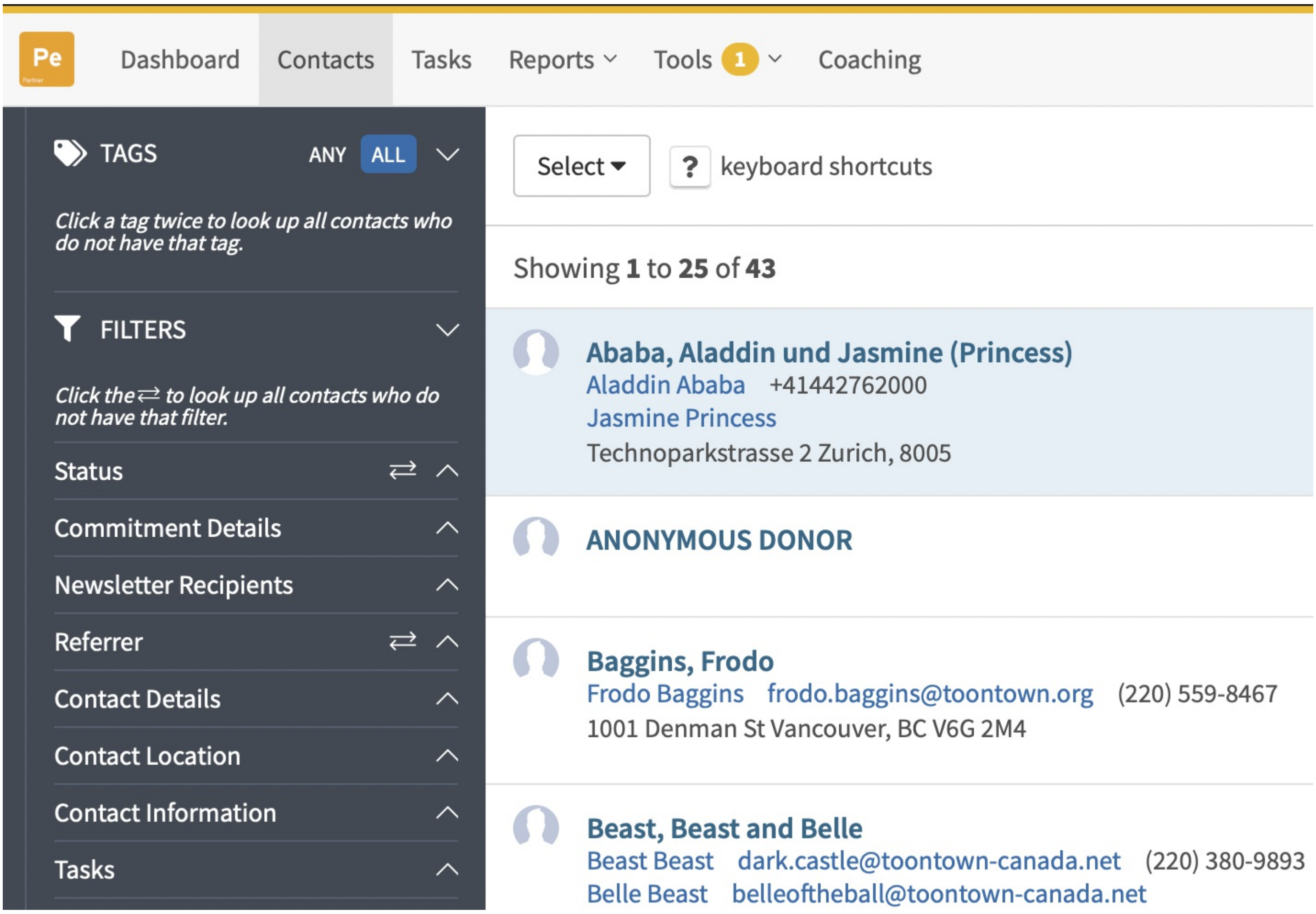
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Contacts List View

The “List” View of contacts is simply that, a list of all of your “Contacts,” or ministry partners, entered into MPDX. This view can help you:

- See a full list of your “Active” Contacts
- See a full list of your Contacts: “Active” and “Hidden”
- Edit your ministry Contacts in Bulk with the “Actions” dropdown menu to
  - Create, prepare, or maintain Newsletter lists
  - Create, prepare, or maintain contact lists for Exports
  - Create Tasks

Understanding What You See:



NOTE: The default view of Contacts in MPDX is whoever contact view you last accessed. But you can switch between views at any time.

The List view <u>without</u> any filters applied will pull up an infinite scroll list of "All – Active" contacts in MPDX. This means all contacts with the statuses: Appointment Scheduled, Ask In Future, Call For Decision, Contact For Appointment, Cultivate Relationship, Never Contacted, Partner - Financial, Partner - Pray, Partner - Special and with no status selected.

NOTE: You can see "Hidden" contacts by unhiding the Filters menu, visiting the "Status" dropdown menu and selecting "All - Hidden." This will include all contacts with the statuses: Expired Referral, Never Ask, Not Interested, Research Abandoned, and Unresponsive.

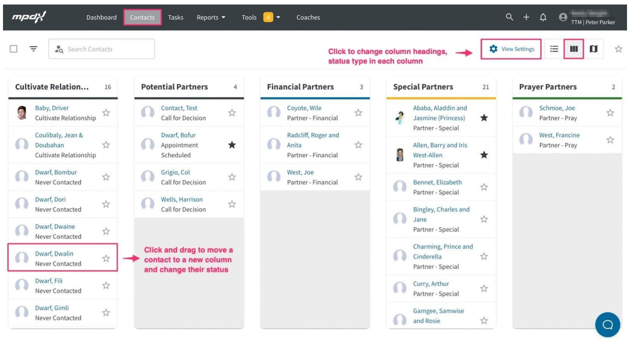
The List view <u>with</u> filters applied will pull up an infinite scroll list of the selected subset of your ministry contacts.

Contacts Flows View

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Contacts Flows View

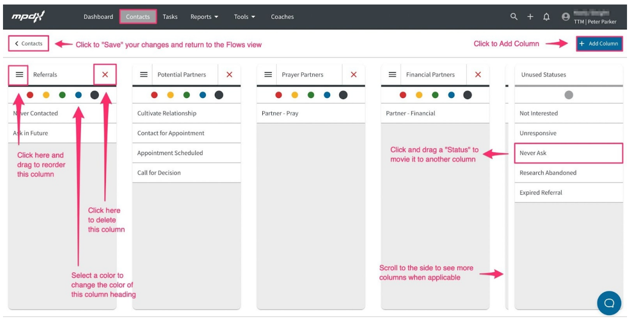
This view is helpful for creating a visual of your contacts by "Status" type (i.e. Contact for Appointment, Partner - Prayer, Partner - Financial, Ask in Future, etc.) and allows you to drag and drop contacts from one phase of the MPD process to another phase very easily moving contacts through an MPDⓇ "workflow."



Setting up the Flows View

- **Step One:** Go to the "Contacts" tab and select the "Flows" view

- **Step Two:** Click to **"View Settings"** (the button to the left of the contacts view options).
- **Step Three:** Click the title bar at the top of the first column and type to create a heading for the column (i.e. "Referrals", "Potential Partners", etc. You can click and type to rename each column heading.
- **Step Four:** Drag a "Status" from the Unused Statuses column to any other column. You may need to scroll right to see it.
- **Step Five:** Repeat steps three and four until you are satisfied with the titles of each column and the status(es) in each column. For this example we chose the column headings: Referrals, Potential Partners, Prayer Partners, Financial Partners, and Special Partners.
- **Step Six:** Click the "<contacts" button="button" to="to" return="return" the="the" flows="Flows" view="view" save="save" your="your" choices="choices" and="and" use="use" view. ="view. "></contacts">

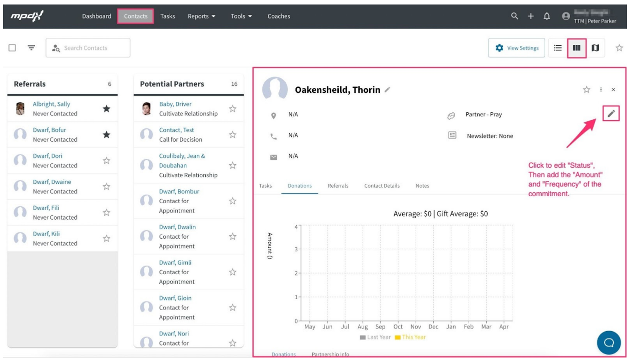


Using the Flows View

This view allows you to drag and drop contacts from one phase of the MPD process to another phase very easily (see screenshot below). MPDX will even prompt you at times to record a task to help remind you of what the next step is for that particular partner. For those people who partner with you financially, you can quickly and easily record their commitment info from this view as well so you can see God's faithfulness in helping you reach your monthly goal.

Once you move a contact into the "Financial Partner" column, go through the following steps to record their donation commitment:

- **Step One: Click on the "Contact Name" hyperlink** (A Contact's Page should slide out from the right of the screen).
- **Step Two: Look in the top section for the pencil icon.**
- **Step Three: Change the "Status"** to "Partner - Financial" then Enter the "Amount" and "Frequency" of the commitment. Make sure to "Save".



Add Referrals to Contacts

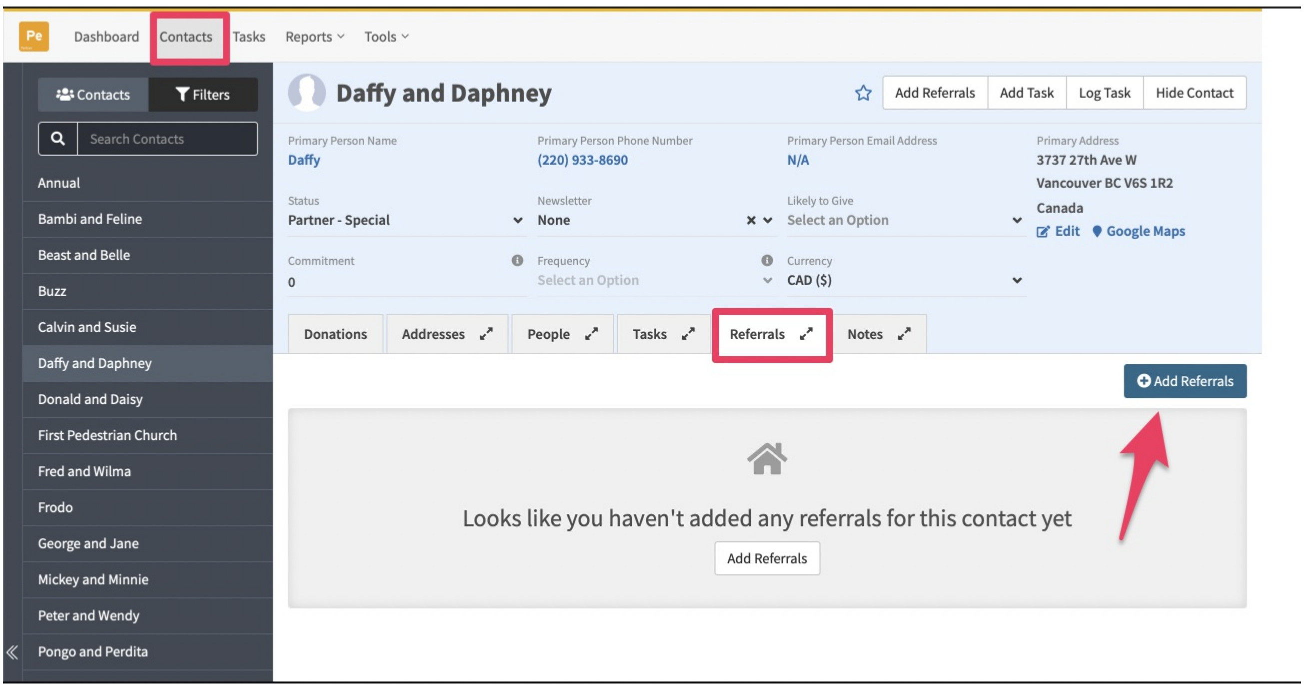
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

In MPDX:

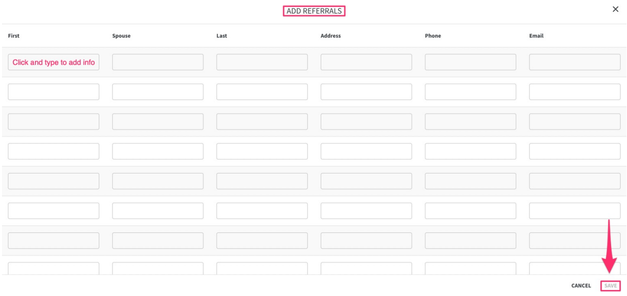
- A "Referrer" is the person who introduced you to a new contact.
- A "Referral" is a person who was introduced by another contact.
- When you add people as "Referrals" to "A Contact's Page" instead of creating new contacts from the main screen, you are recording the connection between the person you've added and the person who introduced you to this new ministry "Contact."
- There is a special way to add connections in MPDX that is different from the usual process to Add Contacts (learn about the usual process of how to Add Contacts). If you use the processes we explain below, MPDX preserves the connection between "Referrer" and "Referral."

Adding a New Referral

A "Referral" is a person who was introduced by another contact. Adding a Referral, or Referrals to a contact is done manually and within A Contact's Page.



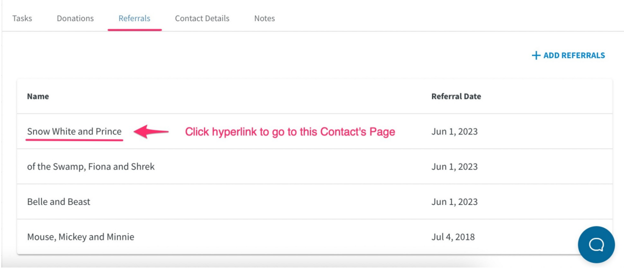
- Click on the Contact Name (i.e. “Charming, Prince and Cinderella”). That “Contact’s Page” will appear from the right side of the page.
- Visit the “Referrals” tab.
- Click the "Add Referrals" button. As a person shares names and contact information enter details such as First Name, Last Name, Spouse Name, Address, Phone and Email.



- Make sure to click "Save."

Under the “Referrals” tab you will see a list of Names with a Referral Date for each “Referral” recorded within this Contact.

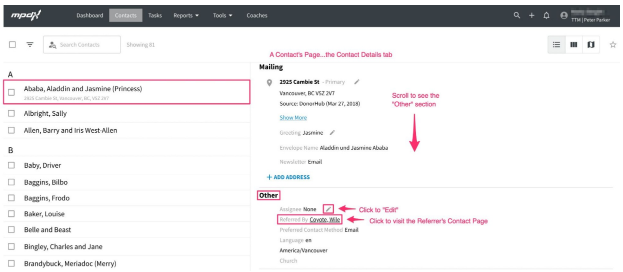
Each Name is a hyperlink to that MPDX Contact’s “Contact Page.”



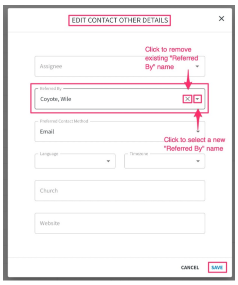
Add a “Referrer” to a Contact

A “Referrer” is the person who introduced you to a new contact. Adding a Referrer to a contact is done manually and within A Contact’s Page.

- Click on the Contact Name (link).



- Visit the Contact Details tab.
- Scroll down to the Others section of the Contact Details tab and you will find the “Referred By” field.
- Click on the pencil icon to the right of "Other" to make changes

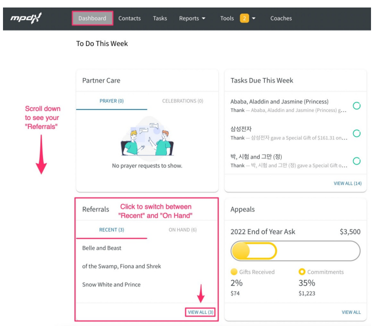


- A pop-up box will appear with the option to "Edit Contact Other Details".
  - Select “X” to remove the Existing “Referred By” name
  - Select the dropdown arrow to select a new “Referred By” name from your Contacts. Click and begin typing the Last Name of the contact you have in mind.

NOTE: You can use Contacts Filters to do a filtered search by Referrer. To do this, unhide the Filters menu, select “See More Filters” and visit the “Referrer” dropdown menu to select a “Referrer” name.

View Your Referrals on the Dashboard

If you'd like to see a list of all of your recently added connections, you can check out the "Referrals" section of the Dashboard. You may need to scroll down to see it. There are two options: "Recent" and "On Hand."



- "Recent" referrals are those that have been added in the last 2 weeks.
- "On Hand" referrals are the total number of referrals in MPDX with the status: Never Contacted, Ask in Future, Cultivate Relationship, and Contact for Appointment.
- Click “View All” for either view to see all contacts of each Referral type.

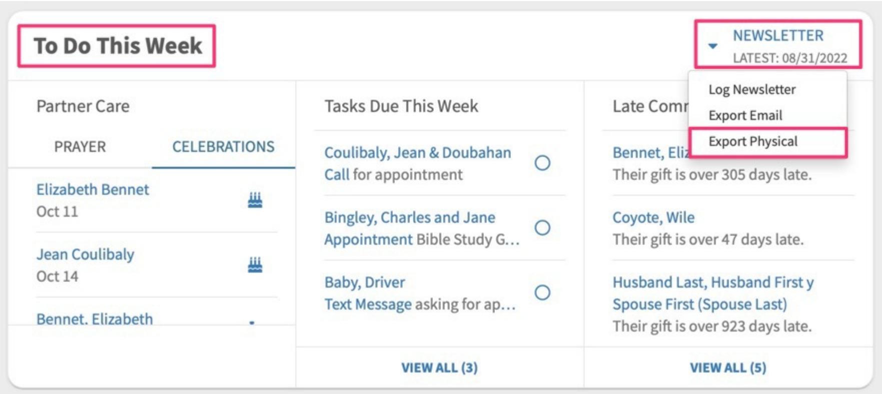
Dashboard: Sending Out Newsletters

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Once your newsletter is ready to be sent out, you can generate that list right from the **Dashboard Care** section.

Send Out Physical Newsletter

- From the Dashboard, locate the **To Do This Week** box.
- Click **the NEWSLETTER dropdown menu** and then **Export Physical**.

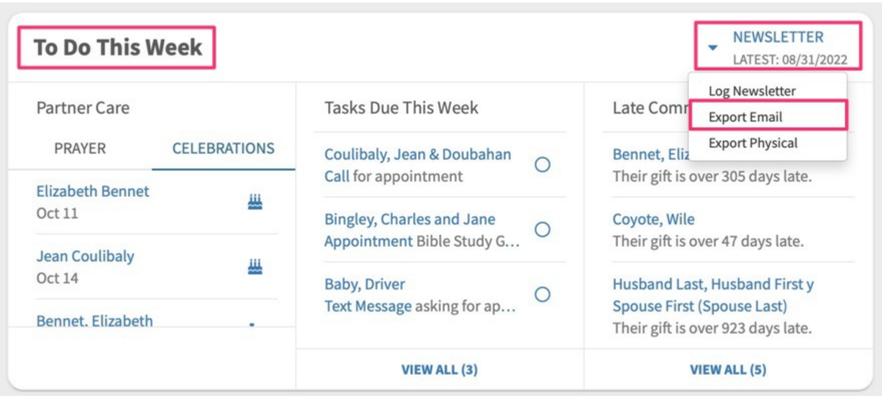


Export Physical Newsletter List

- Select the **CSV file to** Mail Merge option to create letters, envelopes, or labels.
- **Save** your **CSV File** and perform the mail merge.

Send Out Email Newsletter

- From the Dashboard, locate the **To Do This Week** box.
- Click **the NEWSLETTER dropdown menu** button and then **Export Email**.



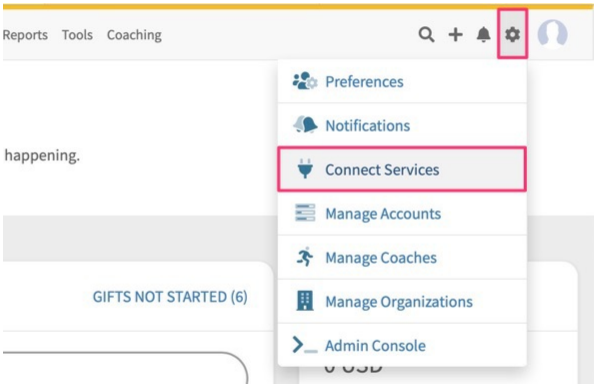
Export Email Newsletter List

- Select the **Advanced CSV** file option for email.
- **Save** your **CSV File** and perform the mail merge.

Connect Services: Send Out Newsletters

MPDX provides [Connect Services]() with Google, MailChimp, PrayerLetters or ChalkLine to create and send out letters or emails.

- Click on **Settings**, then choose **Connect Services**.

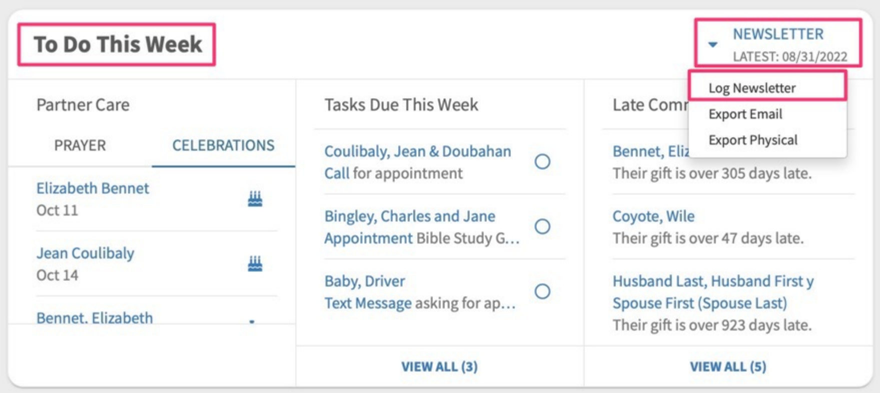


- Locate **External Services**.
- Select the **Newsletter Application** of choice by clicking the **Drop-down Arrow** to the right.
- MPDX will redirect you to log into either **MailChimp**, **Prayer Letters** or **Chalk Line**.

Log Newsletter

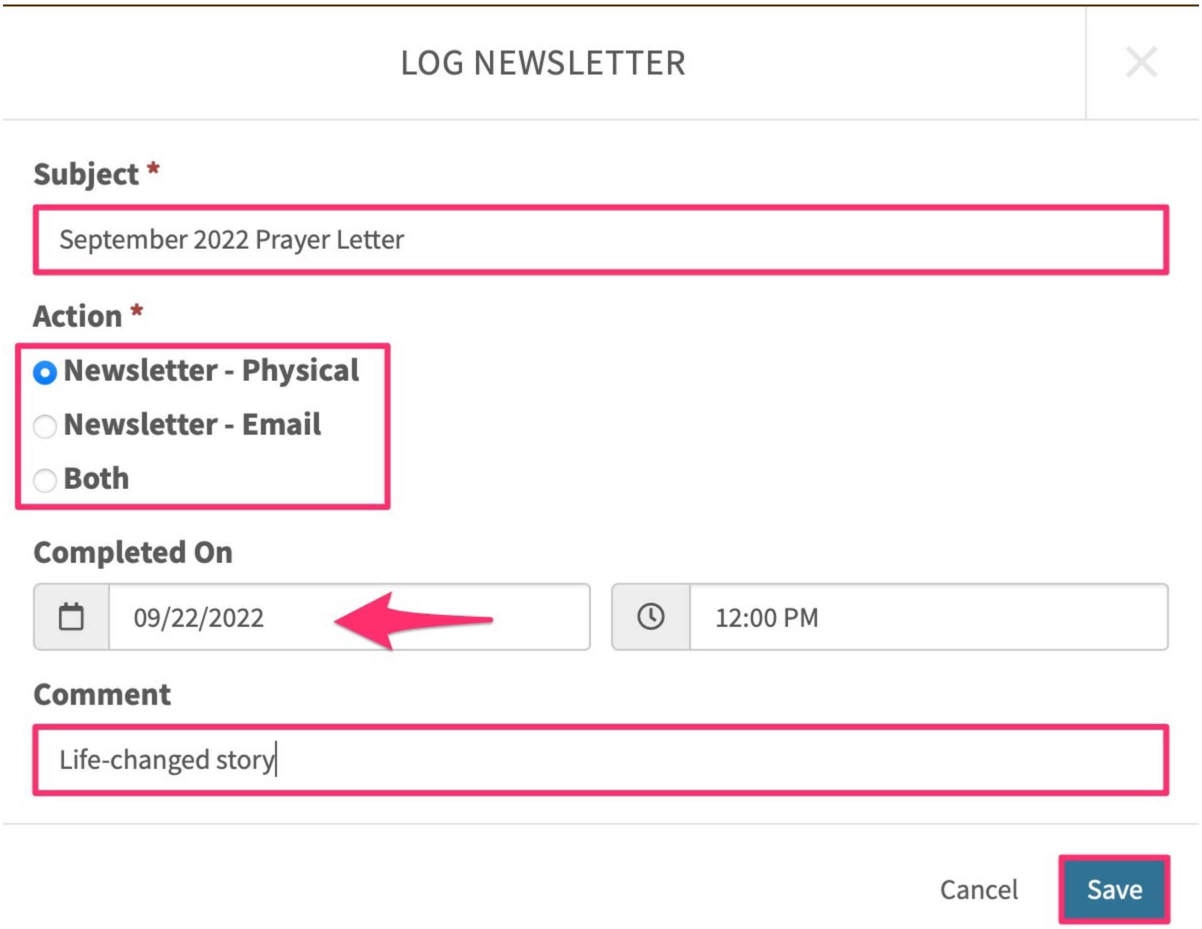
After you have sent out a newsletter, you can log this in MPDX (recommended).

- From the Dashboard, click **the NEWSLETTER dropdown menu** and then **Log Newsletter**.



Log Newsletter Task

- Fill out the **Subject**, choose the **Action**, and **Completed On** date and time
- You can add any **Comments**.
- When finished, click **Save**.



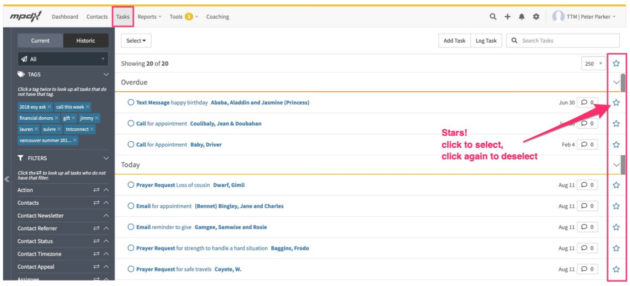
Note: By logging each newsletter type you send out, MPDX will track this for you, and notate the number of days you last sent out a newsletter in Care section of the Dashboard.

Task Stars

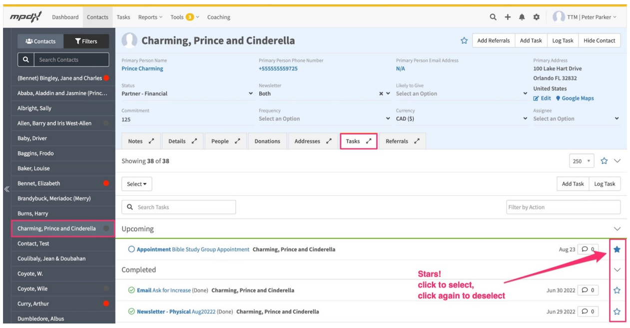
** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

In the same way starring an email makes it stand out from your email list, adding a star to a task can make it stand out from your other added or logged Tasks.

To find the **Stars** feature for Tasks, visit the **Tasks tab in MPDX**.

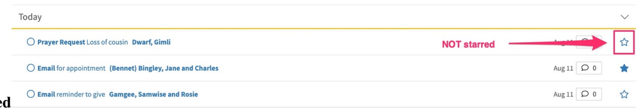


You can also use the Stars feature for Tasks from **the Tasks tab of a specific contact**.



Adding and Removing Stars to and from Tasks:

- A **blue star** means the **Task is STARRED**



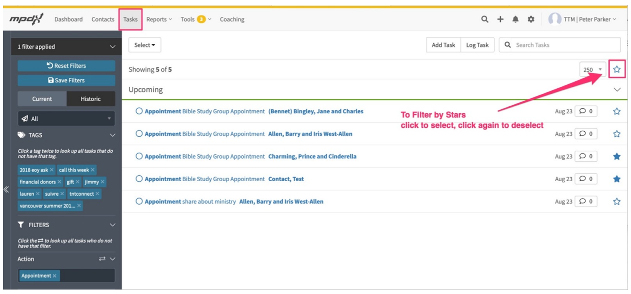
- An **outlined star** means the **Task is NOT starred**

- **To Add a Star:**
  - **click the outlined star** to the right of the task you want to select
  - **The star will turn blue** when selected
  - You can add a star from the Tasks tab, or from the Tasks tab within a specific contact
- **To Remove a Star**
  - **click the blue star** to the right of the task you want to deselect
  - **The star will turn from blue to an outlined star** when deselected
  - You can remove a star from the Tasks tab, or from the Tasks tab within a specific contact
- When you add or remove a star from a specific task, the change made will be applied to that task in both the main Tasks tab of MPDX AND to the Tasks Tab within the specific contact page of the contact associated with the task.

Filter Search by Stars:

In the same way you select and deselect stars, you can select and deselect the Stars filter. Just click the blue star to remove the Stars Filter, or the outlined star to add the Stars filter.

- The Stars filter can be used with other MPDX Task Filters
- When you choose the **Reset Filters** option, the Stars filter will also be reset. This does not remove the stars you've added to specific tasks. It simply resets the current filters.
- As a Note: the Contact Stars feature and Task Stars feature operate independently from one another. Which means, starring a task ***does not*** add a star to all tasks associated with that contact. Similarly, starring one task for a contact ***does not*** add a star to that contact.
- **The Task Stars feature is also available on the MPDX iOS and Android mobile apps.**



Create, Edit, and Log Tasks

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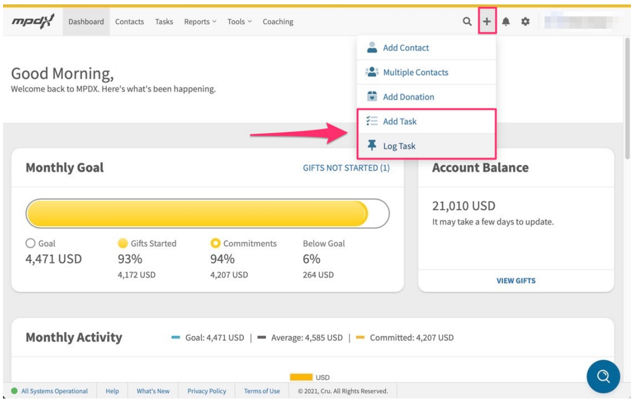
Create or Log a Task From Any Page

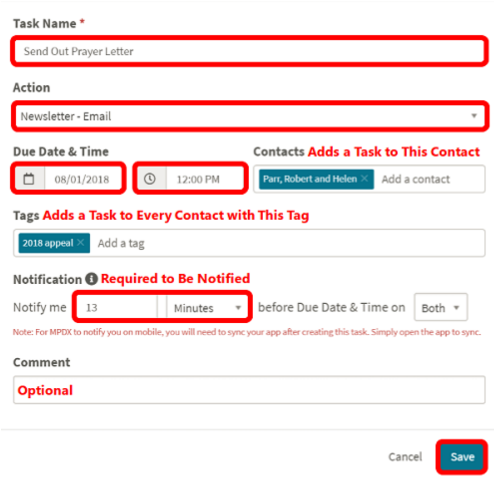
- On the top right of any page, click on the **+Add** button, then choose **Add Task** or **Log Task**.
- Add and Log Tasks from the Tasks Page and Contacts Page.

+Add Button

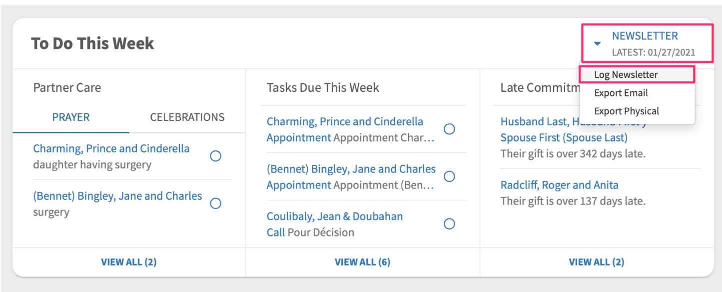


Add a New Task

- Fill in the **Task Name**, i.e., *Send Out Prayer Letter*.
- Select an **Action** type, i.e., *Newsletter - Email*.
- Select a **Due Date and Time** (required for notification).
- Add **Contacts**, if applicable, and this task will be added to each selected contact(s).
- Add **Tags**, if applicable, and this task will be added to every contact with this tag.
- Set a **Notification** time in minutes or hours (required to be notified).
- When finished, click on the **Save** button.

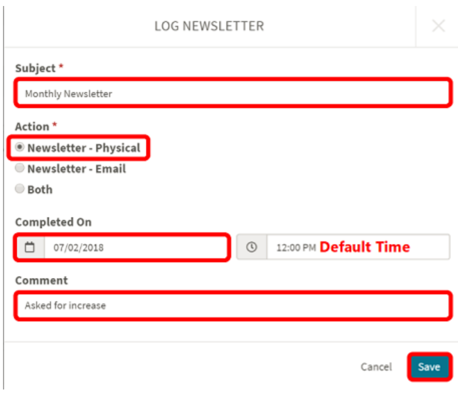


Dashboard: Log a Newsletter



In the **To Do This Week** box, click on **Newsletter** and then choose **Log Newsletter**.

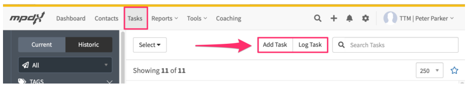
- Fill in the **Subject**, i.e. *Monthly Newsletter*.
- Click the radio button to select an **Action** type, i.e., *Newsletter - Physical*.
- Select the **Completed On Date** and the **Default Time** is *12:00 PM;* Select the time of your choosing.
- Add **Comments** to clarify this task.Click the
- Click the **Save** button when finished.



Tasks: Add, Log, Edit, and Delete

- From the main navigation bar, click on **Tasks**.
- **Search Tasks** by a contact name or task type.

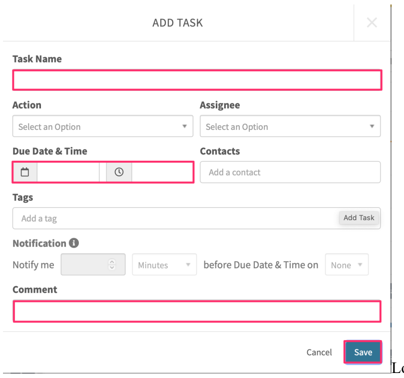
- **Select** multiple tasks to edit or delete them in bulk.
- Click on the **Add Task** button to create a new task.
- Click on the **Log Task** button to add a completed task.



Add Task

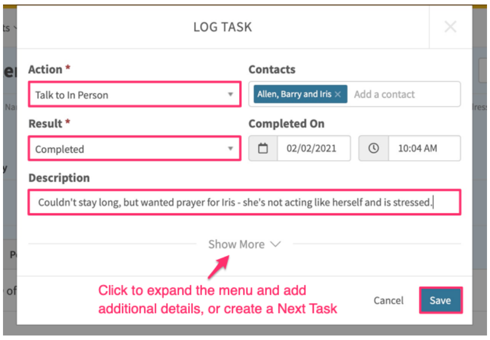
- Go to the **Tasks** page and click on the **Add Task** button.
- Fill out **Task Name**, **Action**, **Due Date and Time**, **Notify Me**, and **Comments**.
- Then click the **Save** button.

To receive task notifications from Google Calendar Integration, see this.



Log Task

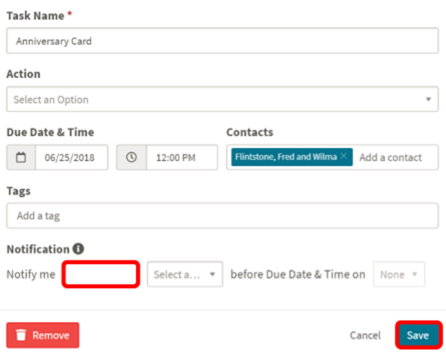
- From the **Tasks** page, click on the **Log Task** button.
- Fill out the **Subject**, select an **Action**, add the date **Completed On**, and add a **Comment**.
- Verify the information, the click the **Save** button.



Tasks: Edit Tasks

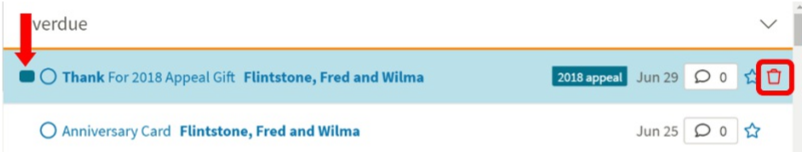
- Click on the **Task Title**.

- Add a **Notification** in minutes or hours.
- Click the **Save** button.

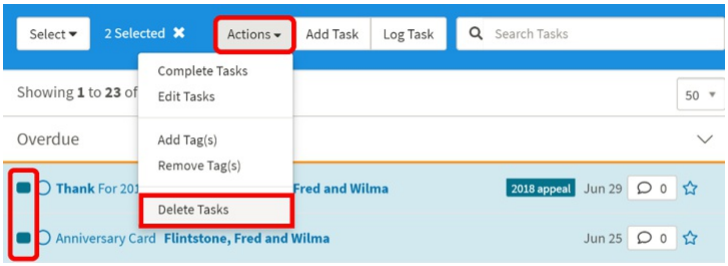


Tasks: Delete Tasks

- Click on the **Checkbox** on the left of one Task.
- Hover your mouse to the right of the star icon.
- Click the red **Trash icon**.



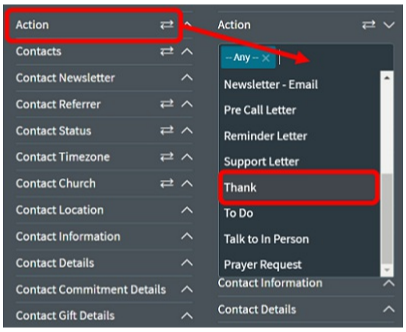
- Click on **Multiple Tasks**.
- Click on the **Actions** button.
- Select **Delete Tasks**.



Tasks: Using Filters

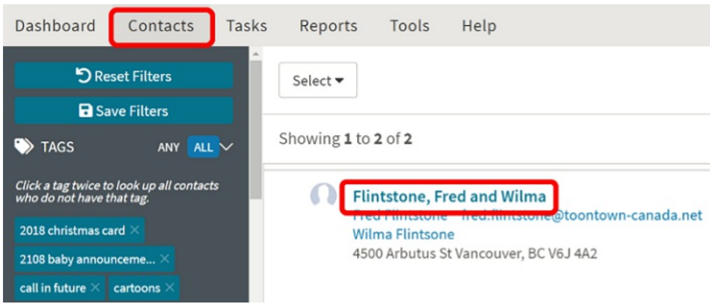
To find specific types of tasks, choose any of the filters you see to the left.

- Click on **Actions**.
- Then click in the **Space Below Actions** to bring up a list of options.
- Select an **Action Type**, i.e., *Thank*.
- A list of these specific tasks (Thank) will be displayed.



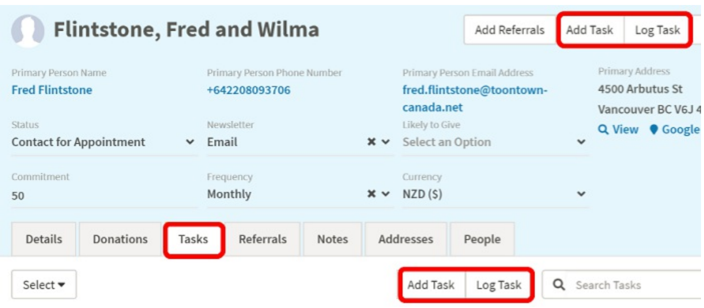
Contacts: Add or Log Tasks

- From the navigation bar, click on **Contacts**.
- Select a contact by clicking on the **Contact Name**.



People: Add or Log Tasks

- To the right of the contact name, click on the **Add Task** or **Log Task** buttons.
- Or click on the **Tasks Tab** and then click the **Add Task** or **Log Task** buttons below.
- Follow the same steps for adding and logging tasks as explained above.



Note: You can add or log tasks for specific applications by clicking on Connect Services, and under External Services, look for connecting MailChimp, PrayerLetter or Chalkline to your MPDX.

Outstanding Recurring Commitments

We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account.

Outstanding Recurring Commitments

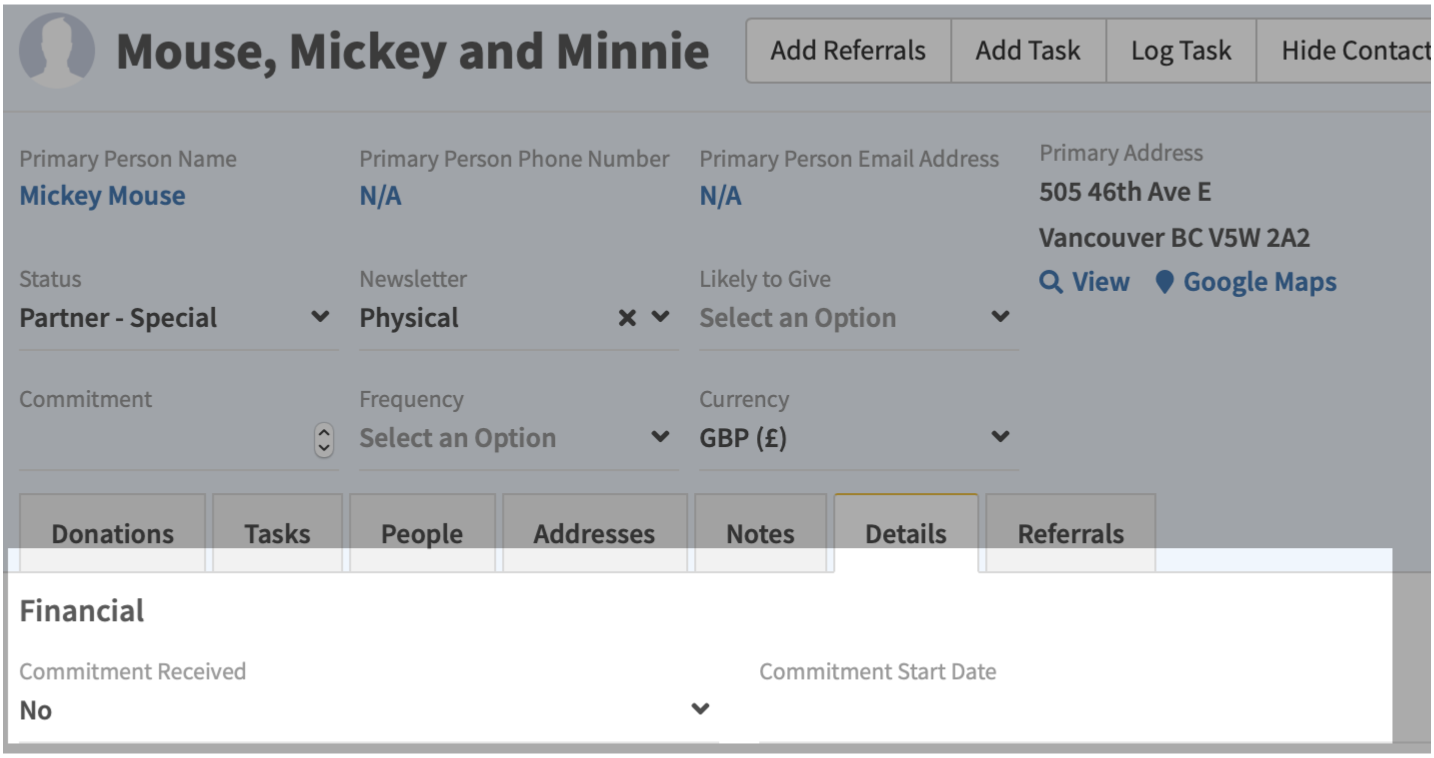
Name	Frequency	Days Late	Amount
B.T	Monthly	26	50.00 USD
D.B.A.F	Monthly	8	30.00 USD

This table tracks and lists all contacts (by initials, not personal identifiable information) with a status of Partner - Financial who have not given. Each contact with an Outstanding Recurring Commitment will have a row reflecting their initials, Frequency of Commitment pledged, number of days past the expected "Commitment Start Date", and the amount pledged in the currency noted.

This report is populated automatically and is updated every 24 hours.*

*A person being coached can update contact information about expected giving by:

1. Finding the Contact in question.
2. Check the "Commitment Received" field. (Only partners who are marked "Commitment Received - No" will appear on this report).
3. Add or Update the "Commitment Start Date" field (Only partners who are marked as having a "Commitment Start Date" in the past will show up on this report).



Outstanding Special Needs

We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account.

Outstanding Special Needs

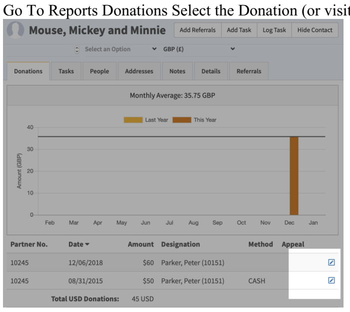
Name	Frequency	Days Late	Amount
D.B.A.F	Monthly	0	30.00 USD
F.F.A.W	Monthly	0	25.00 USD
K.C.A.S	Monthly	0	125.00 USD

This table tracks and lists all contacts (by initials, not personal identifiable information) associated with the Primary Appeal who have "Committed," a gift that is not marked "Received." Each contact with an Outstanding Special Needs Commitment will have a row reflecting their initials, Frequency of Commitment pledged, number of days past the expected "Commitment Start Date", and the amount pledged in the currency noted.

The only Special Needs included here are those associated with the Primary Appeal.

This report is populated automatically is updated every 24 hours.*

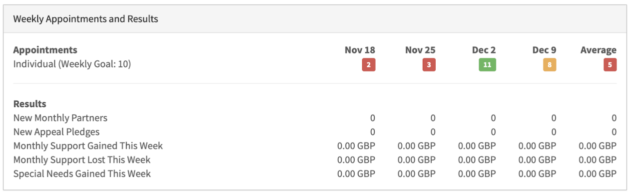
*A person being coached can update contact information and associate a donation with an appeal by:

1. Go To Reports Donations Select the Donation (or visit the Donations tab within a Contact)


2. Select the "edit" button next to the donation.
3. In the "Donation" Modal that pops up, click "Select Appeal" and type the name of the associated Primary Appeal.

Weekly Appointments and Results

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****



Weekly Appointments and Results

Appointments	Nov 18	Nov 25	Dec 2	Dec 9	Average
Individual (Weekly Goal: 10)	2	3	11	8	5
Results					
New Monthly Partners	0	0	0	0	0
New Appeal Pledges	0	0	0	0	0
Monthly Support Gained This Week	0.00 GBP	0.00 GBP	0.00 GBP	0.00 GBP	0.00 GBP
Monthly Support Lost This Week	0.00 GBP	0.00 GBP	0.00 GBP	0.00 GBP	0.00 GBP
Special Needs Gained This Week	0.00 GBP	0.00 GBP	0.00 GBP	0.00 GBP	0.00 GBP

This table tracks the Weekly Appointments and Results of those appointments in the form of New Monthly Partners, New Appeal Pledges, Monthly Support Gained and Lost and Special Needs Gained within the given week. The set week range is Sunday-Saturday and column headings will display Sunday's date.

Appointments

- An Individual appointment in the MPDX system is defined as any one completed appointment regardless of the number of individuals/partners present. One individual appointment may have 15 partners present, but counts as 1 appointment, not 15 appointments.
- Appointments must be input manually by the user as either a Log Task or completing a already existing task in order to count toward the week's tally.
- The color coding of Red, Yellow or Green for the number of Individual Appointments are coded according to the number of logged appointments within that week's date range. Green (10+ logged appointments), Yellow (8-9 logged appointments), Red (0-7 logged appointments)
- The average column is generated by taking the total value per row for the 3 completed weeks and dividing it by 3 to give the weekly average for the number of completed weeks

Results

- New Monthly Partners: this value is a count of all Contacts whose status is updated to "Partner - Financial" in the date range specified
- New Special Needs Commitments: this value is the sum of any special gift commitments manually added by the user as part of an on-going Appeal in the date range
- Monthly Support Gained This Week: This is a sum of the INCREASED amount of all commitment amounts raised in the current week compared to the previous week and converted to the currency of the account being coached
- Monthly Support Lost This Week: This is the sum of the DECREASED amount of all commitment amounts lowered in the current week compared to the previous week and converted to the currency of the account being coached
- Special Needs Gained This Week: The sum total of any donation received that does not match a commitment amount for a Contact
- The average column is generated by taking the total value per row for the 3 completed weeks and dividing it by 3 to give the weekly average for the number of completed weeks. It does not include the current week, since the current week is not complete and would reduce the actual average

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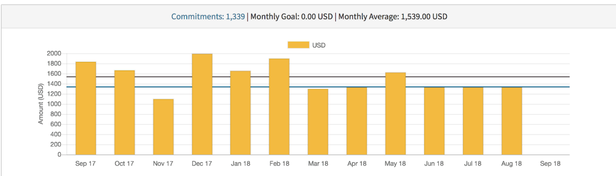
Commitments Graph Coaching View

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

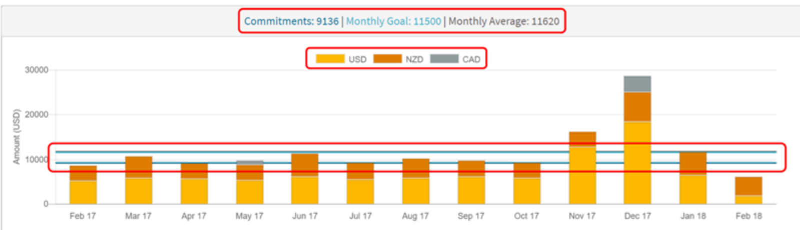
This graph is the same as the 13 Month Graph Component found on your MPDX Dashboard. It updates every 24-hours when donations are added by Donation Services.

Note: The MPDX Coaching view of the 13 Month Graph Component is slightly different from the Dashboard view in that clicking on the Monthly Giving Bar ***does not*** link to a report of all the gifts for that month. Sharing coaching access with someone ***does not*** give them access to any personal identifiable information of contacts.



The MPDX Bar Graph gives you Monthly Totals, from the current month, for the fiscal year.

- Commitments, Monthly Goal, and Monthly Average numbers are displayed above the bar graph.
- Click on the Legend to view a specific currency type. You can check and uncheck which currency type(s) are visible.
- Hover your mouse over any Giving Activity Bar for total gifts given for that month.
- The Bar Graph displays Multiple Currencies and each currency is displayed in a different color.
- Within the bar graphs are colored lines representing Recurring Gift Goal (light blue), Monthly Average (black), and Commitments Made (dark blue).



Getting Started

Kickstart Videos

1

2

3

4

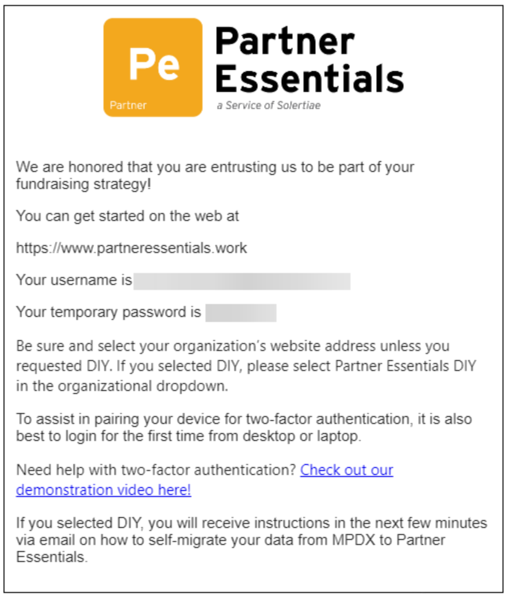
Setup: Account

Overview

This article will walk Partner Essentials customers through the account setup and MFA (multi-factor authentication) process.

Invite

Once you have signed up for Partner Essentials you will receive an email from noreply@solertiaelabs.com titled "**Welcome to Partner Essentials**" which contains your username and temporary password for https://partneressentials.work.



Note: This temporary password is only valid for 24 hours. If your temporary password has expired please submit a help request.

Once you log in with your temporary password you will be prompted to enter your name as well as a new permanent password for your Partner Essentials account.

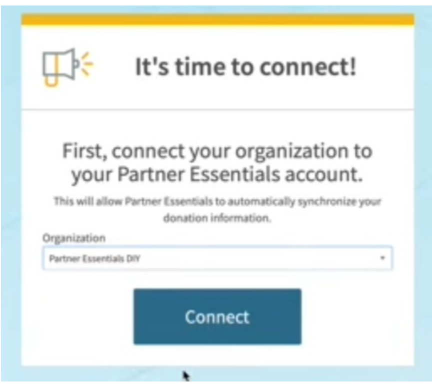
Now that you have finished creating your account you will be prompted to select your preferred language. Select it from the drop-down and click " **Let's Begin**"

Connecting Your Organization

The last step is to connect to your Organization's account. Click the drop-down until you see the name of your organization, then click " **connect**".

If you're part of an organization with automated donation syncing then you will need your username and password for your account that you're connecting to Partner Essentials (Donor Hub Staff portal is an example).

Note: Partner Essentials DIY customers (individual subscribers) should select "Partner Essentials DIY" as their organization.



CHANGE: New Login Experience

Beginning in April 2024, Partner Essentials will be shifting to a passwordless login experience.

Passwordless login via an email PIN, or any similar token-based authentication method, offers several security benefits over traditional password-based systems.

Here are some reasons why it's considered more secure:

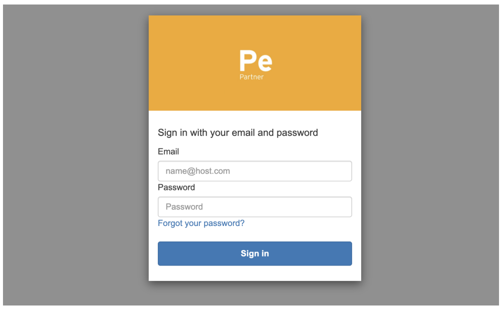
- **Reduction of Phishing Risks:** Users are less likely to enter their credentials into phishing sites because they don't have a static password to be tricked into providing. Instead, they receive a unique, one-time PIN or link via email that is much harder for attackers to replicate or intercept effectively.
- **Elimination of Weak Passwords:** One of the weakest links in password-based authentication is the use of weak, easily guessable passwords. By using a one-time PIN sent via email, the security doesn't rely on the user's ability to create and remember a strong password, thus eliminating the risk of weak passwords.
- **Avoidance of Password Reuse:** A significant security issue is users reusing passwords across multiple sites, which means a breach on one site can compromise their security on others. Passwordless authentication eliminates this risk by not requiring a password that can be reused.
- **Enhanced Security Features:** Email-based authentication often comes with additional security checks, such as verifying the device or location from which the authentication request is made. If an unusual login attempt is detected, it can be flagged or blocked, adding an extra layer of security.
- **Reduced Risk of Password Theft:** Since there's no static password stored on servers or entered by users, the risk of passwords being stolen from a data breach or through malware on a user's device is significantly reduced.

But doesn't two-factor authentication help solve for this? Absolutely, however, there's another side of the coin here - user experience and also supporting the broad range of standard practices from single person nonprofits to those with dozens or hundreds of users. By associating the authentication with the organization's email standards, Partner Essentials can more easily align with the distinct security protocols of a broad audience.

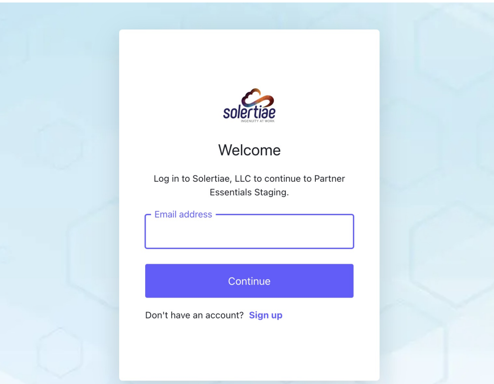
In other words, Partner Essentials becomes as secure as your email account. And everyone will be in their email inbox more often than Partner Essentials making it very convenient for users fetching the PIN without compromising on security.

So here what you need to know.

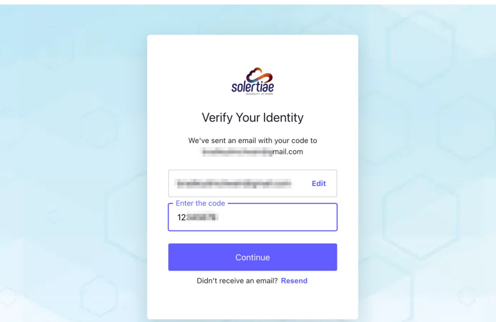
This login screen will be replaced...



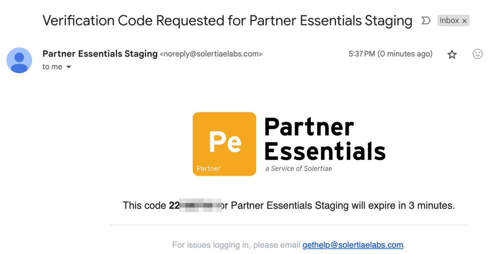
...by this one.



After you enter your Partner Essentials email address, you will advance to this screen.



At this moment, you will have a PIN in your email inbox similar to the following. Enter that PIN into the box above - and you're in!

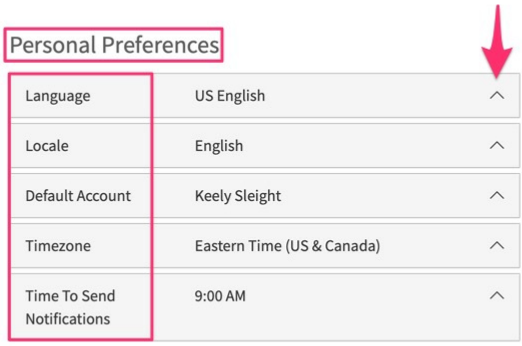


Setup: Preferences

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

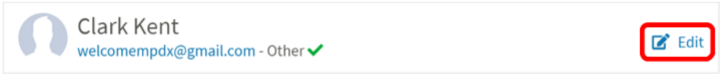
Personal Preferences

At the top is **Personal Preferences**. You can modify **Language**, **Locale**, **Default Account, Timezone,** and **Time to Send Notifications** by clicking on the **drop-down arrow**.

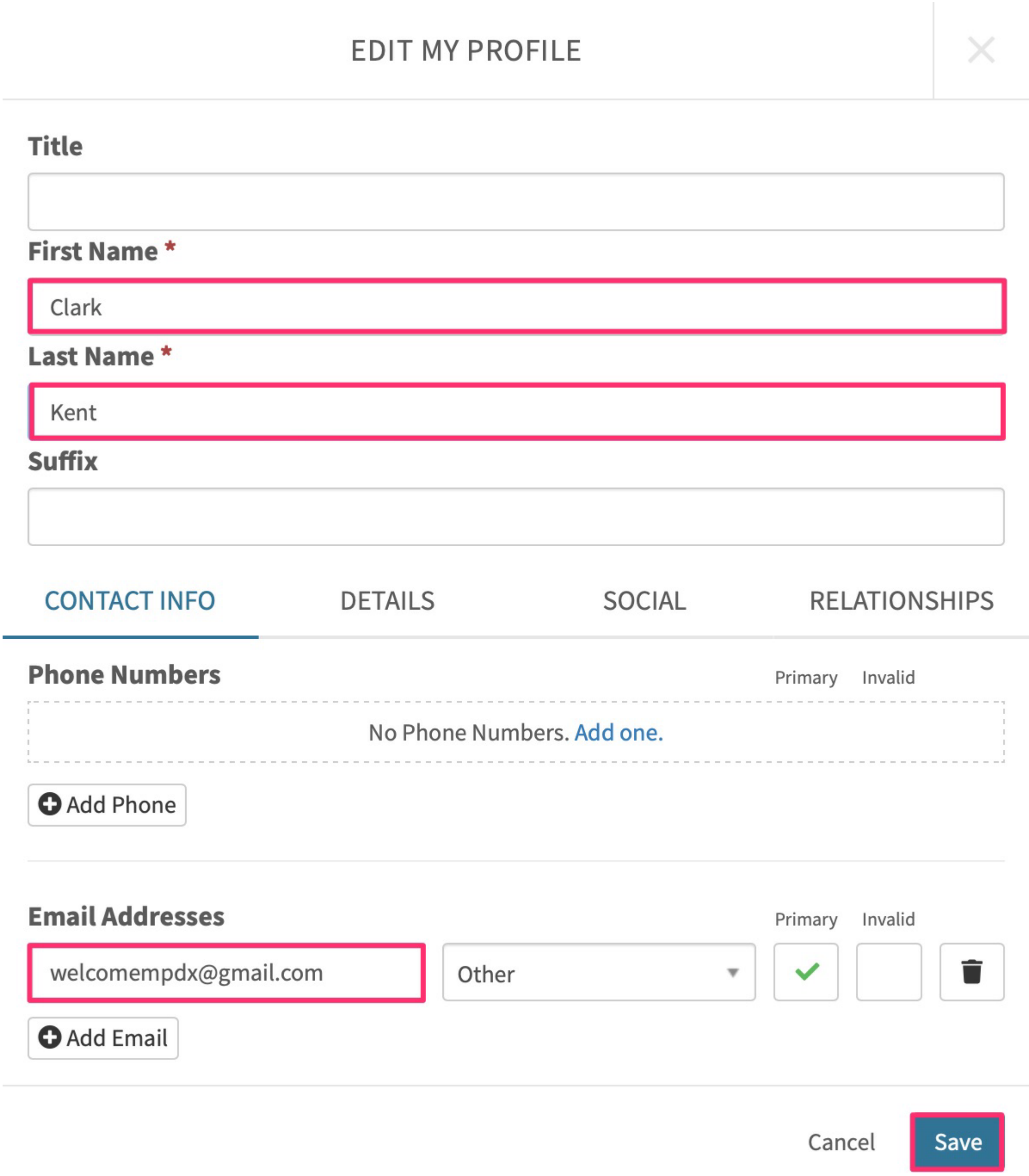


Your Full Name and Email Address

- Click on the **Edit** icon to modify your name or email address.



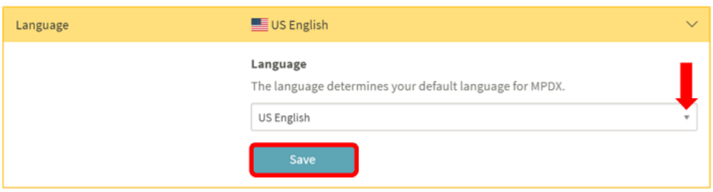
- Type in the **First Name**, **Last Name**, and **Email Address(es)** of your choice.
- When finished, click the **Save** button.



Language

- Click the **drop-down** (to the right) to set the default **Language**.
- Click the **Save** button.

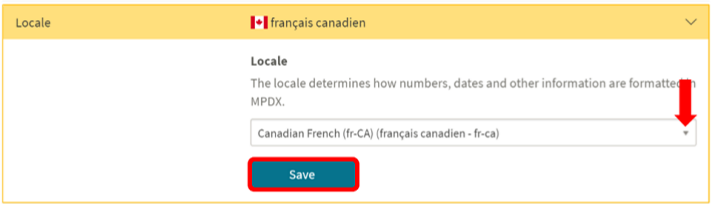
Note: This language determines the language displayed in MPDX.



Locale

- Click the **drop-down arrow** (to the right) to set your default **Locale**.
- Click the **Save** button.

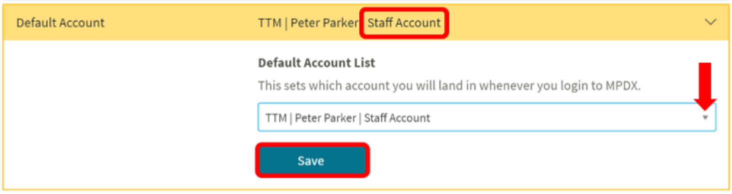
Note: Locale determines how phone numbers, dates, and postal codes are formatted in MPDX.



Default Account

- Click the **drop-down arrow** (to the right) to set your **Default Account** if you have more than one.
- Click the **Save** button.

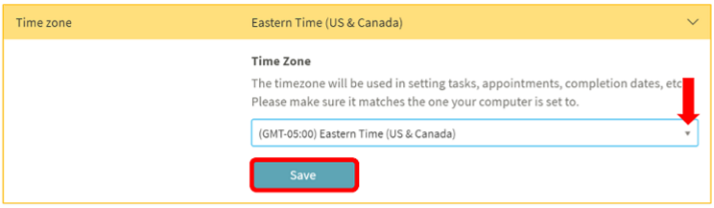
Note: The Default Account is your primary staff account.



Timezone

- Click the **drop-down arrow** (on the right) to change the current **Time Zone**.
- Click the **Save** button.

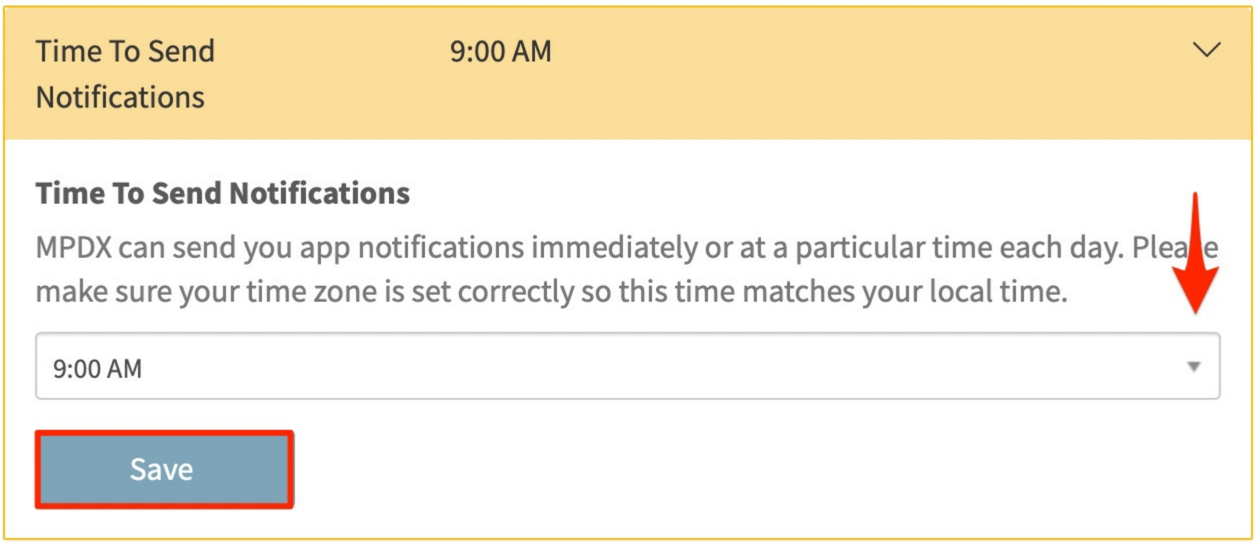
Note: The time zone set should correspond with your place of residence.



Time To Send Notifications

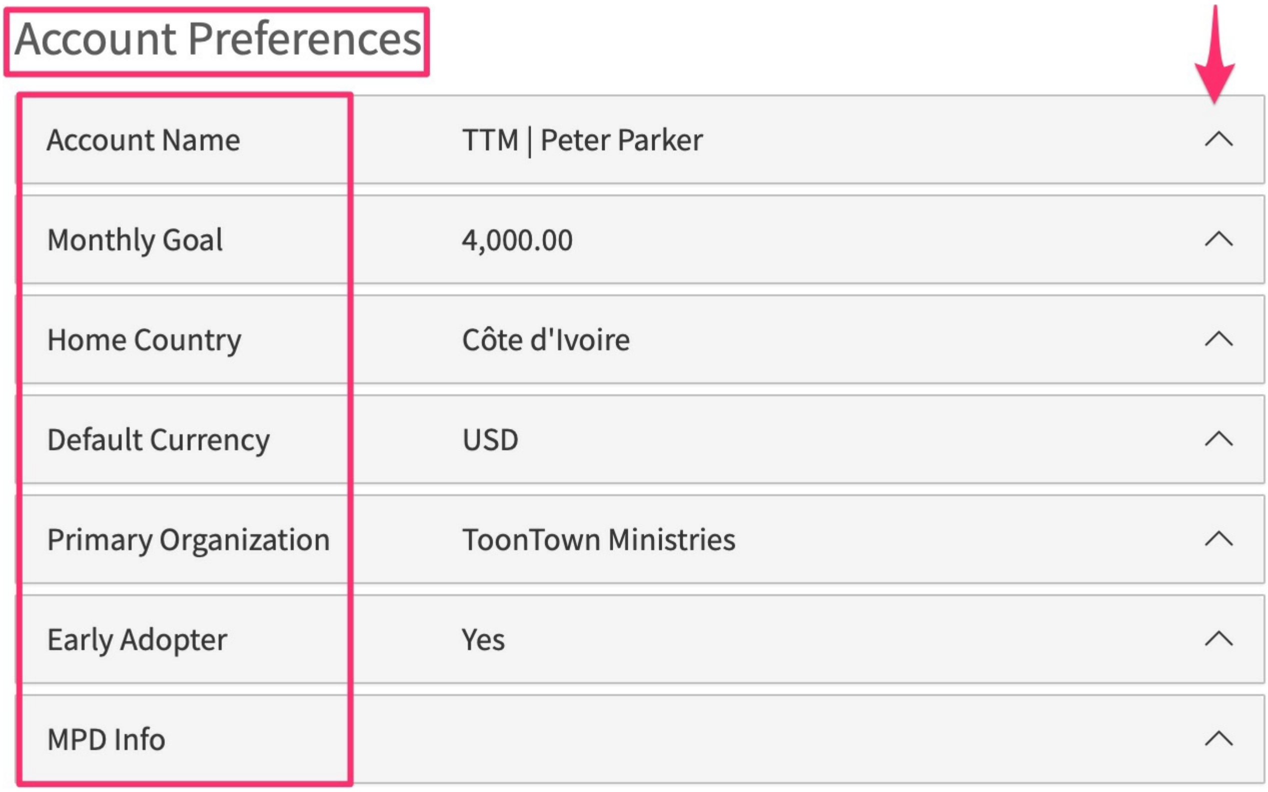
- Click the **drop-down arrow** (to the right) to set your **Time to Send Notifications**
- Click the **Save** button.

Note: This is the time that will be used to send the Notifications you set under the Settings, Notifications section (i.e. In App, Email, Tasks)



Account Preferences

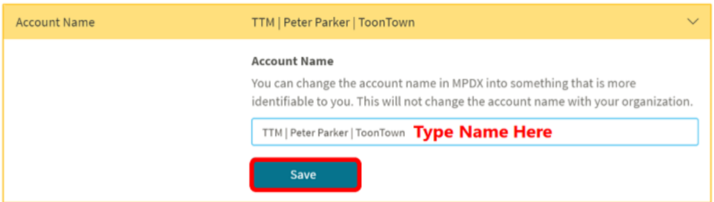
Located under Account Preferences are **Account Name**, **Monthly Goal**, **Home Country**, **Default Currency**, **Primary Organization**, **Early Adopter**, and **MPD Info.** Modify any of these settings by clicking the **drop-down arrow** to the right.



Account Name

- Click in the space provided and type the **Account Name** you prefer.
- Click the **Save** button.

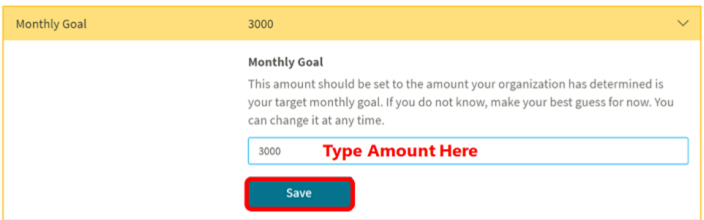
Note: This Account Name does not change the name of your staff account with an organization.



Monthly Goal

This goal should be set by your organization. However, to modify the amount:

- Click in the space provided and enter the **Monthly Goal Amount**.
- Click the **Save** button.



Home Country

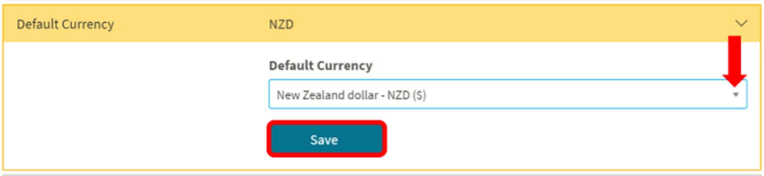
- Click the **drop-down arrow** to set your **Home Country**.
- Click the **Save** button.

Note: Your Home Country should be set to the place you live and from where you send out physical communication to donors such as newsletters and cards.

Default Currency

- Click the **drop-down arrow** to set your **Default Currency**.
- Click the **Save** button.

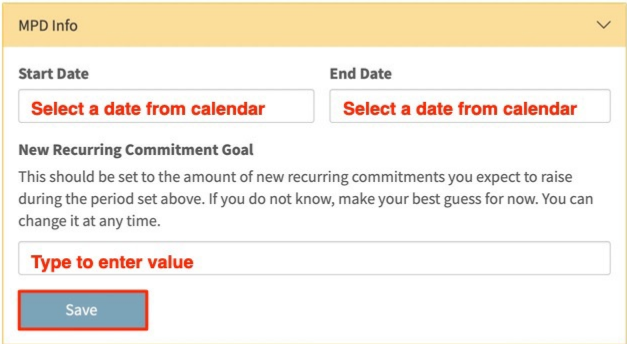
Note: Your Default Currency is used to calculate the gross and net amounts of financial gifts received.



MPD Info

- Click the **drop-down arrow** to set your **MPD Info**.
- Use the pop-up calendars to select a **Start Date** and **End Date** and enter a **Recurring Commitment Goal**.
- Click the **Save** button.

Note: This feature is currently in development and may not be fully accurate. This information influences the Commitment Graph in the Coaching Report.

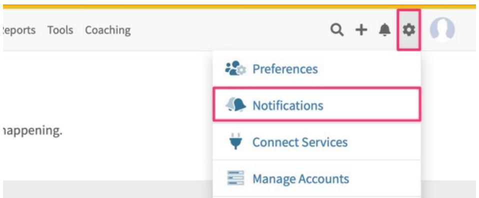


Setup: Notifications

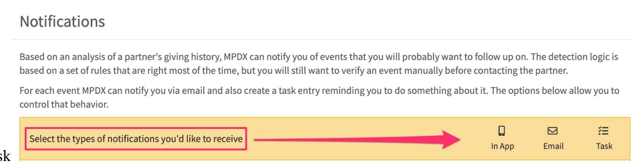
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

You are able to set **Notifications for yourself using this tool that will alert you to the changes you consider important. These can be updated at any time.**

- Click on the **Settings** gear icon, then choose **Notifications**.



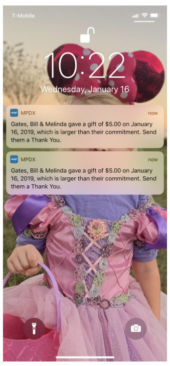
Select the types of notifications you would like to receive: In App, Email, or Task



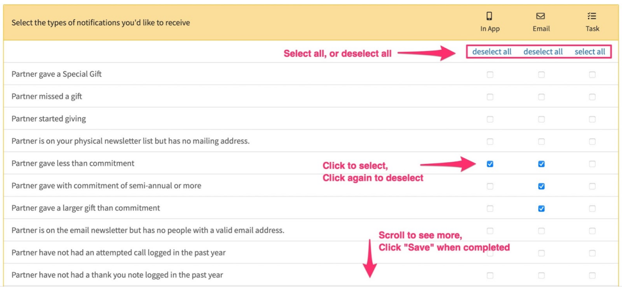
- **In App** - a "push notification" will be generated and appear in your Mobile app for each notification type you select from the list

  NOTE: In order to receive In App notifications, you must have push notifications enabled on your iOS or Android device. To check this, you can go to Notifications in your devices settings and ensure the app is authorized to send you notifications.
- **Email** - a notification will be generated and sent to the email associated with your account for each notification type you select
- **Task** - a task for the associated contact will be added to your Tasks list each time a notification type you have selected applies

Below is an example of how an "In App" or "push notification" will appear when notifications for the app have been enabled on your iOS or Android device:



Below the gold bar is a list of notifications to help facilitate a better MPD process

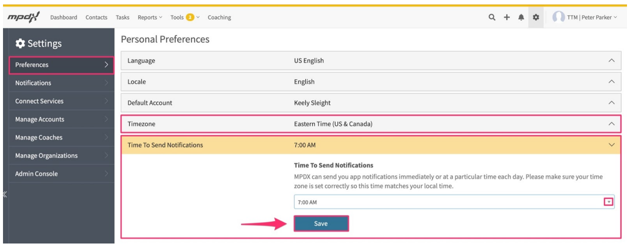


The full list of Notifications available includes:

- Partner gave a Special Gift
- Partner missed a gift
- Partner started giving
- Partner is on your physical newsletter list but has no mailing address
- Partner gave less than commitment
- Partner gave with commitment of semi-annual or more
- Partner gave a larger gift than commitment
- Partner is on the email newsletter but has no people with a valid email address
- Partner have not had an attempted call logged in the past year
- Partner have not had a thank you note logged in the past year
- Partner (semiannual, annual, etc) has an expected donation one month from now. Send them a reminder.
- Partner recontinued giving
- New Partner added and merged
- New Partner added but no merged
- New Partner added with no duplicate found
- New contact added through your Give Site subscription form
  - NOTE: this notification is only available if your organization has this feature enabled
- Partner has upcoming anniversary
- Partner has upcoming birthday
- Partner received a new address from the donation system
  - NOTE: this notification is only available if your organization syncs your account with a donation system

To choose the time you would like to receive the notifications:

- Click on the **Settings** gear icon, then from the drop-down menu, select **Preferences**.
- Under the heading **Personal Preferences**, find the box marked **Time to Send Notifications**.
- **From the drop-down menu, choose any time** from 5:00 AM to 9:00 PM. Ensure that your time zone is set properly by choosing from the drop-down menu under the heading Timezone.

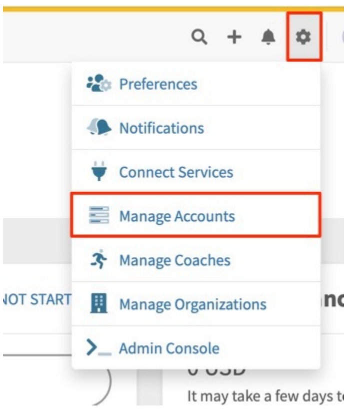


Setup: Manage Accounts

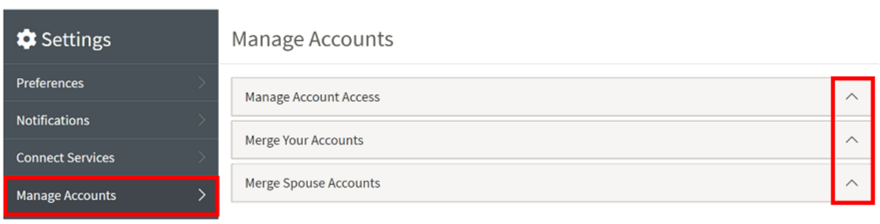
Managing your accounts in MPDX is facilitated within 3 main categories:

[Manage Account Access](), [Merge Your Accounts](), and [Merge Spouse Accounts]().

- Click on the **Settings** gear icon and select **Manage Accounts**



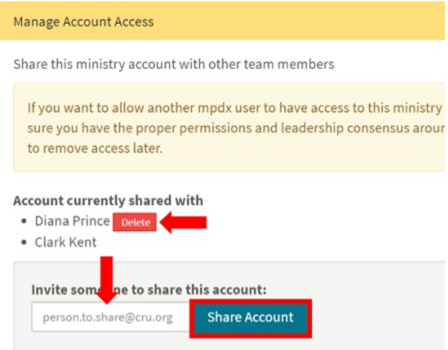
Click on the **Drop-down Arrow** to the right of the applicable option.



Manage Account Access

You can share access to an account with other staff such as your MPD coach. If you have already shared your account, those names will be listed under **Account Currently Shared With** section.

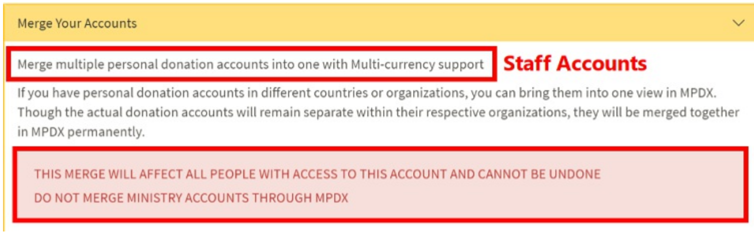
- Click the red **Delete** button to remove a specific person from account access.
- Type in an **Email Address** and click **Share Account** to grant access.



Merge Your Accounts

You can merge personal ministry accounts from multiple countries and in multiple currencies.

- Merge **Personal Accounts** only, i.e., *Staff Accounts*.
- This merge will **affect account access** for **all users** who access and use the given account.
- This merge **cannot be undone**.
- **Do not merge** ministry accounts (organizations).



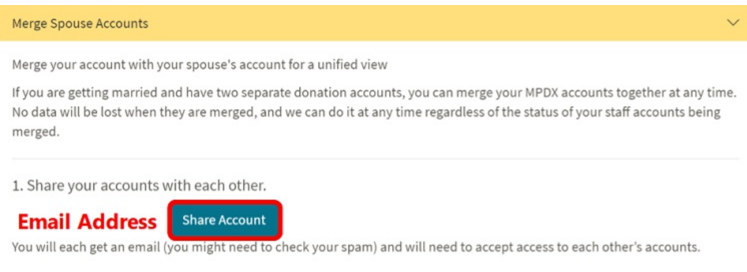
- Select the **Merging From** account by clicking the drop-down arrow to the right.
- Next, select the **Merging Into** account.
- Click on the **I accept checkbox** and then click **Merge**. NOTE: You can't accept an MPDX invite to access another account list on a mobile device. This can only be done through MPDX Web.

Note: This account merge cannot be undone.

Merge Spouse Accounts

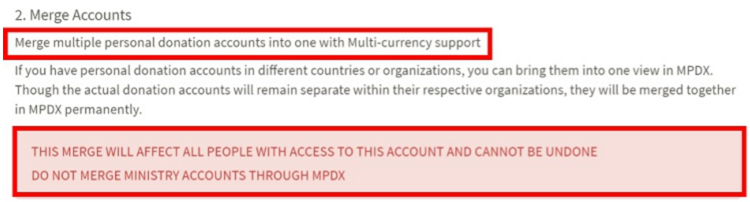
If you are married, you can share your account with your spouse. If you are getting married and have separate ministry accounts, you can also merge them into one account.

- Type in your spouse's **Email Address** and then click **Share Account**.



- Pick the personal **Merge Accounts**, i.e., *your spouse's staff account*.

Note: This merge cannot be undone.



- Select the **Merging From** account by clicking the drop-down arrow to the right.
- Next, select the **Merging Into** account.
- Click on the **I accept checkbox** and then click **Merge**.

Setup: Organizations- new, offline

You must select an organization to setup your account in Partner Essentials.

Partner Essentials is available to help you in your ministry for any missions organization and/or church. If your organization is listed in the dropdown box, you can use that to setup your account. If not, we need to add your organization. There are two routes to go about this.

1.) Organizations with Donor and Donations Syncing

The best experience will be for us to work with your organization and to set up your account to sync your donations from your organization. Please reach out to us using our helpdesk and we'll work with you and your organization to get this setup!

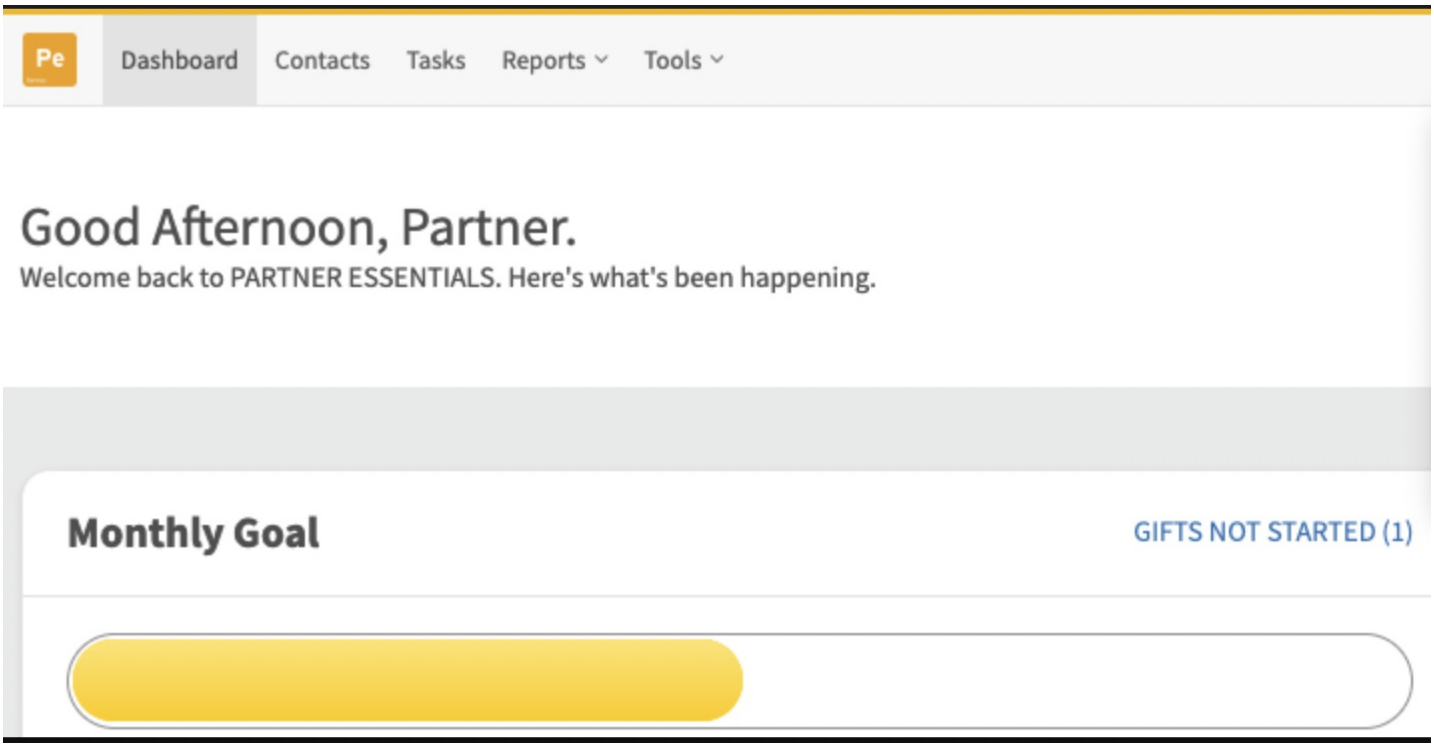
2.) Offline Organizations.

Another option is to use and offline organization. Partner Essentials DIY is an example of an offline organization. We can add an offline organization specifically for you and your coworkers quickly and easily; however, this means that you have to enter in your contacts and donations into your account. If you would like to go this route, please request this using our helpdesk.

Quick Reference Guide: Settings

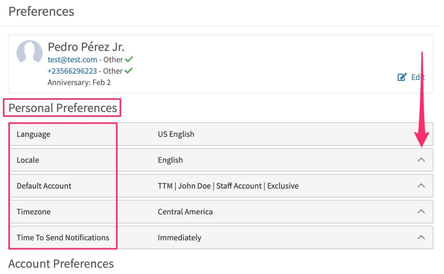
Settings

Click the Settings button (gear icon) to view or edit: Preferences, Notifications, Connect Services, Manage Accounts, and Manage Coaches.



Preferences

- The top section is your MPDX Personal Preferences.
- **Language** and **Locale** will affect things like phone numbers, postal codes, and currency. Click the dropdown arrow to expand, select an option, and Save.
- **Default Account** should be your primary organization staff account.
- Make sure the **Timezone** is set to where you live.
- **Time to Send Notifications** allows you to choose your timing preference from the dropdown menu.



Account Preferences

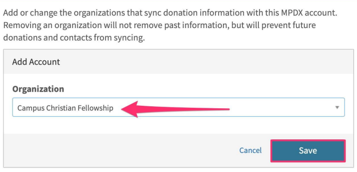
- The **Account Name** can be modified to something simpler (i.e. "John Doe" instead of Staff Account 0005550000).
- The **Monthly Goal** should be set to what your organization has recommended.
- Your **Home Country** should be set to where you live.
- Your **Default Currency** is critical to accurate donation amounts, totals, and reports.
- You can opt in and choose to be an **Early Adopter** to be the first to try new trial features in MPDX.
- The **MPD Info** should be set to match the MPD goals and time frame that your organization has recommended.

Notifications

- Under **Notifications** you can choose where MPDX will notify you: **In App**, **Email** or as a **Task**. Scroll to see all of the Notification types and options. For example, in the Email column, click the box to the side of the notification type to receive an email notification.
- **Scroll down and click "Save."**
- **You can change your notification settings at any time.**

Connect Services

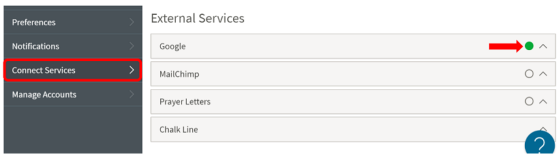
- **Make sure to set your Organization to the correct ministry.**



External Services

Connect Google to MPDX, (i.e. an @cru.org or @gmail.com email account) to track MPDX activity on the go.

Connect MailChimp, PrayerLetters or ChalkLine to populate emails lists from your MPDX Contacts.

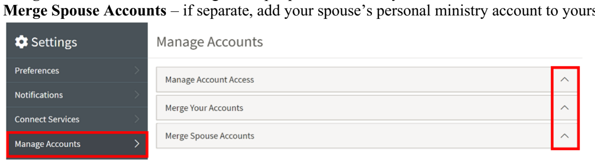


Note: MPDX will redirect you to your MailChimp, PrayerLetters or ChalkLine login screen.

Note: A green dot means the sync is set up and working

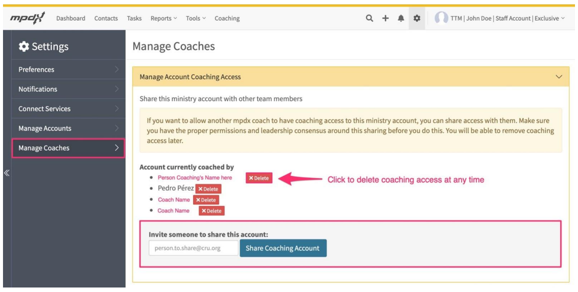
Manage Accounts

- **Manage Account Access** – add an email address to grant access to your MPDX account (use wisely).
- **Merge Your Accounts** – to merge multiple personal ministry accounts into one.
- **Merge Spouse Accounts** – if separate, add your spouse's personal ministry account to yours.



Manage Coaches

- **Manage Coaches** – add an email address to grant coaching access to your MPDX account. This allows an MPD coach, staff, or supervisor to see your MPD progress WITHOUT seeing any personally identifiable information of your contacts.



Quick Reference Guide: The Dashboard

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Monthly Goal Thermometer

The thermometer is designed to make it easier to measure your personal MPD "health" and see the key percentages and amounts are now discretely displayed below the thermometer graphic. There are 4 key metrics:

- **Goal:** The monthly MPD Goal entered in your MPDX Settings
- **Gifts Started:** How much money in gifts have come in during the current month and what percentage that amount is relative to your goal
- **Commitments:** How much money in gift commitments you have for the current month and what percentage that amount is relative to your goal
- **Below Goal:** The gap between your monthly commitments and your monthly MPD goal

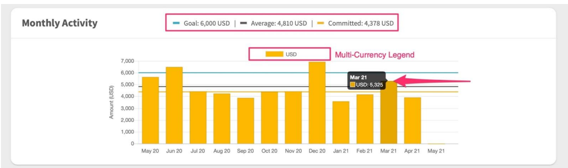
There is a link to access a list of partners with **"Gifts Not Started"** so you know who needs to be reminded to send in that first gift.

NOTE: When viewing the full list of Gifts Not Started, you can click a contact's name to go to their contact page and edit information. Changes must be done manually by visiting the Details tab, under the Financial section. The Commitment Received drop-down is a freely editable field. The system does NOT change it automatically when a contact begins a gift, or stops a gift. The MPDX user must mark the commitment received "Yes" or commitment received "No."

Account Balance

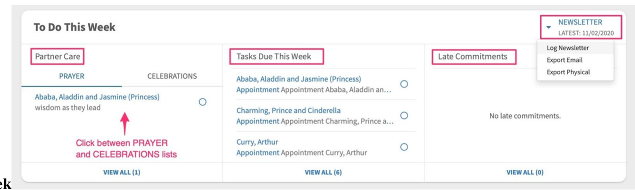
You can click the **"View Gifts"** link to view all of the financial gifts you've received in the current month (or scroll to see additional with the ability to view previous month's donations as well).

Monthly Activity Graph



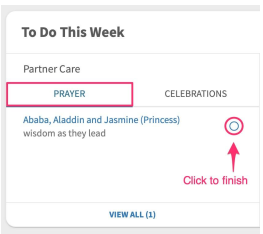
- Displayed at the top are your **Goal, Average**, and **Committed** amounts.
- The **Monthly Activity Graph** shows your monthly giving totals for the year, from the current month.
- There are **3 lines** that show your **MPD Goal (blue), Average Monthly Giving (gray)**, and **Committed Giving (gold)**
- Hover your mouse over any monthly bar (gold) to view that monthly total
- Click any monthly bar (gold) to open the Donations Report for that month

To Do This Week



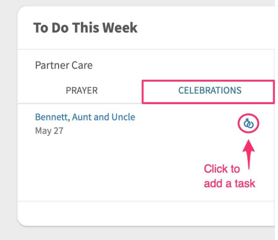
Partner Care - Prayer

- **The PRAYER list is a collection of all created "Prayer Request" Tasks**
- Click on the circle to the right of any of the partner names to **finish (log)** the task associated with that contact. You must finish (log) the task in order for it to disappear from the PRAYER list.
- Click the **VIEW ALL** option to see all of the Prayer Request Tasks in MPDX



Partner Care - Celebrations

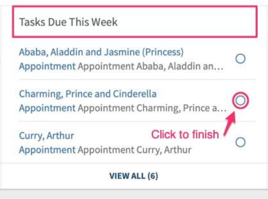
- Weekly **Birthdays (cake with candles icon)** and **Anniversary (two rings icon)** will be displayed in this section. This list includes celebrations 1 week back and 3 weeks forward from the current MPD week.
- **If you click on the contact name or celebration date**, MPDX will take you to that partner's contact page.
- **If you click on the icons, MPDX will create an ADD TASK** (that you can update) to wish the contact a happy birthday or anniversary.
- Click the **VIEW ALL** option to see all of the Celebrations associated with this week
- A Birthday and/or Anniversary can be added by visiting the People tab within a Contact's page and selecting Edit. Under the Details tab you will see the Birthday and Anniversary options.



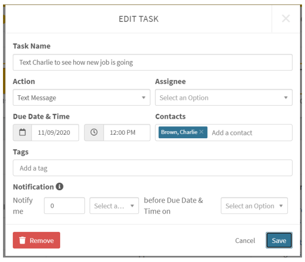
Tasks Due This Week

This list includes all tasks (except for prayer request tasks) due this week. It will display the 3 most "pressing" tasks in your list (that is, they are overdue or due to be done today). As you mark these tasks finished, the list will refresh to include more tasks from your overall task list (if more than 3 exist).

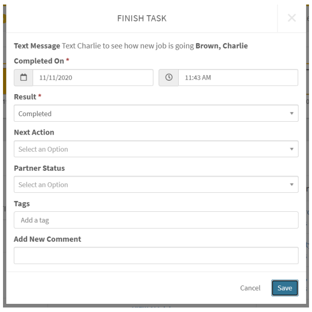
- **Click on any partner name to edit the Task for that contact**
- **Click on the circle to the right of a partner's name to finish (or log) that task**



Clicking on either the contact name or task description will bring up the **EDIT TASK** modal shown below. **This modal allows you to update key task information, including Due Date & Time and Notification details.**

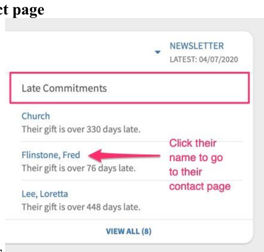


There is also a circle to the right of each task that when clicked brings up the **FINISH TASK** modal. **This modal allows you to add details like Result and Next Action and/or click Save to mark the task finished.**



Late Commitments

- **Each partner name** (i.e. Flinstone, Fred) **links to that ministry partner's contact page**



- **Select VIEW ALL to see the complete list of partners with Late Commitments**

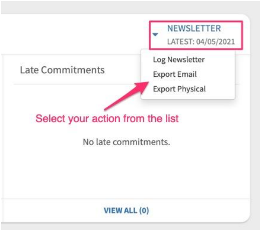
Newsletter

The date of when you logged your last newsletter is displayed right under the Newsletter drop down list. **To add a LATEST log date, "Log Newsletter" with the Action "Newsletter - Physical", "Newsletter - Email" or "Newsletter Both" task.**

This drop down list provides **3 Options** related to sending out a newsletter:

- **Option 1: Log Newsletter** will log the date and subject of your latest newsletter.

- **Option 2: Export Email** will export the email addresses of all contacts who are on your email newsletter list.
- **Option 3: Export Physical** will export the data for sending a physical newsletter.



Referrals, Appeals, Weekly Activity

Referrals

The MPDⓇ Team has recently introduced a shift in language from "referrals" to "connections." The vision behind this shift is: "we want people to connect us with their friends more than refer us to their friends." **Though "Referrals" are now formally called "Connections," MPDX uses the term "Referrals."** In MPDX: a “Referrer” is the person who introduced you to a new contact and a “Referral” is a person who was introduced by another contact.

- **RECENT:** This list includes all referrals entered into MPDX in the last 2 weeks.
- **ON-HAND:** This list includes the total number of referrals in MPDX with the status: Never Contacted, Ask in Future, Cultivate Relationship, and Contact for Appointment
- **VIEW ALL:** See a full list of Recent or On Hand Referrals.

Appeals

This section will display the appeal marked Primary (the appeal in your appeal list with the star icon checked). The thermometer shows:

- **Gifts Received:** How much money in gifts that have been associated with this appeal and what percentage that amount is relative to your goal
- **Commitments:** How much money in commitments that have been associated with this appeal and what percentage that amount is relative to your goal

Weekly Activity

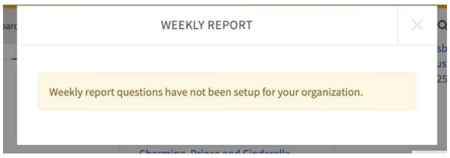
This section displays the amount of Calls, Messages, Appointments and Correspondence tasks you completed for the current week. These numbers update when you Log or Add Tasks within MPDX.

- **Calls:** The total number of Call tasks logged.
- **Messages:** The total number of Email, Text Message, Facebook Message tasks logged.
- **Appt Produced:** This number changes when a Call or Message task is logged with an “Next Action” - Appointment task.
- **Appointments:** The total number of Appointment tasks logged.
- **Correspondence:** The total number of Pre Call, Reminder, Support Letter, and Thank tasks completed.

There is also a **View Activity Details** link that, when clicked, takes you to the **Coaching Report** that your coach or team leader can view for you (if you have set up a coaching relationship with either of those staff members).

The **Fill Out Weekly Report** link will, when clicked, cause a box with a series of questions to pop up.

NOTE: If you do not see questions or get an error message like the one below - it means that your MPDX Account is not associated with an organization that has provided questions. If you believe this message is in error contact the help desk.



Quick Reference Guide: Reports

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

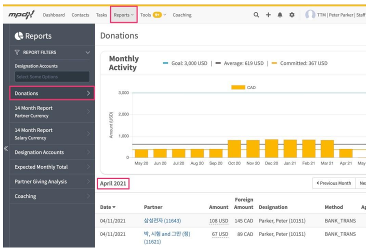
Reports: Donations

- Displayed at the top are Goal, Average, and Committed.
- Below the progress bar, is the Multi-Currency Legend.
- There is also a Bar Graph of the fiscal year, from the current month.
- Click on any Monthly Gold Bar to see a total.
- You can click on to see Donation reports for different months

Reports: Current Monthly Report

- Under the Donations section, is the current month's activity, i.e., April 2021.

- Each Contact Name is a hyperlink to that specific contact.

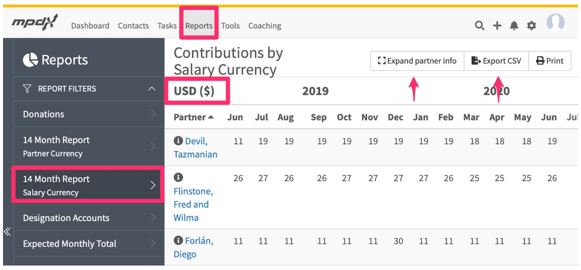


- Click on the Previous Month or Next Month buttons for other monthly reports.
- Click on the Paper/Pen icon to edit a donation.

Scroll to the bottom of Donations to see the total given for the month.

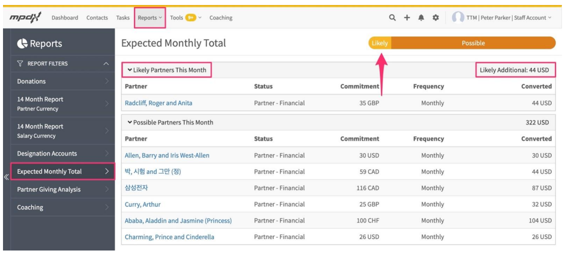
14-Month Report

- Contributions By Salary Currency, i.e., USD is listed by fiscal year from the current month.
- Click Expand Partner Info for more details.
- Click on Export CSV for a spreadsheet report



Expected Monthly Total

See The Likely Partners This Month and the Possible Partners This Month (Current Month) who are expected to give financial gifts.

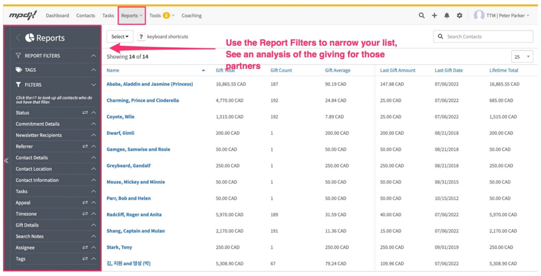


Scroll down to see Possible Partners This Month and an Estimated Total.

Partner Giving Analysis

See an analysis of a partner's giving history with stats like Gift Total, Gift Count, Gift Average, Last Gift Amount, Last Gift Date, and Lifetime Total.

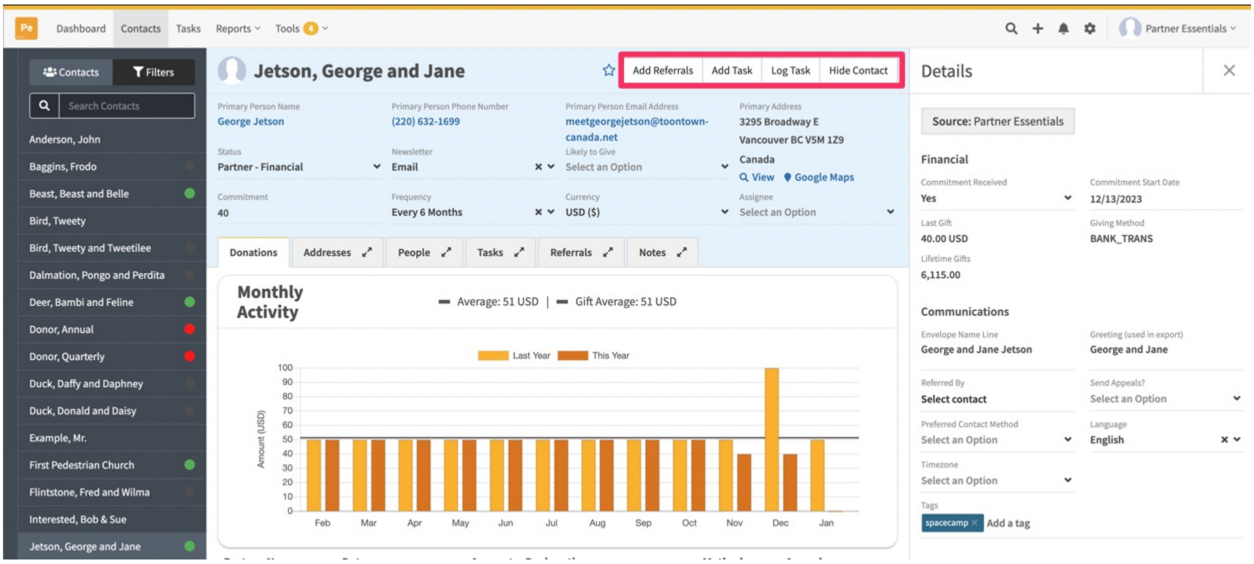
Use REPORT FILTERS to narrow the list of ministry partners included in the Analysis.



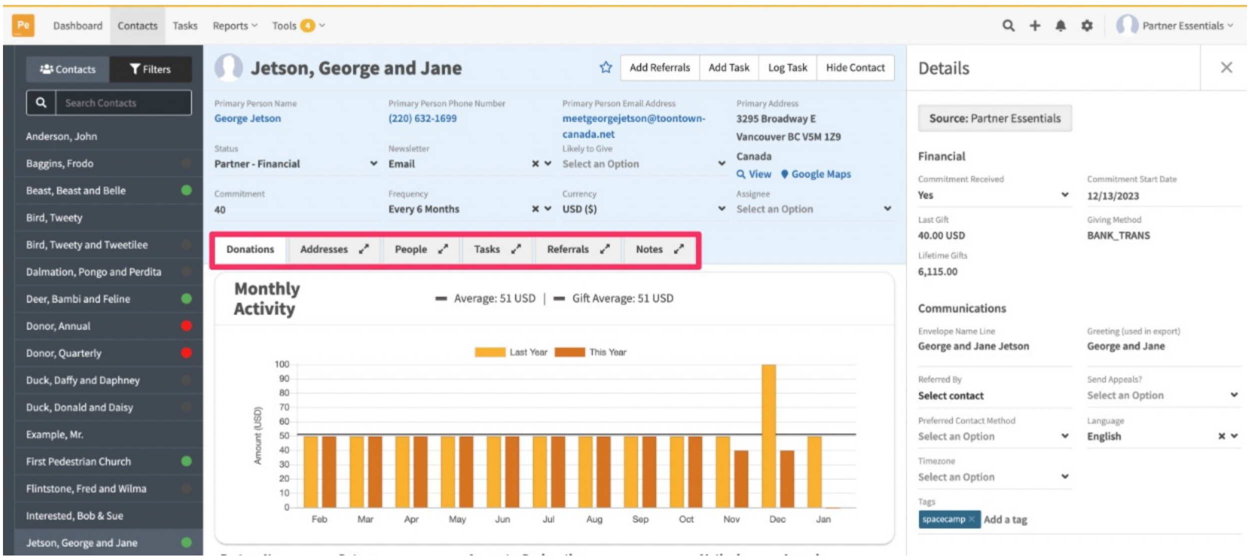
Quick Reference Guide: A Contact's Page

A Contact’s Page

Click on a Contact Name to view and edit their contact page.
The contact’s page will open from the right side of the screen to show details for that contact.

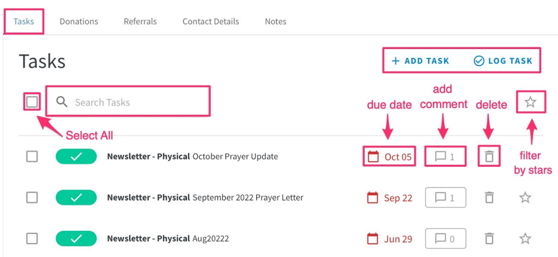


- **You can quickly add a referral, add a task, log a task, or hide a contact with the buttons at the top.**



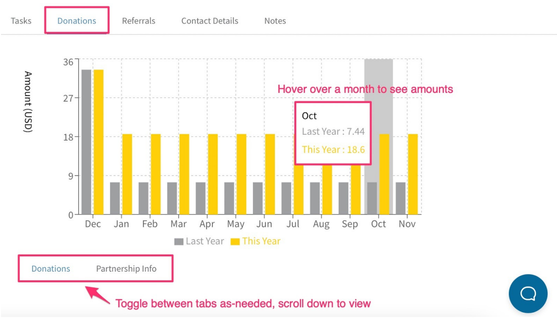
- **Click on any tabs for more detailed information**

Tasks



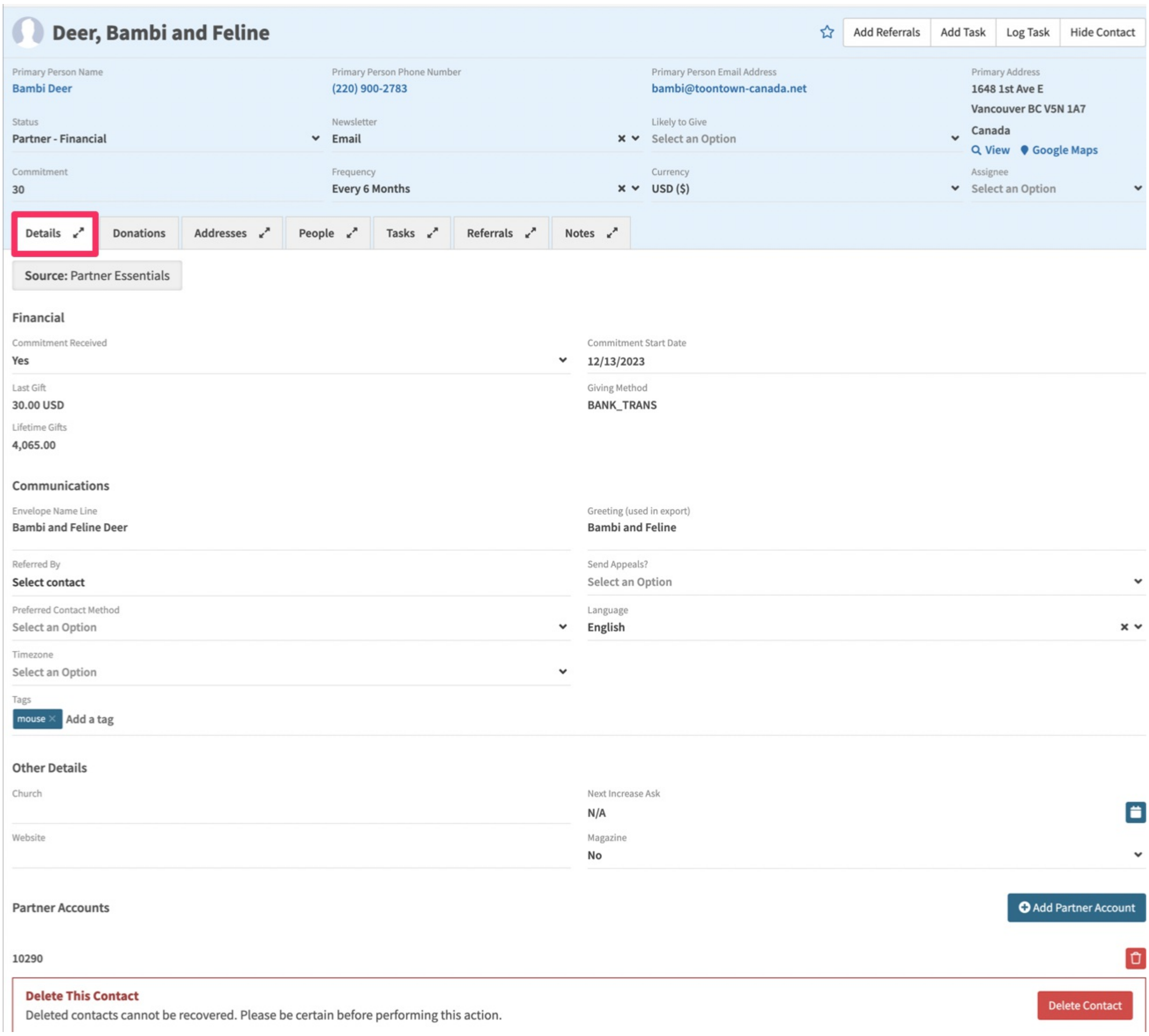
- **Each Task has its own line and can be edited independently**
- Or, **use Select All to edit multiple tasks at one time**
- **A "complete" task will appear as a green oval with the outline of a white check mark in the middle.**
- **An "incomplete" task will appear as a white oval with a green outline and checkmark in the middle**
- **When you Add Task or Log Task from a contact's page, the task will automatically be associated with this contact**

Donations



- **The y-axis of the chart shows the currency amount** (as set in a contact's page in the top section by the handshake icon)
- **The x-axis of the chart shows 24 months of giving** (the current month is displayed on the far right and there is a side-by-side comparison of giving with Last Year shown in gray and This Year shown in gold)
- **Two tabs: Donations and Partnership Info**
  - **Donations: a list of all donations from this contact with the Date, Amount, and Converted Amount of each gift** (based on the currency set under Settings Preferences Account Preferences Default

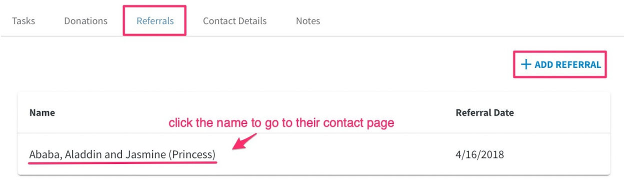
Currency)
  - **More Partnership Info can be found in Details:** Contact-specific partnership information including Status, Currency, Frequency, Commitment Received, giving Start Date, Last Gift Date, Last Gift Amount, Method of giving, Lifetime Gifts, Referred by, Send Appeals preference and Partner Account information.



Referrals

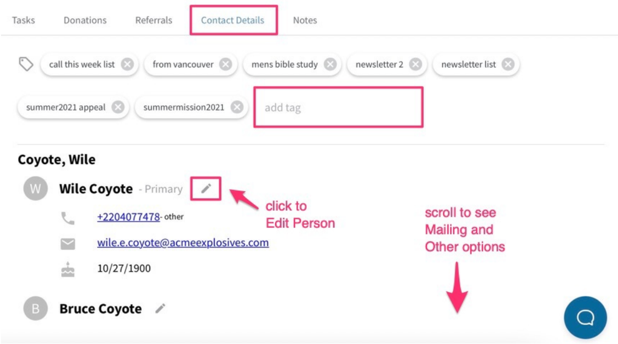
- A "Referrer" is the person who introduced you to a new contact.

- A “Referral” is a person who was introduced by another contact.

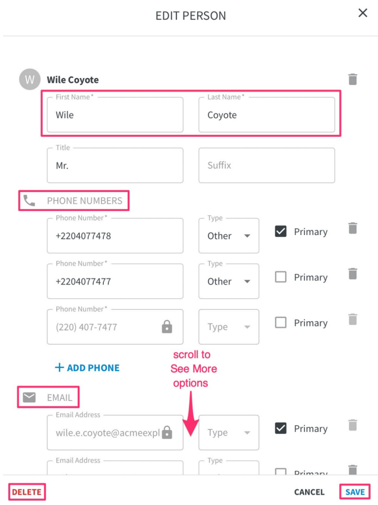


- **Each person entered with the Add Referral button under this contact will appear in this list, along with their Name and Referral Date**
- **If you click the Name,** i.e. Ababa, Aladdin and Jasmine (Princess), **it will take you to that person’s contact page**

Contact Details

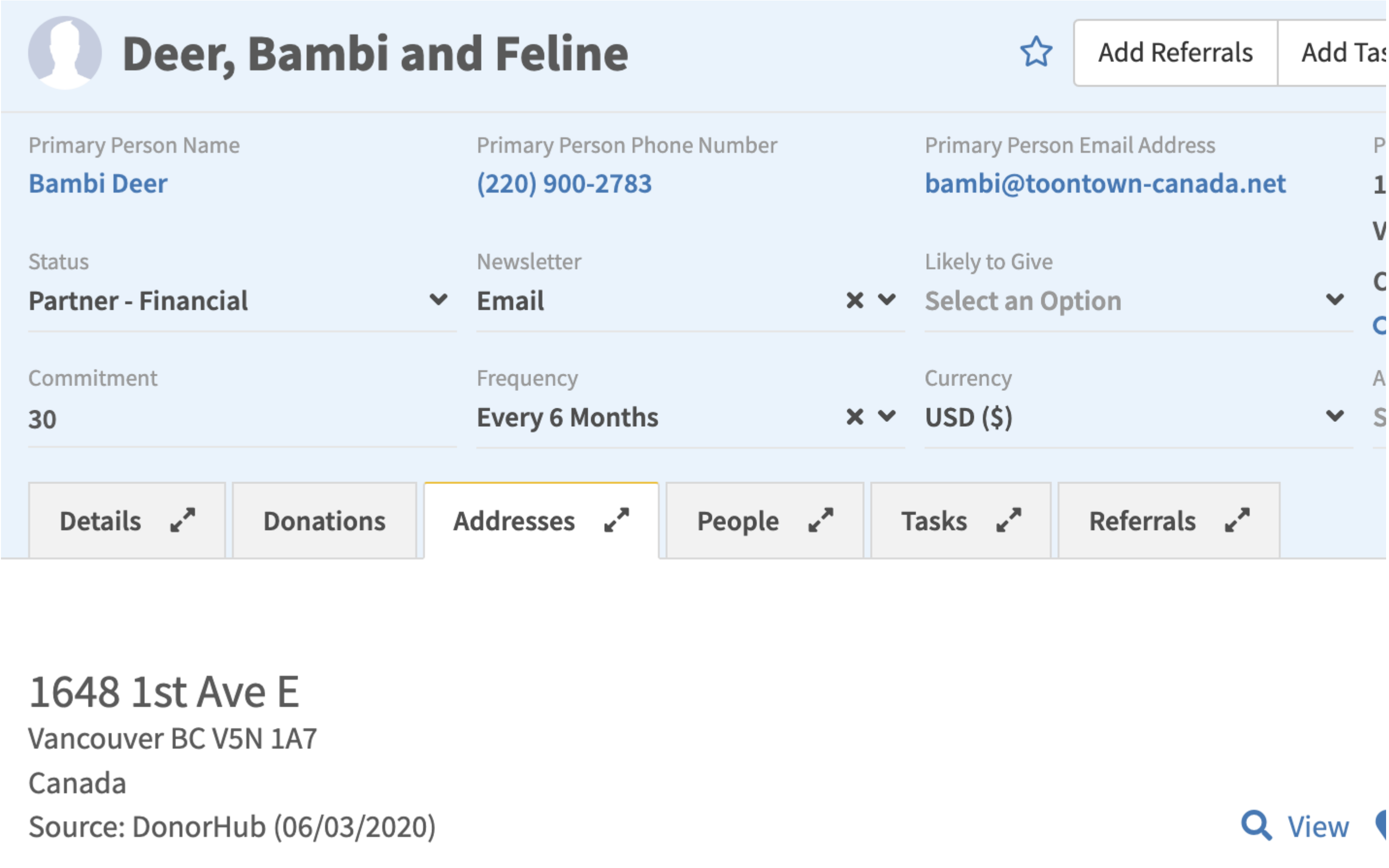


- **A Contact can include multiple individuals, or Persons** (in this contact, “Coyote, Wile,” there are two people: Wile Coyote and Bruce Coyote).
- **Edit Person:**
  - **Verify or edit Phone Numbers, Emails and select a Primary, if applicable**
  - **To Delete a phone number or email click the trash icon to the right of the information** (If there is a lock icon next to the phone number or email it means this information is supplied by donation services and cannot be edited or deleted)



  - **Verify or edit their First Name, Last Name, and Title**
  - **Add Phone or Add Email for this person**
  - **Click the Opt Out of Email Newsletter checkbox, if applicable**
  - **Verify or edit their Birthday**
  - **Select or change their Relationship Status** (i.e. Married, Single)
  - **Verify or edit their Anniversary**
  - **Select their Gender**
  - **Verify or edit their Alma Mater, Employer and Occupation**
  - **Add Social links for a contact** (i.e. Facebook, Twitter, Linkedin, Website)
  - **Add their Legal First Name**
  - **Click the Deceased checkbox, if applicable**
  - **DELETE** this person from this contact, **CANCEL** the changes made**, or SAVE** to exit the Edit Person view

Addresses:



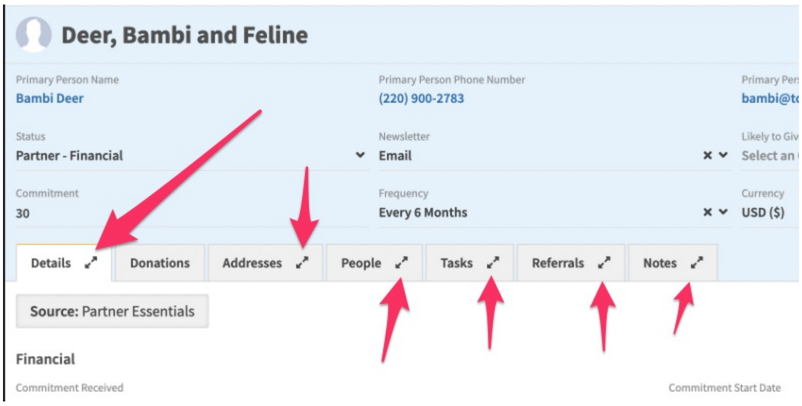
- **Greeting is what the Envelope Label or Mail Merge uses to greet this Contact** (NOT person or people within a contact) **when the contact is exported from Partner Essentials for a mailing.** (found on the "Details" tab)
- **Newsletter is their preferred method of receiving a Newsletter**, also recorded in the top of the contact's page.

Notes:

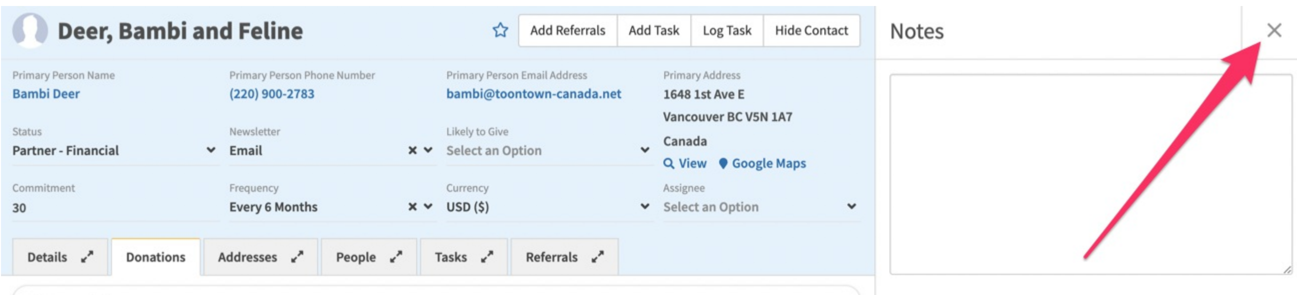
- Notes can be used to store information like children's names, how you met this contact, what they are passionate about and do for work, when you last interacted, etc.
- If you keep notes, looking here before a call or text check-in can be a good way to recall highlights from your last conversation.

Side Window:

Note the tabs on the Contact page with a double arrow. This indicates that the content of that tab can be displayed to the right as a side window.



By clicking on one of these you can open it to the right hand side and you can close it from the side by clicking the "X".

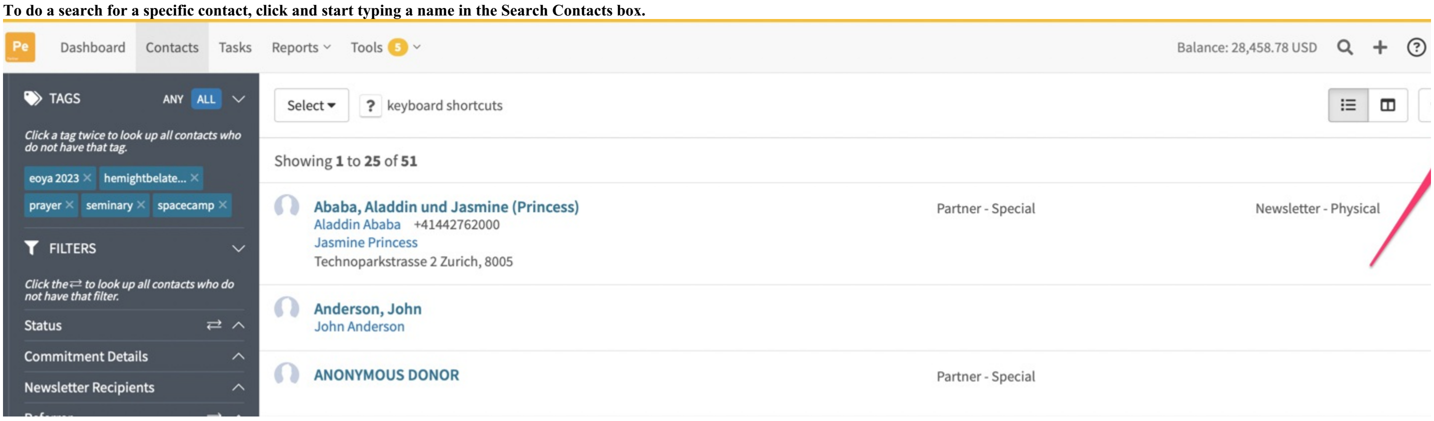


Quick Reference Guide: The Contacts Tab

** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

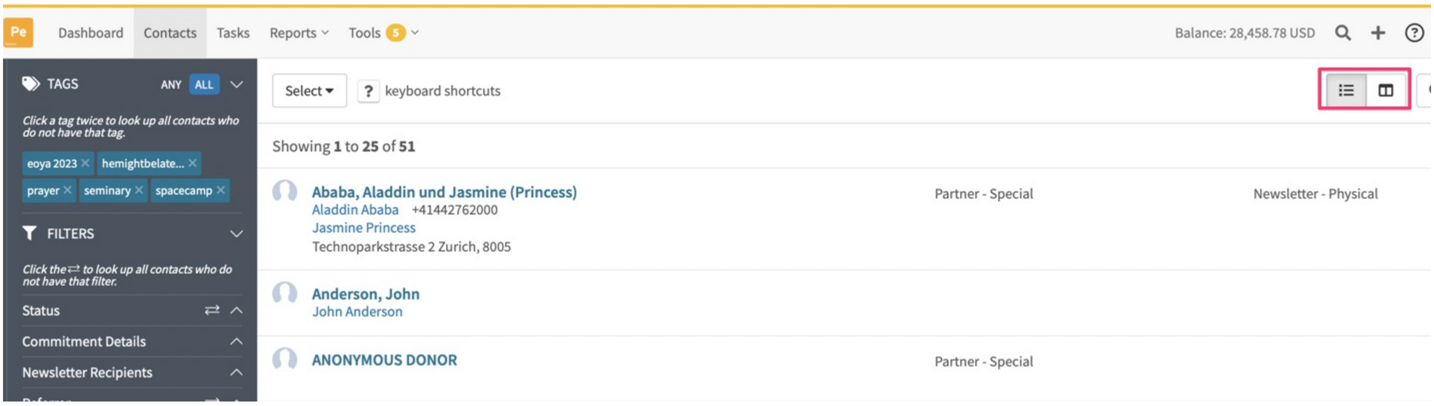
The Contacts Tab

To do a search for a specific contact, click and start typing a name in the Search Contacts box.

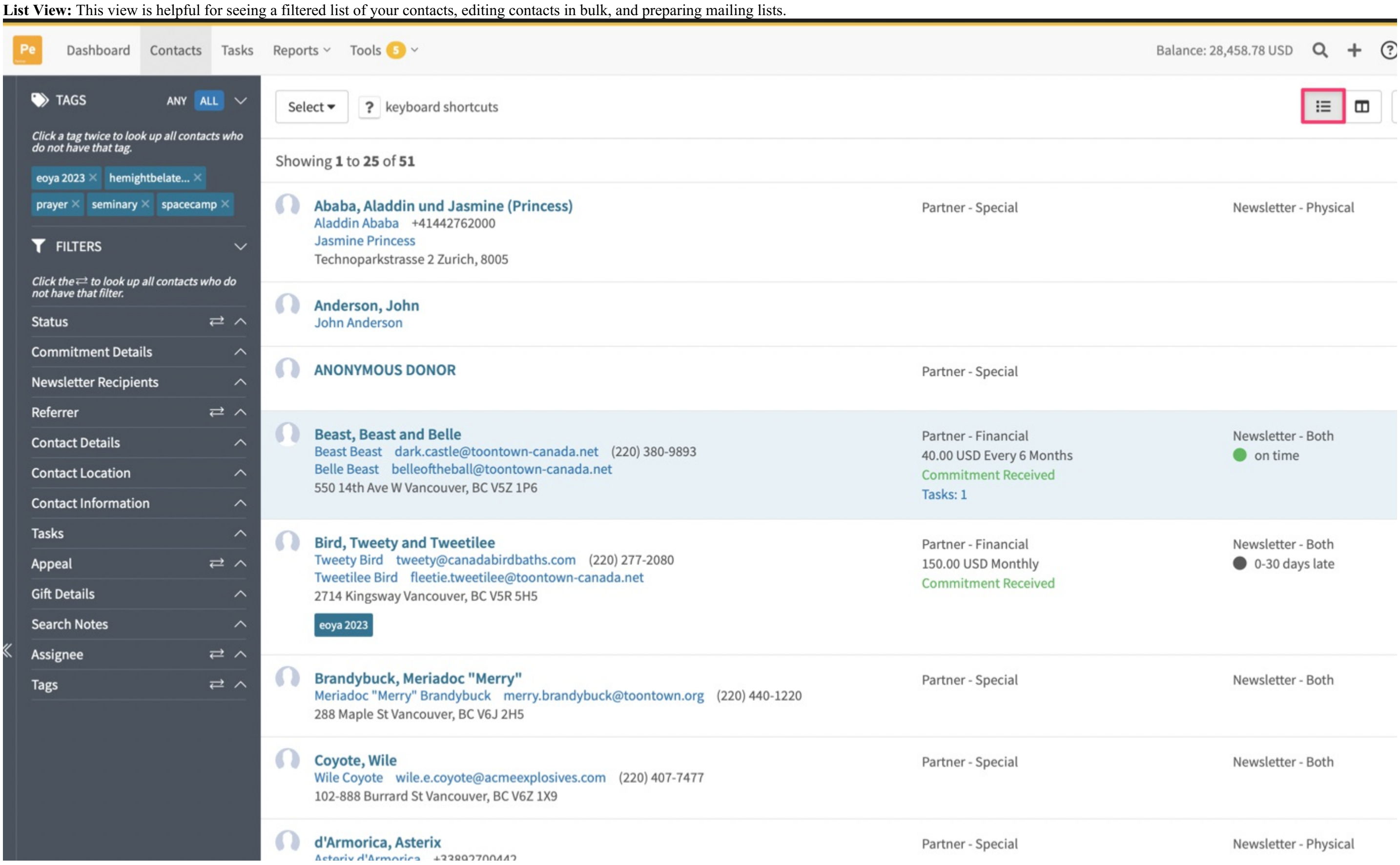


Contact Views

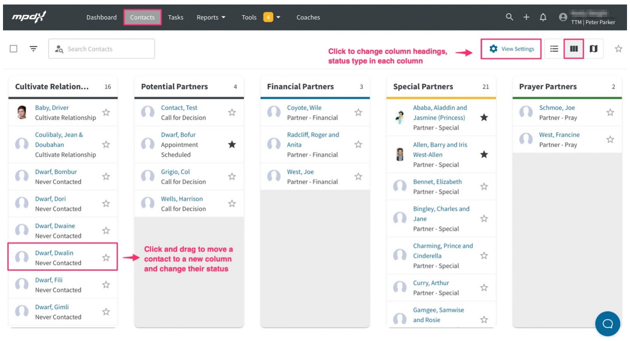
There are two ways to view your list of contacts: List View & Flows View.
NOTE: The default view of Contacts in MPDX is whichever contact view you last accessed. But you can switch between views at any time.



List View: This view is helpful for seeing a filtered list of your contacts, editing contacts in bulk, and preparing mailing lists.

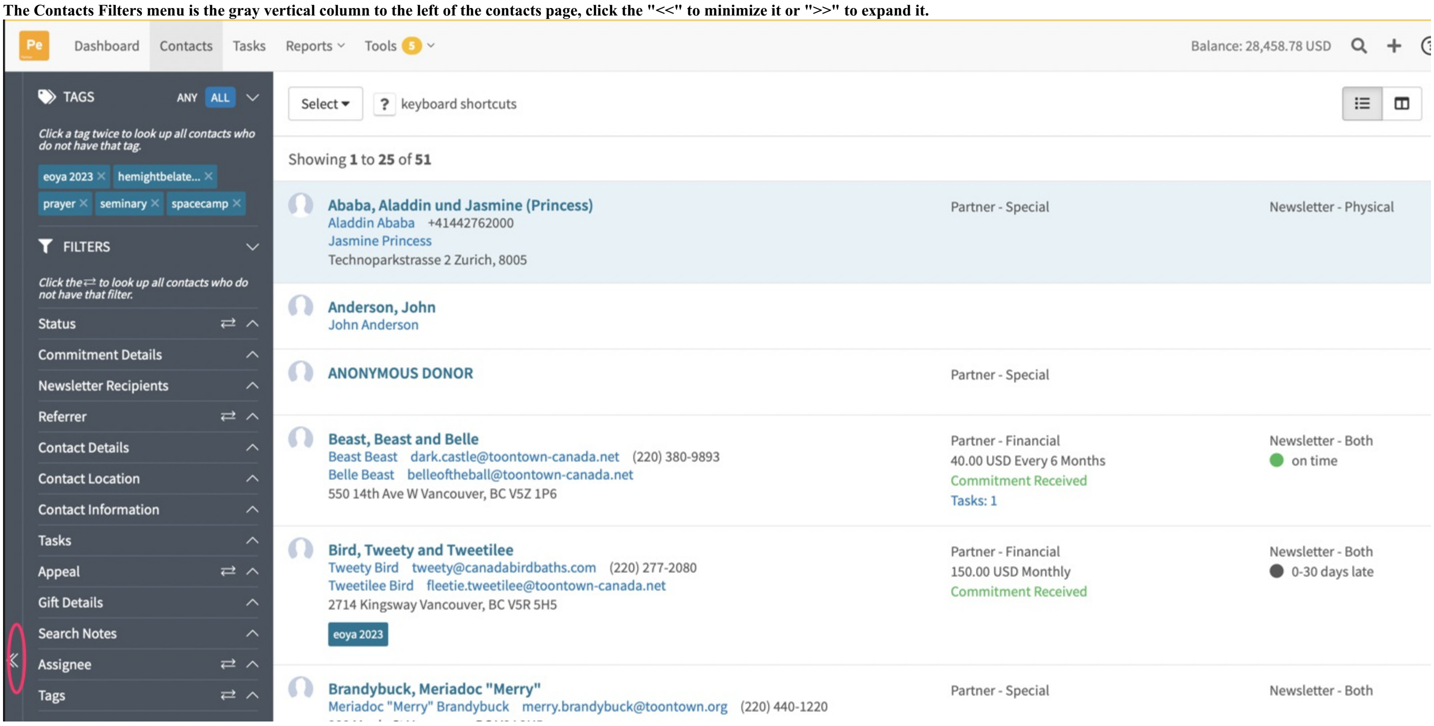


Flows View: This view is helpful for creating a visual of your contacts by status type (i.e. Contact for Appointment, Partner - Prayer, Partner - Financial, Ask in Future, etc.) and moving contacts through an MPD® "workflow."



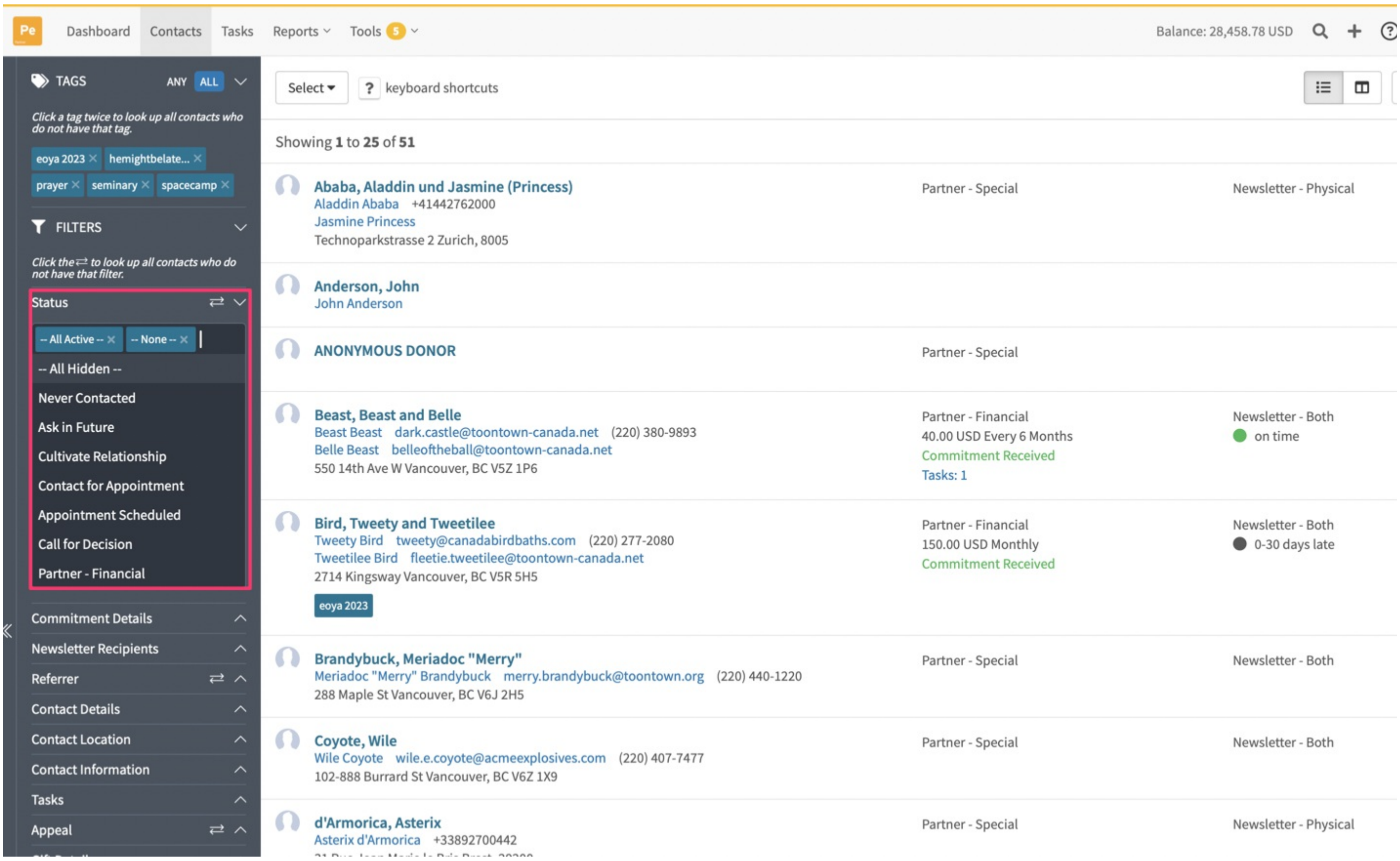
Applying Filters and Tags

The Contacts Filters menu is the gray vertical column to the left of the contacts page, click the "<<" to minimize it or ">>" to expand it.

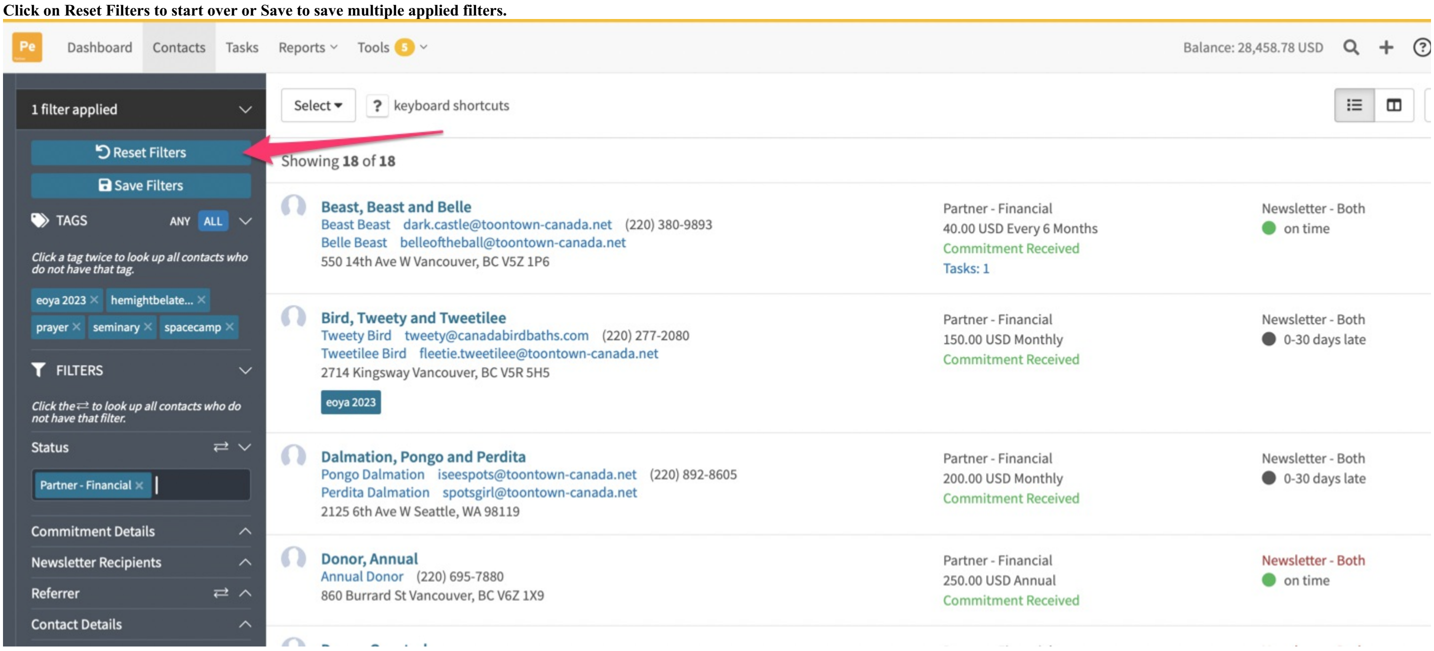


When the Filters menu is expanded you will see options to filter by Tags, Status, Contact Location and Gift Details.

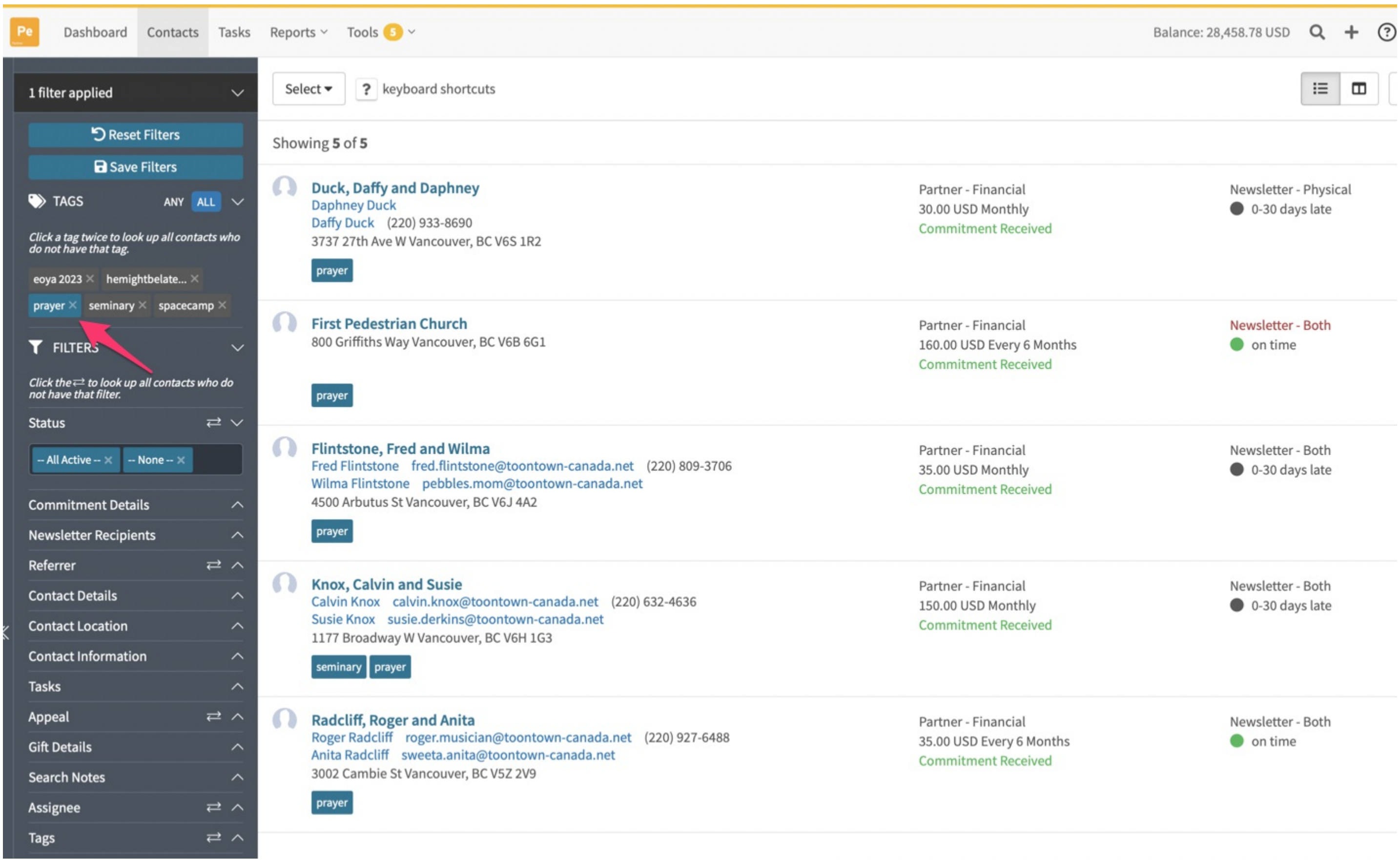
Choose options from the dropdown menus to apply the desired Filter(s) (i.e. Status: Partner - Financial) **and generate a list of contacts who fit your search criteria.**



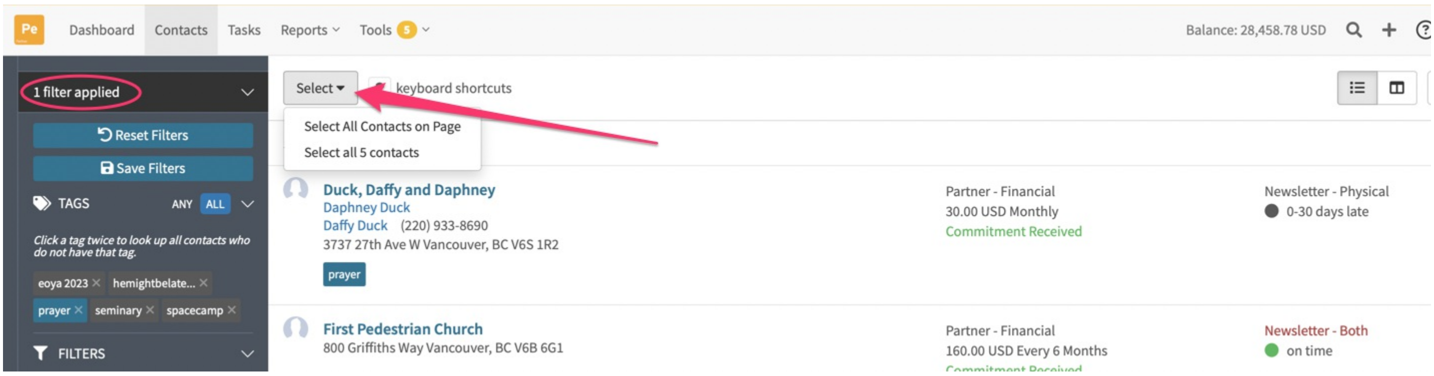
Click on Reset Filters to start over or Save to save multiple applied filters.



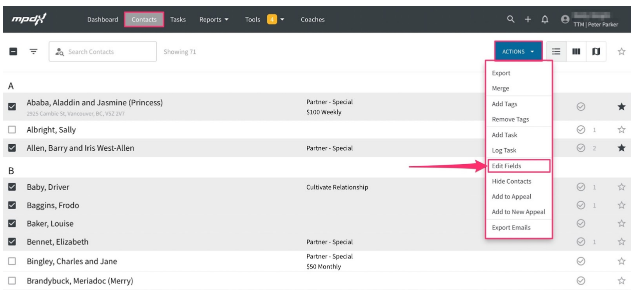
Click on one or more Tags to filter your full Contact list and show only the contacts with the selected tag(s).



You can [**edit contacts in bulk**](#) **by clicking the checkbox in the top left corner to Select All contacts listed** . Use Filters (as outlined above) to see a specific list of your contacts. Click to deselect a selected contact. Click again to reselect a contact that has been deselected.



- Once the desired contacts are selected, click on the **Actions dropdown menu** and select **Edit Fields**.
- **You can also choose to** [**Add Tags**](#)**,** [**Remove Tags**](#)**,** [**Add Task**](#)**,** [**Log Task**](#)**, or** [**Hide Contacts**](#)**.**



Contacts: Individuals

Click on a Contact Name to view and edit their record.

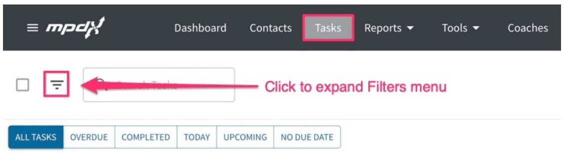
The [Quick Reference Guide: A Contact's Page](#) **gives an overview of the information you can view within a Contact's page**

Quick Reference Guide: Tasks

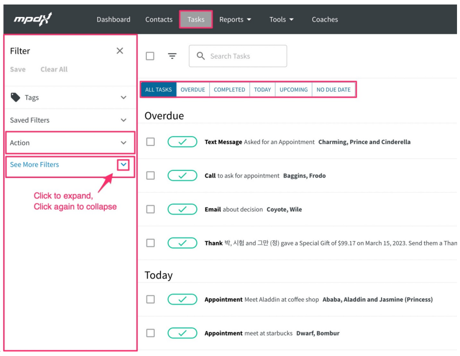
** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

The Tasks Tab

To display a specific group of tasks you can:

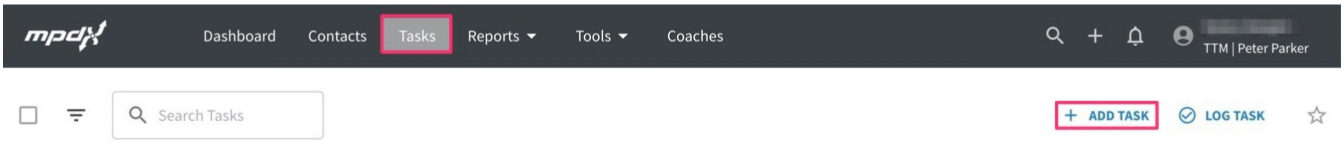


- Visit the **Tasks Tab** and click the **expandable Filters Menu**
- **You can search by…**
  - **All Tasks, Overdue, Completed, Today, Upcoming,** or **No Due Date Tasks**
  - **Tags**
  - Previously **Saved Filters**
  - Task **Action**

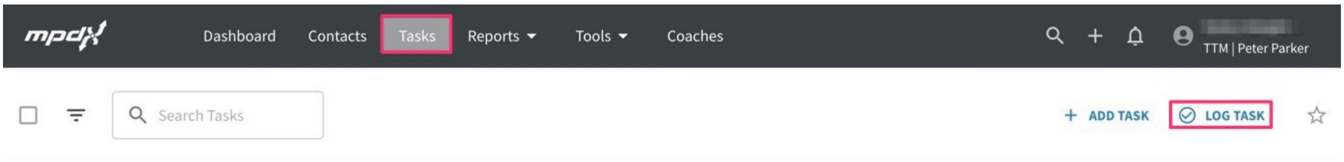


- **To see a menu, click expand the dropdown and click to make your selection**

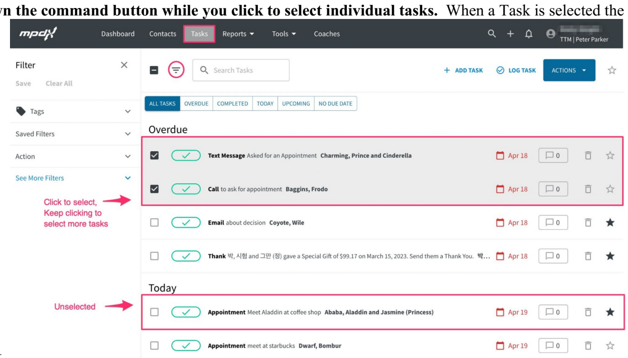
Click the Add Task button to create a single task.



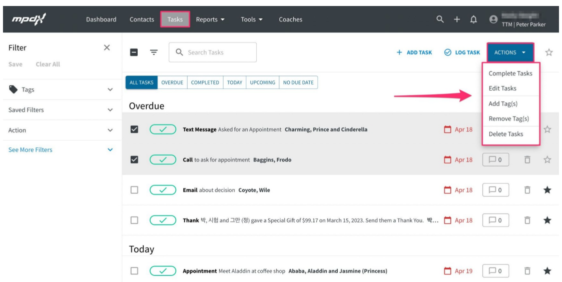
Click on the Log Task button to log a single, completed task.



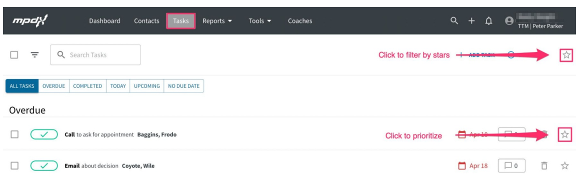
You can **select multiple tasks at a time by holding down the command button while you click to select individual tasks.** When a Task is selected the space behind it will appear gray, and the checkbox to the left of the box will have a checkmark. Click again to deselect a task.



Click the **Actions** button for the dropdown menu and choose between the options:

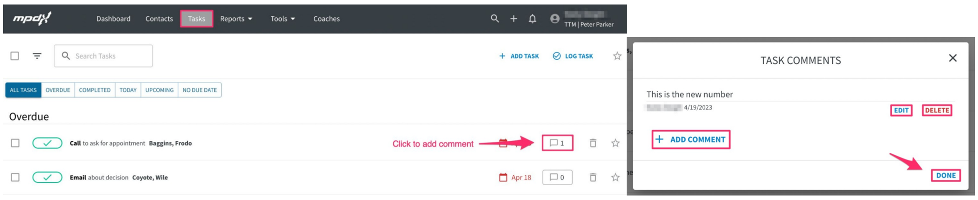


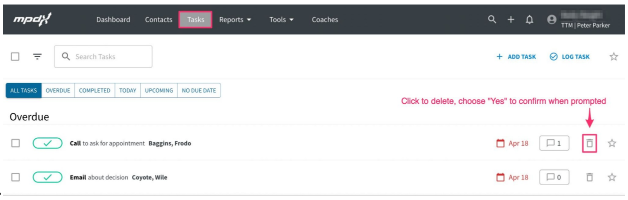
Complete Tasks, Edit Tasks, Add Tags, Remove Tag(s), and **Delete Tasks**.



Click on the Star icon to make those tasks a Priority (starred).

Click on the Chat icon to add Comments to a task. Click **Add Comment** and type, then **Edit**, or **Delete** until you are **Done.**

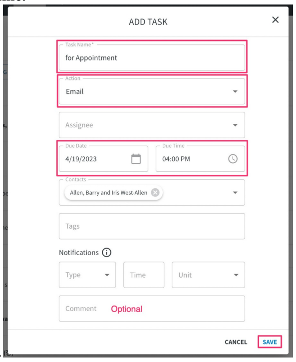




Click the Trash icon to delete a single task.

Adding a Task

- **Fill out Task Name** i.e. “for Appointment” and select an Action, i.e. Email.
- **Select a Due Date and Time and then add Contacts**, if applicable.
  - To Add a Time, use the clock to choose an hour, minute, and whether or not the time is AM or PM
- **Add any applicable Tags**
- **Set the Notifications in minutes or hours before the due date and time.**



- **Finally, add any applicable Comment(s) and click the Save button.**

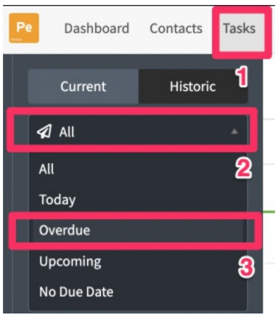
Quick Reference Guide: Using as a Minimalist

Step One: Delete Overdue Tasks

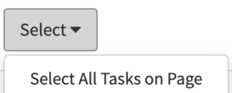
In Partner Essentials, you can remove clutter by deleting all of your "Overdue" tasks to simplify what you see . Over time, when tasks are added and forgotten, or you've set task notifications that have gone ignored, your tasks can accumulate and overwhelm. If this is true for you, **we recommend that you clear your "Overdue" task list and start fresh with something motivating and manageable.**

To clear this list:

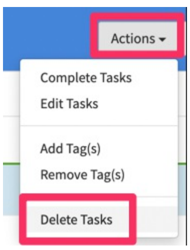
- Visit **Tasks tab**
- Choose the **"Overdue"** Tasks filter



- Click the topmost check box to **"Select All."**



- Go to the **"Actions"** dropdown
- Choose **"Delete Tasks"** from the dropdown menu.

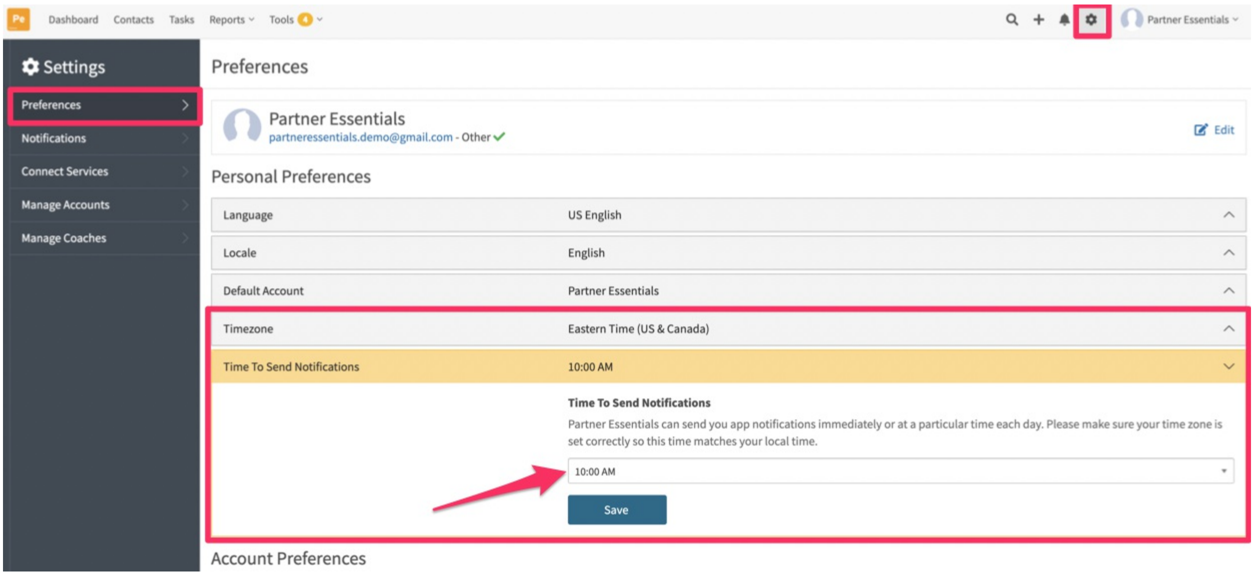


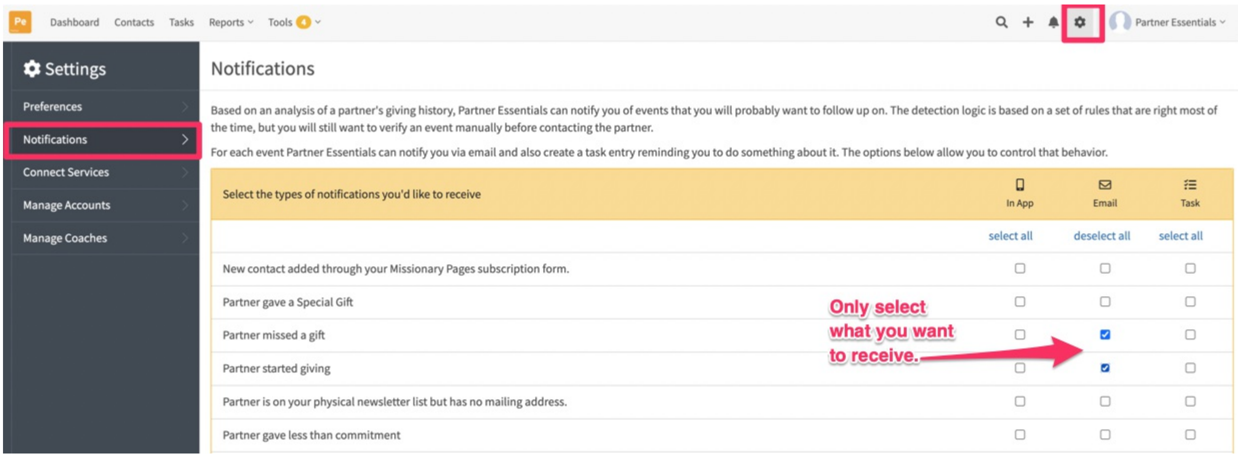
- **When prompted, click "Yes" for a blank Tasks page.**

Step Two: Set Notification Preferences

To refocus your efforts and simplify what you see in the tool going forward, we recommend refreshing your Notifications. You know best what information you need to know, what time is best to see it, and where you prefer to receive the notifications you consider important.

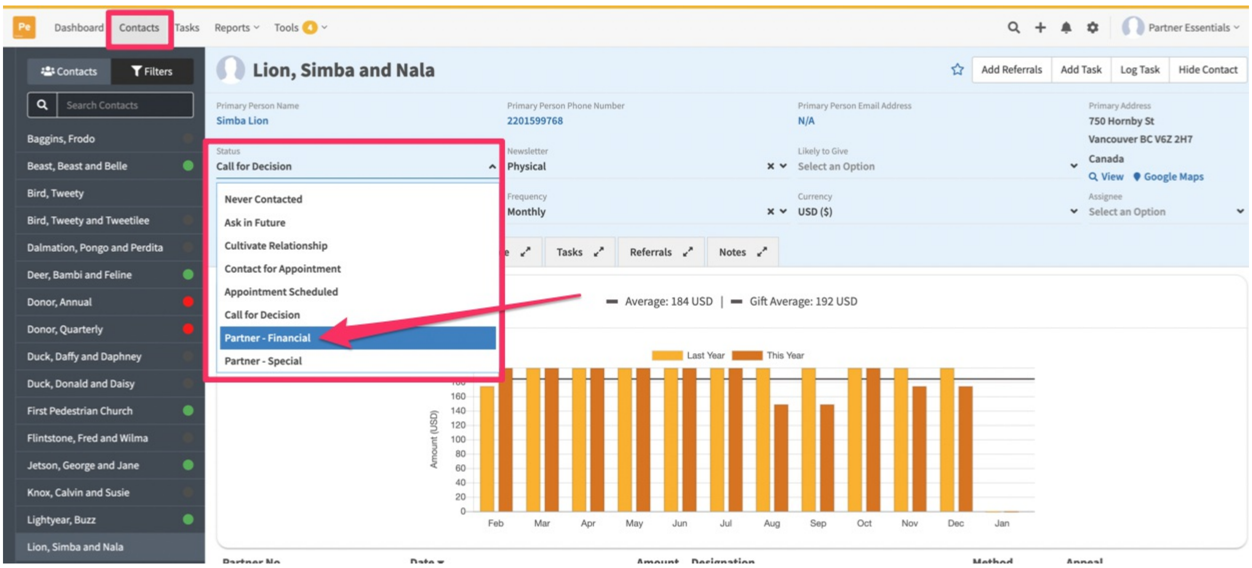
In the tool, when you visit Settings, then Preferences, you can choose the Time Zone and Time To Send Notifications. Then, visit Notifications to select and deselect the notification types that are useful to you and choose where you would like to see them: In App, Tasks, or by Email. These settings can be changed at any time - just be sure to **click "Save"** before you exit the screen.





Step Three: Update Your Contacts' Status

A contact's "Status" explains where a contact is in the MPD process (i.e. Ask for Appointment, Call for Decision). There are several places you can set a status depending on whether you are working with a single contact, or with multiple contacts at one time.

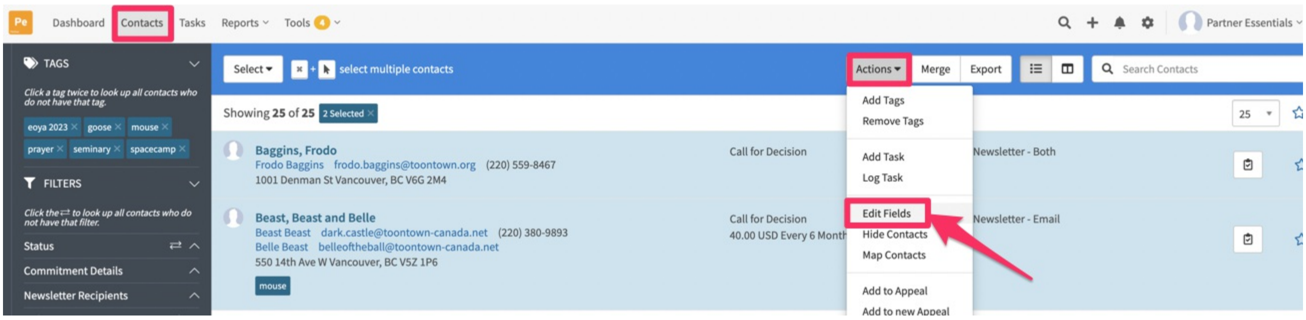


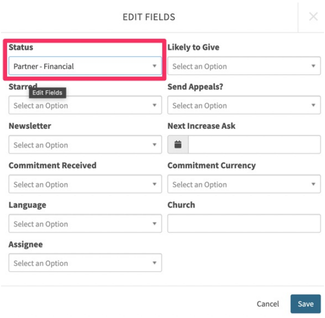
To set the Status for a single contact: Go to **A Contact's Page**.

- In the top section, click the edit icon and make changes to the "Status" within the pop-up menu options. Choose a Status, then "Save."

To set the Status for multiple contacts at one time: Go to the **Contacts tab**:

- You can set a status for multiple contacts at a time by selecting each contact from your list, then visiting "Edit Fields" under the Actions menu. Pick a "Status" from the dropdown menu and then "Save."



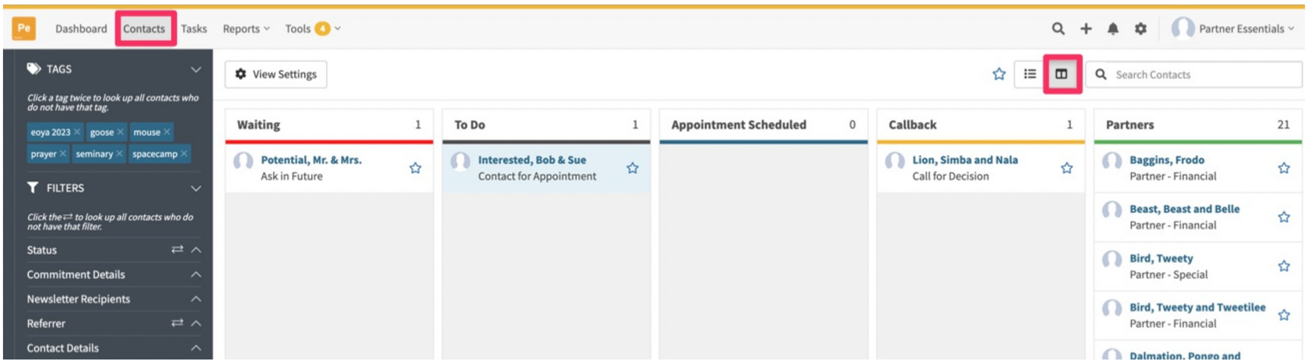


Having a status set for your contacts will be helpful for our next minimalistic tip: use the Contact Flows view as a way to see and set up connection steps with each Contact, or potential ministry partner.

Step Four: Use the Contacts Flows View

This view is helpful for creating a visual of your contacts by "Status" type and allows you to drag contacts from one phase of the MPD process to another phase very easily moving contacts through an MPD "workflow"

When you click a contact's name and hold it in the Flows view, you can move their name between columns and through the MPD process. For example, let's say we texted Bofur and set up an Appointment. I can click and drag his name to the "Potential Partners" column to the "Appointment Scheduled" section. Partner Essentials will generate an "Add Task" pop-up where I can add a task with the "Action" - "Appointment."



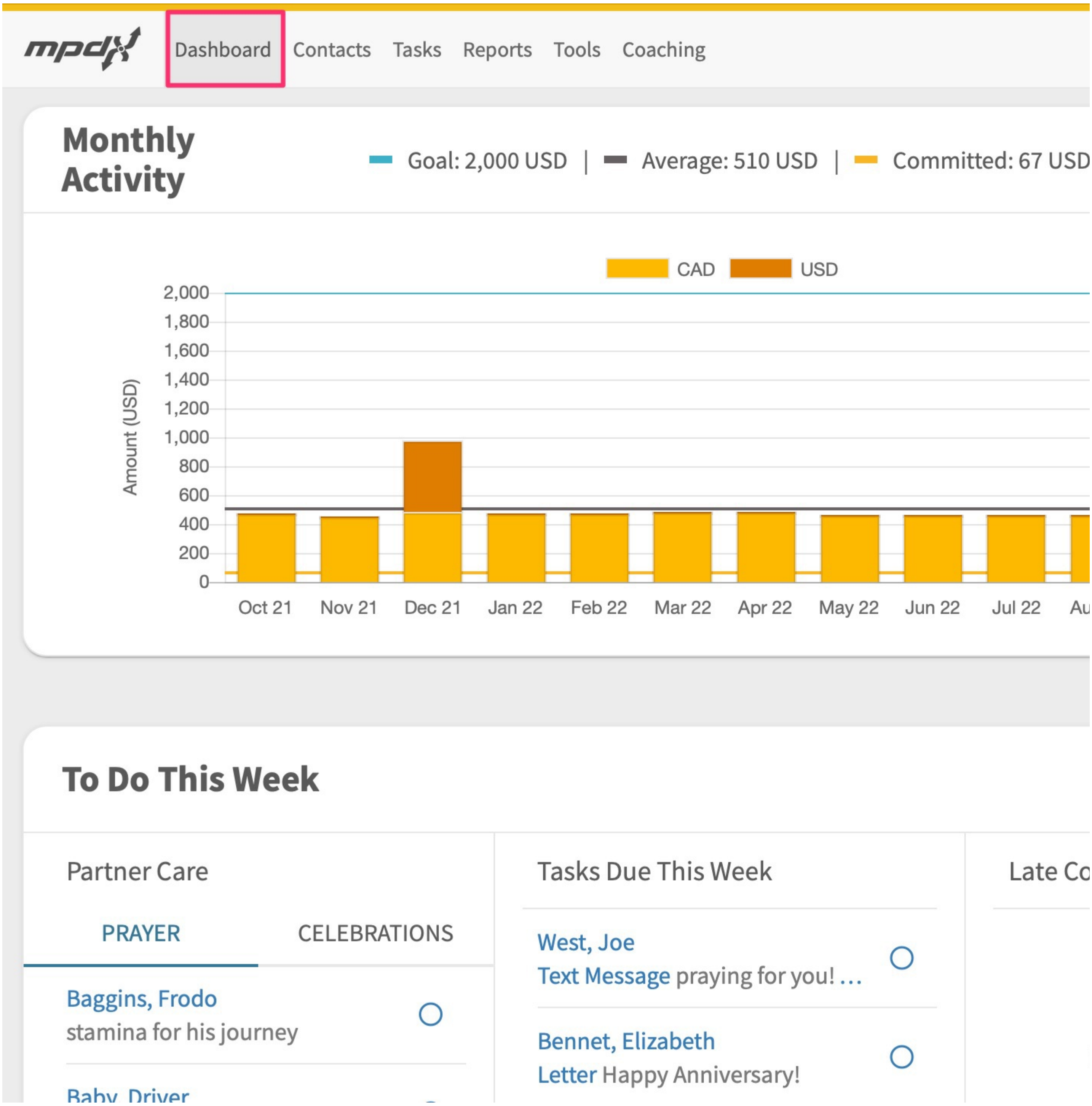
Contact Management

Export Contact Info

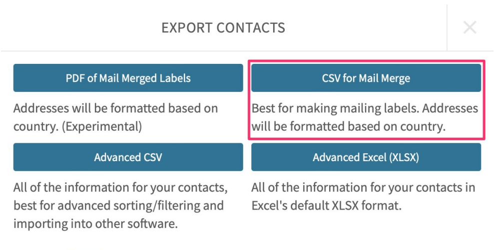
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

You may want to export your contacts by mail merging to make letters, labels, envelopes, etc. To do this:

- Go to the **Dashboard**
- Scroll to the **To Do This Week** section.
- Under the **NEWSLETTER dropdown** menu select **Export Physical**. This will create a file that will export your Newsletter - Physical subscriber list as you have set it up in MPDX.

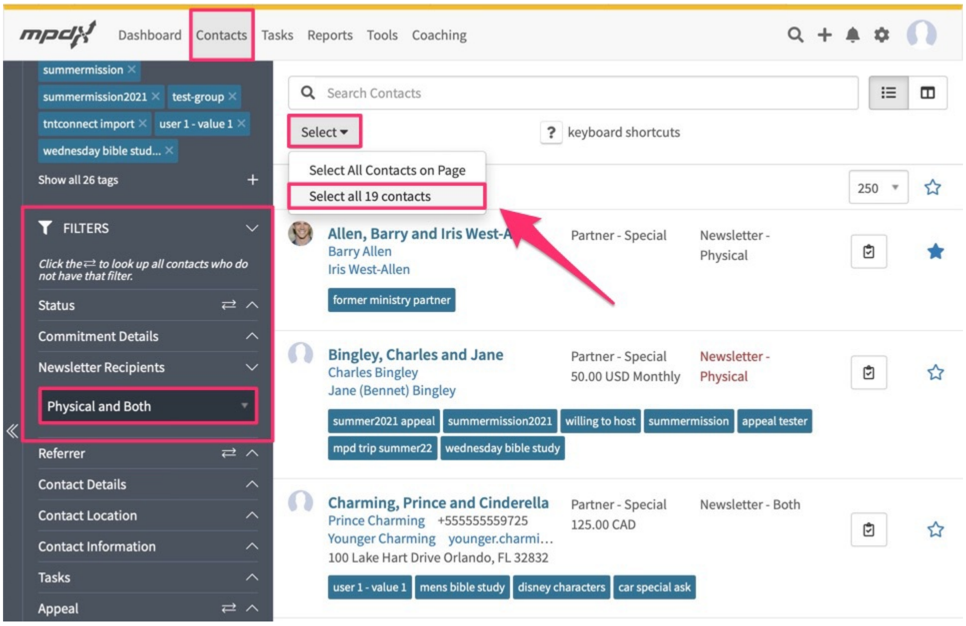


You can **choose CSV for Mail Merge** when exporting in order to create your letters, labels and envelopes.

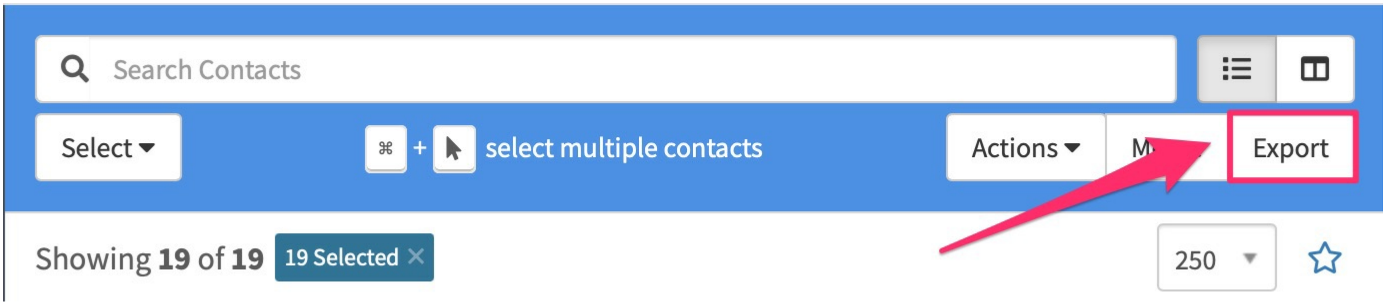


You can also create exports manually. To do this:

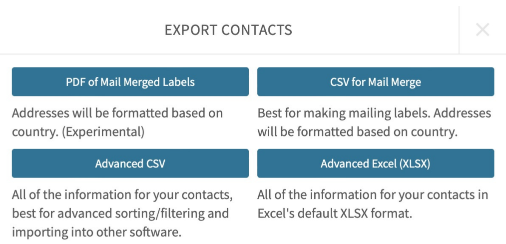
- Go the **Contacts tab**
- Under **Filters, Newsletter Recipients, choose "Physical and Both."**
- Under the **Select dropdown** be sure to choose select all of your newsletter contacts by clicking "Select all ## contacts":



- Then, Click **Export**



Choose the option that best suits your needs. (PDF of Mail Merged Labels, CSV for Mail Merge, Advanced CSV or Advanced Excel (XLSX). CSV files can import data with headings into spreadsheets like Excel, Numbers, and Google Sheets, or into mail merge functions of word processors. If you have things like multi-line addresses or zip codes that start with zero, the Advanced Excel (XLSX) option will probably work best. Learn how to Mail Merge.



Updating MPDX When a Ministry Partner Gets Divorced

** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

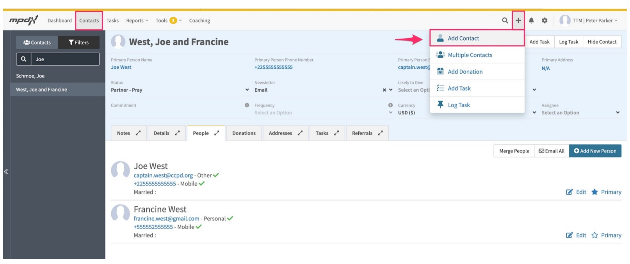
It is a sad reality that Ministry Partners get divorced. And in the aftermath, it is important to care for the individuals well. Making administrative adjustments in MPDX can be a loving way to avoid awkward and painful mishaps in communication like misaddressed envelopes.

In the instance of a Ministry Partner getting divorced, the best place to start in MPDX is the former couple's shared contact page. Here you will be able to make the following changes:

Create a new MPDX Contact page for the non-primary person

Step 1: Visit the Contact page of the couple who is getting divorced.

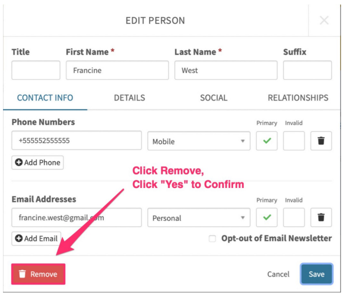
Step 2: We recommend creating a new contact page for the person in the divorcing couple who is NOT marked "Primary." To do this, click on the Add Contact button and type the Last Name, First Name. Click Save. MPDX will automatically create and open the newly created contact page for this individual.



Step 3: Copy and paste any contact information for this individual (i.e. phone number(s), email(s), notes, etc.) that you would like to have saved for them as a newly created contact going forward.

NOTE: As an optional step it may be helpful to copy and paste this contact's previous address, but divorces often lead to address changes so note the "Address no longer valid" field when applicable as you Edit Address(es) in MPDX. Be aware that a changed address can also affect physical newsletter lists and mailing addresses for letters, thank you notes, and other ministry communications. Remember to update your other Newsletter lists as well where applicable (i.e. MailChimp, prayerletters.com, ChalkLine, etc.).

Step 4: Go to the Person tab within the former shared contact page and choose **Edit** for the contact you just "moved." Once you have fully transferred their data to the new contact page, Delete this individual from the former shared page.



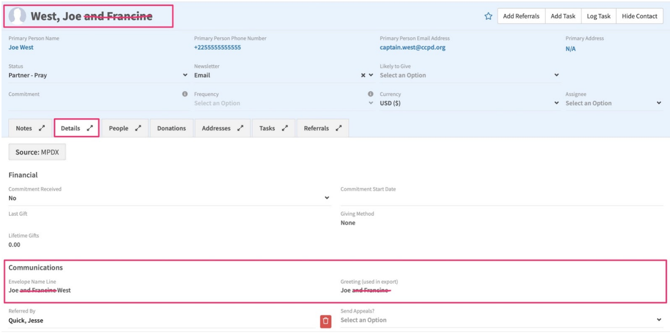
Update the following information on EACH individual's contact page:

Change the Envelope Name Line, Contact Name, Greeting used in Exports

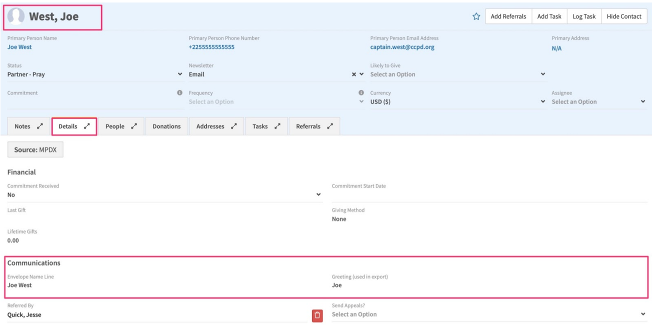
The **Details tab** within a Contact gives additional contact information such as **Communications** preferences. An oversight here could be an honest mistake, but an acutely painful reminder of loss to a grieving ministry partner.

Step 1a: Change the Contact Name, Envelope Name Line and Greeting for the primary contact of the former couple.

Step 1b: Change the Contact Name, Envelope Name Line and Greeting on the new contact page for the secondary contact of the former couple.

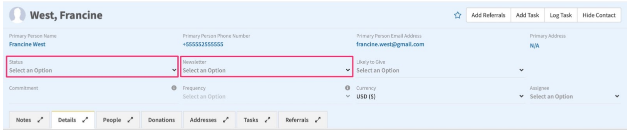


Click and type to replace and edit the existing information. Refresh your page. The changes should appear immediately. Below is an example of the changes noted above when ministry partner Joe West divorced ministry partner Francine West.



Update the Newsletter preferences and Status

Visit the top blue section of each contact page and select Partner Status (i.e. Partner - Prayer, Partner - Financial, etc) and **Newsletter preference** (i.e. Physical, Email, Both)

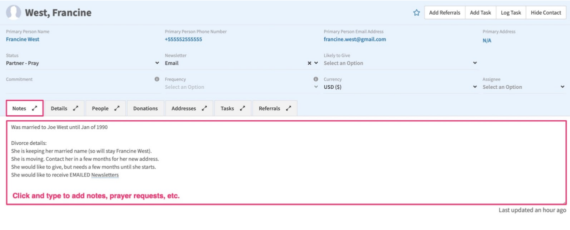


NOTE:

- You will need to manually update the Partner Status and Newsletter preference for the individual with the newly created MPDX contact (in this example, Francine West).
- **If you have the sync turned on with ChalkLine and/or PrayerLetters.com,** you will need to manually update or check your Email (i.e. MailChimp) and/or Physical Newsletter lists (i.e. ChalkLine and/or PrayerLetters.com) in MPDX.
  - **If BOTH individuals have been receiving and still want to receive your Newsletter - Email, AND you have turned on the sync with MailChimp you will want to follow the steps outlined above and remove the contact information of the non-primary spouse from the original contact page and add it to the newly created MPDX contact page.** Make sure the Newsletter preference is marked as Email or Both. When you refresh the sync with MailChimp, the email will sync from the newly created contact.
  - **If BOTH individuals have been receiving and still want to receive your Newsletter - Physical, AND you have the sync with PrayerLetters.com turned on,** make sure you add or update any address changes and refresh the sync before sending your next Newsletter update.
- **If you do NOT have the sync turned on with ChalkLine and/or PrayerLetters.com,** you will need to manually update the contact information and check your Email (i.e. MailChimp) and/or Physical Newsletter (i.e. ChalkLine and/or PrayerLetters.com) lists for each individual of the divorced couple.

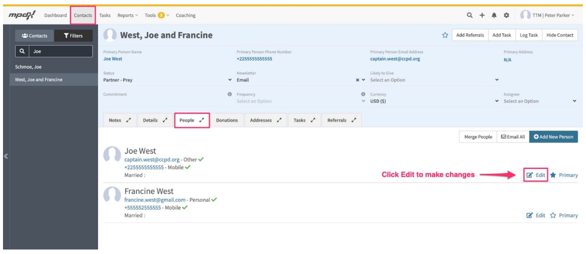
Add a Note with the divorce date and the administrative actions taken in MPDX

Visit the Notes tab within each contact and record details



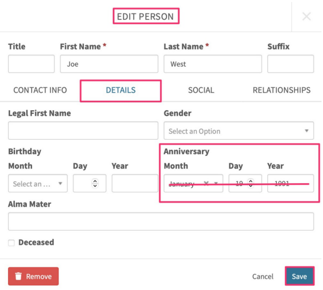
Optional Steps: If you use the DETAILS and RELATIONSHIPS fields of Edit Person in the Contacts page, you can delete the Anniversary date, change the Relationship Status of a person, and delete outdated relationships by following the steps below:

The **People tab** within a Contact lists each individual associated with that Contact. When a person gets divorced, scroll to the individual and click the “Edit” next to their name.

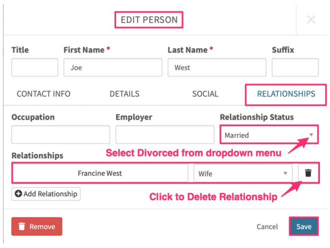


When you **select “Edit,”** a box will pop-up where you can make and Save the needed changes:

- The second tab, **DETAILS**, is where the option exists to **edit a person’s Anniversary records**.
- **Delete the Month, Day, and Year of this person’s Anniversary.**
- Click **Save.**
- *NOTE: You can add the Anniversary Date of the marriage that ended in divorce to the Notes tab in MPDX for both contacts (it may be a caring time period to reach out and check on your ministry partner). <u>This information will be helpful to remove so that you don’t get a future notification under the Partner Care section of the To Do This Week section of the Dashboard and mistakenly send an Anniversary card to the (former) couple.</u>*



- The fourth tab, **RELATIONSHIPS**, is where the option exists to **edit a person’s changed relationship status**
- **Choose “Divorced”** from the Relationship Status dropdown menu.
- If Applicable, **Delete the Relationship and Type** (i.e. wife, husband) **by clicking the trash icon**.
- Click **Save**



Contact Stars

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

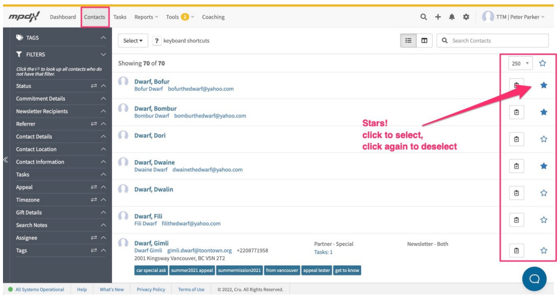
In the same way starring an email makes it stand out from your email list, adding a star to a contact can make that contact stand out from your other MPDX contacts.

To find the **Stars** feature for Contacts, visit the **Contacts tab in MPDX**.

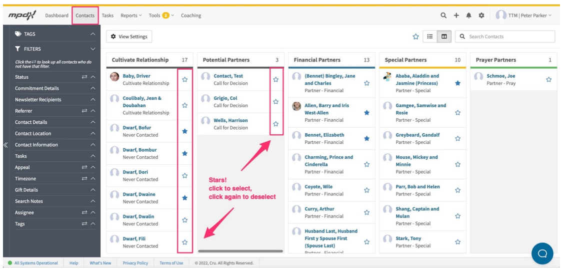
There are two ways to view Contacts in MPDX:

- List View
- Flows View

Contact Stars - List View



Contact Stars - Flows View



Adding and Removing Stars to and from Contacts:

- **To Add a Star**:
  - **click the outlined star** to the right of the contact you want to select
  - **The star will turn blue** when selected
- **To Remove a Star**
  - **click the blue star** to the right of the contact you want to deselect
  - **The star will turn from blue to an outlined star** when deselecte

Note:

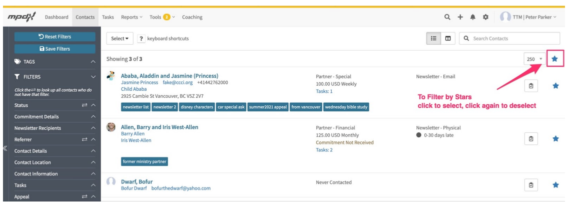
- A **blue star** means the **Contact is STARRED**
- An **outlined star** means the **Contact is NOT starred**

Filter Search by Stars:

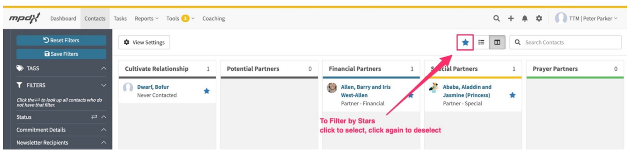
In the same way you select and deselect stars, you can select and deselect the Stars filter. The Stars filter helps you see ***only*** starred Contacts.

Once you have completed your star tasks, turn the stars filter off to see your full list once again. Just click the blue star to remove the Stars Filter, or the outlined star to add the Stars filter.

Stars Filter Search: Contacts List View



Stars Filter Search: Contacts Flows View

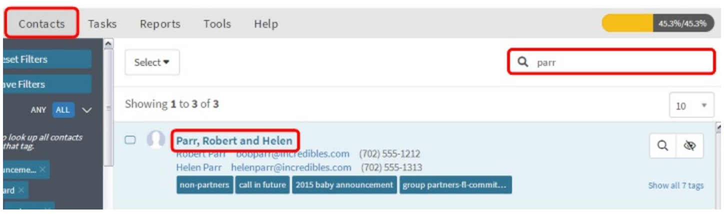


- The Stars filter can be used with other MPDX Contact Filters
- When you choose the **Reset Filters** option, the Stars filter will also be reset. This ***does not*** remove the stars you've added to specific contacts. It simply resets the current filtered search.
- As a Note: the Contact Stars feature and [Task Stars]() feature operate independently from one another. Which means, starring a contact ***does not*** add a star to all tasks associated with that contact. Similarly, starring one task for a contact ***does not*** add a star to that contact.
- **The Contact Stars feature is also available on the MPDX iOS and Android mobile apps**.

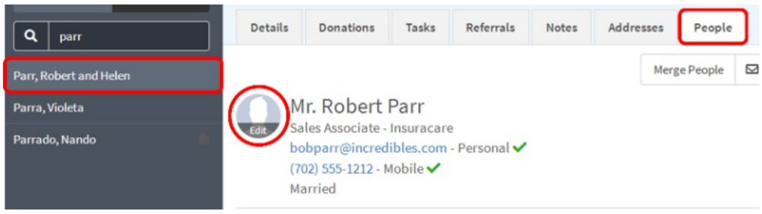
Add Pictures to Contacts

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

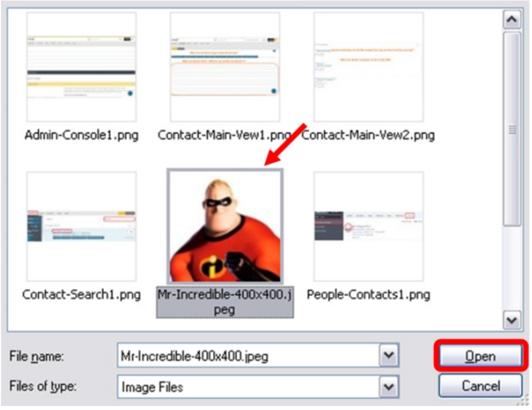
- Go to the **Contacts** page
- Type the last name in the **Search Bar**
- Then click on **Contact Name**



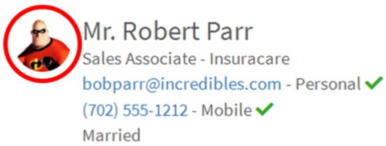
- Scroll down to the individual located under the **People** tab
- Hover your mouse over the **Profile Picture Placeholder**
- When you see **Edit** click on it.



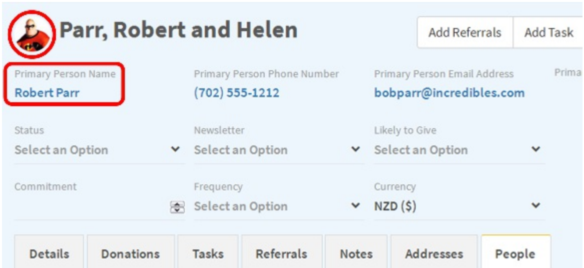
- Browse your computer to **Select the Photo** you'd like to add
- Click on the **Open** button



- The photo will be displayed in the **Individual Contact People Card**.
  - Repeat this process for the spouse



Only when you add the **Primary Person's** profile picture will it be visible in the **Individual Contact**.

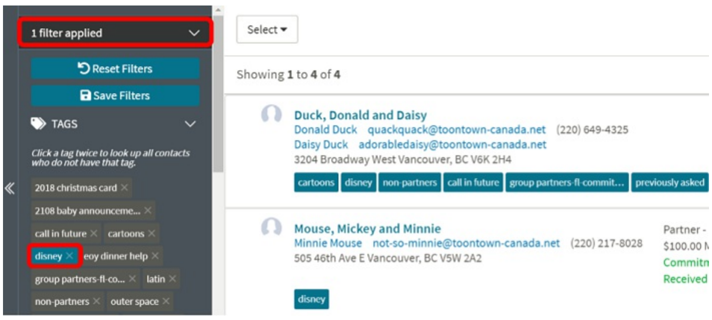


Editing Contacts in Bulk

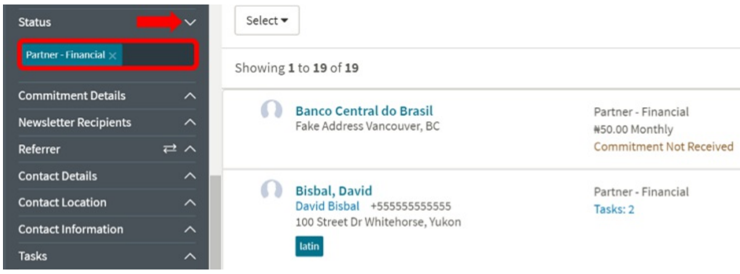
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Editing Contacts by Tags or Filters

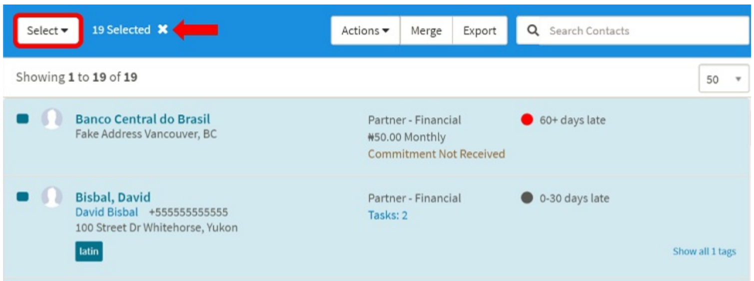
- Click on a **Tag** to filter on a specific list, i.e., *Disney*.



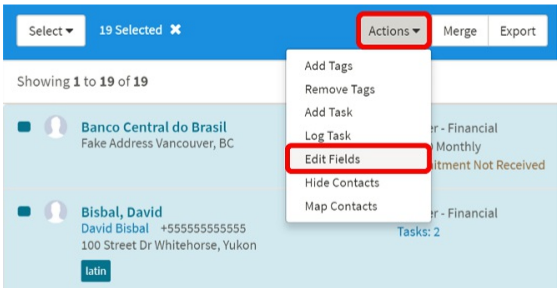
- Or use a **Filter**, i.e., **Status, Partner -Financial** to display a specific list of contacts.



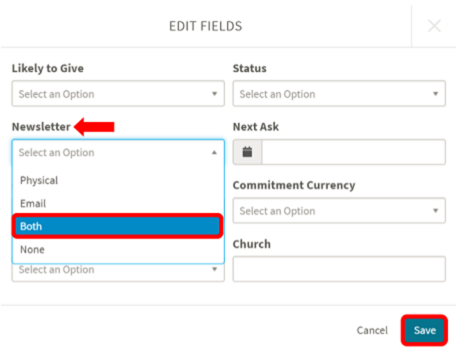
- Select all the contacts by clicking on the **Select** button.
- Then choose **Select all # contacts**, i.e., *19 Selected*.



- Then click **Actions** button and choose **Edit Fields**.

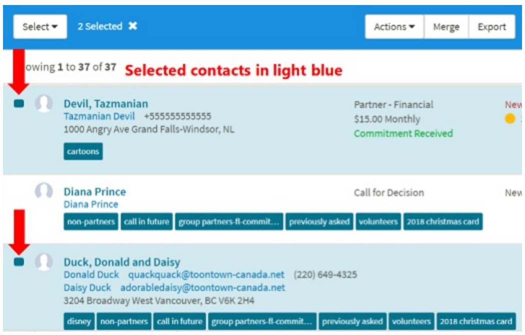


- Choose the field you want to edit, i.e., **Newsletter**.
- Make your selection, i.e., **Both**.
- Click the **Save** button.



Editing Multiple Contacts by Manual Selection

- Choose individual contacts by clicking on **checkbox** to the left (contacts highlighted in light blue).



- Then, click on **Actions** button and select **Edit Fields** (see above).

Add Contacts

How to Add Contacts to Partner Essentials

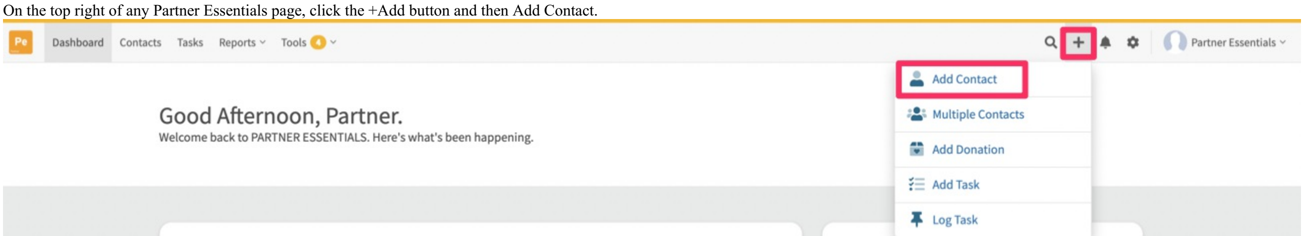
There are several ways to add contacts in Partner Essentials:

- Add Contact
- Add Multiple Contacts
- Using Tools:
    - Import from Google
    - Import from CSV
    - Import from TNTConnect

This article will explain how to Add a Single Contact and How to Add Multiple Contacts to Partner Essentials. To learn about the other options click the article links above.

Add Contact: Adding a New Contact

- On the top right of any Partner Essentials page, click the +Add button and then Add Contact.

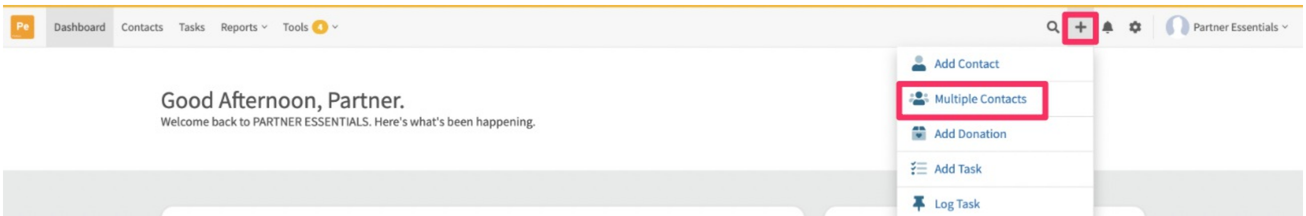


- Add Last Name, First Name and Spouse Name (if applicable) and click Save.

Partner Essentials will then pull up the newly created contact page.

Add Multiple Contacts

This can be helpful if you have multiple new contacts to add simultaneously. For example, if you are brainstorming names of people in your family, small group, at church, etc.

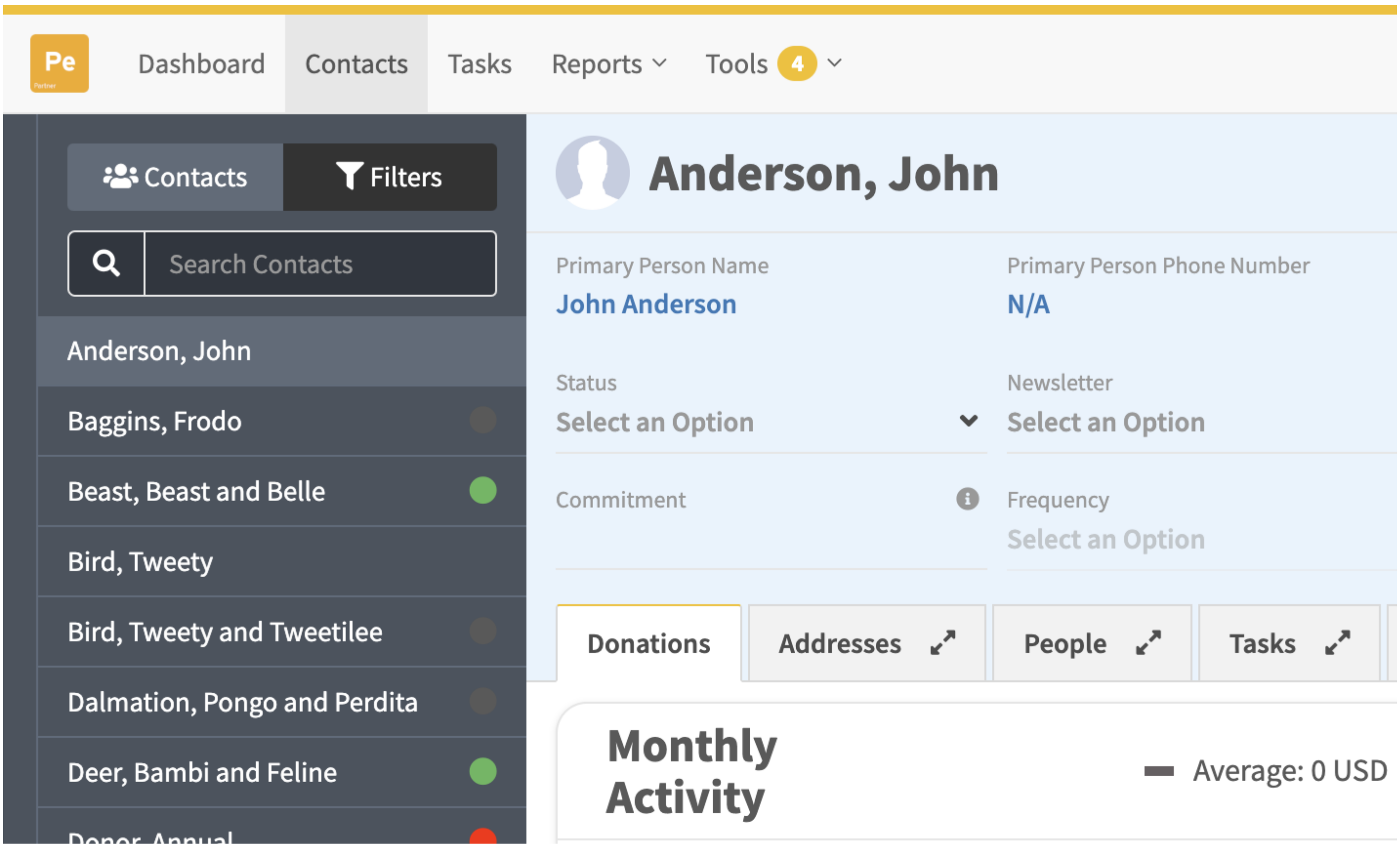


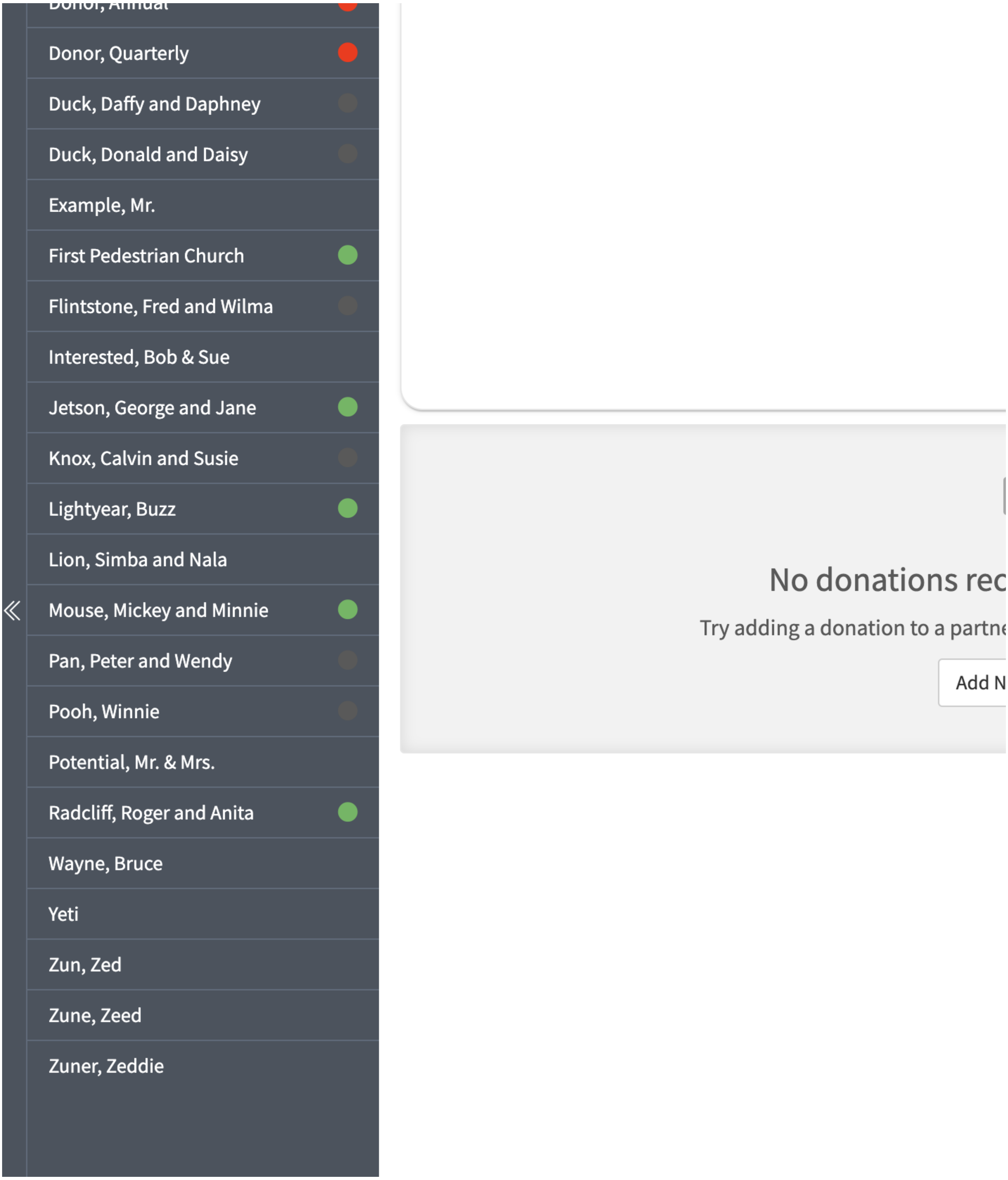
- On the top right of any Partner Essentials page, click the +Add button and then Add Contact.
- Add Last Name, First Name and Spouse (if applicable), then any Address, Phone, or Email you know for each Contact. Each line will turn into a new Partner Essentials Contact.
- Click Save.

Adding Contact Details

Once you've created a new contact or multiple new contacts, you can find them under the "Contacts" tab of Partner Essentials.

When adding a new contact it is important to add details to this new contact. This can be done by visiting "A Contact's Page" and making changes. For more information about how to add information to a contact, check out the article Quick Reference Guide: A Contact's Page.

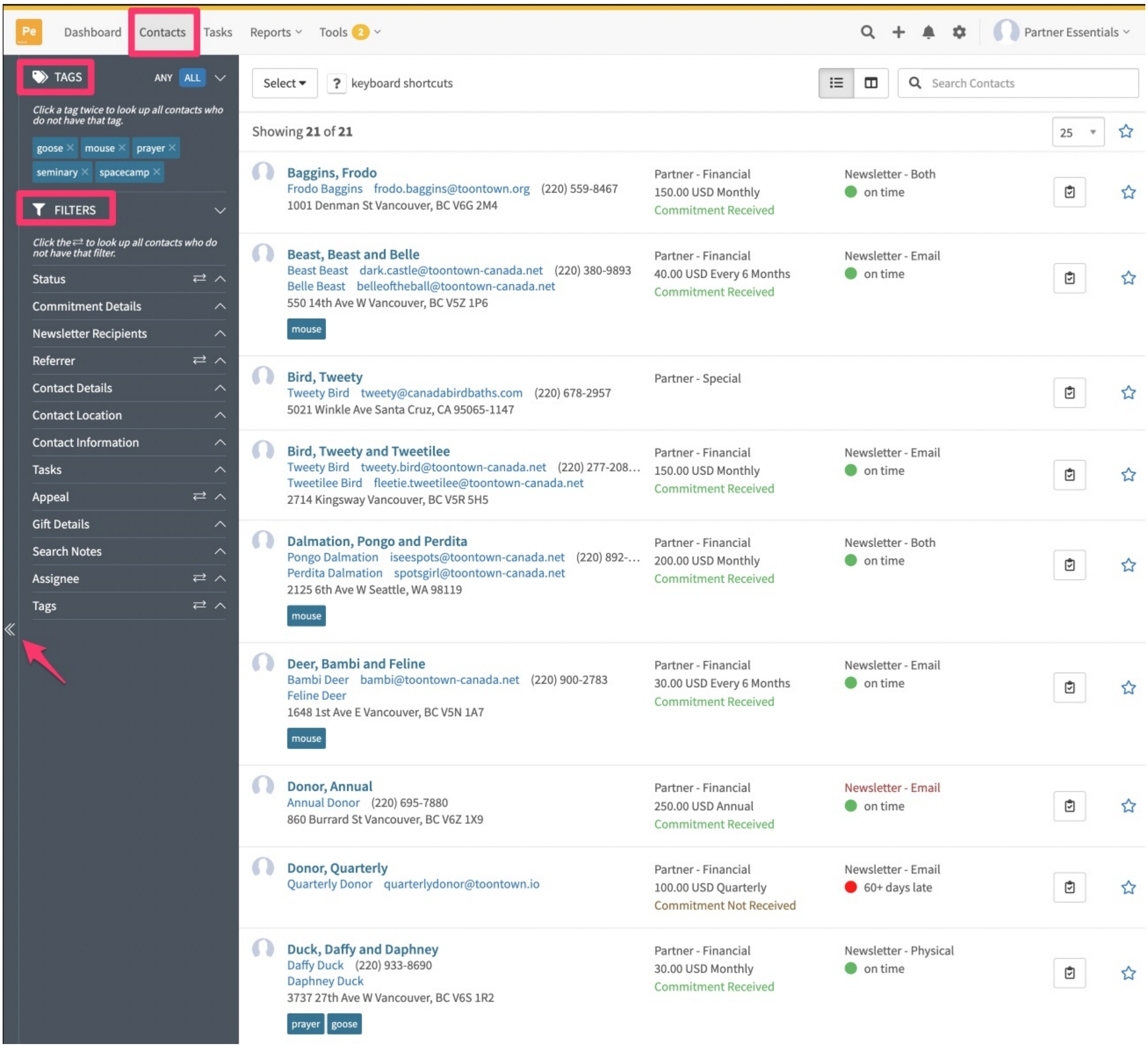




Contacts: Lookup with Filters and Tags

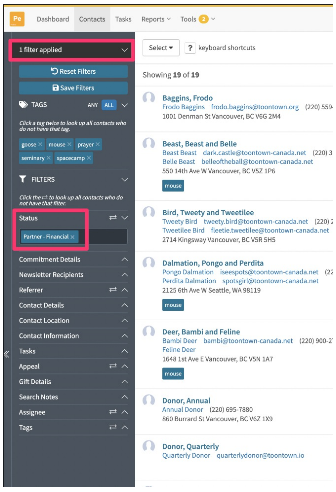
Filters narrow down your contact list by specific criteria. A single filter or a combination of filters can be used to display a specific list of contacts.

To find the Contacts Filters menu, go to the “Contacts” tab and you'll see a dark grey bar on the left side of the window. This can be collapsed and expanded by the "<<" and ">>" button. You'll find the TAGS section at the top and the FILTERS just below that.



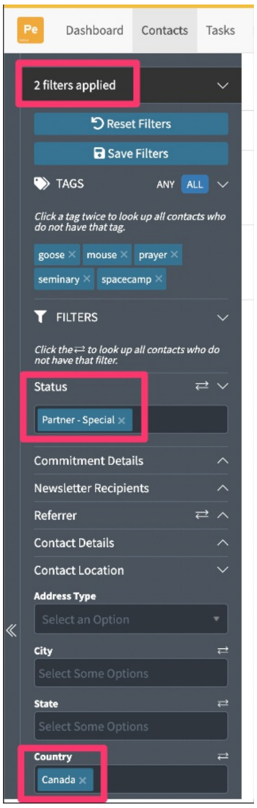
Lookup with a Single Filter

When you add a Filter you will see the number of filters applied appear after the Filter menu title (i.e "1 filter applied." For this example, we searched by **Status** and filtered by **Partner - Financial**.

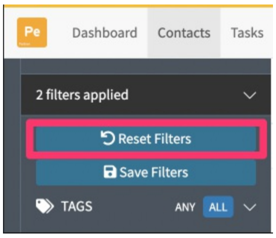


Lookup with Multiple Filters

When you add more Filters you will see the number of filters increase at the top of the dark grey sidebar i.e. "2 filters applied". For this example, we searched by **Status**, and selected **Partner - Special**. Then, under **Contact Location** and **Country**, chose **Canada** from the list.



At any time you can clear all current filters by clicking on "Reset Filters"



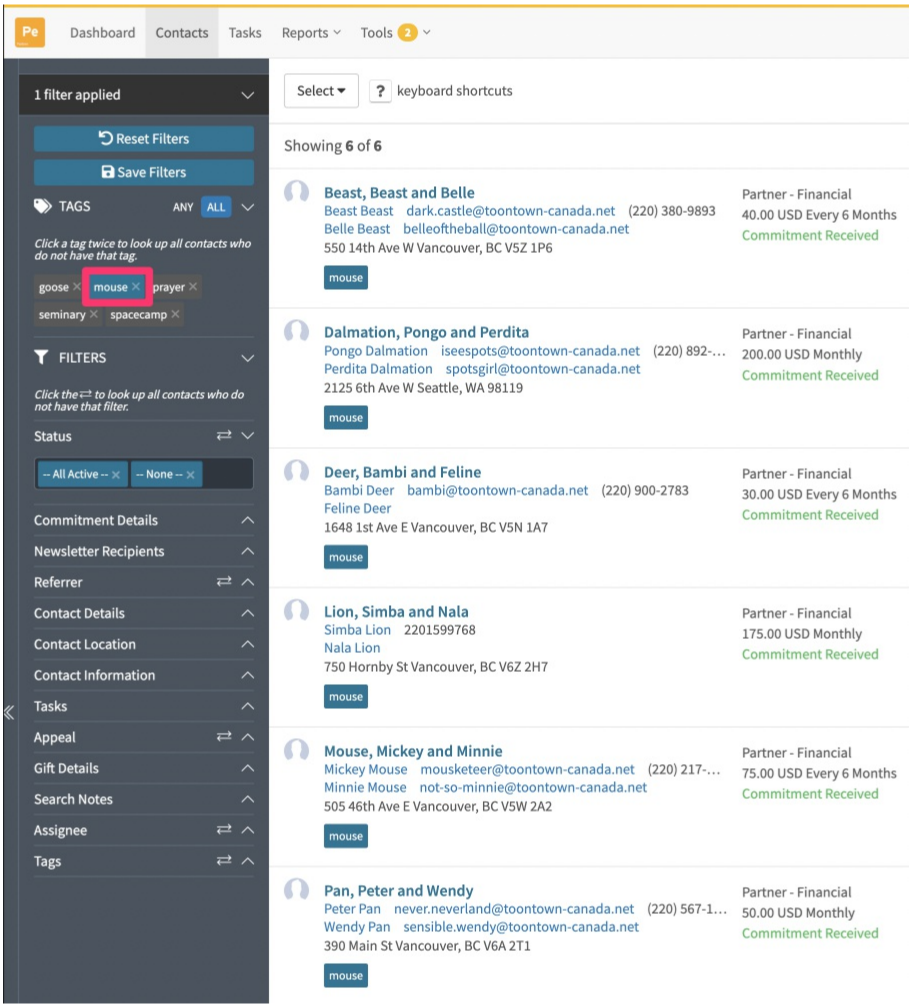
Using Tags as Filters:

Tags

Tags are one way to narrow down your contact list. A single tag or a combination of tags can be used to display a specific group of contacts.

Lookup by a Single Tag

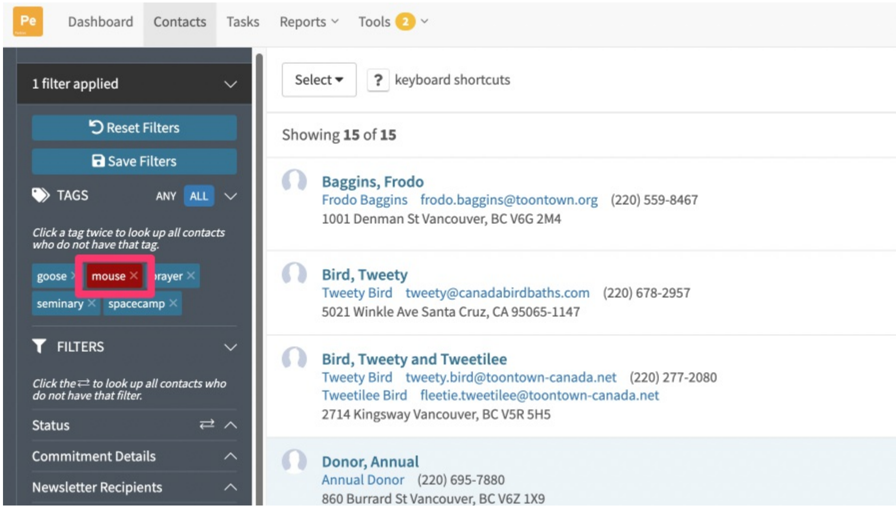
- Under Tags, click on a single tag (i.e. mouse). Your list should show only contacts who have this tag.



Lookup by Reverse Tag

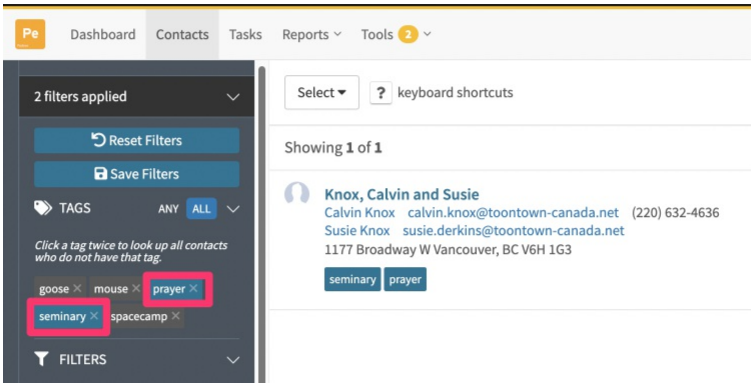
It can be helpful to search by "Reverse Filter" for Tags, searching for all contacts who DO NOT have a tag. In the example above, clicking on the "mouse" tag resulted in seeing 6 contacts, but, a reverse search of this tag will pull up a list of all contacts that do not have this tag.

- Under **Tags**, click on a single tag (i.e. mouse). Your list should show only contacts who have this tag.
- Click on this single tag again. It will turn from blue to red. Your list should now show only contacts who DO NOT have this tag.
- Click on this tag a third time to deselect this tag as a filter.



Lookup by Multiple Tags

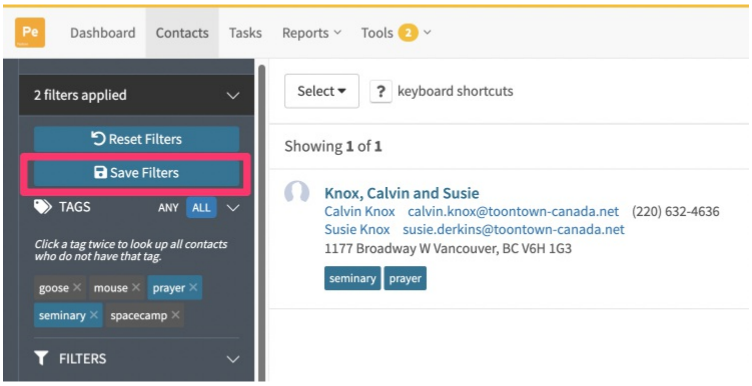
- Choose multiple tags to further narrow your search.
- In the example below two tags are selected: "seminary" and "prayer." All contacts listed meet both criteria.



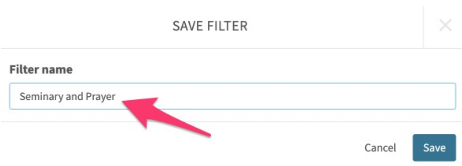
Saved Filters

Once filters have been applied, you can save a particular search with multiple filters for future use.

- On the left, scroll up until you see the number of **Filters Applied** (i.e. Filter (2).
- Below the applied filters, click the **Save** button.

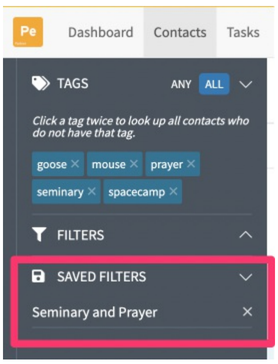


- Type in a **Filter Name** and click **Save**.



On the left, scroll down to the bottom to see the filter you just saved.

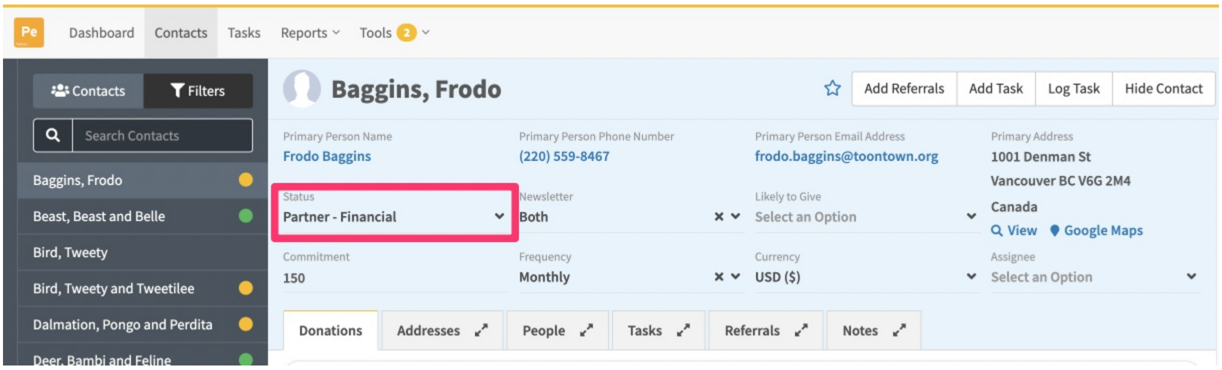
- It is located under **Saved Filters**.



Status

A **Status** is used to track how your contacts progress through each MPD phase and how they will partner with you in your ministry.

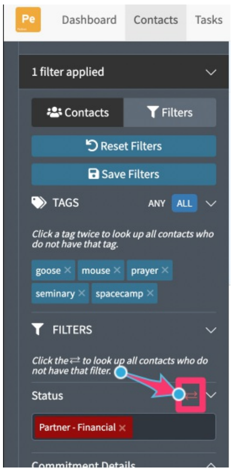
This "Status" is set within a Contact's Page in the topmost section. Click on the field for a dropdown menu to change the Status.



When using Contact Filters you can Search by a single status (i.e. "Cultivate Relationship"), multiple statuses (i.e. "Cultivate Relationship" and "Ask For Appointment"), or by contact Status Category (i.e. "All Active", "All Hidden", "None."

- "All Active" includes all Contacts with an "Active" status: Never Contacted, Ask in Future, Cultivate Relationship, Contact for Appointment, Appointment Scheduled, Call for Decision, Partner - Financial, Partner - Special, Partner - Prayer.
- "All Hidden" includes all Contacts with a "hidden" status: Not Interested, Unresponsive, Never Ask, Research Abandoned, Expired Referral.
- "None" includes all Contacts with no status entered.

You can use the "Reverse Filter" icon to select statuses who DO NOT have the selected status type (i.e. a list of all contacts who DO NOT have the status "Contact for Appointment"). When you are searching by reverse filter the filter will turn red. Click the arrows icon again to return to the non-reversed filter search.



Contact Location

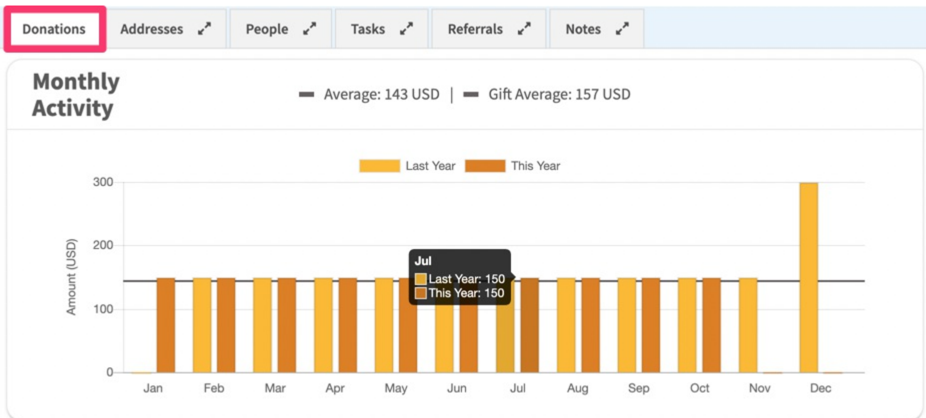
A Contact's Location is set within A Contact's Page in the Addresses tab of an individual contact.

When you use the Contact Location Filters, you can specify your search by "Address Type." There are several address type options available to choose from:

- Primary Address: The address entered and listed for a contact that is marked "Primary" within that contact's page
- Active Address: Any address listed in the system that is NOT marked "Address No Longer Valid"
- Inactive Address: Any address listed in the system that is marked "Address No Longer Valid"
- Any: Any address listed in the system.
- You can also filter by "City", "State", "Country", "Metro Area", or "Region".
- The option exists to do a "Reverse Filter" search of each of the filter options. When selected Partner Essentials will include all contacts who DO NOT have the selected filter.

Gift Details

A Contact's Gift Details are determined by the donations received and recorded on A Contact's Page in the Donations section.



When filtering using "Gift Details" there are several possibilities:

- Gift Options:
  - Any
  - No Gifts
  - One or More Gifts
  - First Gift, or Last Gift
- Exact Gift Amount: Choose a specific gift amount listed in the dropdown menu to find the contacts who have given that gift amount
- Gift Amount Range: Set a "min" or minimum, then "max" or maximum gift amount range to see a list of contacts who have given within the amount set
- Gift Date: Set a "Start Date" and "End Date" to see a list of contacts who have given a gift in this date range
  - Begin by selecting a "Start Date." You can click in the Gift Date field and use the calendar option to page through months and choose a day, month and year.
  - End by selecting an "End Date" using the same process as above.

- If you are having trouble, use the “Clear Filters” option to refresh your search.
- Next Increase Ask: You can enter this date in the “Partnership Info” tab of the Donations tab. Click the pencil icon to edit. The filter will pull all Contacts with a next increase ask date within whatever date range is entered in the filter.
- Designation Account: Choose between ministry accounts. Pick one, multiple, or “Any” from the filter options.

“See More Filters”

- Click “See More Filters” to expand the filters menu beyond the most used filters.
- Click “See Fewer Filters” to return to the simplified list of the most used filters.

MPD Status & MPD Phase for Contacts

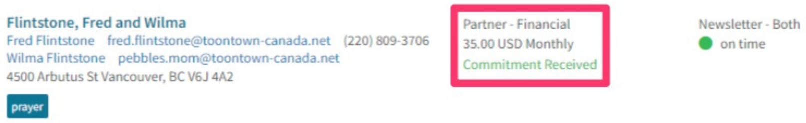
A MPD **Status** is used to track how your contacts progress through each MPD phase and how they will partner with you in your ministry.

MPD Contact Status

From the main **Contacts** page, the **Status** is located to the right of the contact name.

Status includes:

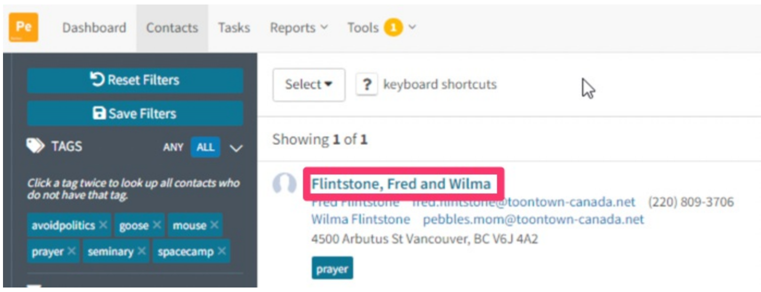
- **Status Type**, i.e. *Partner - Financial*.
- **Commitment Type and Amount**, i.e. *$35.00 Monthly*.
- **Commitment Received** (*yes or no*).



- The **Financial Status** (colored dot) indicates whether the commitment is:
  - On Time - Green
  - 0 to 30 days Late - Gray
  - 30 to 60 Days Late - Gold
  - 60 or More Days Late - Red

Partner Essentials Status Details

To view or change the status of a contact, click on the **Contact Name**.



In this individual contact view are the following status details:

- **Status**, i.e. *Partner - Financial*
- **Commitment Amount**, i.e.*$35*
- **Frequency**, i.e. *Monthly*
- **Currency Type**, i.e. USD *(US dollars)*

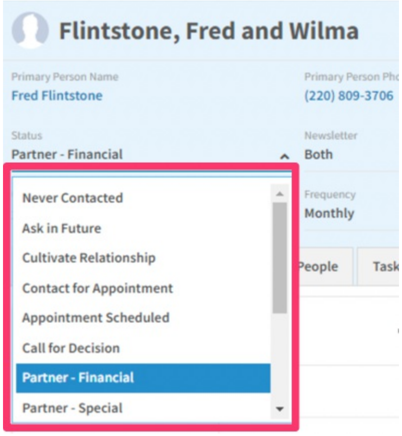
All of these Status fields can be changed by clicking on the drop-down arrow or into the field itself.

Contact Status Types

- Contacts with an "active" status (Never Contacted, Ask in Future, Cultivate Relationship, Contact for Appointment, Appointment Scheduled, Call for Decision, Partner - Financial, Partner - Special, Partner - Prayer) will show up in your main contacts list as an active contact.
- Contacts with a "hidden" status (Not Interested, Unresponsive, Never Ask, Research Abandoned, Expired Referral) will be hidden from your active contact list.
- To find these "hidden" contacts, filter by "--All Hidden--" in the Status filter search to view them in your contact list.

Change Status for a Single Contact

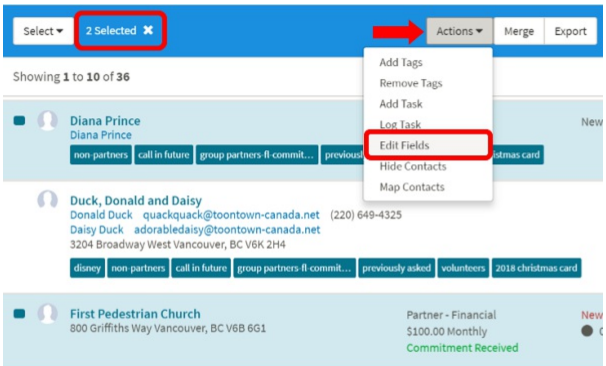
Click the **Status drop-down arrow**, then select the new status.



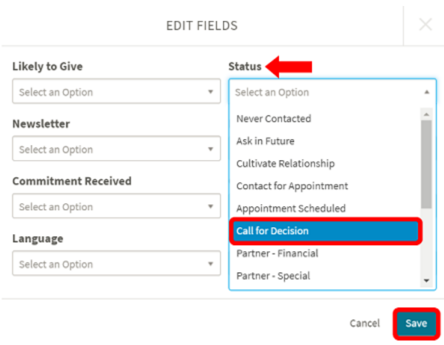
Change Status for Multiple Contacts

You can also change statuses of multiple contacts at one time. To do so, follow these steps:

- **Select the Contacts** whose status you want change (highlighted in light blue).
- Click on **Actions** button and then **Edit Field.**



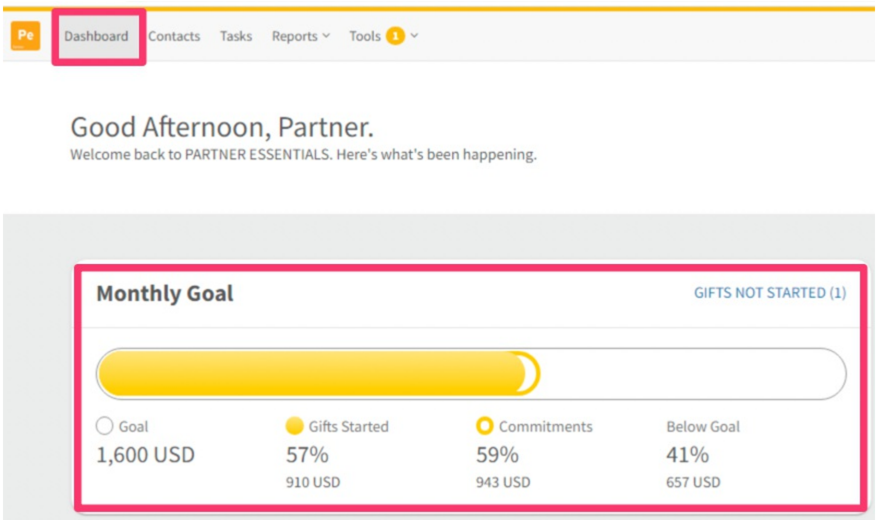
- Locate the **Status** field and click the dropdown arrow,
- Click on the appropriate **Status** and then click **Save**.



Note: A contact's status affects multiple things within Partner Essentials. One of these is the MPD monthly progress bar.

Monthly Status Bar

The **Monthly Status Bar** is based on the monthly financial goal set in Preferences. This status bar is located on the Dashboard in the Monthly Goal section.



- Contacts with **Partner-Financial** status and **Gifts Started** are displayed in gold.
- Contacts with **Partner-Financial** status with Committed (not started) giving are displayed as **Commitments** outlined in goal.

- One-time gifts or commitments will not show up in this bar and those contacts should be labeled as *Partner-Special*.

Is It Possible to Assign More Than One Status to a Contact?

Unfortunately, it is not possible to assign more than one status to a contact at a time. However there are other options to accomplish this function.

- Assign the status that best describes each contact's current partnership with you.
- Organize your Contact tags to assign more than one status to a contact.

Multi-Currency Tour

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Multiple Currencies From the Dashboard

- **Balance:** Each currency type is totalled and converted into the currency by which you are paid.
- **Commitment:** Financial commitments in multiple currencies and are converted into the currency by which you are paid.
- **Legend:** Each currency type is represented by a different color.
- **Bar Graph:** Monthly donation totals are displayed in the corresponding color for each currency type.

Multiple Currencies From Contacts

- Go to the **Contacts** page and click on a contact name, i.e., *Flintstone, Fred and Wilma*.
- By default, the **Contact People Card** (light blue) is displayed.
- Below the name and to the right is the **Currency** type.

Editing the Currency Type For Individuals

- From people card of the individual contact, Locate the **Currency Field**.
- Click in the **Search Field** and type the first few letters, i.e., *AU*
- Click on the **Currency Type**, i.e., *AUD.*
- MPDX will automatically save your selection.

Note: The currency type, for each Contact, will be set by their initial donation. However, this can modified any time, if necessary.

Editing the Currency Type For Multiple Contacts

- From the **Contacts** page, **Select** the contacts for whom the currency type should be changed.
  - Selected contacts are highlighted in light blue with a **Dark Blue Checkbox** next to their name.
  - Note the **Number of Selected** contacts next to the *Select* button.
- Click on **Actions** and then select **Edit Fields**.

- Locate the **Commitment Currency** field.
- Click on the **Drop-down Arrow** and type the **Currency Abbreviation**, i.e., *AUD*.
- Select the **Currency Type** and click **Save**.

Reports: Multiple Currencies

MPDX generates contribution reports in multiple currencies, if applicable.

- From the **Reports** page, the default screen is **Donations**.
- In the **Bar Graph**, each currency type corresponds with a specific color in the **Legend**.

- Beneath the bar graph are the **Donations** for the **Current Month**.
- The **Currency Type** of each gift is listed in the **Amount** column.

Note: Scroll to the bottom of the current month's Donations to see the Donation Totals by currency.

Tags for Contacts: Add, Remove, Delete, Edit

The Task and Contact Tags are different from one another:

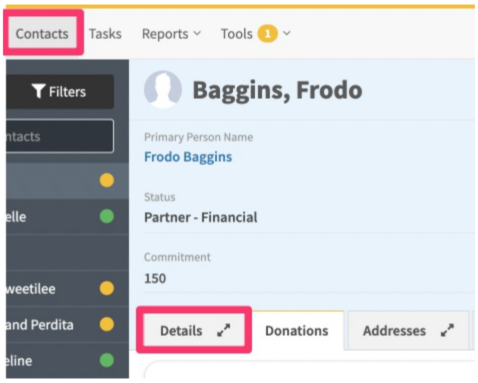
- If you add a tag to a Contact it WILL NOT add that tag to any task of that Contact
- If you add a tag to a Task it WILL NOT add that tag to any other tasks for that Contact
- If you add a tag to a Task it WILL NOT add that tag to that Contact

Add a Tag

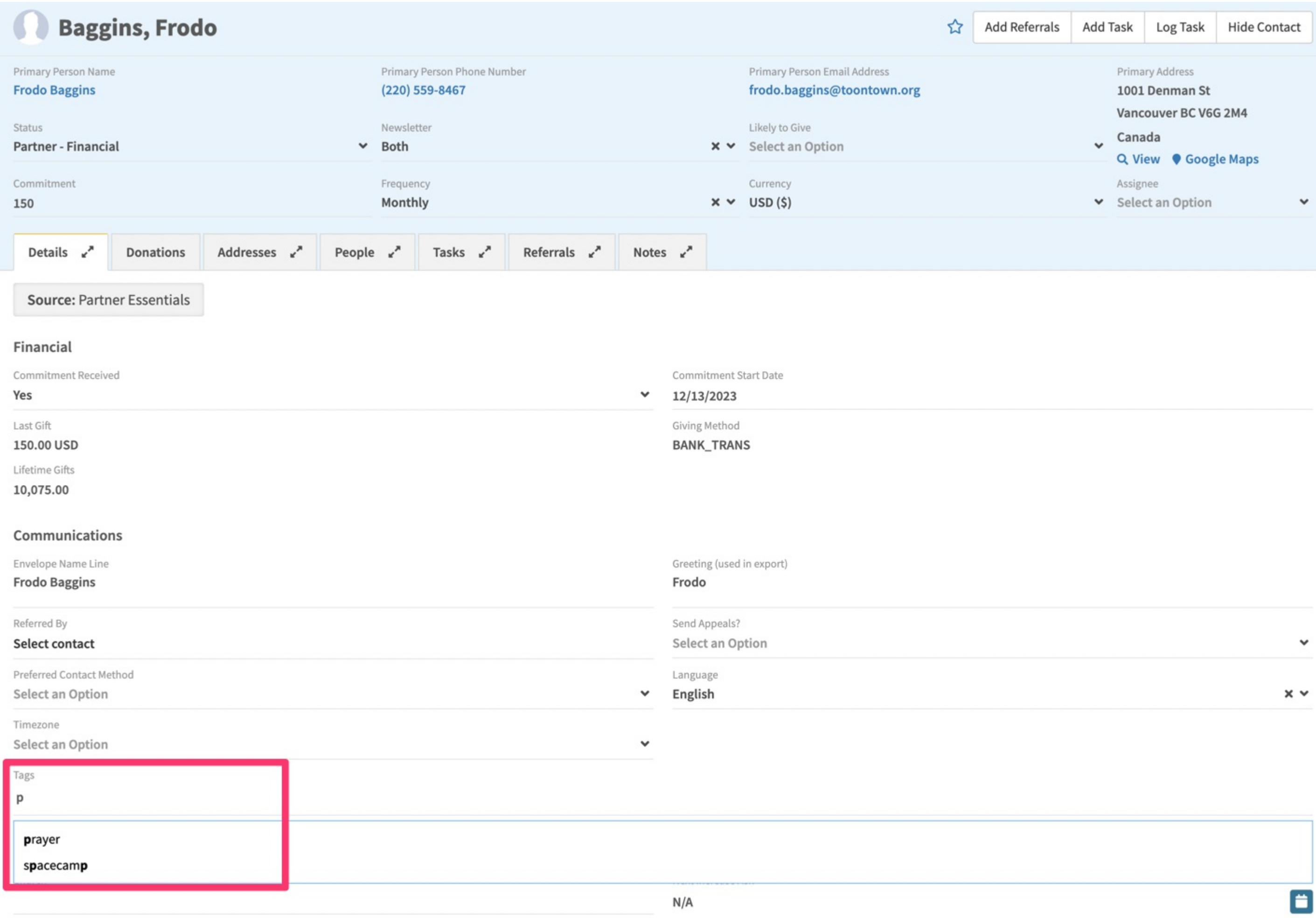
To organize your contacts into specific groups by tags, you will need to add a tag to your contact(s).

Adding a Tag or Tags to a Single Contact

- Go to the **Contacts** tab and click on a contact name.
- Locate and click on the **Contact Details** tab.



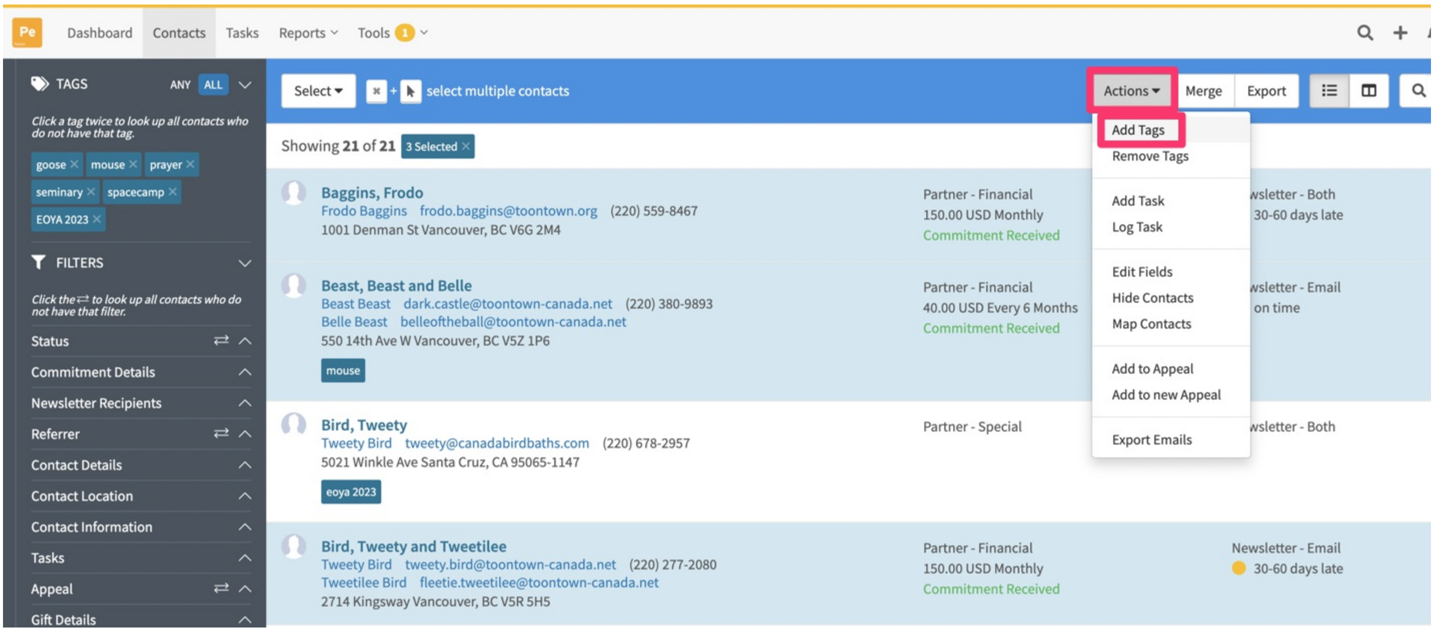
- Scroll to the **Tags** section.
- Click where it says **"Add a tag."** Type the name of the tag and press enter. Then **"Save."**
- The new tag will appear under the Tags section within the contact page and on the main "Contacts" page under the "Tags" Filters menu options.



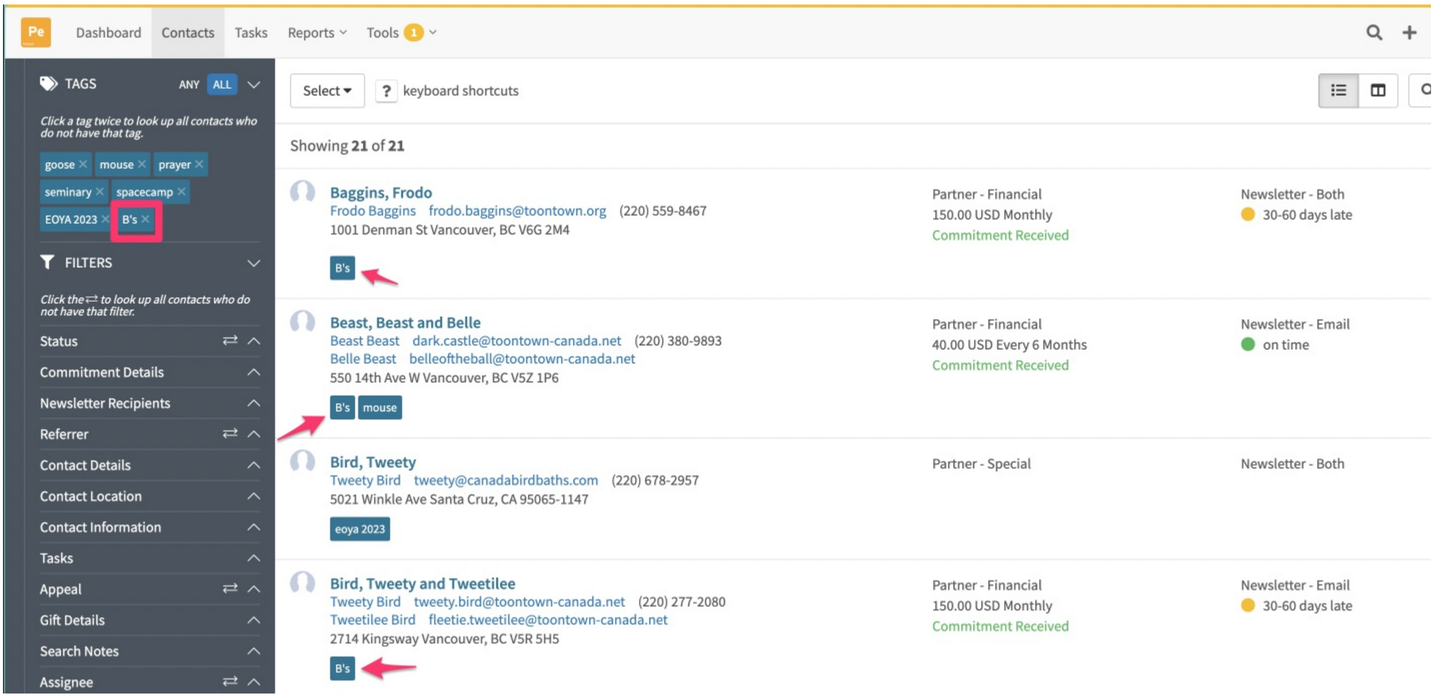
Adding a Tag or Tags to Multiple Contacts

Once you've added a tag to a single contact and you see it in your Tags list, then you can add it to additional contacts. To add a tag or tags to multiple contacts at a time:

- Go to the **Contacts** tab.
- Apply any **Filters** needed to narrow your list if helpful.
- Click the contacts you want to add the Tag to. You can hold the control button down on Windows or the command button down on a mac to selct more than one.
- Click on the **Actions** button, then **Add Tags**.



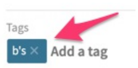
- **After you add new tags, they will show up in the Contacts Filters "Tags" List**



Remove a Tag

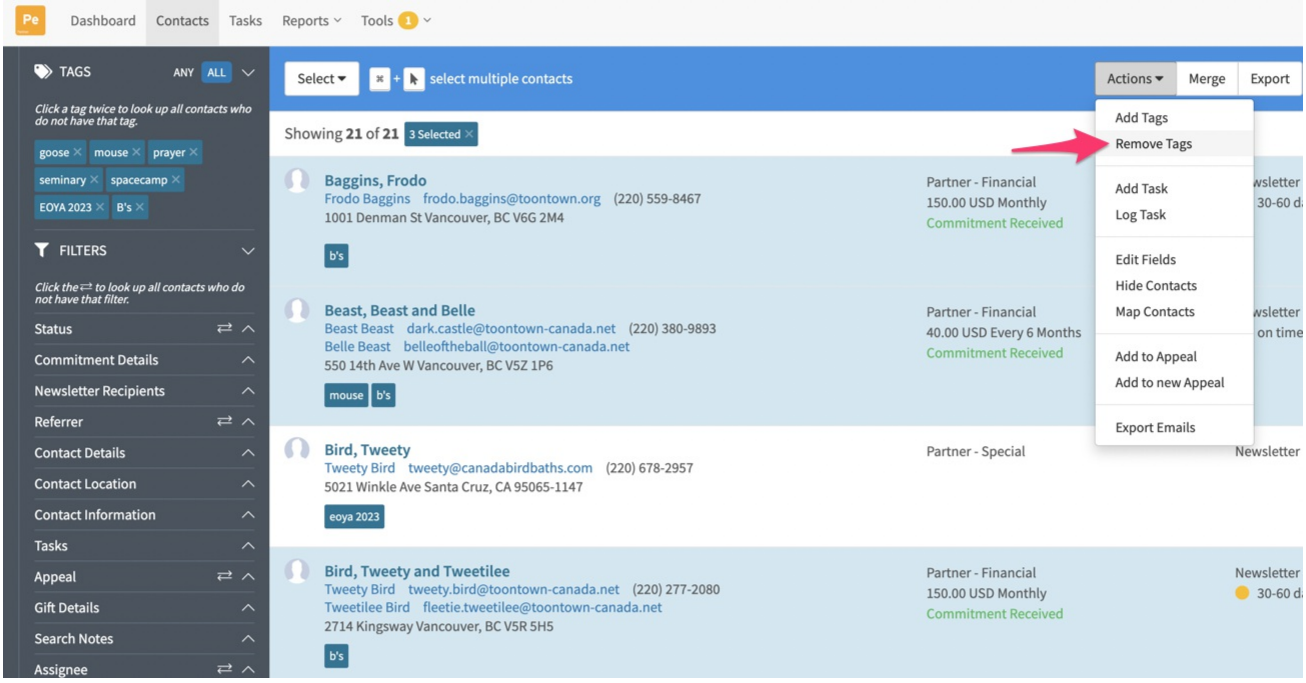
Removing a Tag or Tags From an Individual Contact

- Go to **A Contact's Page**, of the person from whom you want to remove a tag.
- Visit the **Contacts Details** tab.
- Locate the **Tag** you want to remove and **click on the "x"** to the right of that tag

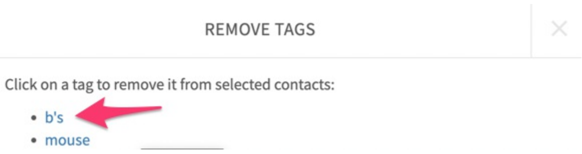


Removing a Tag or Tags from Multiple Contacts

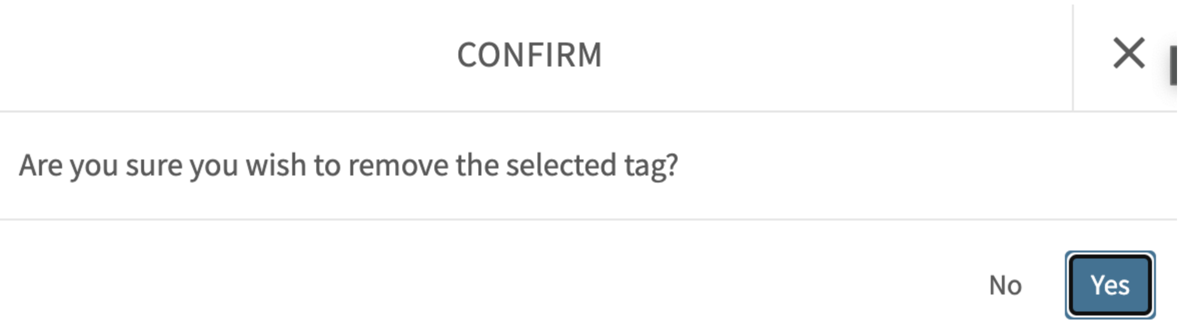
- Go to the **Contacts** tab
- Apply any **Filters** needed to narrow your list.
- **Select the Contacts** from whom you want to remove tags (highlighted in gray).
- Click on **Actions**.
- Select **Remove Tag**.



- Click on the **Name of the Tag** you want to remove.



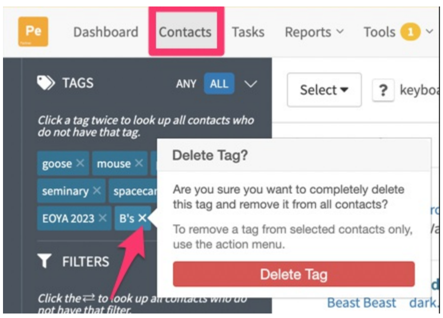
- Say **Yes**.



Deleting Tags

Unlike removing a tag from an individual contact or multiple contacts, deleting a tag is permanent and will remove the tag from all contacts who have this tag.

- From the **Contacts** tab, locate the **Tags** section.
- **Click on the X** next to the **Tag Name** you wish to remove.
- The **Deleted Tag** will be **removed from all contacts** who had the tag.



Edit or Rename a Tag

To edit a tag name, you will actually need to add a new tag and then remove or delete the old tag.

- Unhide the Contacts Filters menu.
- Under the **Tags** Section, click on the **Tag Name** you want to edit.
- Click the checkbox at the top to **Select All**
- You can see the **total number of contacts selected** (all contacts that have the tag) to the right of the search menu

The **total number of contacts selected** corresponds with the **Tag** highlighted on the left.

- Click on the **Actions** button.

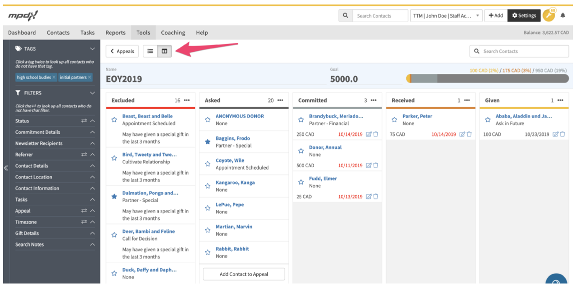
- Select **Add Tags**.
- Create a **New Tag**, i.e., "Wednesday afternoon study," by typing in the Add a tag space.
- After typing the new tag name, press enter and click on **Save**.
- To delete the **Old Tag** i.e., "Wednesday bible study, click the **"x" to the right.**
- Click to confirm when the **Delete Tag** pop-up appears to remove it.

Flows View for Appeals

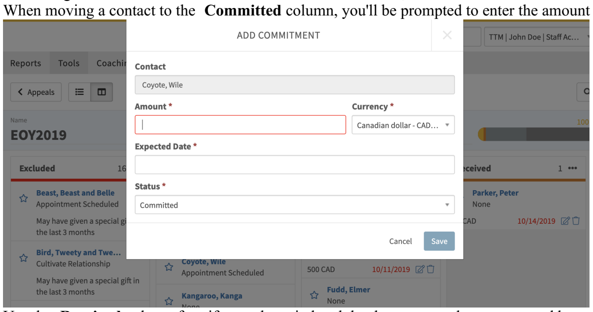
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Flows view is a helpful tool that allows you to view and manage your progress for an appeal.

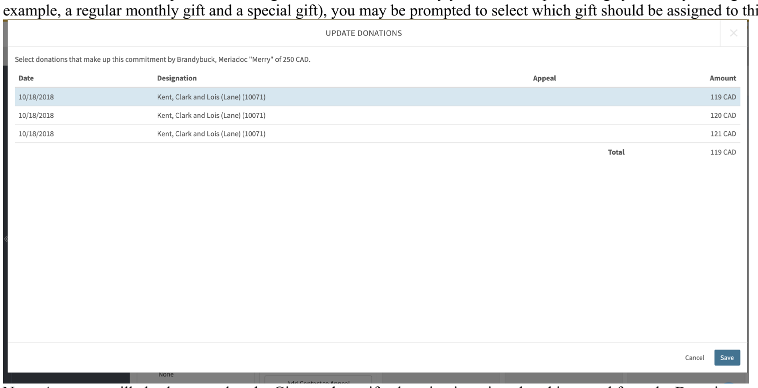
Using Flows View



- Go to the Tools tab and select your appeal. Then click the flows view button.
- You can click and drag contacts from the **Asked** column to the Committed, Received or Given columns.
  - When moving a contact to the **Committed** column, you'll be prompted to enter the amount and date you expect to receive the gift.



  - Use the **Received** column for gifts you have in hand that have not yet been processed by your donation processing system. When you move a contact here, you can adjust the actual amount and date you received the gift.
  - The **Given** column is for partners whose gifts have been received by your donation processing system. If you drag the contact to the Given column and the contact has recently given multiple gifts (for example, a regular monthly gift and a special gift), you may be prompted to select which gift should be assigned to this appeal.

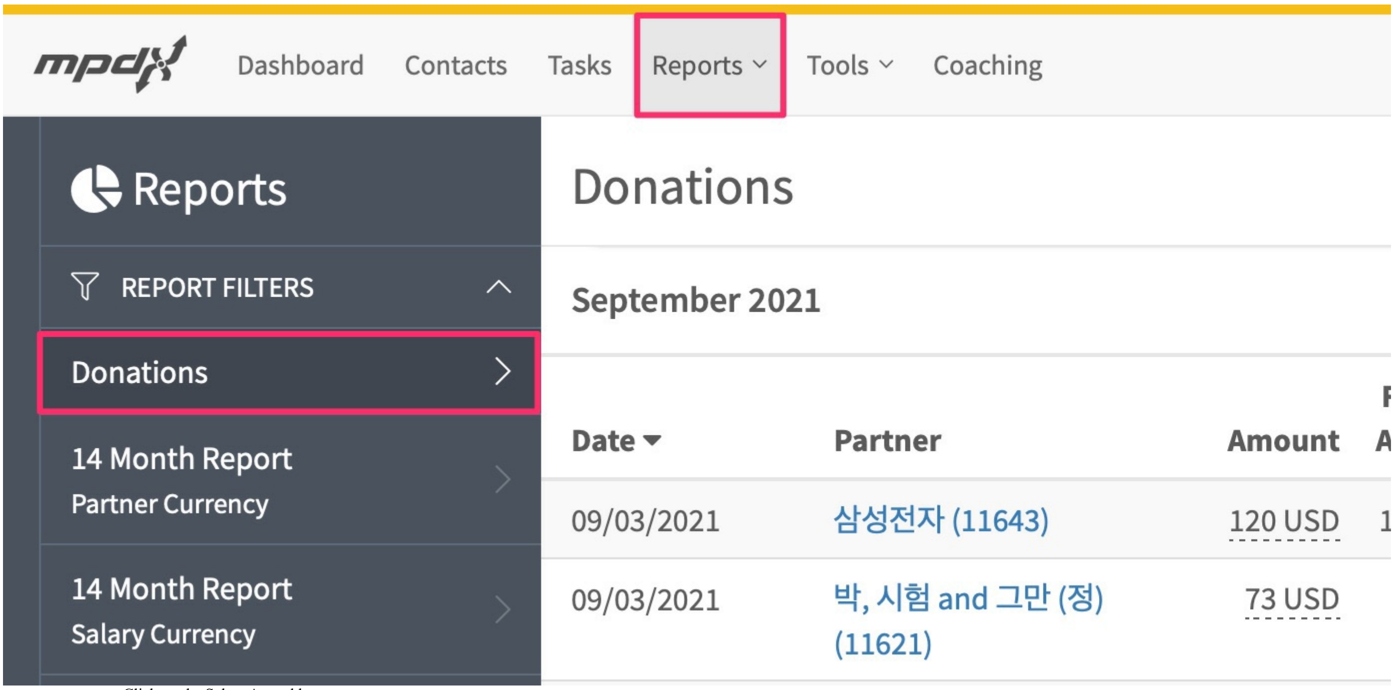


  - Note: A contact will also be moved to the Given column if a donation is assigned to this appeal from the Donation report.

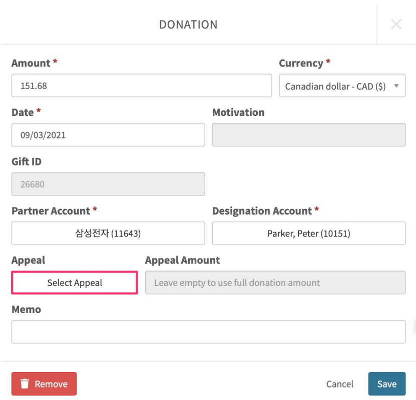
Applying a Donation to an Appeal

If you receive a donation not listed under your appeal, you can apply the appeal to a donation.

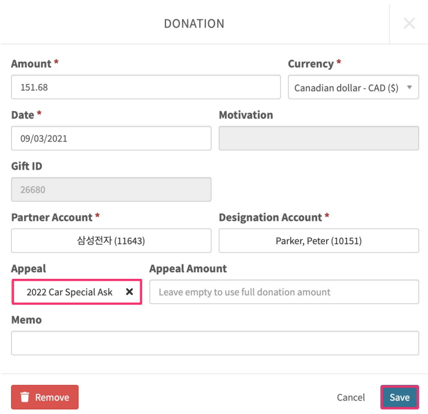
  - Go to the Reports page and scroll down to Donations.
  - Click on the Edit icon (paper/pen).



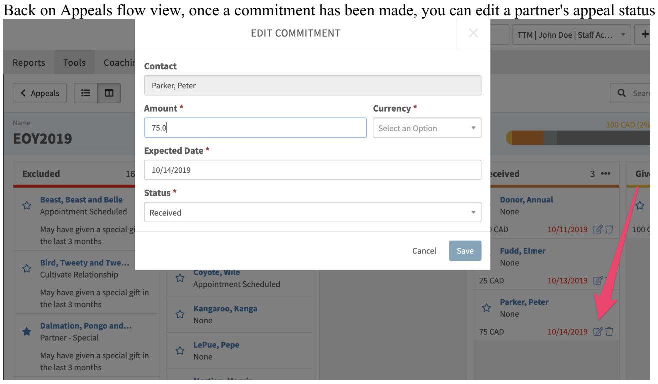
- Click on the Select Appeal button.



- After the Selected Appeal, i.e., *2022 Car Special Ask* has been added, click the Save button.



- Back on Appeals flow view, once a commitment has been made, you can edit a partner's appeal status or gift details by clicking the edit button on each contact card.



Updating When a Ministry Partner Dies

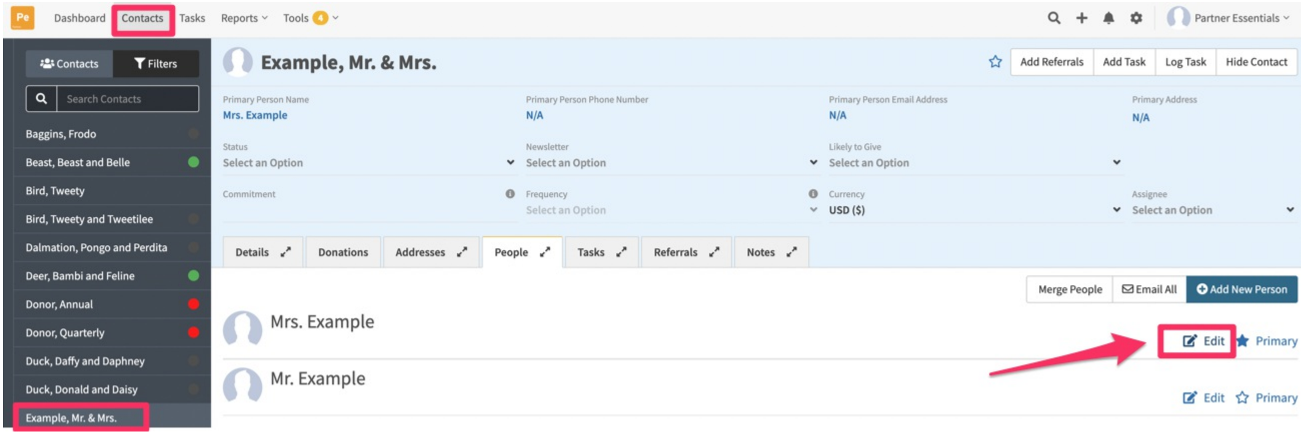
It is a sad reality that Ministry Partners die. And in the aftermath, it is important to care for the family members who are left behind well. Making a few small administrative adjustments in Partner Essentials can be a loving way to avoid awkward and painful mishaps like misaddressed envelopes and continued newsletter mailings.

In the instance of a Ministry Partner death, the best place to start in partner Essentials is that individual, family, or couple's contact page. Here you will be able to make the following changes:

- **Mark a person as "Deceased"**
- **Add a Task** as a reminder to reach out to your Ministry Partner's family
- **Partner Essentials now automatically updates the following fields once you have marked a person "Deceased."** You may want to confirm the accuracy of these changes before sending out your next prayer letter:
  - The Greeting used in Exports
  - The Envelope Name Line
  - The Contact Name (if applicable)

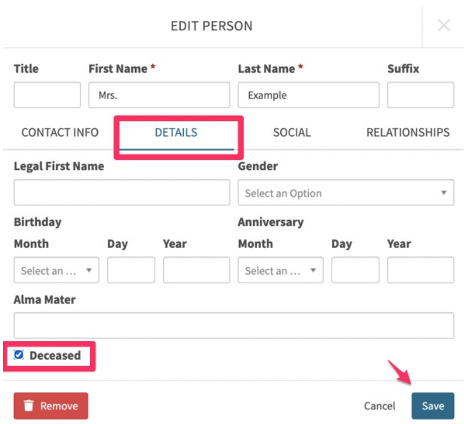
To Mark a Person as Deceased

Step 1: The "Contact Details" tab within A Contact's Page lists each individual associated with that Contact. When a person dies, scroll to that individual and click the pencil icon next to their name to edit and make changes.



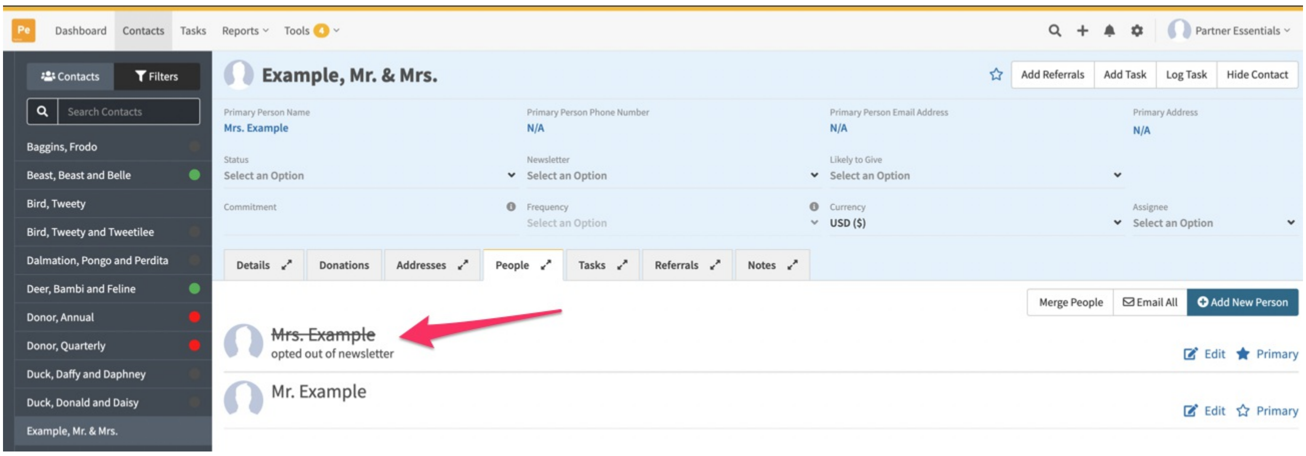
Step 2: When you select the pencil icon, a box will pop-up where you can make and "Save" the needed changes:

- Select "Details" tab.
- Click to check the box for "Deceased".
- Click "Save". This change will automatically mark this person (NOT every person in the Contact) "Opt Out of Newsletter."



Step 3: Check to make sure the change was applied. The below screenshot is how the change will appear after you mark a person "Deceased."

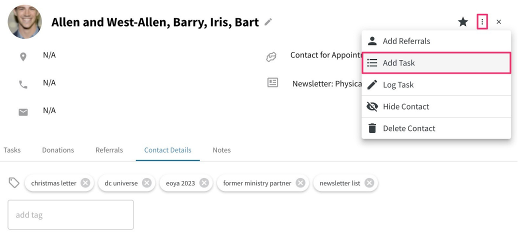
NOTE: This action **can** be undone if the change was made in-error, but you will need to go to the "Contact Details" tab, click the click the pencil icon next to their name, then unmark BOTH "Opt Out of Newsletter" and "Deceased" to note this individual as living and opt them back IN to receiving Newsletters.



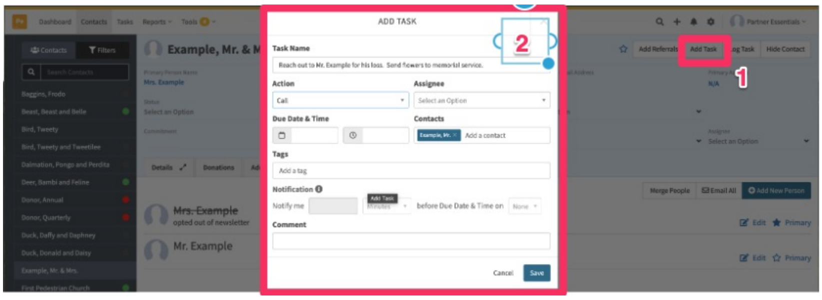
Add a Task as a reminder to reach out to your Ministry Partner's family

The death of a loved one is a very significant event and a key time to show care to a Ministry Partner and/or their family members. Remembering to call, email, talk to in-person, send a letter, etc. is important to do and worth recording.

One way to do this in **Partner Essentials** is using Add Task (or Log Task). Add Task and Log Task can both be found near the top right corner of a contact's page.



When you select "Add Task" a pop-up box will appear. Entering "Task Name", "Action", "Due Date", then "Save" will add this Task to the Contact's Page "Tasks" tab as well as the "Tasks" tab in the **Partner Essentials** Top Navigation menu.



Confirm the Accuracy of the Automated Changes:

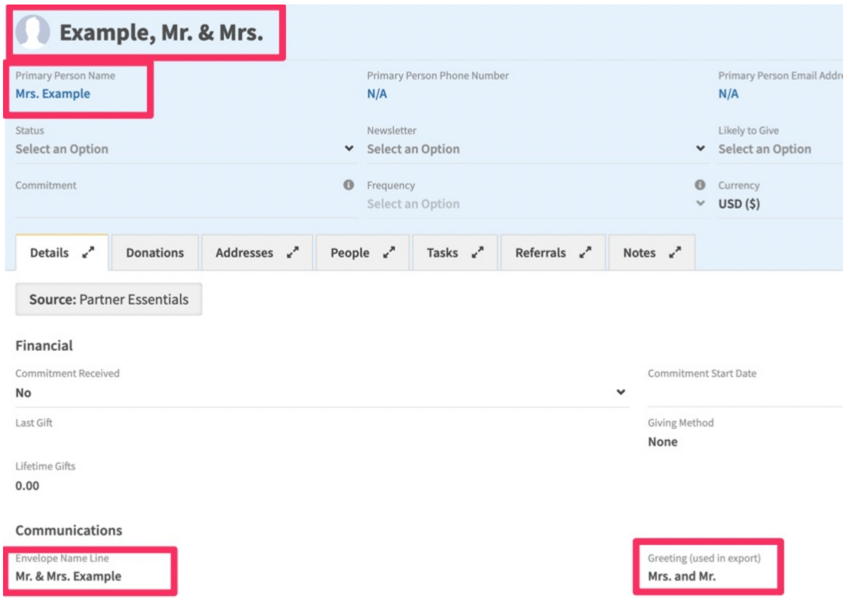
The "Contact Details" tab within A Contact's Page gives additional contact information such as their communications preferences. An oversight here could be an honest mistake, but acutely painful reminder of loss to a grieving ministry partner.

Some changes happen through automation, but we advise reviewing your contact record.

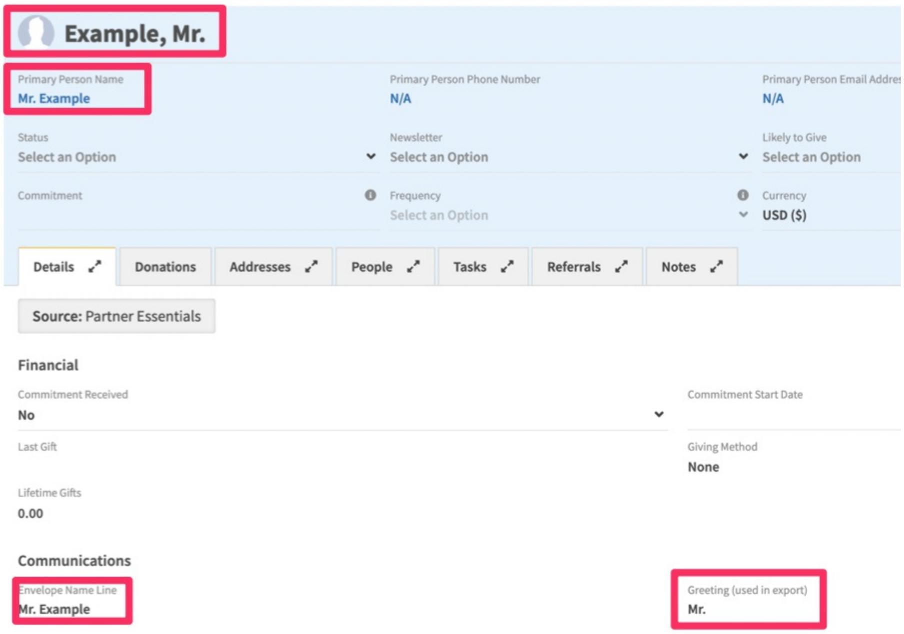
Note and verify the changes made in these specific areas:

- **Contact Name** is what you regularly see in your Contacts list in **Partner Essentials**. Changing this is more for your own benefit so you are not regularly seeing the name of a person who has passed away.
- **Greeting (used in Export)** is the set greeting for this contact that **Partner Essentials** uses for Exports for Newsletters, etc.
- **Envelope Name Line** is the first line in an address label for this contact.

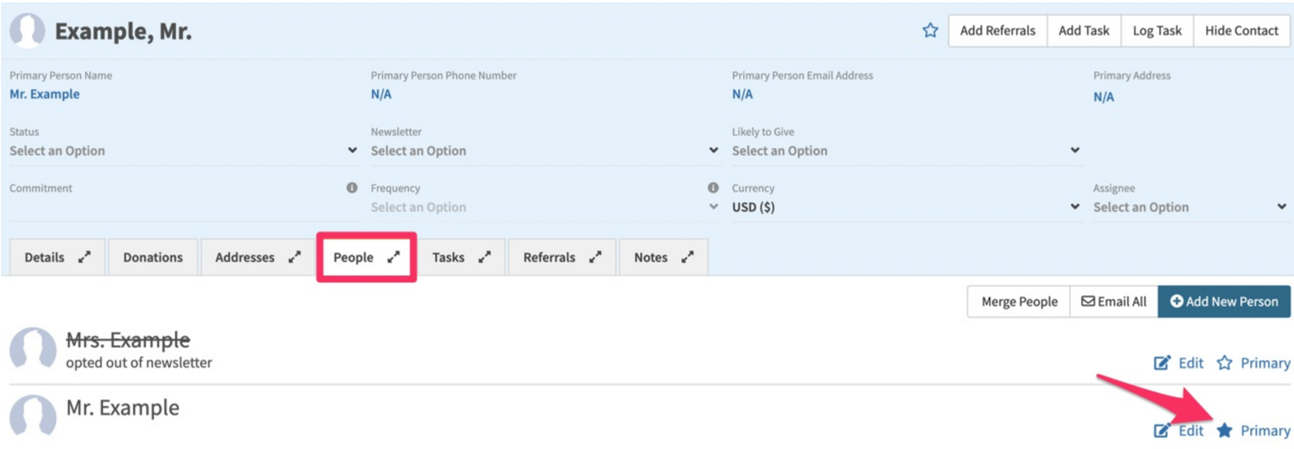
Original:



Updated:



- **Primary person** can be updated in the People tab of the contact.



NOTE: You will need to manually update your Email (i.e. MailChimp) and/or Physical Newsletter lists (i.e. ChalkLine or PrayerLetters.com) information within A Contact's Page in Partner Essentials and within the respective applications if the application syncing with Partner Essentials is not turned on.

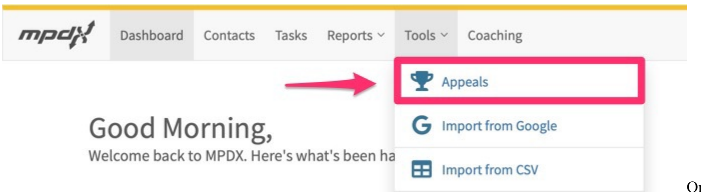
Setup an Appeal

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Appeals are for specific financial campaigns, outside of your monthly goals.

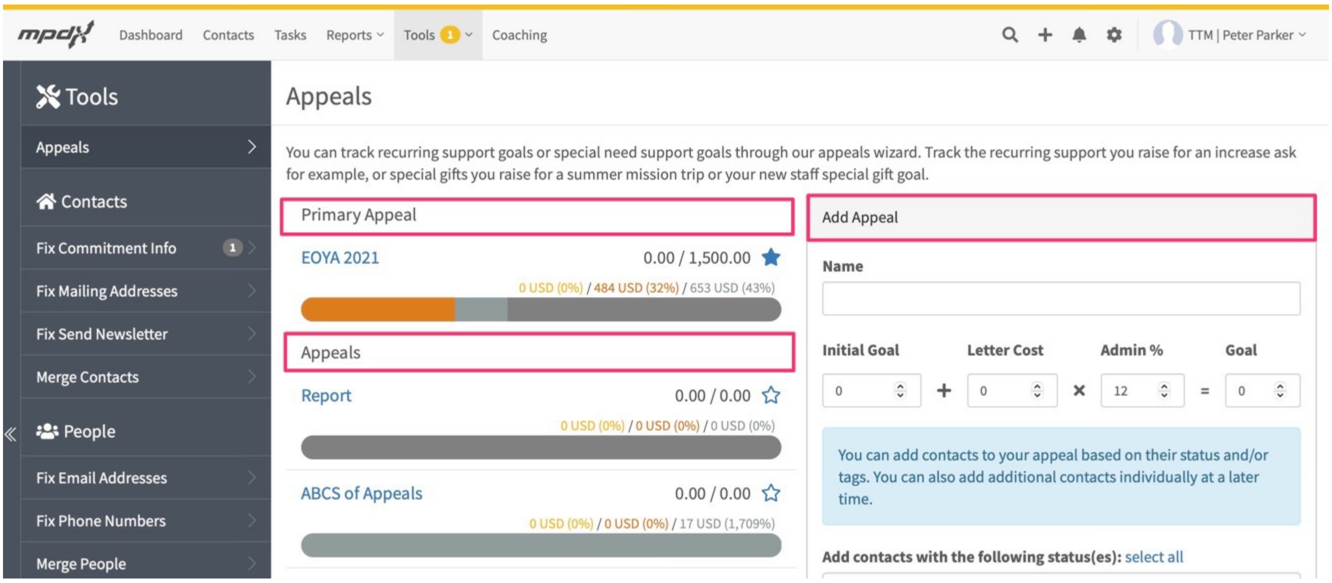
How to Setup an Appeal

Click on the **Tools** menu, then click on **Appeals**.



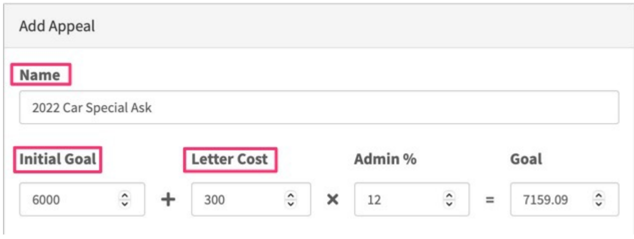
On the left side of the main Appeals screen, past and current appeals will be displayed.

- Select an appeal as your **Primary Appeal**, or create a new appeal.
- Use the **Add Appeal** wizard, on the right, to create a new appeal.

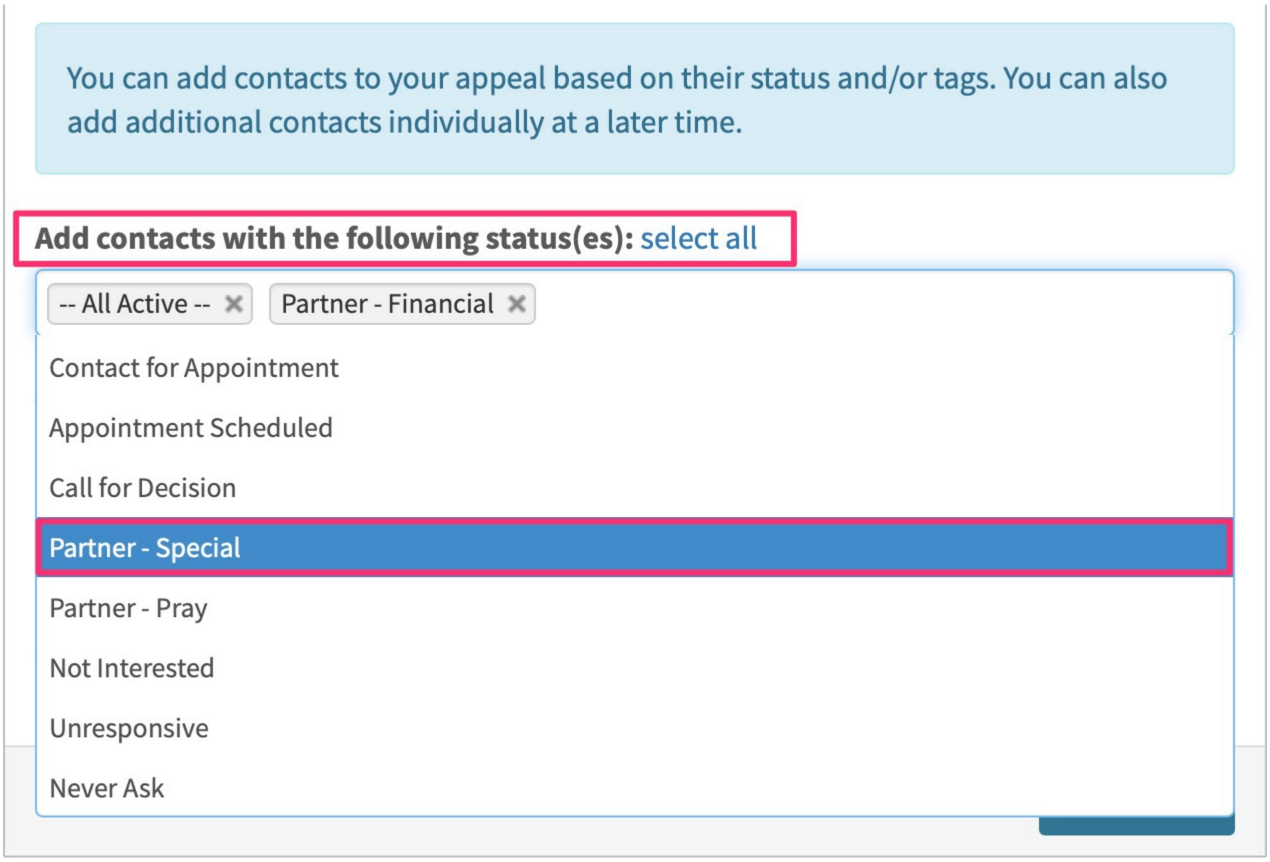


- In the **Add Appeal** wizard, give the appeal a **Name** and enter the **Initial Goal** amount.
- Enter the **Letter Cost** and the *Admin %* ministry costs to calculate your total *Goal*.

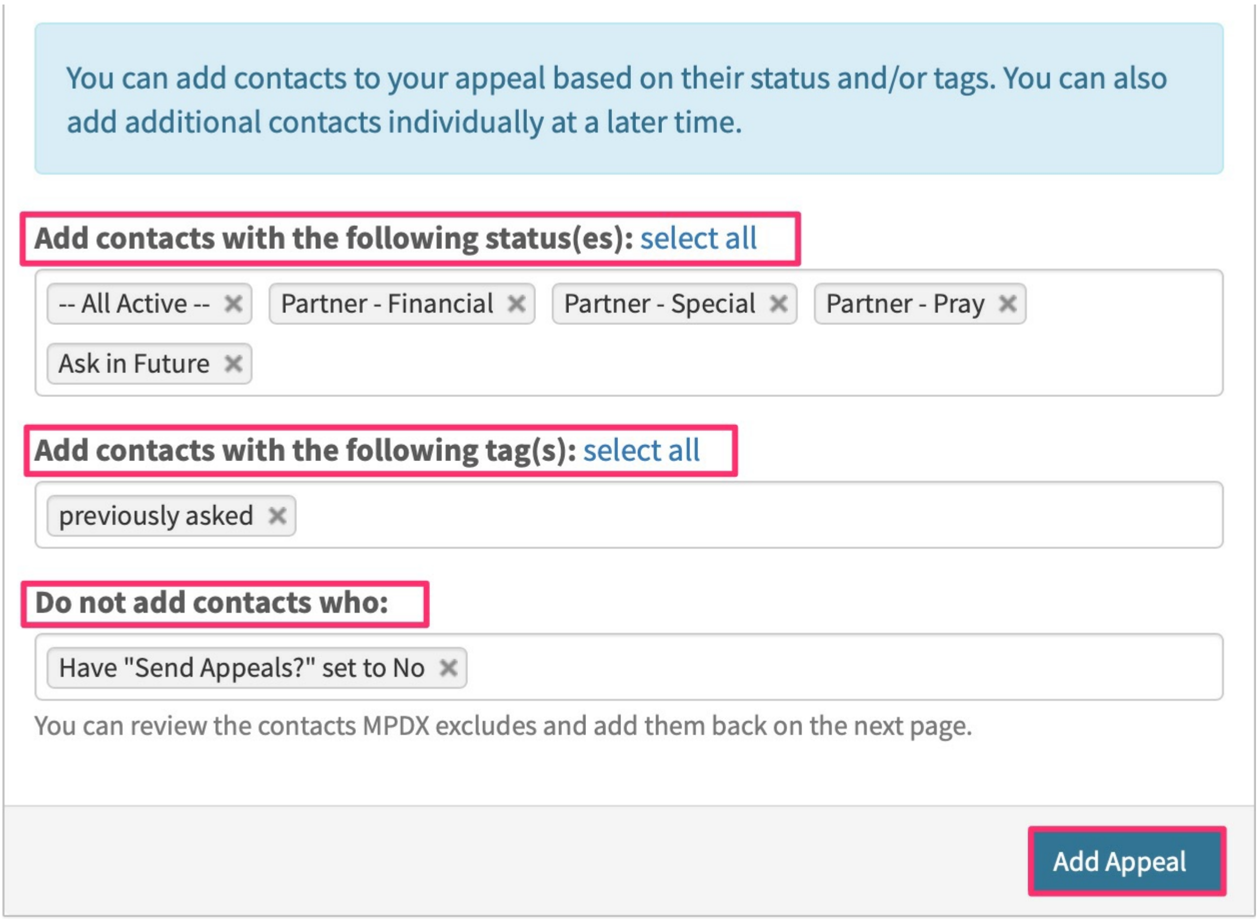
Note: You can also edit the appeal goal later.



- Next, select the **Status(es)** you would like to add to the appeal.
- Select as many or as few statuses and tags as you'd like.
- In addition to statuses, you can add tags.



- All added contact **Status** will be listed like tags.
- You can add additional statuses or click on the **X to delete** any unwanted ones.
- You can add any **Tag** to your appeal for those specific contacts.
- Add any exclusions to your appeal, i.e. *Send Appeals set to No*.
- Verify all the appeal information and then click **Add Appeal**.

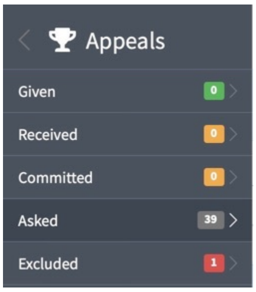


After you click the **Add Appeal** button, the details of the the appeal will be displayed.

- On the far right, is the **Amount Given, Amount Received** and the **Appeal Goal** with a visual of those amounts
- To left is the **Appeal Name** i.e., *2022 Car Special Ask*

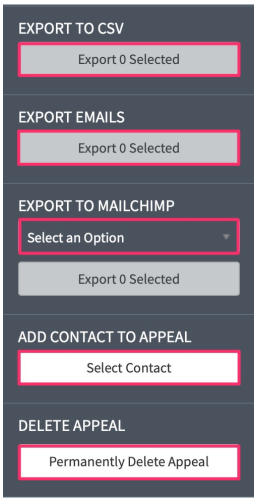
On the far left (in the list view) is the **Appeal Stats**:

- The number of contacts who have **Given** to the appeal.
- The number of appeal gifts **Received**.
- The number of pledges **Committed.**
- The number of **Asked** contacts who received the appeal letter or email.

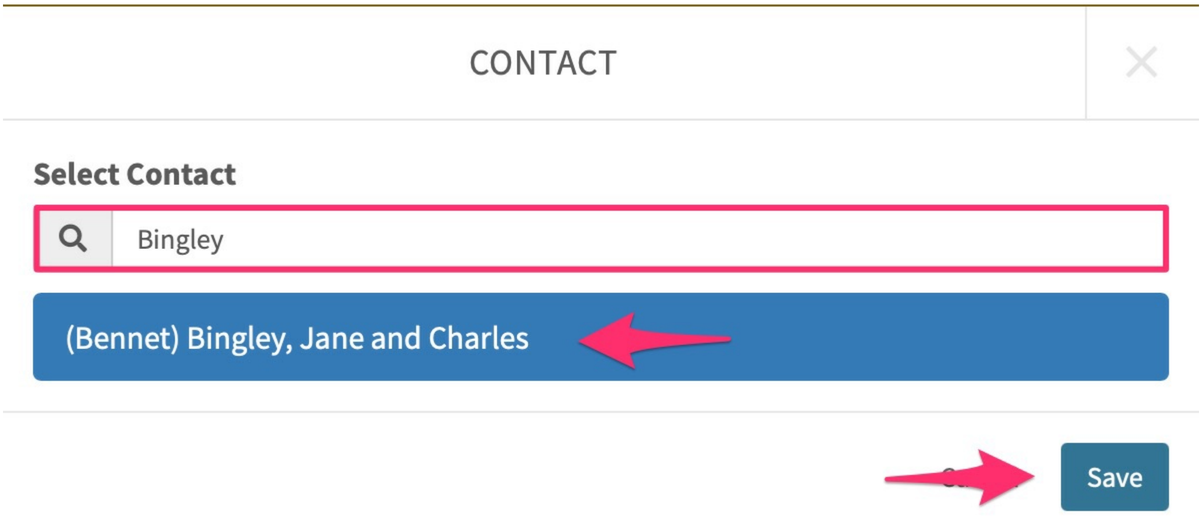


Below the Appeal Stats are **Appeal Functions**:

- **Export** the appeal to a **CSV** file
  - This allows you to export selected contacts to a spreadsheet or a MailChimp list.
- **Export Emails** of selected contacts
- You can **Add a Contact** to the Appeal.
- Or **Permanently Delete Appeal.**

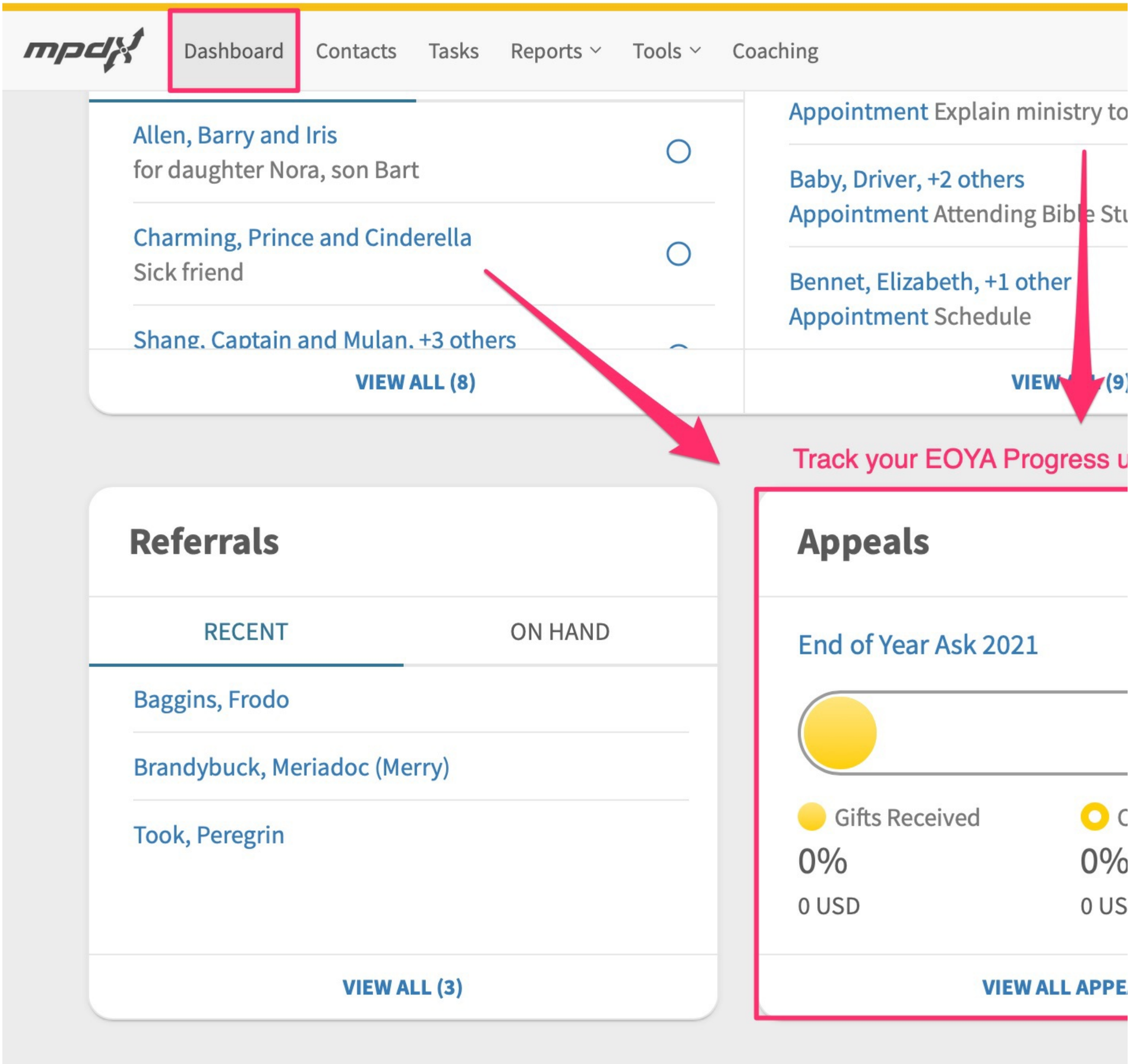


- To **Select Contact**, type in the contact's last name.
- Click on the **Contact Name** so it's highlighted in blue.
- Click the **Save** button.



Primary Appeal at a Glance

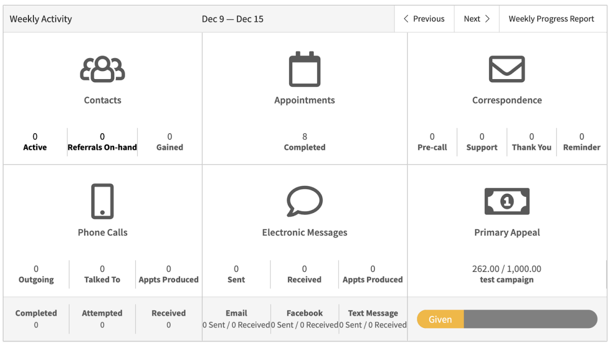
Each time you log into MPDX or click on the Dashboard menu, your primary appeal will be visible.



Note: If your appeal does not appear on your dashboard, you need to set your Primary Appeal. Remember, it's the appeal with the solid blue star.

Weekly Activity

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****



The Coaching view of Weekly Activity is the same Weekly Activity view a person being coached sees on their Dashboard. Totals are automatically generated based on contacts updated and tasks logged in MPDX. The MPD Week starts Sunday morning and ends Saturday night.

Each progress category gives you the current weekly activity.

- Click the Previous or Next buttons to see respective weekly activity.
- Contacts Box - displays amount of contacts that were Active, the Referrals on Hand, and new contacts Gained.

- Appointments Box - displays the number of task Appointments Completed.
- Correspondence Box - displays the number of Pre-call, Support, Thank You, and Reminder tasks completed.

- Phone Calls - displays the number of Ongoing, Talked To, Appts Produced, Completed, Attempted, and Received current weekly tasks.
- Electronic Messages - displays the Sent, Received, Appts Produced, Email, Facebook, and Text Message current weekly tasks.
- Primary Appeal - the currently weekly progress of a current Primary Appeal.

Understand How the Values Increase:

Contacts

- Active Contacts: This value reflects all contacts within the users MPDX account with a status of “Never Contacted” or “Contact for Appointment”
- The Referrals On-hand value increases when the user manually enters and saves a contact using the “Add Referral” button in the Referrals tab on a contact’s page.
- Gained Referrals is the sum of referrals added this week

Appointments

- Appointments completed is the sum of all logged appointment tasks with a date in the given weekly span

Correspondence

- The Pre-call number increases when a “Pre Call Letter” task is logged
- The Support number increases when a “Support Letter” task is logged
- The Thank You number increases when a “Thank” task is logged
- The Reminder number increases when a “Reminder Letter” task is logged

Phone Calls

- Outgoing calls reflect the total of all logged “Call (Completed), “Call (Attempted)” and “Call (Attempted - Left Message)” tasks
- Talked To is the sum total of all “Call (Received)” and “Call (Completed)” tasks
- *Appts Produced is the sum total of all “Call” tasks logged with a “Next Action - Appointment”*
- Completed is the sum total of all logged “Call (Completed)” tasks
- Attempted is the sum total of all “Call (Attempted - Left Message)” tasks logged
- Received is the sum total of all “Call (Received)” tasks logged

Electronic Messages

- Sent is the sum of all “Email,” “Facebook Message” and “Text Message” tasks logged
- Received is the sum of all “Email,” “Facebook Message” and “Text Message” tasks logged as “Action - Email,” “Action - Facebook Message” and “Action - Text Message,” “Result - Received”
- *Appts Produced is the sum total of all Email, Facebook Message and Text Message tasks logged with a “Next Action - Appointment”*
- Email Sent is the sum of all logged Email tasks marked “Result - Completed”
- Email Received is the sum of all logged Email tasks marked “Result - Received”
- Facebook Sent is the sum of all logged Facebook Message tasks marked “Result - Completed”
- Facebook Received is the sum of all logged Facebook Message tasks marked “Result - Received”
- Text Message Sent is the sum of all logged Text Message tasks marked “Result - Completed”
- Text Message Received is the sum of all logged Text Message tasks marked “Result - Received”

Primary Appeal

- The value to the left of the / is the total weekly value of one-time gifts marked in association with the Primary Appeal and converted in the currency type default set by the user
  - To associate a donation with an appeal, simply find the donation, click the edit button next to the donation, then in the Appeal field, select the Appeal the donation is associated with.
    - If only part of the donation is associated with the appeal, you can also indicate that here.
  - To add a commitment to an appeal go to Tools Appeals Primary Appeal Asked select the “+” associated with a contact and enter Amount, Expected Date, mark as either “Received” or not received, and press the Save button
- The value to the right of the / is the total “Initial MPD One-Time Needs” goal

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The Gift Details Filter

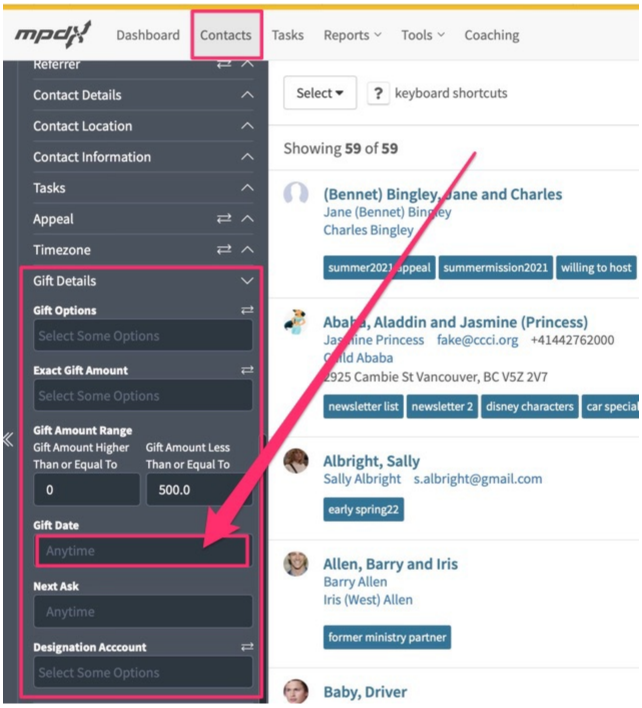
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

The Gift Details Filter

In MPDX it possible to filter your contacts and create a list of people who have made donations within a certain timeframe.

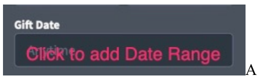
Under the Contacts tab, search for the filter category "Gift Details."

You will see several available filters to narrow your search including Gift Options, Exact Gift Amount, Gift Amount Range, Gift Date, Next Ask, and Designation Account.



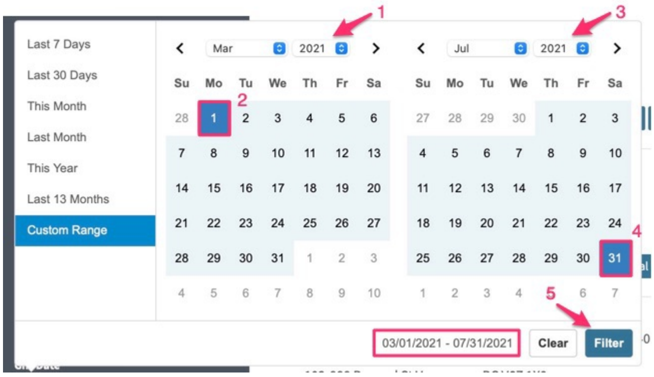
For a general search, under Gift Options and Exact Gift Amount, both options read "Select Some Options," but an entry is NOT required to run a search.

To set a gift date within a specific date range, scroll directly to the Gift Date box and click.



A pop-up box with a calendar view will appear. **To set a Custom Range follow these steps:**

Step 1: Enter the first range (from) in the left calendar. Use the menu arrows to choose a month, then year.
Step 2: Click on a specific start date within the left calendar. (For this example, I used March 1, 2021)
Step 3: Enter the second range (to) in the right calendar. Use the menu arrows to choose a month, then year.
Step 4: Click on a specific end date within the right calendar. (For this example, I used July 31st, 2021)
Step 5: You will see the date range at the bottom of the screen. When this is correct, click "Filter" to filter your contacts.



Following the order outlined above should result in a contact list of those who gave donations in the set range.

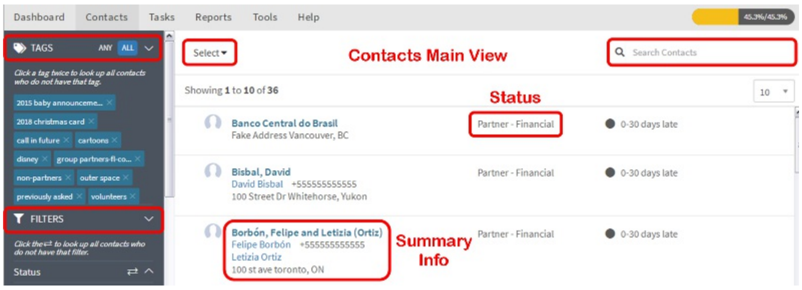
After selecting a date range, you will need to reset all filters or refresh the page to enter a new date range.

Contacts and Individuals

** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

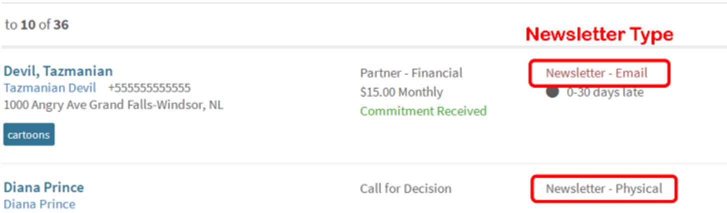
Contacts Main View

After you click on the Contacts page, the Contacts Main View is displayed.
Type a last name in Contact Search Bar (top right) to find a specific contact.
To the right of the contact name is Contact Status, i.e. Partner - Financial.
In the contacts main view, is the Summary Info for each contact.
The Select drop-down (top left) allows you to select any or all contacts to perform specific tasks.
On the left are Tags and Filters to view specific contacts, meeting select criteria.

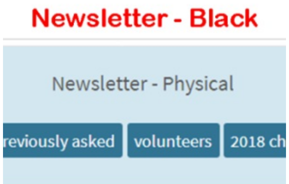


Newsletter Type

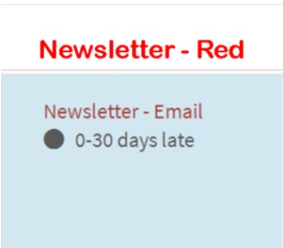
The Newsletter Types are Email, Physical, and Both.



A Newsletter Type displayed in Black indicates correct mailing information for a physical or email newsletter.



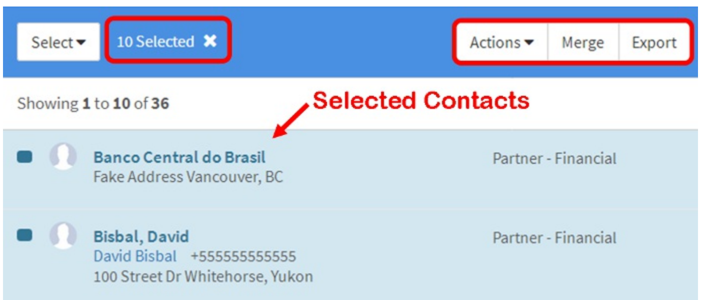
A Newsletter Type displayed in Red indicates incorrect mailing information for a physical or email newsletter.



Select Contacts

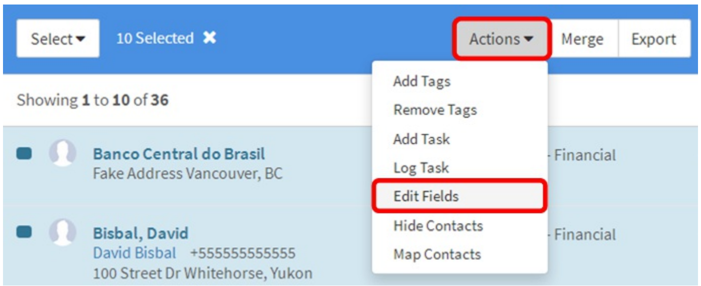
Click on the Select drop-down to select Contacts on Page or All Contacts.

Beside the Select drop down will be the Number of Contacts Selected, i.e., 10 Selected.
The Selected Contacts will be highlighted in light blue.
The Select feature brings up the Actions, Merge, and Export functions.



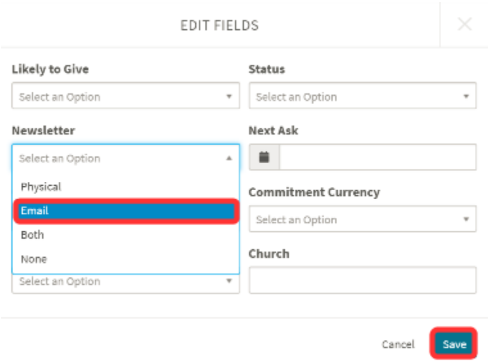
Actions

The Actions button allows global functions to select or all contacts.
Click Actions button.
Select the Edit Fields option.



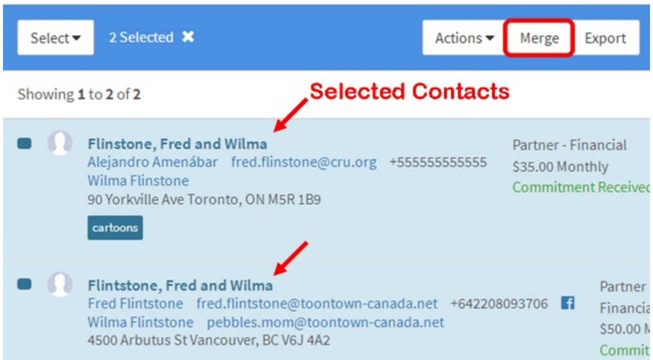
You can also Add Tags, Remove Tags, Add Task, Log Task, Hide Contacts, and Map Contacts (Google Maps) for select or all contacts.

To change the Newsletter type for the selected contacts:
Click the Newsletter field and select Email.
Update as many fields as you like then, click Save.



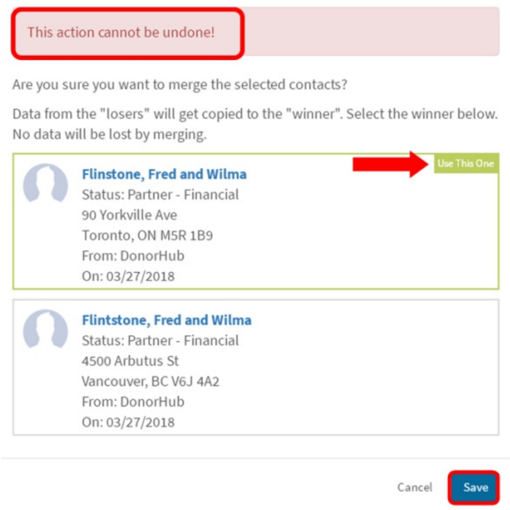
Merge

From the main contacts view, you can merge duplicate contacts.
Select the Duplicate Names by clicking on them.
Selected Contacts will be highlighted in light blue.
Then click on the Merge button.



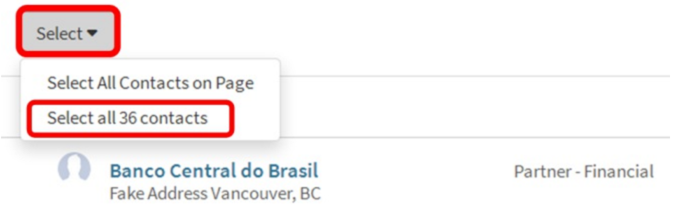
Select the contact you want to be the "winner" aka Use This One.
Click Save to perform the merge.

IMPORTANT: This action cannot be undone!

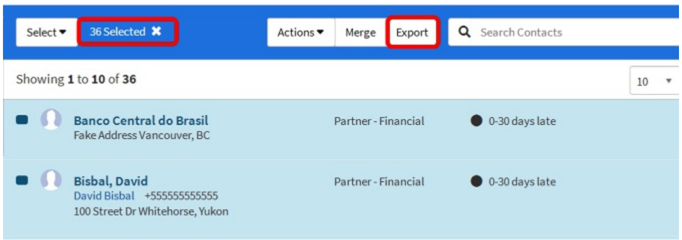


Export

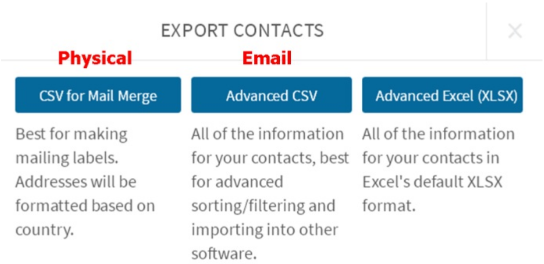
From contacts main view, click on the Select button.
Then click on Select All # Contacts i.e., 36 Contacts, to export your entire list of contacts.



After you select all contacts, a blue Taskbar will appear.
Click on Export.



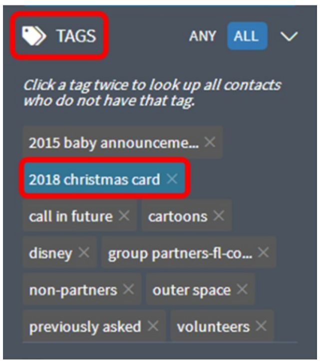
Choose CSV for a Mail Merge for physical newsletters.
Or choose Advanced CSV for email newsletters.



Tags

Click on any Tag to display those specific contacts, i.e., 2018 Christmas Card.

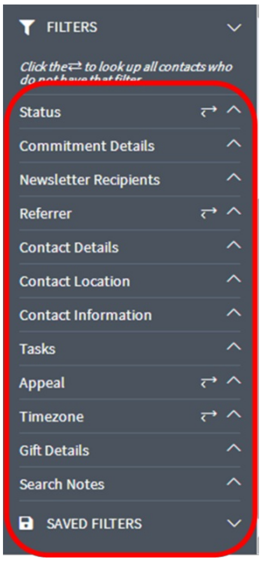
TNTConnect Groups and User Fields become tags in MPDX.



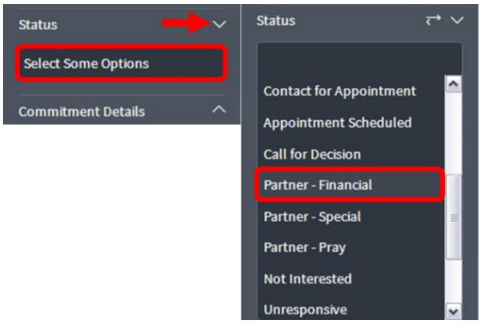
For more information on Tags click these links: Add, Remove or Edit a Tag | Organizing Contacts with Tags | Tags Cleanup After TntConnect Import.

Filters

With Filters you can select one or more options to display the desired list of contacts.
Filters compare to the TNTConnect Lookup menu.



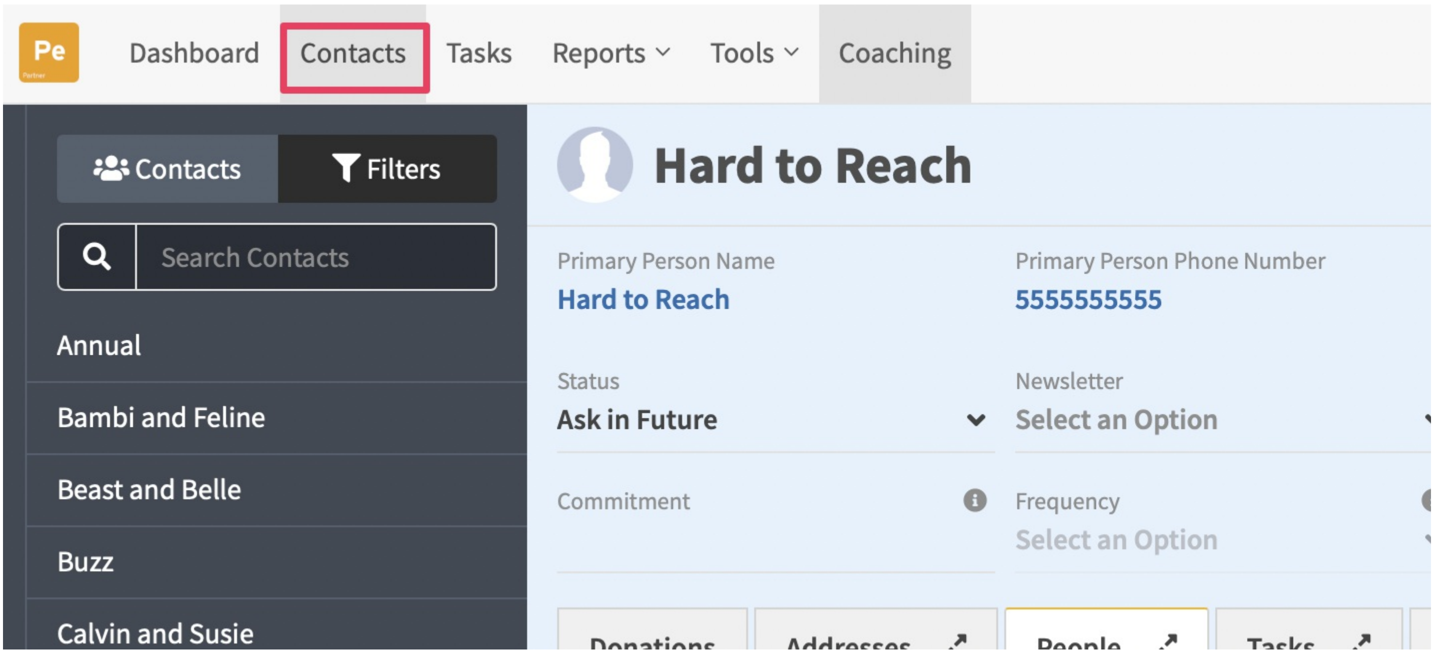
You can filter on a single criteria, i.e. Status: Partner - Financial
Click on the Drop-down Arrow to the right of Status.
Click on Select Some Options and choose Partner - Financial.



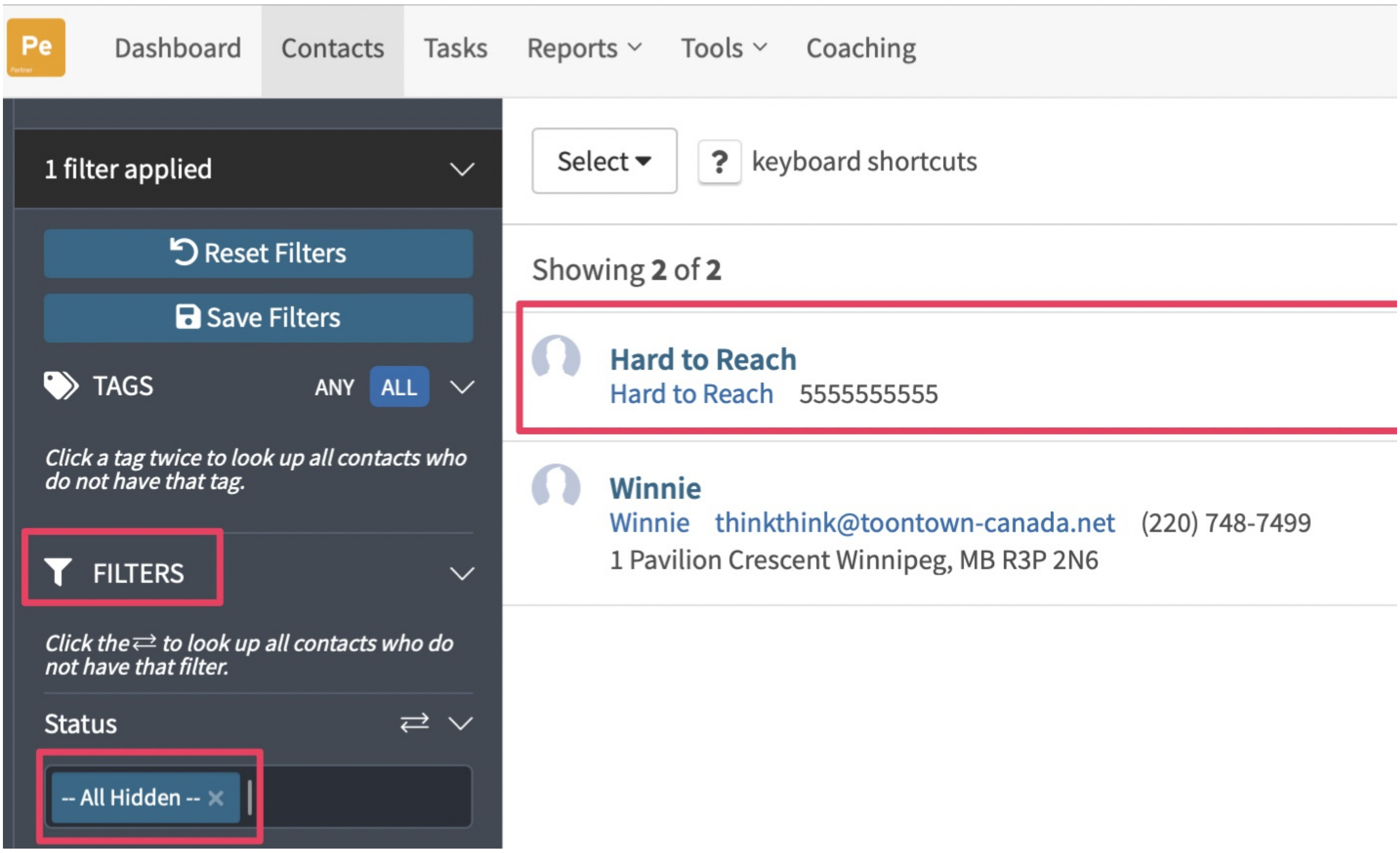
Click on the link: [Lookup with Filters and Tags] for more detailed instructions.

Hide or View Contacts

Hide Contact icon hides the contact from the main contact view.
From the contact's page you can click the "Hide Contact" button to hide it.



You can find hidden contacts by name or by applying the filter Status: All Hidden.

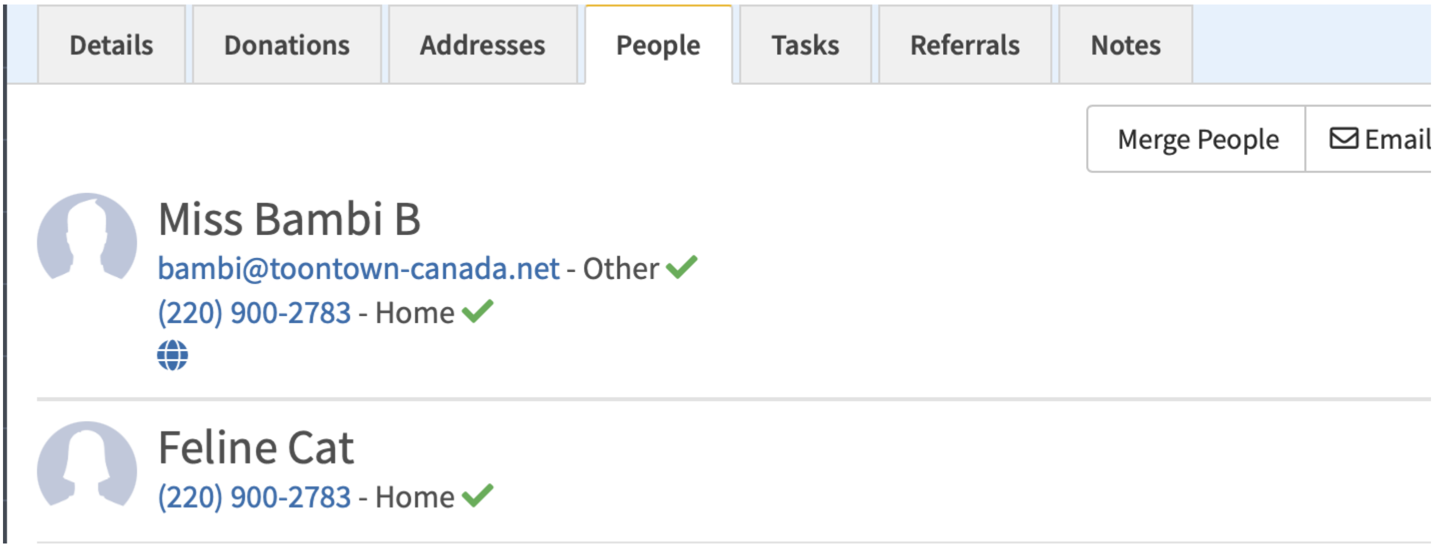


Contacts - People

The Individual Contact is considered a household. A husband and wife would be members of the household and any children, as well.
The Individual Contact Summary, in blue, displays:
The Primary Person's, Name, Phone Number, Email Address, and the Primary Address Status, Newsletter type, Likely To Give, Commitment amount, Frequency, and Currency
Each field in the individual contact summary can be edited right there.
On the top right is Individual Task Bar where you can:
Add Referrals, Add Task, Log Task, and Hide Contact for this single contact.

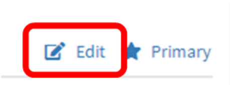
People Tab

People Task Bar - you can Merge People (duplicates), Email All, and Add New Person.
People Summary - displays name, email and phone number, etc..
Click on the Star icon to mark the Primary contact.
Click the Edit icon (paper/pen) to change the People information.



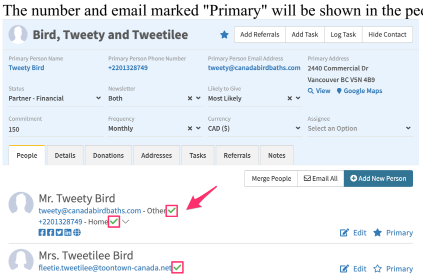
Editing People Information

To manually enter or edit an individual's information, click on the Edit icon.



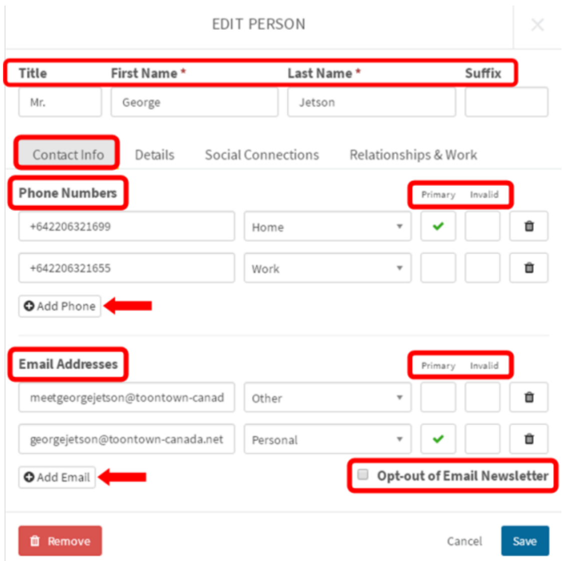
The Contact Info Tab is displayed by default. On this tab you can:
Add or edit Title, First Name, Last Name, Suffix
Edit Phone Numbers, Add Phone, or delete a phone number.
Set a Primary phone number or mark Invalid old or disconnected numbers.
Edit Email Addresses, Add Email or delete an email address.
Set a Primary email address or mark an old email address Invalid.
As a note:

- The number and email marked "Primary" will be shown in the people tab, next to each person's name with a green checkmark:

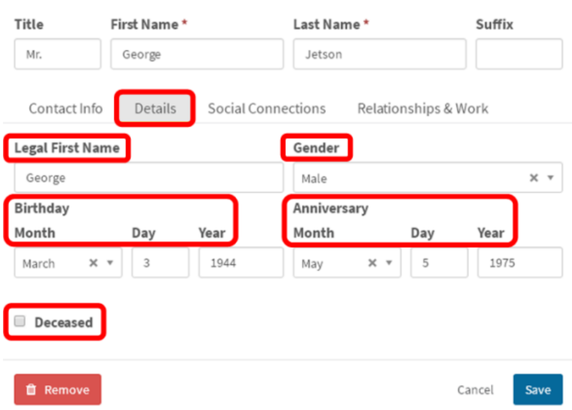


- Unless you delete the information entirely, you will still be able to see it when you click "Edit."
- In the case of locked information, you won't be able to delete or make changes, but marking the email or number "Invalid" will hide it from view.

Mark the Opt Out of Email Newsletter Checkbox
The Opt Out Removes a specific person from syncing with MailChimp, being exported in the email newsletter selection, and still allows other individuals to receive email newsletters.

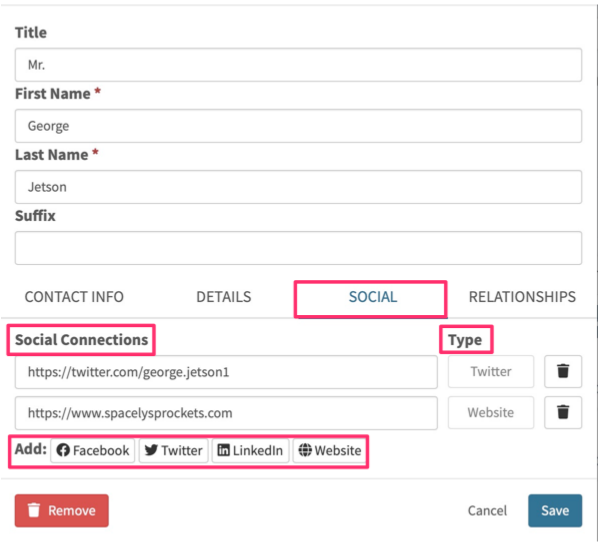


The Details Tab allows you to:
Add or edit Legal First Name.
Select Gender.
Add or edit Birthday Month, Day, and Year.
Add or edit Anniversary Month, Day, and Year.
Mark a specific individual as Deceased.
Checking this box removes this person from the envelope and greeting information, as well as email newsletters.



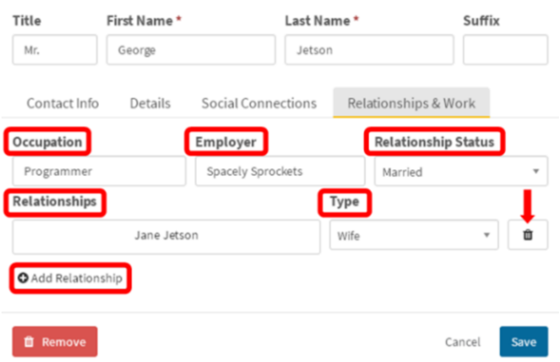
The Year field must be filled in for both birthdays and anniversaries to be displayed. If the year is unknown, simply enter 1900 or 2000.

The Social Connections Tab allows you to:
View or edit existing Social Connections.
Click on the Trash icon to delete existing social connections.
Add Facebook, Twitter, LinkedIn, and Website URLs (links).

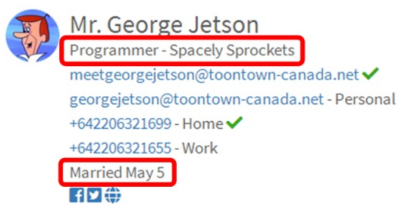


Social connections will be displayed with the corresponding icon, i.e., *Facebook and Twitter*
The globe icon represents a website or blog URL.

The Relationships and Work Tab allows you to:
View, edit, or add an Occupation and Employer.
Select or change a Relationship Status, i.e., Married.
Select or change a Type of relationship, i.e., Wife.
Click the Trash icon to delete an existing relationship.
Click the Add Relationships button to add a spouse, child, or other family member.

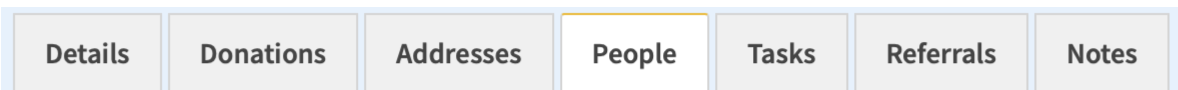


The Occupation and Employer, as well as the Relationship Status, will be displayed on an individual's people card.



People Contact Tabs

Beneath the individual contact summary are 7 tabs: Details, Donations, Address, People, Tasks, Referrals, Notes. Below is a detailed description of the first 6 tabs.

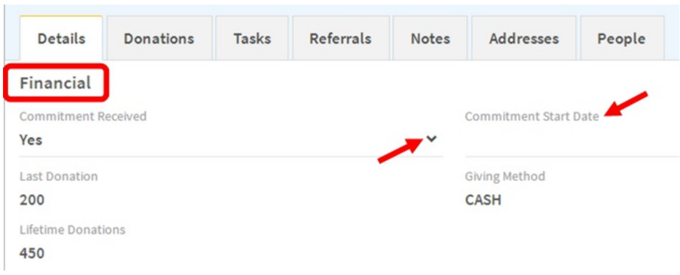


Details Tab

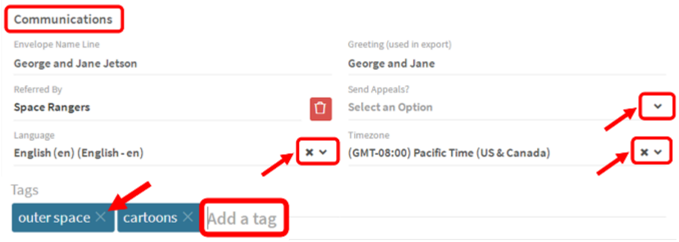
The Details tab has 3 sections: Financial, Communication, and Other Details. Below is a description of each section and the specific information listed.

Details Tab - Financial

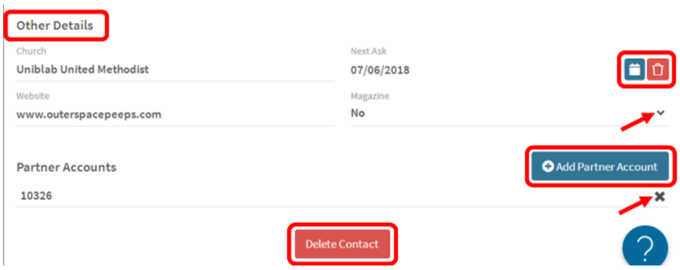
The Financial section displays Commitment Received, Last Donation, Lifetime Donations, Commitment Start Date , and Giving Method.
NOTE: The Commitment Received drop-down is a freely editable field. The system does NOT change it automatically when a contact begins a gift, or stops a gift. The MPDX user must mark the commitment received "Yes" or commitment received "No."
To edit Commitment Received, click on the drop down arrow to the right.
To add or edit the Commitment Start Date, click the line below it.



The Communication section displays:
Envelope Name Line, Referred By, Language, Greeting, Send Appeals, Time Zone, and Tags.
Send Appeals allows you to track donors who give a gift toward an appeal.
However, this information does not sync back to your organization.
Select "No" for Send Appeals and MPDX will exclude them.
Language information is exported to MailChimp so you can send newsletters in different languages.
Time Zone is a field you can filter on for contacts within that timezone. Click the X to delete or the drop down arrow to edit this field.
To delete a Tag, click on the X to the right or to add tags, click the Add a Tag text.



The Other Details section displays:
The individuals contact's Church, Website, Next Increase Ask, Magazine (from TnTConnect), Partner Account and Delete Contact button.
Edit the Next Ask by clicking on the blue Calendar icon or delete the date by clicking on the Trash icon.
Partner Accounts can be deleted by clicking on the X to the right or can added by clicking on the Add Partner Account.

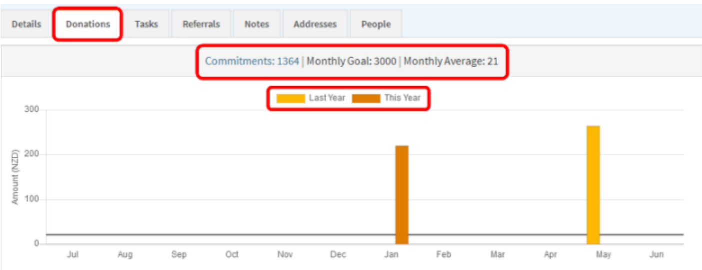


Each individual contact must have a Partner Account in order to add or receive donations.

Donations Tab

The Donations Tab displays:

A Bar Graph of gifts for the fiscal year (from the current month). The graph tracks this contact's Commitments, Monthly Goal, and Monthly Average. The bar graph displays gifts from Last Year and This Year, side by side.



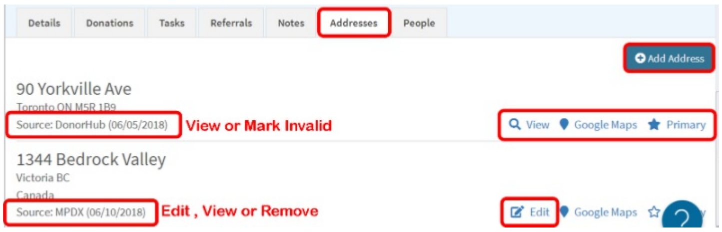
The Gift Details section of the donations tab displays:
The Partner No. (account), Date, Amount, Designation (account), Method, and Appeal (if applicable).
At the bottom of the gift details is the lifetime Total Donations by currency type.
Edit a specific donation by clicking on the Paper/Pen icon to the right.

Partner No.	Date	Amount	Designation	Method	Appeal
10326	01/10/2018	200 CAD	10106	CASH	
10326	05/23/2017	125 CAD	10093	CASH	
10326	05/23/2017	125 CAD	10106	CASH	
	Total CAD Donations (3):	450 CAD			

Addresses Tab

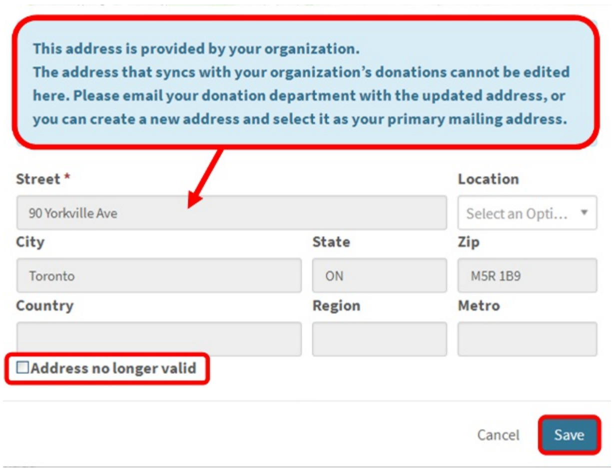
Any imported addresses or added manually will be listed under the Addresses tab.
If the Source is your Organization, i.e. DonorHub, it can only be Viewed or Marked Invalid.

If the Source is MPDX, TNTConnect, or .CSV you can Edit, View, or Remove the address.



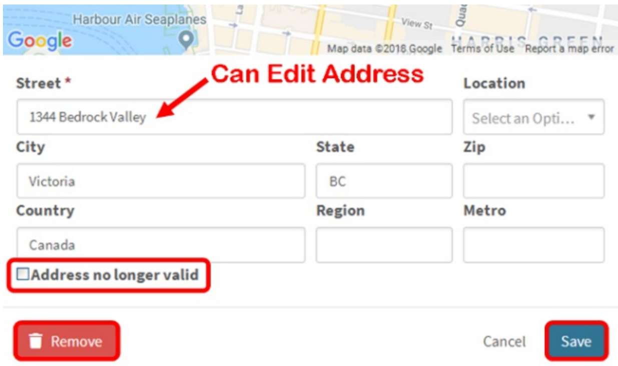
View Only Addresses

Provided by Organization are view only (fields are grayed out).
When applicable, click on Address No Longer Valid and click Save.



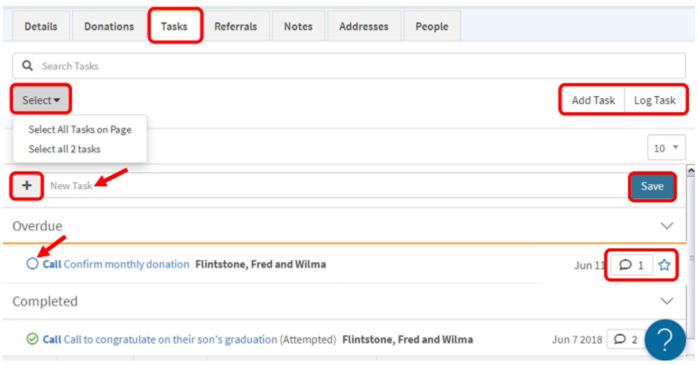
Edit or Remove Address

With an imported or manually added address you can:
Edit any address field.
Mark it Address No Longer Valid and click Save.
Click Remove to delete it.

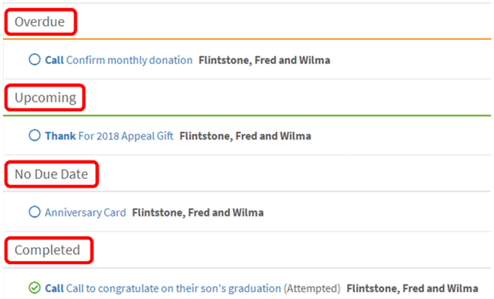


Tasks Tab

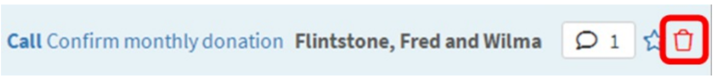
Search Tasks by type, i.e. Call, to locate those specific types of tasks (helpful if you have many)
On the top right, you can Add Task (upcoming), Log Task (completed).
Select All to make global changes to your tasks.
To add a task, you can also click on the text New Task, type the name, and then click Save.
On the left side of a task, click on the Circle icon to mark a Task Completed.
Click on the Chat Bubble icon to add Comments to a task (i.e. phone call details).
Next to the chat bubble, click on the Star icon to make it a Priority Task.



Below the New Task bar are the types of Tasks:
Overdue, Upcoming, Completed, and Completed Tasks associated with this contact.

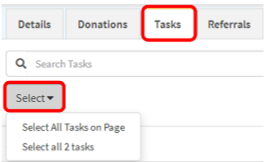


To Delete a Task, hover your mouse over by the chat bubble icon.
The task will be highlighted in blue and the Trash icon will become visible.
Click the Trash icon to delete the task.



Task Tab - Actions

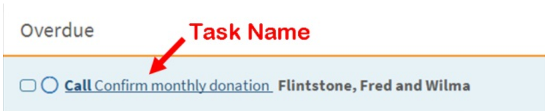
To perform any actions, one or more tasks must be selected.



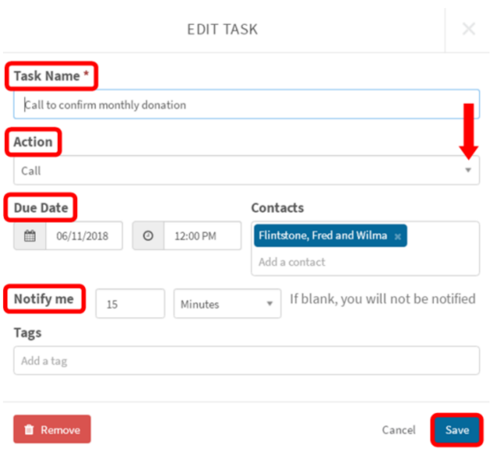
Once Tasks have been selected, the Task Bar (blue) and and the Actions drop-down is displayed .
To the right of the Select drop down are the # of Selected tasks. Selected Tasks are highlighted in light blue.
Click Actions button and select a specific task to perform:
Complete Tasks Edit Tasks Add Tags Remove Tags Delete Tasks

Edit Tasks

To edit a task, click on the Task Name link.



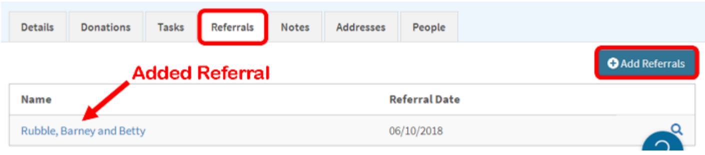
In the Edit Task window, you can:
Change the Task Name.
Select or change the Action by clicking the drop-down arrow.
Set a Due Date and time.
Set a Notify Me in minutes or hours (if blank you will not be notified).
Add new or existing Tags Click Save when you've finished.



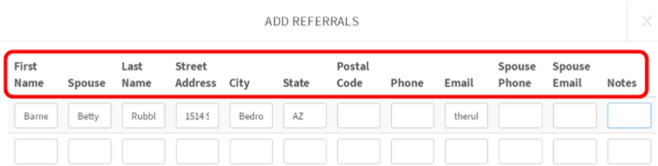
If you have connected your Google mail account, the content of email exchanges will show up here as well.

Referrals Tab

To add a referral, click on the blue Add Referrals button on the top right.
After the referral has been added, you will see the Referral Name and Referral Date listed.



Type at the First Name, Spouse First Name (if applicable), and Last Name.
Fill in any of the referral's contact information, i.e. Street Address and Email.
Add as many names as are applicable.
When finished, scroll down and click Save.
Once a referral has been added, that referral will become a new contact in your Contacts Main View.



Notes Tab

Add personal updates and communication about a contact.
This can also be done with Tasks like Email and Calls, as well.

If you've imported your TNTConnect database, your Referred by: would be found in Notes for each contact that had a referral.

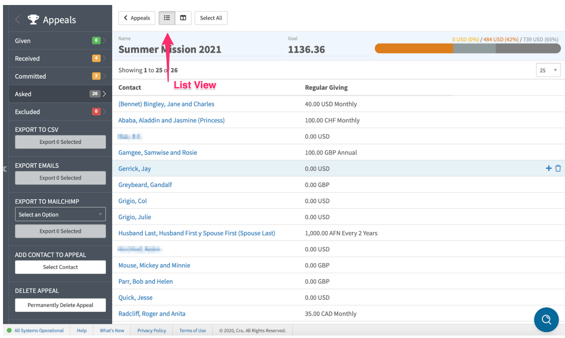
List View for Appeals

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

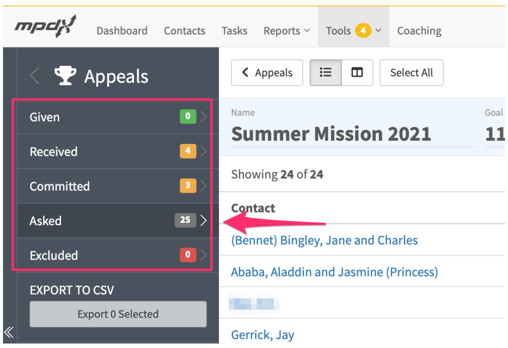
List view is a helpful tool that allows you to view and manage your progress for an appeal.

Using List View

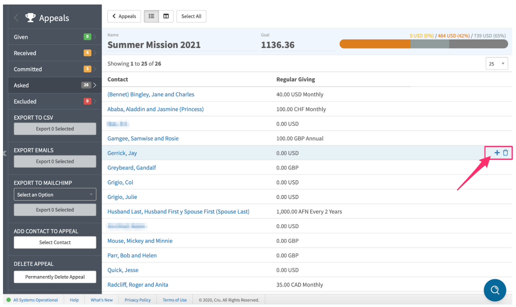
- Go to the Tools tab and select your appeal. Then click the List View button.

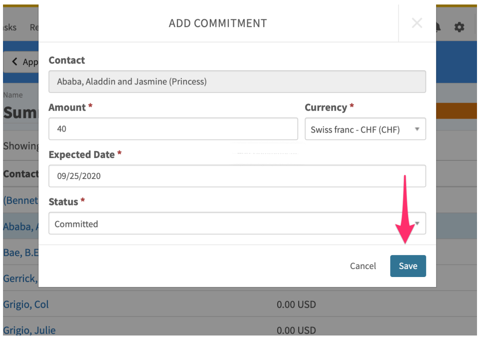


- You can view the contacts in each category, **Given, Received, Committed, Asked,** or **Excluded** in list form by clicking on the desired category title in the left menu.

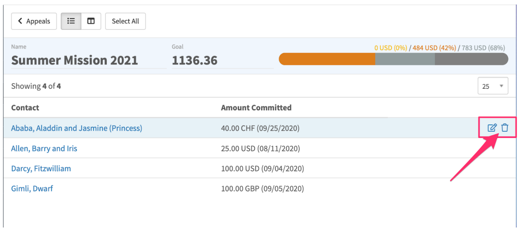


- You can move contacts from the **Asked** column to the **Committed** or **Received** columns by entering, or editing a donation commitment.
    - When adding a commitment, you'll be prompted to enter the **Amount**, **Expected Date** you expect to receive the gift, **Status**, and **Currency**. Click Save to preserve your changes.

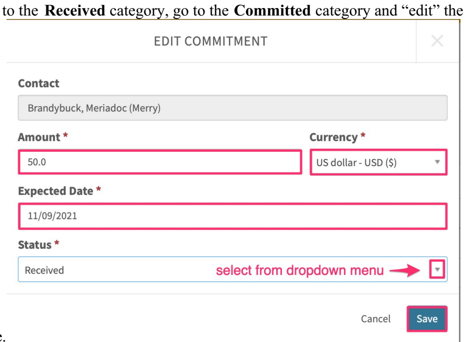




- You can move contacts from the **Committed** or **Received** columns by editing a donation commitment.
  - To remove a commitment from an appeal, go to the **Committed** category, then click on the trash icon to the right of the contact. Select "Yes" to confirm and delete. This will delete the commitment and move that contact back to the **Asked** category.



  - To mark a commitment as received and therefore move that contact to the **Received** category, go to the **Committed** category and "edit" the commitment. Update the **Amount**, **Expected Date** to the day the



commitment was received, **click the Received checkbox** and "Save.
- When a donation associated with an Appeal is received and processed by your organization, MPDX will move the gift automatically to the **Given** category.

Track an Appeal

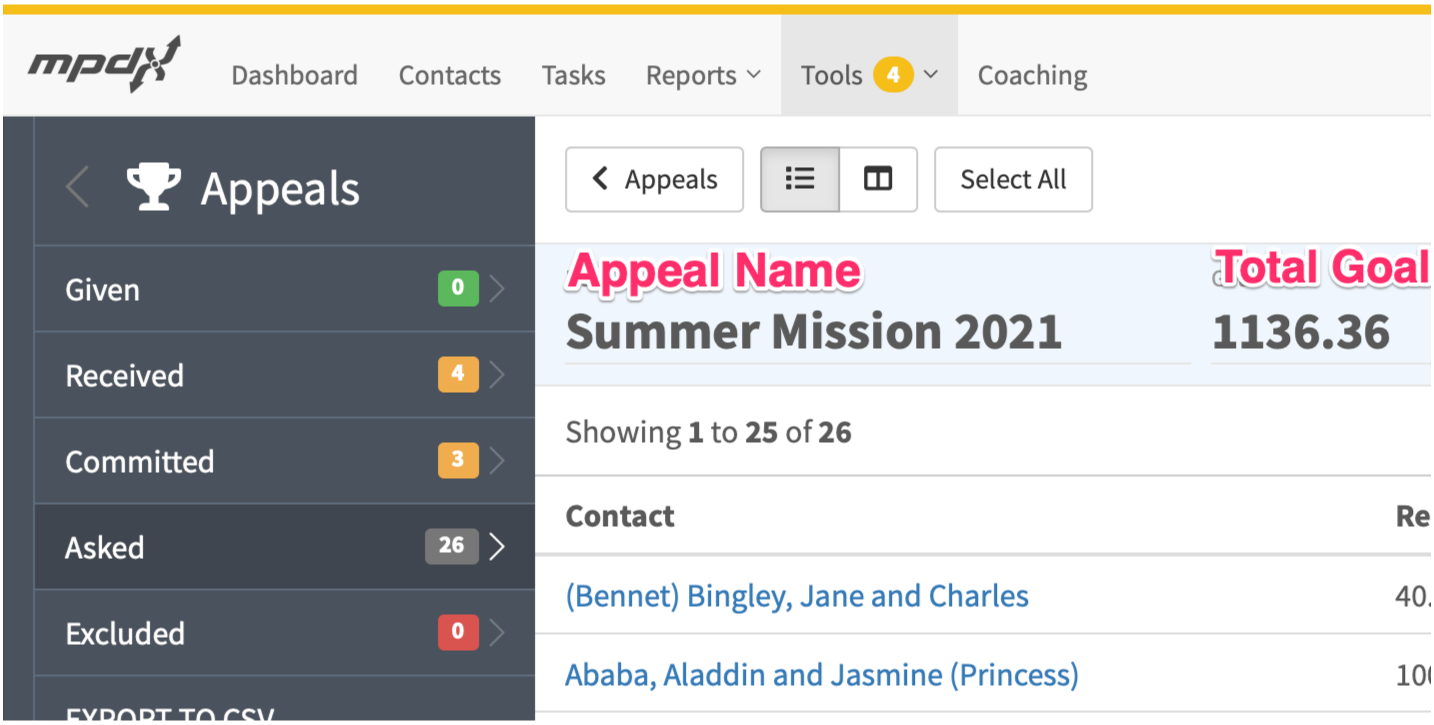
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

If you need information on creating an appeal, click this link: [Setup an Appeal] for detailed instructions.

Tracking An Appeal

Go to the Tools Tab, and select the appeal you wish to view.

Once within the Appeal, look for the summary of your progress in the shaded blue section. This summary shows the **Appeal Name, Total Goal**, and a **Progress Chart**. **Appeal Name** and **Total Goal** can be changed by clicking the existing text and typing. The Progress Chart is updated as donations are associated with, or added to, an appeal.



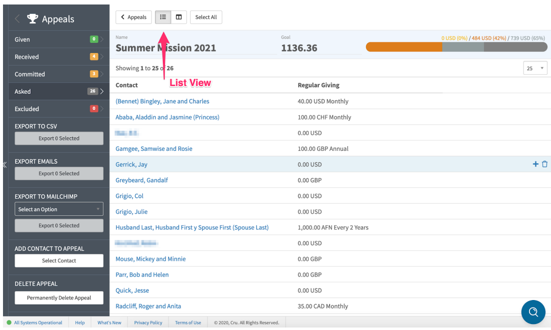
The Progress Chart of the appeal is color-coded:

- **Total Given** is shown in gold
- **Total Received** is shown in orange
- **Total Pledged**, not yet given, is shown in gray
- Dark Gray indicates the amount that still needs to be raised

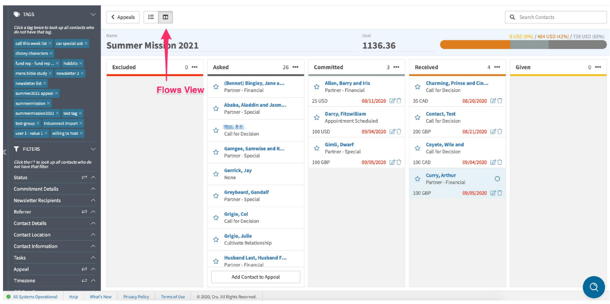
List View vs. Flows View

The list of contacts in appeal can be viewed in List View or Flows View. You can toggle between these two views at any time.

List View

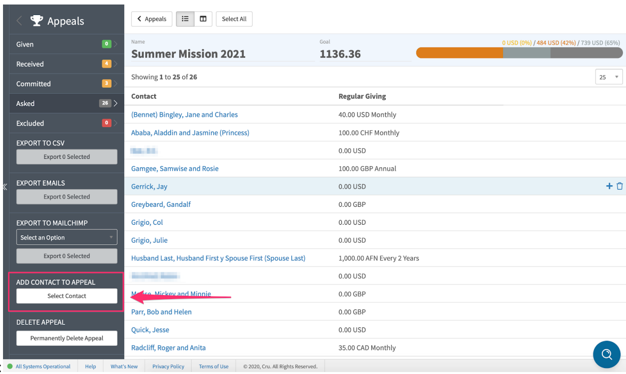
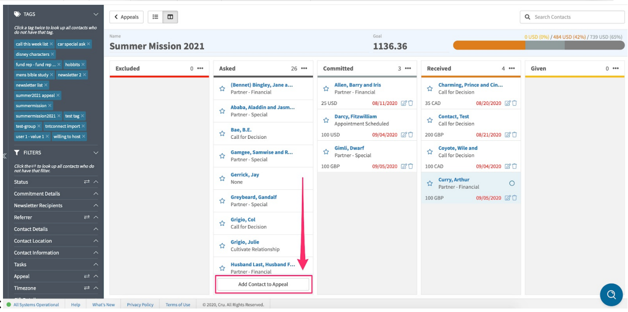


Flows View



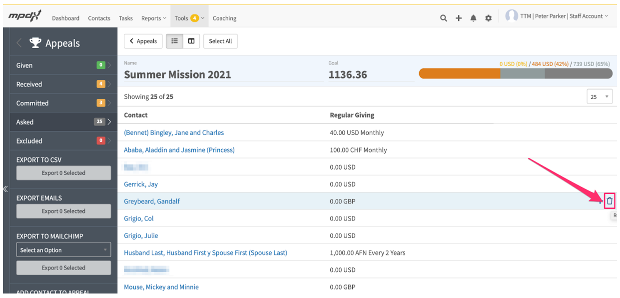
Adding and Removing Contacts from an Appeal

You can Add a Contact to an Appeal from within either List View or Flows View.

- Add Contact - List View: 
- Add Contact - Flows View: 

To **Remove a Contact from an Appeal** click on the Trash icon to the right of their name under the List view. And click “yes” to confirm when prompted.

Removing a contact from an appeal does NOT remove them from MPDX.



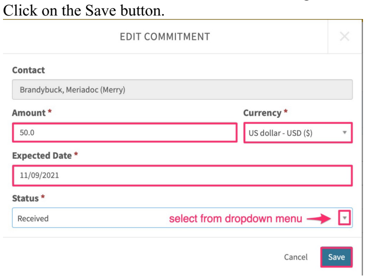
To learn more about **Tracking an Appeal using List View,** go to [this article](#).
To learn more about **Tracking an Appeal using Flows View**, go to [this article](#).

Both the List and Flow view organize contacts into the same **5 Categories**:

Excluded: a list of contacts intentionally excluded from your appeal.
Asked: a list of contacts added to your appeal who have not yet committed or given.
Committed: a list of contacts who have committed but whose gift has not been received.
Received: gifts you have in hand that have not yet been processed by your donation processing system.
Given: partners whose gifts have been received by your donation processing system.

General details about the categories in List and Flow view:

- Click on any contact name to view that contact record on the [Contacts](#) page.
- All contacts begin in the **Asked** category.
- You can only move contacts to the **Excluded** category within the Flow view. Do this by clicking the associated contact and dragging them to the **Excluded** column. This differs from deleting a contact from an appeal, because the contact is still visible within the appeal.
- You can only delete a contact from an appeal under the List view. Do this by clicking on the Trash icon to the right of their name under the List view. Click “yes” to confirm when prompted. Deleting a contact from an appeal does NOT delete them as a contact from MPDX.
- If a contact is in the **Received** category, you can edit the amount and date you received the gift.
  - Under Actions, click on the Edit icon (paper/pen) to the right of a contact name.
  - Update the Amount and Expected Date.
  - Click on the Received Checkbox ONLY if the gift has been given.
  - Click on the Save button.



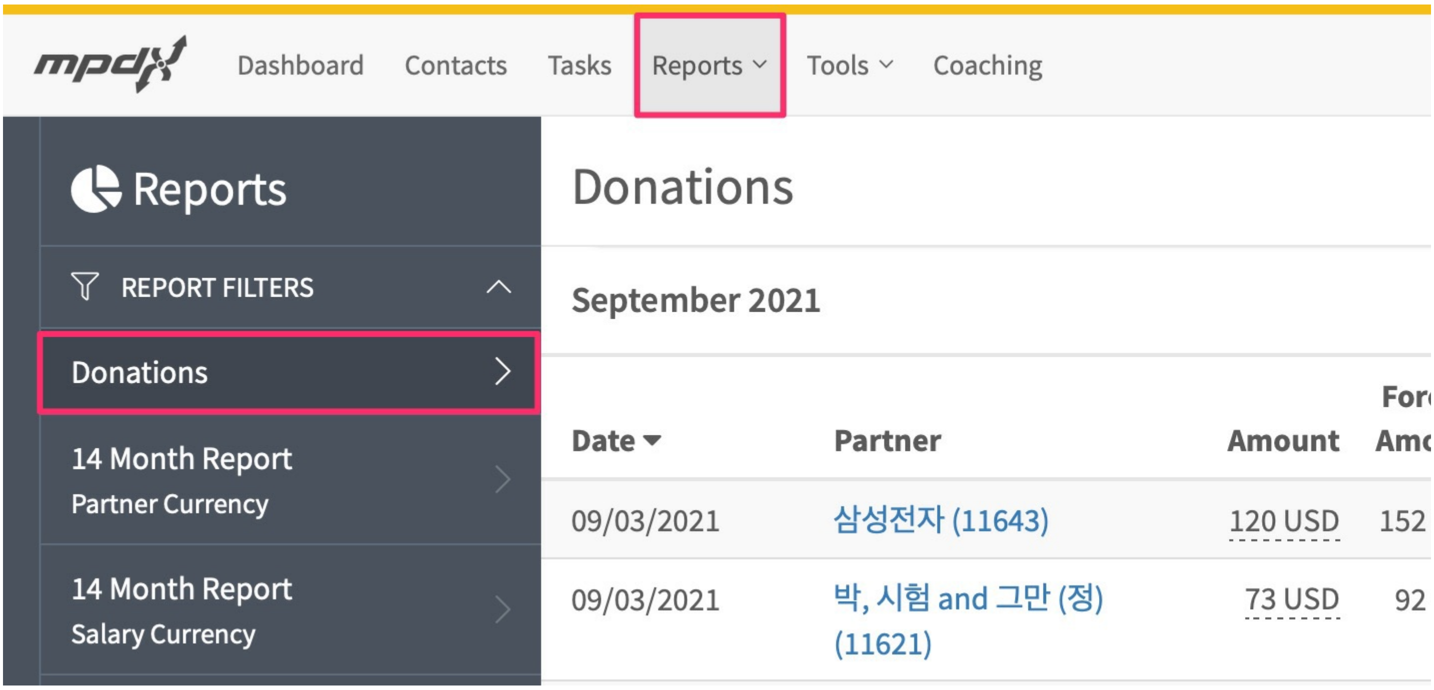
- When you add, edit or associate a gift to a contact within an appeal, MPDX will update the donation and move the contact to the appropriate category.
- When a donation associated with an Appeal is received and processed by donation services, MPDX will move the gift automatically to **Given**.

Applying a Donation to an Appeal

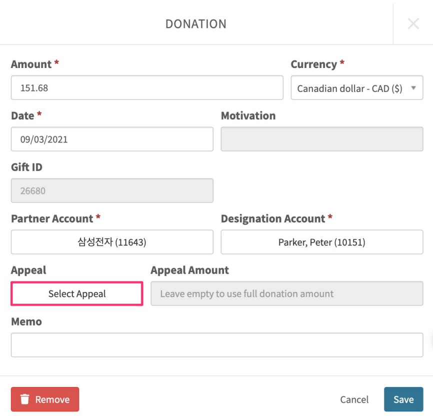
If you receive a donation not listed under your appeal, you can associate the donation with the appeal.

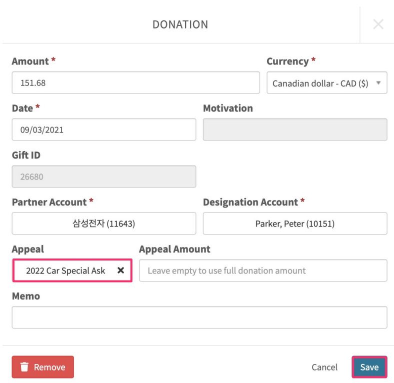
Go to the Reports page (or the Donation tab within a Contact), and scroll down to Donations.

Click on the Edit icon (paper/pen).



Click on the Select Appeal button.



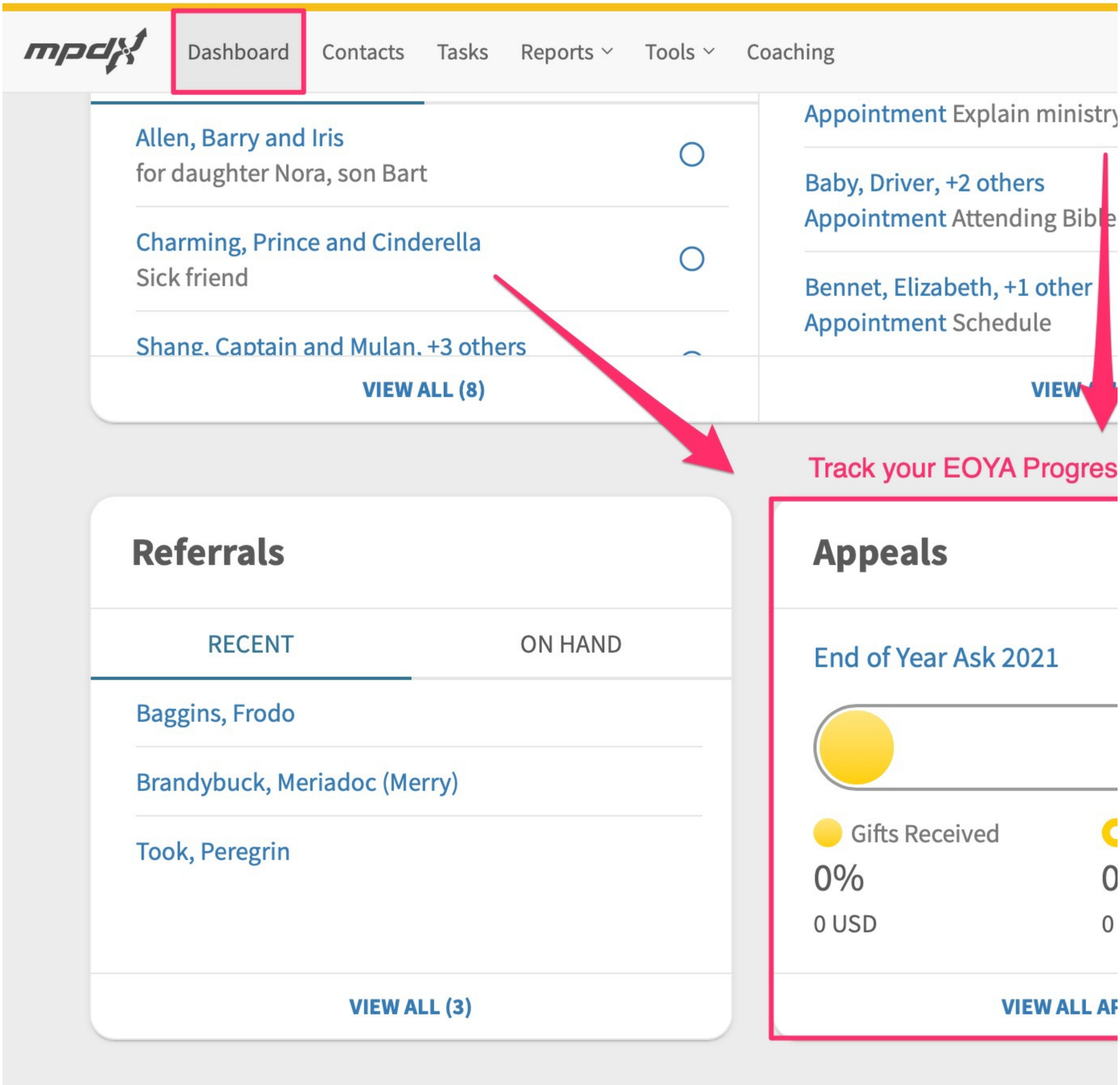


After the Selected Appeal, i.e., 2022 Car Special Ask has been added, click the Save button.

Tracking a Primary Appeal From the Dashboard

The Appeal marked as Primary, will appear on your Dashboard with the total progress to date.

- Click on the Appeal to view the details.



For MPD Coaches, Team Leads and Supervisors

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

The MPDX coaching tool is for MPDX Users, MPD coaches, and supervisors to have a way to easily see and track the MPD progress of another MPDX user who has opted to "share" their MPD progress tracked through MPDX.

Table of Contents

Step One: Have the User You Coach "Share" Their Account With You

An invitation to view an account shared does NOT give the coach the ability to update or alter their MPDX account and information. It simply allows the coach to view the number of calls, appointments, and overall trend of reaching the MPD goals set. (Similar to other MPD progress reports but without the need to manually enter the data). A coach will NOT be able to see the names, contact information, personal identifiable information, or financial information of any ministry partner. Personal information will be hidden so giving amounts and initials, NOT names, addresses, donor identification numbers, etc. are shared.

We suggest you send the following email to the staff you will be coaching. This will help them know how to add you as a coach.

> Hello ______________,
>
> In order for me to be able to act as a coach for you in MPDX I need you to go into your MPDX account and invite me. To do so:
>
> 1. Log in to MPDX
> 2. Go to Settings Manage Coaches Manage Account Coaching Access box

3. In the “ person.to.share@cru.org” field, type desired coach’s email address
4. Click “Share Account”

Once you do this I will get an email from MPDX inviting me to accept your invitation.

Along with this, please read the help article found **here** and follow the steps there to setup your goal.

I’m looking forward to helping you reach your MPD goals!

Sincerely,

Your Coach

Step Two: View The Account You are Coaching

The staff person you are coaching must first share their account with you. Once they have done so:

1. Open the automated email invite from noreply@solertiaelabs.com
2. Select “Accept Coaching Invite”
3. Login to your MPDX account
4. Select “Coaching” tab in the menu bar
5. Select the staff person you want to view (you may have multiple) by clicking the “See Details” button for the full view

Step Three: Verify MPD Goals and Set Up the MPD Time Frame

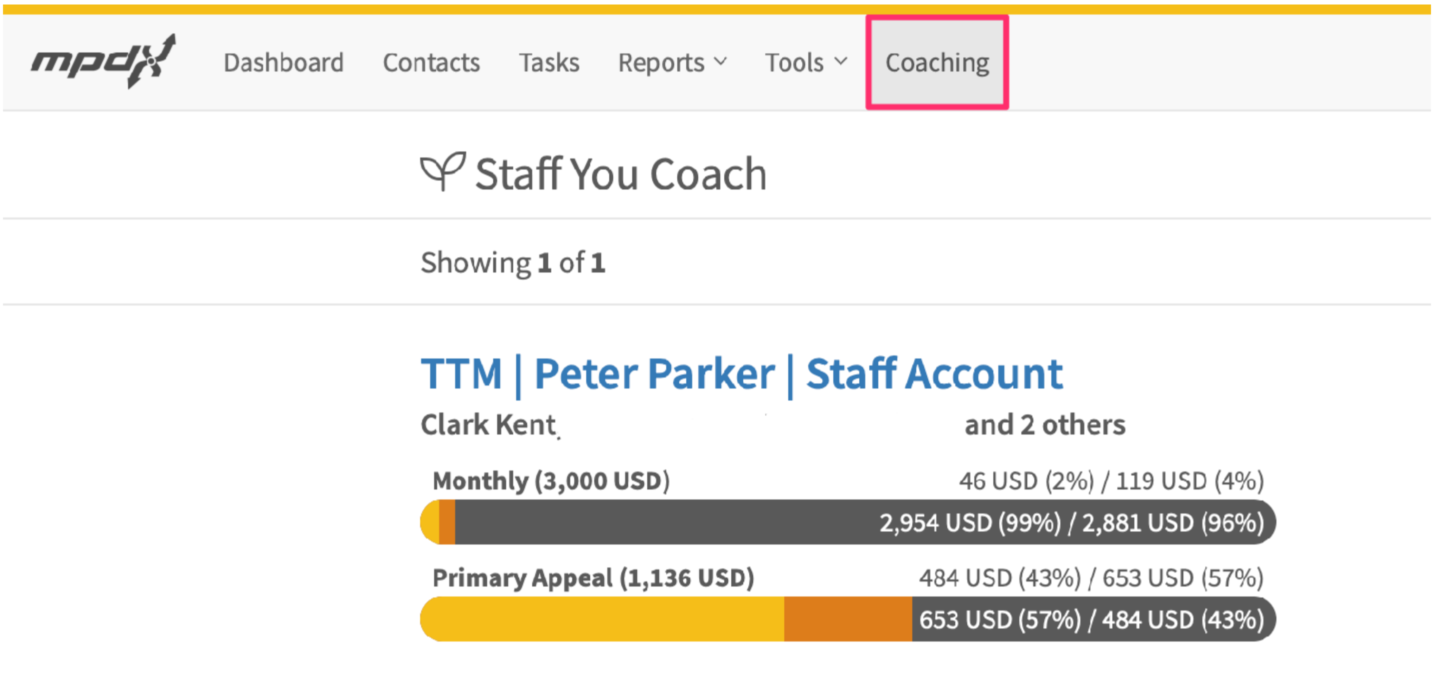
1. Settings Preferences Account Preferences
2. Make sure that the staff you coach has updated their Monthly Goal field with the most current amount, and set up an Appeal that reflects their one-time MPD goals
3. Working with the staff you coach, determine together and have them manually enter their MPD Start Date, MPD End Date, MPD Goal, and any appeals in progress.

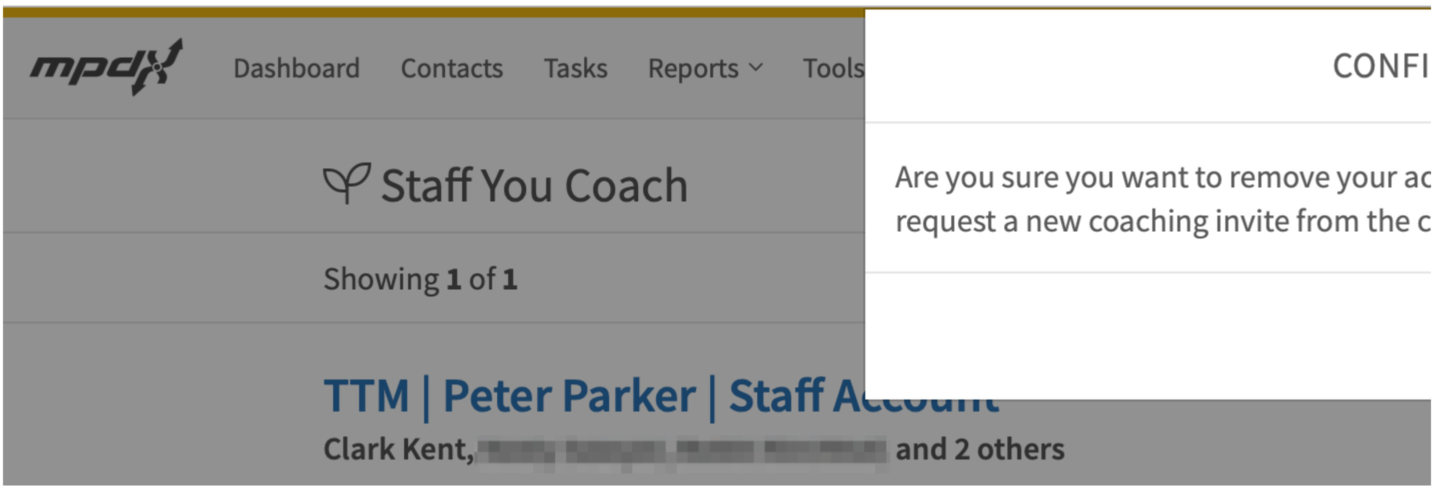
This will help you track their weekly progress in reaching the set MPD goals. Emphasize the importance of keeping MPDX information up to date.

When you no longer need coaching access to an individual's account, remove yourself as their coach, or ask them to remove you as their coach:

To remove yourself:

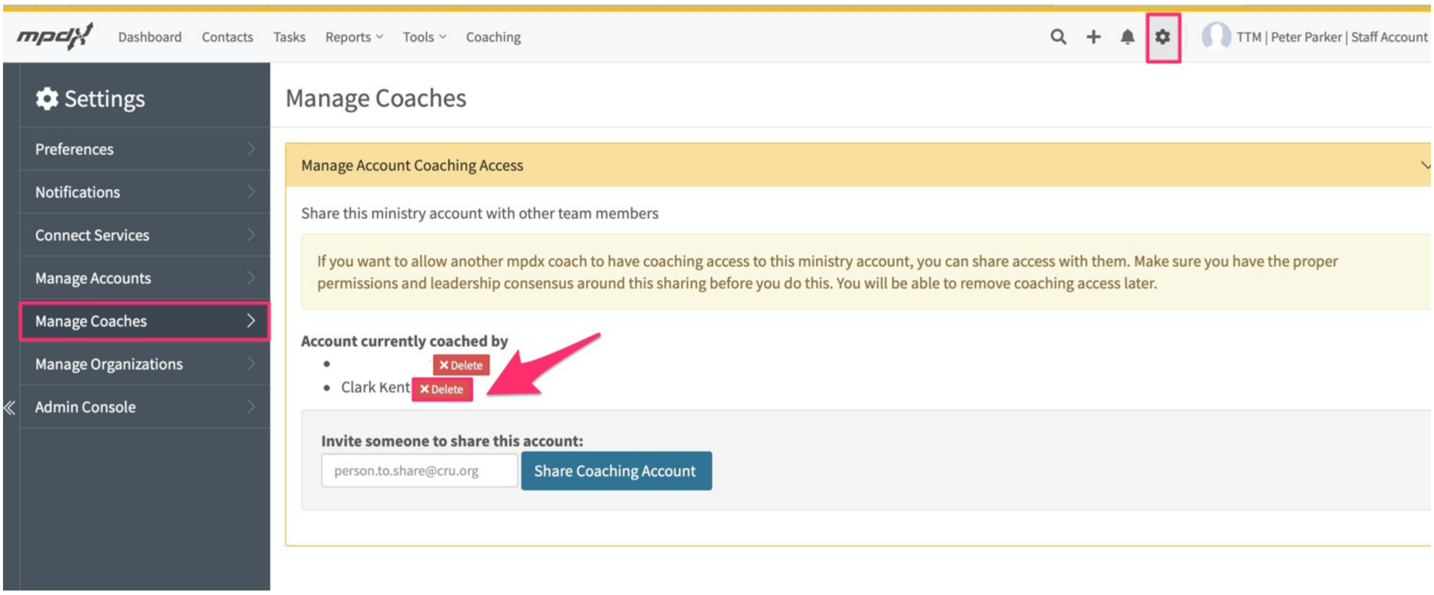
Go to the Coaching Tab Staff You Coach Find their name. Click the "Remove Coaching Access" button next to "See Details" and click "Yes" to confirm when prompted.





Your person you coach can also remove you:

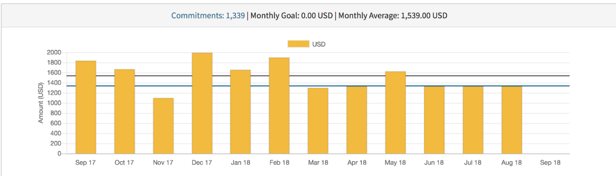
Have them go to their MPDX Settings Manage Coaches. And click the red "Delete" button next to your name.

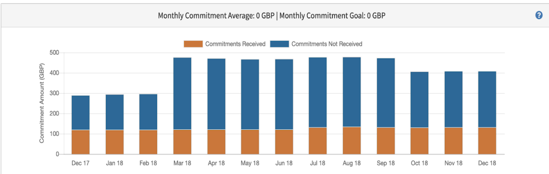


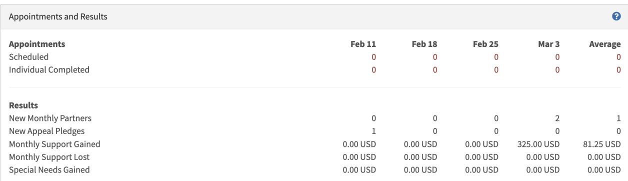
What You Will See As the Coach of a User

Note the dark gray Coaching sidebar component to the left of the screen. This sidebar gives a summary of each user coached with basic information to note concerning their progress.

The detailed, full-page view of the coached user's MPD progress will look like this:

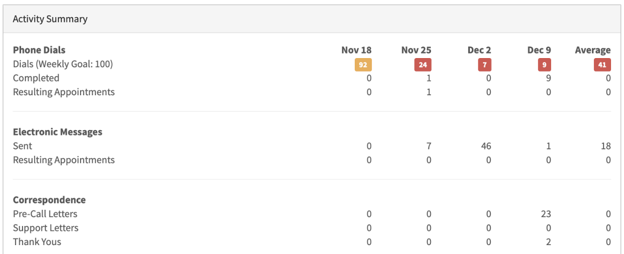






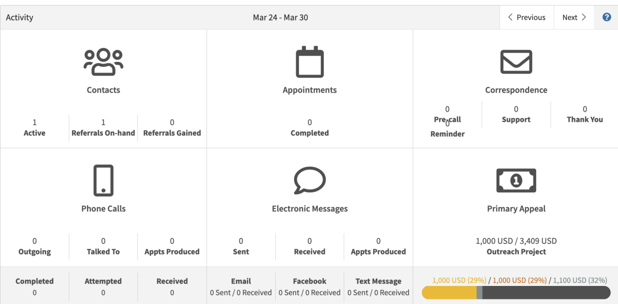
Appointments and Results

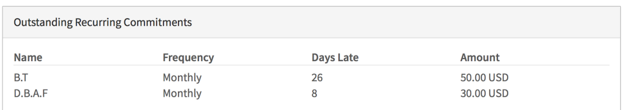
Appointments	Feb 11	Feb 18	Feb 25	Mar 3	Average
Scheduled	0	0	0	0	0
Individual Completed	0	0	0	0	0
Results					
New Monthly Partners	0	0	0	2	1
New Appeal Pledges	1	0	0	0	0
Monthly Support Gained	0.00 USD	0.00 USD	0.00 USD	325.00 USD	81.25 USD
Monthly Support Lost	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD
Special Needs Gained	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD



Activity Summary

Phone Dials	Nov 18	Nov 25	Dec 2	Dec 9	Average
Dials (Weekly Goal: 100)	52	24	7	9	41
Completed	0	1	0	9	0
Resulting Appointments	0	1	0	0	0
Electronic Messages					
Sent	0	7	46	1	18
Resulting Appointments	0	0	0	0	0
Correspondence					
Pre-Call Letters	0	0	0	23	0
Support Letters	0	0	0	0	0
Thank Yous	0	0	0	2	0





Outstanding Recurring Commitments

Name	Frequency	Days Late	Amount
B.T	Monthly	26	50.00 USD
D.B.A.F	Monthly	8	30.00 USD

Outstanding Special Needs

Name	Frequency	Days Late	Amount
D.B.A.F	Monthly	0	30.00 USD
F.F.A.W	Monthly	0	25.00 USD
K.C.A.S	Monthly	0	125.00 USD

Contact Tags

Tag Name	Jan 28	Feb 4	Feb 11	Feb 18	Feb 25	Mar 3	Total
eoya 2023	0	0	1	0	0	0	1

Task Tags

No tags added in last 6 weeks.

Weekly Report

Previous Next

No answers found.

This information gives you a detailed look into the amount of commitments the person you coach has, as well as their level of effort in MPD.

Understand How the Values Change by Component

The dark gray “Coaching” sidebar component shows the Balance, Staff ID numbers, Last Prayer Letter, Weeks on MPD, MPD Report Date, Basic Contact Information, and Birthday/Anniversary. This information is entered by the staff member you are coaching and needs to be updated by them.

Information about the user(s) coached

- The “Balance” value is not adjusted by the user and is automatically updated every 24-hours based on donations received through Donation Services
- The Staff ID(s) shown reflect all designation numbers associated with the staff member(s)
- Last Prayer Letter is based on the most recently logged newsletter task of either “Newsletter - Physical” or “Newsletter - Email”
- Weeks on MPD is determined by the MPD Information set in Account Preferences. The number of weeks value is generated by rounding up to the nearest whole week from the MPD Start Date to the current date
- The MPD Report Date value is pulled from the MPD Information MPD End Date value in the staff members MPDX settings
- Users change their avatar by selecting “edit” on the avatar image in settings preferences and uploading a photo
- Users input personal information such as email, phone, Anniversary and Birthday by visiting settings preferences edit on the person card at the top of the page

13-Month Donation Graph:

This 13-month graph component of a user’s donations is a copy of the one on their dashboard. It updates when donations are added or deleted.

Weekly Appointments and Results:

The Weekly Appointments and Results component tracks the number of Individual Appointments and the Resulting New Monthly Partners, New Special Needs Pledges, Monthly Support Gained/Lost This Week, and Special Needs Gained during each week. Four weeks, or one month, is shown in this component at a time. The columns read left to right with the current week located in the fourth dated column from the left. The date shown is the beginning day of the MPD week being calculated.

The set week range is Sunday-Saturday. Column headings note Sunday as the start (i.e. the week of Sunday 11/18/18 - Saturday 11/24/18 is represented by the column heading Nov 18).

The average column is generated by averaging the 3 completed weeks. It does not include the current week in its calculation.

Appointments

- This is the sum of all Appointments logged in MPDX with a Result of Completed within the date range.
- The color coding of Red, Yellow or Green for the number of Individual Appointments reflect the number of logged appointments within that week’s date range. Green (10+ logged appointments), Yellow (8-9 logged appointments), Red (0-7 logged appointments).

Results

- New Monthly Partners: Total number of contacts with status updated to “Partner - Financial” within the date range.
- New Appeal Pledges: Total Commitments added to your Primary Appeal within the date range.
- Monthly Support Gained This Week: Total INCREASE for Commitment Amount for your Contacts within the date range.
- Monthly Support Lost This Week: Total DECREASE for Commitment Amount for your Contacts within the date range.
- Special Needs Gained This Week: The sum of any donation received that does not match the Commitment Amount for a Contact.

Weekly Activity

The Weekly Activity component shows the weekly summary of Contacts, Appointments, Correspondence, Phone Calls, Electronic Messages and Primary Appeal status for the ongoing week of the user’s MPD progress toward goals. This is the same Weekly Activity report that the staff member sees on their dashboard.

The default setting is the current week, but note in the top right corner of the component that a coach is able to scroll through and see information totals from previous weeks.

Contacts

- Active Contacts: This is all Contacts with a Status of “Never Contacted” or “Contact for Appointment.”
- Referrals On-Hand: This is all Contacts who have a Referred By in their Details tab, and a Status of “None”, “Never Contacted”, “Cultivate Relationship”, “Ask In Future”, or “Contact for Appointment.”
- Gained Referrals: The sum of new Contacts added within the date range who also have a Referred By Contact assigned in their Details tab.

Appointments

- Completed: Sum of logged Appointment Tasks within the date range with a Result of Completed.

Correspondence

- Pre-call: Sum of logged “Pre Call Letter” Tasks within the date range.
- Support: Sum of logged “Support Letter” Tasks within the date range.
- Thank You: Sum of logged “Thank” Tasks within the date range.
- Reminder: Sum of logged “Reminder Letter” Tasks within the date range.

Phone Calls

- Outgoing: Sum of logged “Call” Tasks within the date range with a Result of either Completed, Attempted, or Attempted - Left Message.
- Talked To: Sum of logged “Call” Tasks within the date range with a Result of Received or Completed.
- ***Appts Produced: Sum total of all “Call” tasks logged with a “Next Action - Appointment”***
- Completed: Sum of logged “Call” Tasks within the date range with a Result of “Completed.”
- Attempted: Sum of logged “Call” Tasks within the date range with a Result of “Attempted - Left Message.”
- Received: Sum of logged “Call Tasks within the date range with a Result “Received.”

Electronic Messages

- Sent: Sum of logged “Email,” “Facebook Message” and “Text Message” Tasks within the date range with a Result “Completed.”
- Received: Sum of “Email,” “Facebook Message” and “Text Message” Tasks logged within the date range with a Result of “Received.”
- ***Appts Produced: Sum total of all Email, Facebook Message and Text Message tasks logged with a “Next Action - Appointment”***
- Email (Sent/Received): Sum of logged “Email” Tasks marked “Result - Completed” within the date range /Sum of logged “Email” Tasks marked “Result - Received” within the date range.
- Facebook (Sent/Received): Sum of logged “Facebook Message” Tasks marked “Result - Completed” within the date range /Sum of all logged “Facebook Message” Tasks marked “Result - Received” within the date

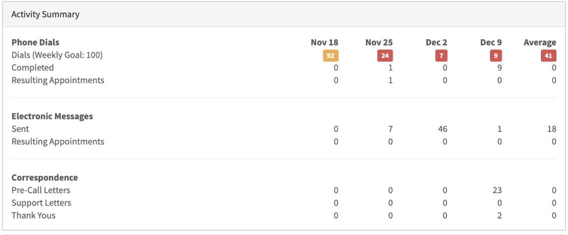
range.

- Text Message (Sent/Received): Sum of logged “Text Message” tasks marked “Result - Completed” within the date range /Sum of logged “Text Message” Tasks marked “Result - Received” within the date range.

Primary Appeal

- The total one-time gifts associated with the Primary Appeal and converted to the currency type default set by the user / The total Primary Appeal Goal converted to the currency type default set by the user.

Activity Summary



Activity Summary

Phone Dials	Nov 18	Nov 25	Dec 2	Dec 9	Average
Dials (Weekly Goal: 100)	92	24	7	9	41
Completed	0	1	0	9	0
Resulting Appointments	0	1	0	0	0
Electronic Messages					
Sent	0	7	46	1	18
Resulting Appointments	0	0	0	0	0
Correspondence					
Pre-Call Letters	0	0	0	23	0
Support Letters	0	0	0	0	0
Thank Yous	0	0	0	2	0

Phone Dials

- Dials (Weekly Goal 100): Sum of logged “Call” Tasks with a result of Completed, Attempted, and Attempted - Left Message within the date range.
- Completed: Sum of logged “Call” Tasks with a result of Completed within the date range.
- Resulting Appointments: Sum of logged “Call” Tasks with a Next Action of “Appointment” within the date range.

Electronic Messages

- Sent: Sum of logged “Email,” “Facebook Message,” and “Text Message” Tasks with a Result of Completed within the date range.
- Resulting Appointments: Sum of logged “Email,” “Facebook Message,” and “Text Message” Tasks with a Next Action of “Appointment” within the date range.

Correspondence

- Pre-Call Letters: Sum of logged “Pre Call Letter” Tasks with a result of “Complete” within the date range.
- Support Letters: Sum of logged “Support Letters” Tasks with a result of “Complete” within the date range.
- Thank Yous: Sum of logged “Thank You” Tasks with a result of “Complete” within the date range.

Outstanding Recurring Commitments

This component tracks the number of Commitments committed but not received and the “Name” (noted by initials, not personal identifiable information), Frequency, Days Late and Amount expected.

This component tracks and lists all Contacts with a Status of “Partner - Financial” and a Commitment Amount, but with Commitment Received set to No, and a Commitment Start Date in the future.

“Name” is noted by initials (not personal identifiable information).

Each Donor with an Outstanding Recurring Commitment will have a row reflecting their initials, Frequency of Commitment pledged, number of days past the expected “Commitment Start Date”, and the amount pledged in the currency noted.

This report is populated automatically from the account of the person being coached.

Outstanding Special Needs Commitments

This component tracks and lists all Special Needs donations “Committed,” not “Received” within the Primary Appeal Tool.

“Name” is noted by initials (not personal identifiable information).

This field is populated automatically from the Appeals Tool when Donations are noted as “Committed,” but are not “Received” according to Donation Services records.

The 14 Month Report

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

Understanding the 14 Month Report

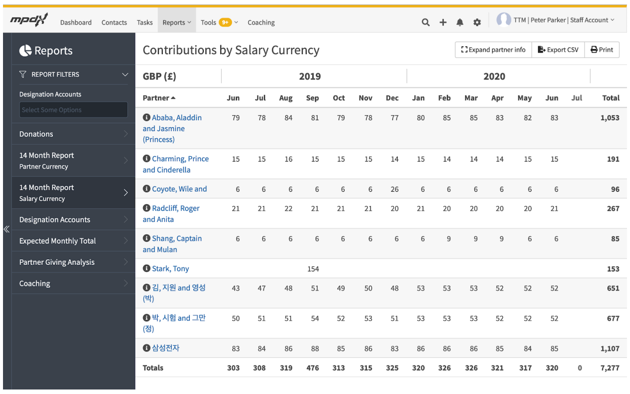
14 Month Report Partner Currency vs. Salary Currency

There are two Reports titled 14 Month Report available to staff: Partner Currency and Salary Currency

- The 14 Month Report - Partner Currency is useful for missionaries who use MPDX that have ministry partners, or contacts, giving in multiple currency types.
- The 14 Month Report - Salary Currency shows the Partner contributions by Salary Currency, or the currency in which you are paid by your organization.

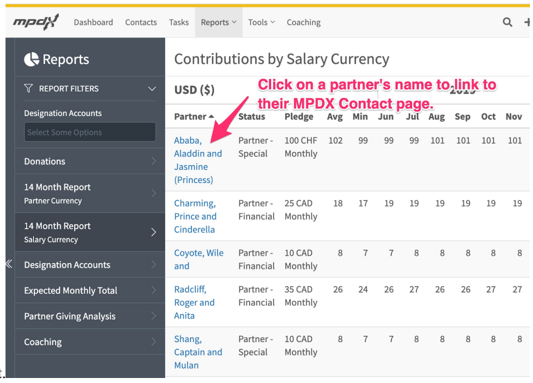
Click to view the desired version of the 14 Month Report.

The report will update every 24 hours as donations are added by donation services.



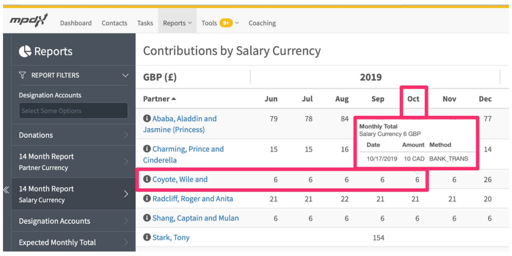
GBP (£)	2019							2020						
Partner ▲	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Total
Ababa, Aladdin and Jasmine (Princess)	79	78	84	81	79	78	77	80	85	85	83	82	83		1,053
Charming, Prince and Cinderella	15	15	16	15	15	15	14	15	14	14	14	15	15		191
Coyote, Wile and	6	6	6	6	6	6	26	6	6	6	6	6	6		96
Radcliff, Roger and Anita	21	21	22	21	21	21	20	21	20	20	20	20	21		267
Shang, Captain and Mulan	6	6	6	6	6	6	6	6	9	9	9	6	6		85
Stark, Tony				154											153
김, 지원 and 영성 (박)	43	47	48	51	49	50	48	53	53	53	52	52	52		651
박, 시험 and 그만 (정)	50	51	51	54	52	53	51	53	53	53	52	52	52		677
삼성전자	83	84	86	88	85	86	83	86	86	86	85	84	85		1,107
Totals	**303**	**308**	**319**	**476**	**313**	**315**	**325**	**320**	**326**	**326**	**321**	**317**	**320**	**0**	**7,277**

- Along the left, you will see a list of your ministry partners. Each name is a link to that ministry partner’s contact page in MPDX where you can see detailed information about each donation, person, contact

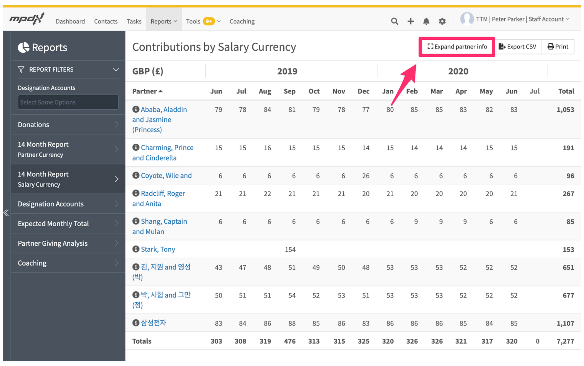


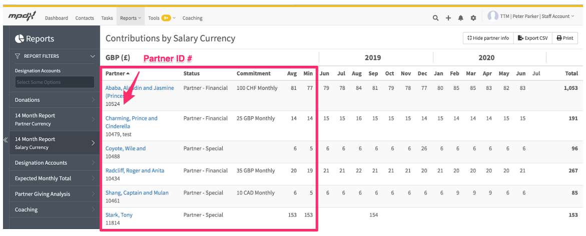
information, and task associated with that partner, or contact.

- The furthest left value is what that partner gave on the current month, last year.
- The furthest right value is what that partner gave on the present month, this year.
- You can flip the order of a column by clicking onto that column: notice the top name is now the bottom name.
- To see more information about a particular partner's gift in one of the months noted, hover over the intersection point of the month and that partner's name line.



Click "Expand Partner info," to expand the full report view to include the Status, Pledge, Avg (Average), and Min (Minimum Gift) columns:



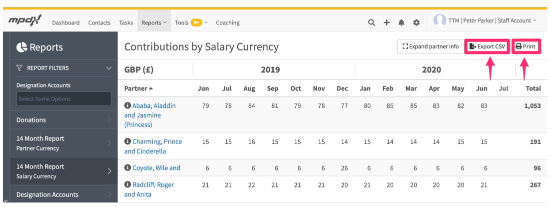


- The Partner Status, Commitment Amount, Currency Type and Frequency are set within an Contact's MPDX page and can be edited at any time within that contact's page.
- The Avg, or Average column is calculated using the Total given for that Ministry Partner and dividing it by 13 months (the current giving month is not used in this number).
- Min, or "Minimum" and is the lowest recorded gift for that particular partner in the past 14 months.

(Optional) **Step Five: Export, or Print your 14 Month Report**

If you choose, you may Export CSV, or Print this report.

To do this, go to the top right corner of MPDX and click to select.



For Those Being Coached

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

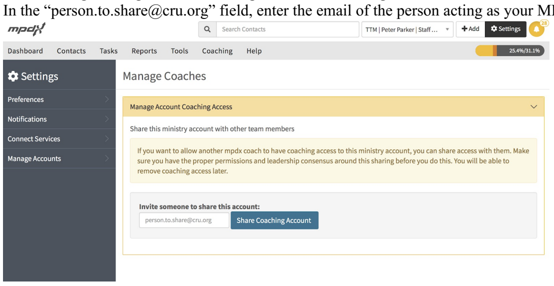
The coaching tool in MPDX provides encouragement and accountability in reaching your MPD +goals. As part of being New Staff with Cru, you need to share coaching access with the MPD Coach who is coaching you through initial MPD.

An invitation to share Coaching access does NOT give the coach the ability to update or alter your MPDX account and information. It simply allows the coach to view the number of calls, appointments, and overall trend of reaching the MPD goals set. A coach will NOT be able to see the names, contact information, donor ID number, or any personal identifiable information of any ministry partner.

Table of Contents

Step One: Share your account with a coach

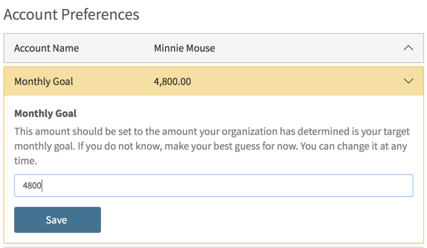
1. Login to Partner Essentials.
2. Go to Settings Manage Coaches Manage Account Coaching Access.
3. In the “person.to.share@cru.org” field, enter the email of the person acting as your MPD coach while you work toward your initial MPD goals:



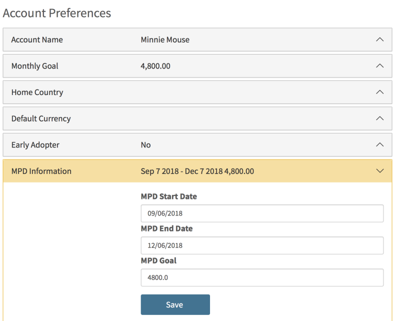
4. Once invited, this individual must “Accept” the email invitation before they can view the shared information.

Step Two: Set Up the Monthly Goal and MPD Time Frame

1. Go to Settings Preferences Account Preferences.



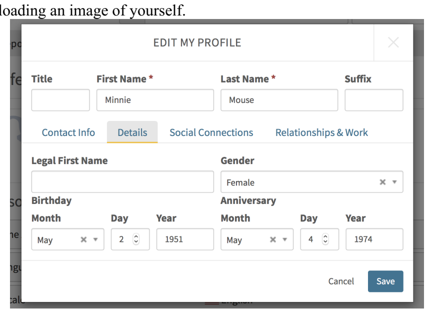
2. Make sure the Monthly Goal field is updated with your current monthly goal amount.
3. Enter your MPD dates and goals into the MPD Information bar at the bottom of the page. Work with your coach to determine your MPD Start Date, MPD End Date, and MPD Goal. As new staff raising support for the first time, your MPD Goal should be the same as the Monthly Goal you entered above.



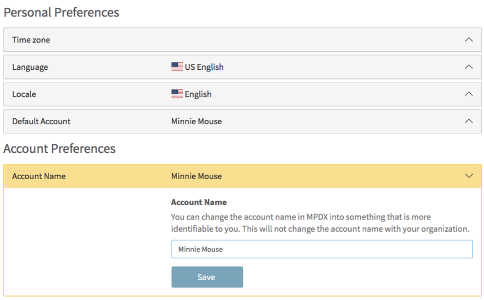
These values are crucial to accurately track your weekly progress in reaching your goals.

Step Three: Add a Photo, Update Contact Information, Update the Account List Name

1. Go to Settings Preferences Edit (on the small face). Add an Avatar by uploading an image of yourself.



2. Click Edit to add phone, email, birthday, and anniversary (if applicable).
3. To Update Your Account List Name: Go to Settings Preferences Account Preferences. Type in the Account Name (First Name Last Name) and click the "Save" button.

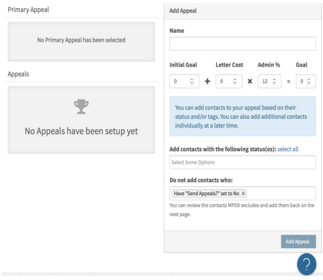


Step Four: Create an Appeal for your One-Time Goal

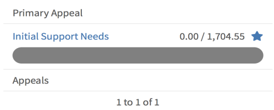
Appeals in MPDX is a tool that helps you track ministry partner giving toward a one-time ask. This is a required aspect of initial MPD and a regular part of ongoing MPD. For Initial MPD, you need to set up a One-Time Initial MPD Appeal and mark it as Primary.

You can find more detailed instructions on how to set up and manage an appeal **here**.

1. Go to https://www.partneressentials.work/tools/appeals.
2. Add an Appeal, and enter your One Time Need as your Goal. If you don't know this yet, you can leave it blank for now and add it later.



1. Once added, look at the list of Appeals and select the "star" icon next to the new appeal. This will flag it as primary and associate it with the MPD goals seen by your coach:



Step Five: Keep MPDX Updated

In order for you and your coach to have accurate information, it is vital to use MPDX to track and update your MPD contacts and activity. By Adding and updating Contact information such as Status, Commitment Amount and Frequency, Newsletter preferences, etc. you can know and track how your contacts would like to partner with your ministry. By Adding, Logging, and Completing Tasks, MPDX will track your correspondence with ministry partners. Make sure you are logging every connection with ministry partners so you and your coach have an accurate representation of where you stand in reaching your MPD Goals.

- The Contact Status must be set to "Partner - Financial" in order to count toward your monthly giving goal.
- Updating the giving amount in the Commitment field and setting a gift Frequency for a contact marked "Partner - Financial" will automatically update your monthly giving totals.
  - Commitment is manually entered (note the ability to select Currency type)
  - Frequency can be set to: Weekly, Every 2 Weeks, Monthly, Every 2 Months, Quarterly, Every 4 Months, Every 6 Months, Annual, Every 2 Years

- **Attention Interns Joining Staff:** Financial supporters from your intern year do not count as "Partner - Financial" status until you verify their continuing support. In order to accurately track your MPD support goal you will need to change their partner status from "Partner - Financial" to "Call for Decision." To do this:
  1. Filter contacts by: Status Partner - Financial
  2. Select All
  3. Add Tag "Internship Partner"
  4. Select All
  5. Edit Fields
     - Partner Status - Call for Decision
     - Commitment Received - No

When you no longer need MPD coaching

When you no longer need MPD coaching, remove your coach from your account using the following steps:

1. Settings Manage Coaches click the red Delete button next to the coach's name

For more information about using MPDX check out this video training series:
https://www.youtube.com/playlist?list=PL1nTOKhRxBt673yiW3qmvnx3ulDOawoLU

Activity Summary

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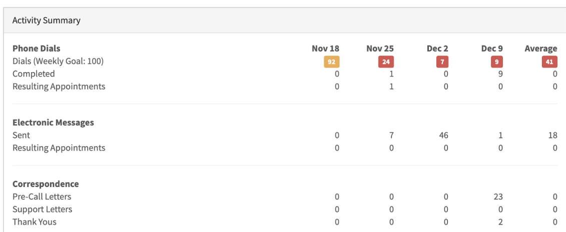


Activity Summary

Phone Dials	Nov 18	Nov 25	Dec 2	Dec 9	Average
Dials (Weekly Goal: 100)	92	24	7	9	41
Completed	0	1	0	9	0
Resulting Appointments	0	1	0	0	0
Electronic Messages					
Sent	0	7	46	1	18
Resulting Appointments	0	0	0	0	0
Correspondence					
Pre-Call Letters	0	0	0	23	0
Support Letters	0	0	0	0	0
Thank Yous	0	0	0	2	0

This graph shows progress toward Phone Dial, Electronic Messages (Text, Email, and Facebook), and Correspondence type goals. Totals are automatically generated from Tasks logged in MPDX within the date range. The set week range is Sunday-Saturday and column headings will display Sunday's date. The Average column is generated by averaging the 3 completed weeks and does ***not*** include the current week in its calculation.

The color coding of Red, Yellow or Green for the number of Phone Dials reflects the number of dials made compared to the weekly goal of 100. Red (0-79 dials), Yellow (80-99 dials), or Green (100+ dials).

Phone Dials

- Dials (Weekly Goal 100): The sum of logged "Call" Tasks with a result of Completed, Attempted, and Attempted - Left Message within the date range.
- Completed: The sum of logged "Call" Tasks with a result of Completed within the date range.
- Resulting Appointments: The sum of logged "Call" Tasks with a Next Action of "Appointment" within the date range.

Electronic Messages

- Sent: The sum of logged "Email," "Facebook Message," and "Text Message" Tasks with a Result of Completed within the date range.
- Resulting Appointments: The sum of logged "Email," "Facebook Message," and "Text Message" Tasks with a Next Action of "Appointment" within the date range.

Correspondence

- Pre-Call Letters: The sum of logged "Pre Call Letter" Tasks with a result of "Complete" within the date range.
- Support Letters: The sum of logged "Support Letters" Tasks with a result of "Complete" within the date range.
- Thank Yous: The sum of logged "Thank You" Tasks with a result of "Complete" within the date range.

Data Cleansing

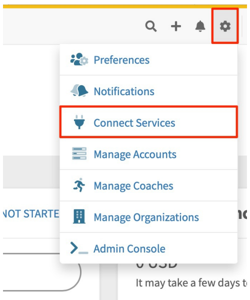
Adding and Merging Organizations

**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

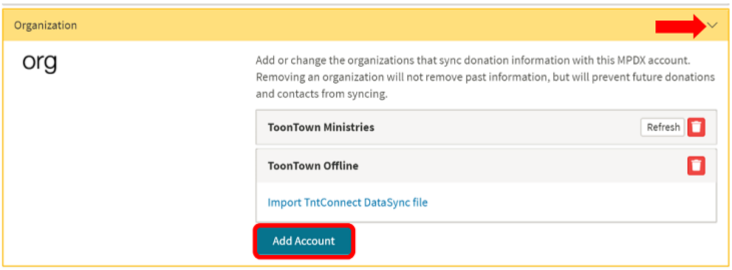
MPDX allows the connection of **multiple organizations** with an *existing user account*. You can then track the **multi-currencies** from those organizations and merge them into one primary personal account.

Adding Multiple Organizations - Existing Users

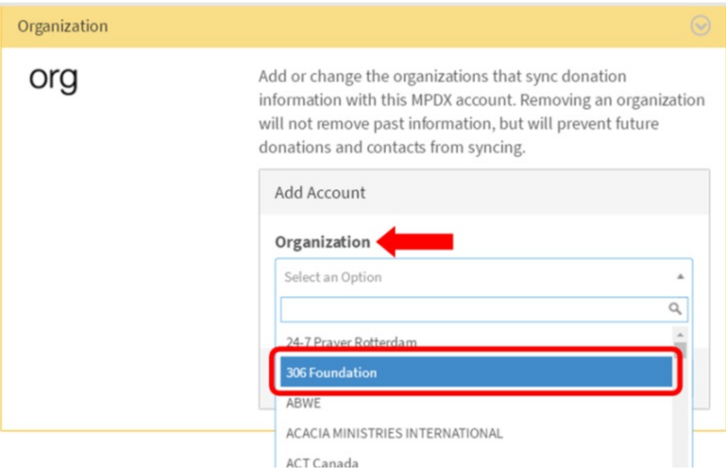
1. Click on the **Settings** gear icon at the top right of your screen.
2. Choose **Connect Services**.



- Click on the **drop-down arrow** to the right of **Organization**.
- Click on the blue **Add Account** button.



- After you click the **Add Account** button, select the applicable **Organization**.



- Verify you have selected the correct **Organization**
  - Enter your username and password for that integrated organization's donation portal if it syncs donations.
- Click on the blue **Save** button
- Repeat the steps above for each organization in which you have a donation account.

Managing Your Accounts and Organizations

See this article if you need to merge accounts.

Deleting and Hiding Contacts

** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. **

Deleting Contacts

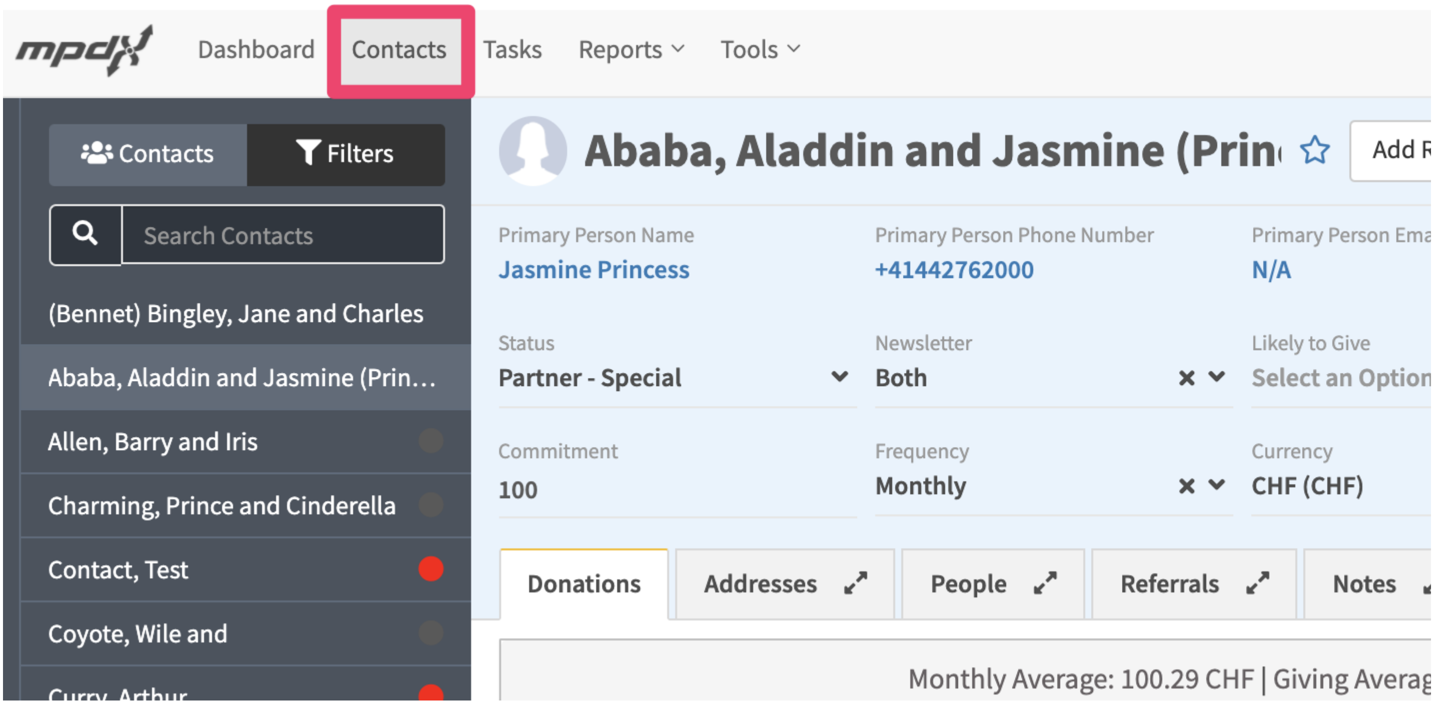
When the contacts and their donations sync **to** MPDX **from** a donor system, the contacts cannot be deleted. The data that is synced from the donation system will override the deleted contact record in MPDX. The solution is to hide a contact instead.

Hiding Contacts

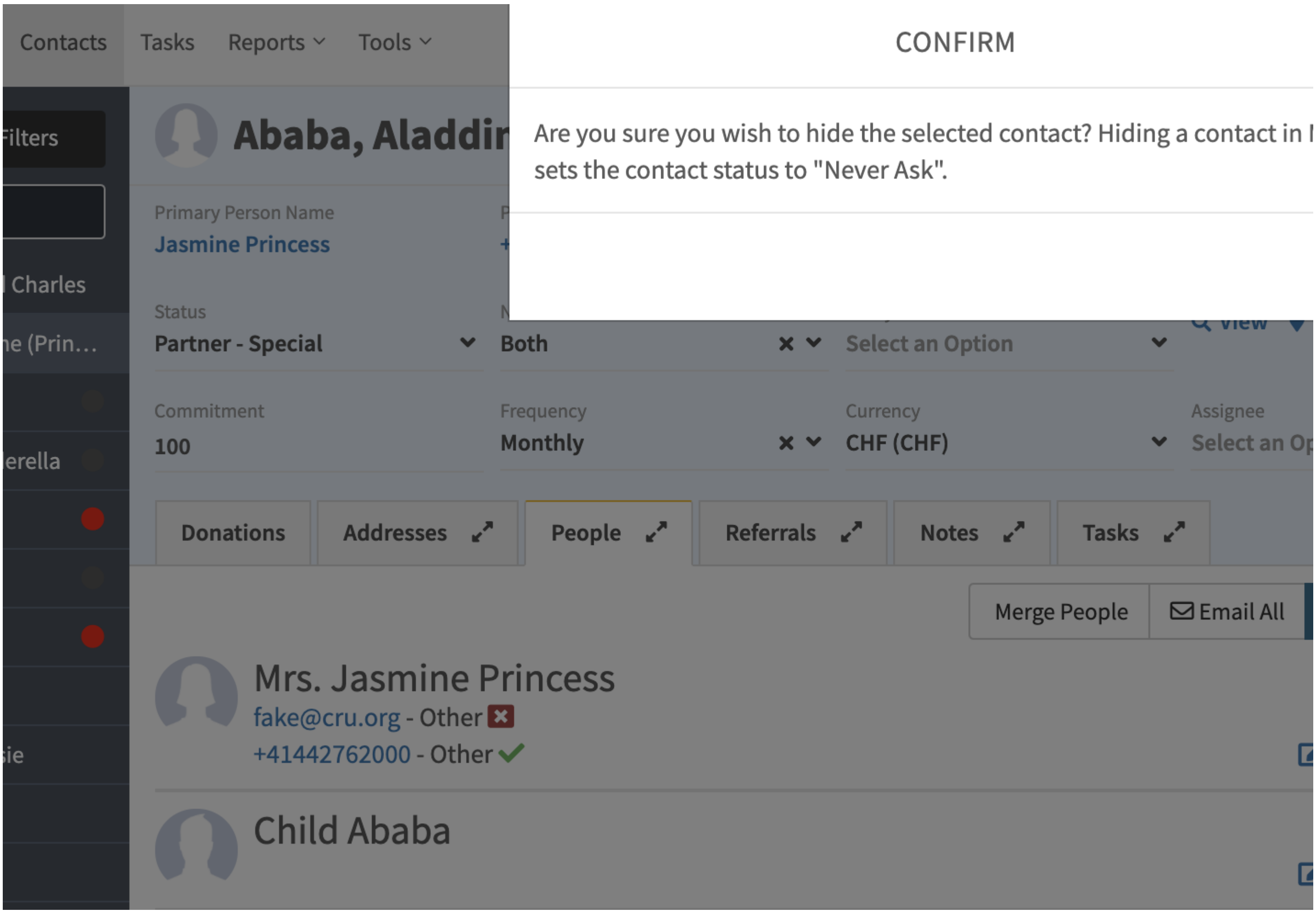
You can hide a single contact or multiple contacts from the **Contact** page.

Hiding a Single Contact

- From the **Contacts** tab, find the name of the contact you wish to hide.
- Click on the contact record.
- On the right, click on the **Hide** button.

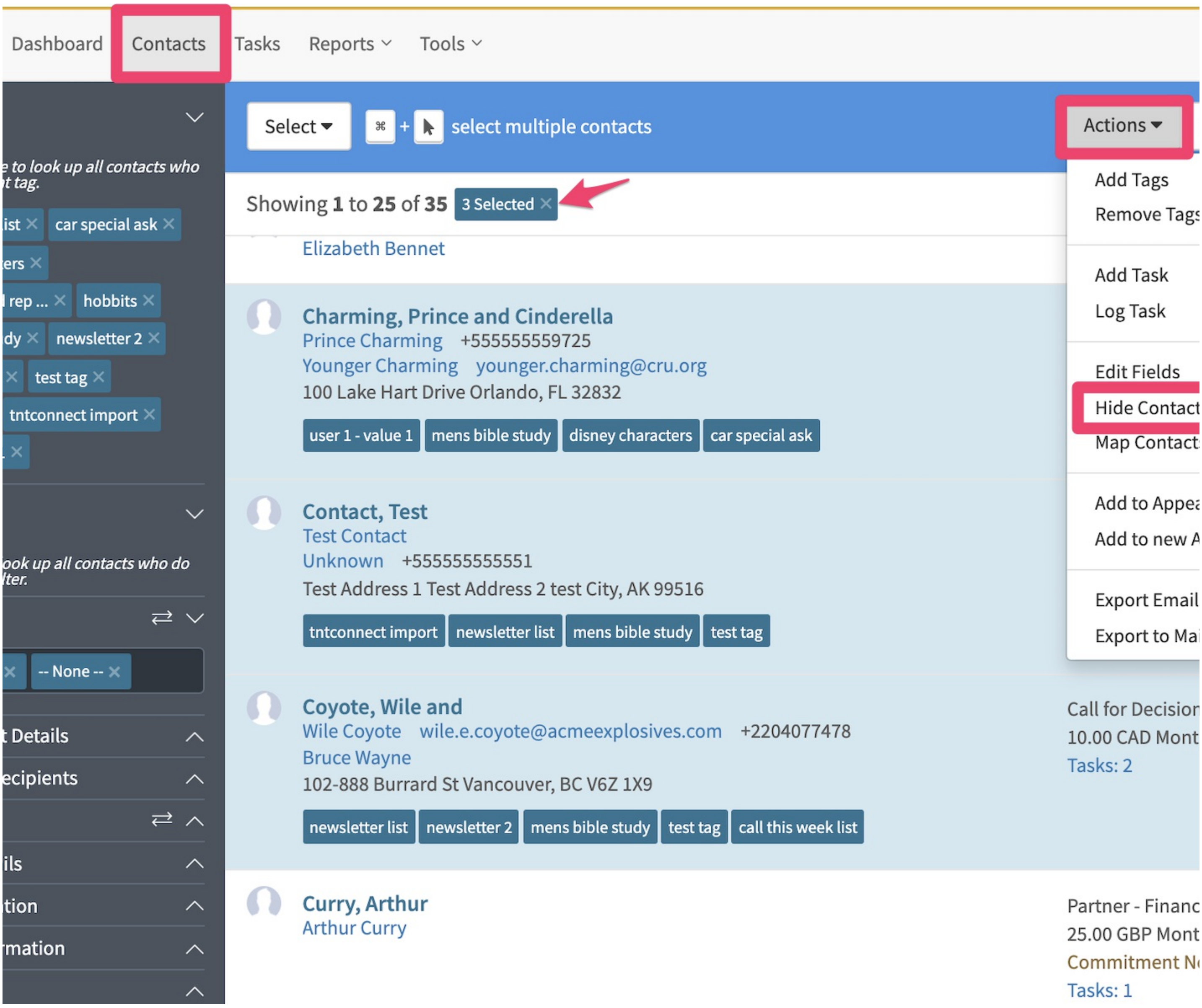


- A message will show on the screen confirming your change. When you select "Yes," the contact will be hidden and the status will change to "Never Ask."



Hiding Multiple Contacts

- Click the **Contact** row once to highlight the contacts you wish to hide.
  - They will be *highlighted in light blue*.
- Hold the shift key to select more than one record at one time.
  - The number of selected contacts will be listed next to the **Select** button.
- On the top right, click on the **Actions** button and select **Hide Contacts**.



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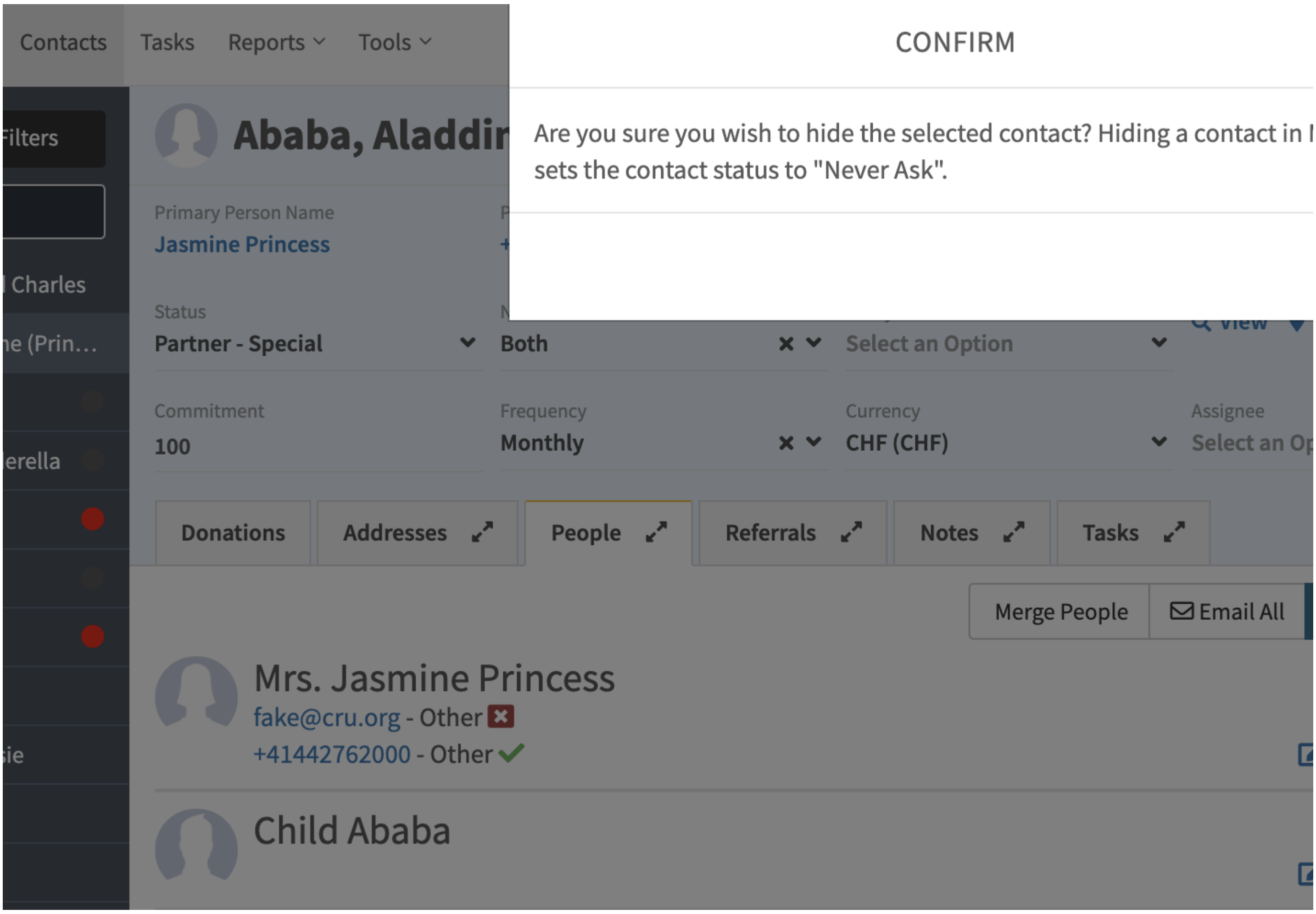


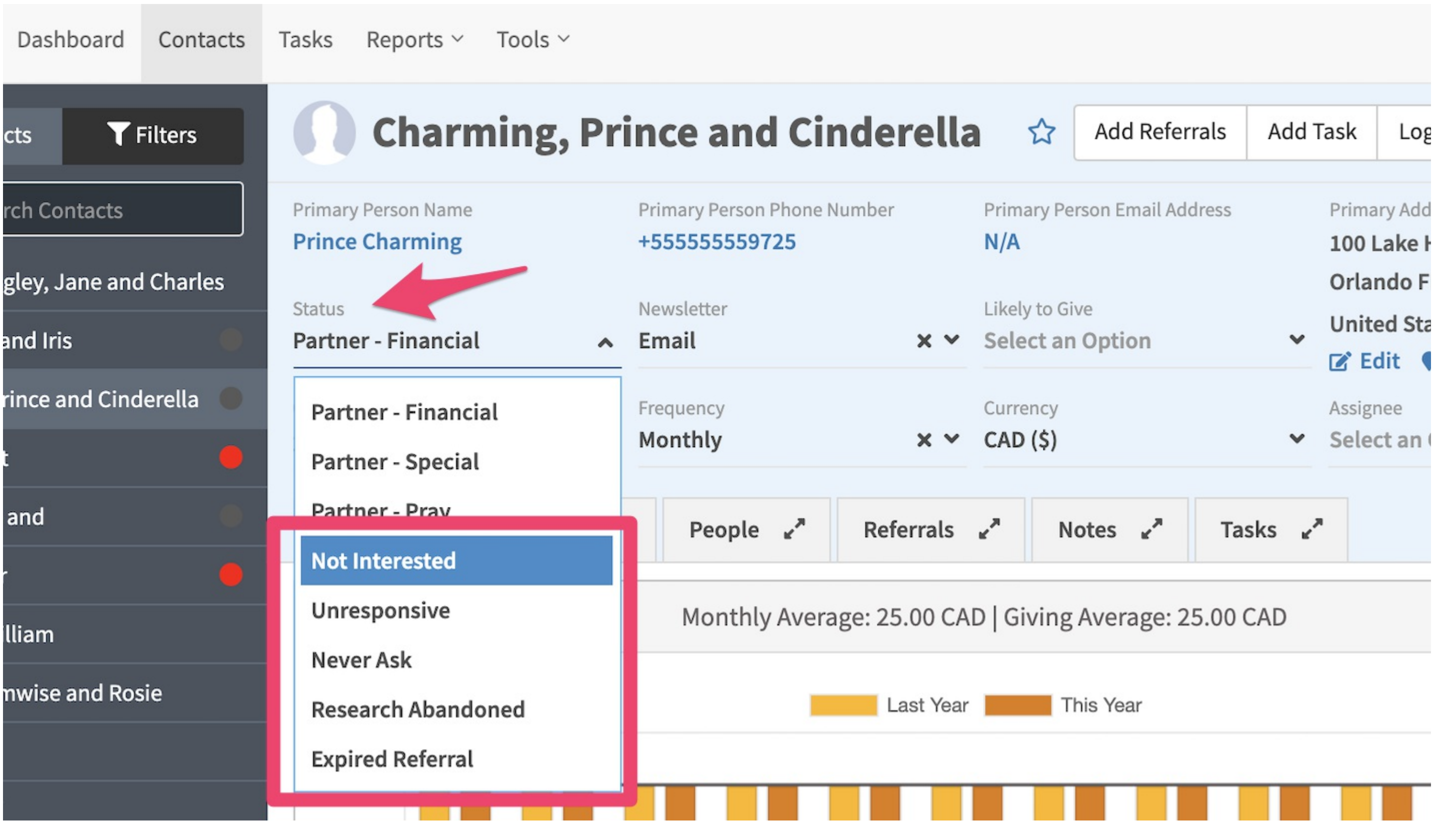
Hiding a Contact by Changing the Status

You can also hide a contact or multiple contacts by selecting one of the following inactive statuses;

- Not interested, Unresponsive, Never Ask, Research Abandoned, and Expired Referral.

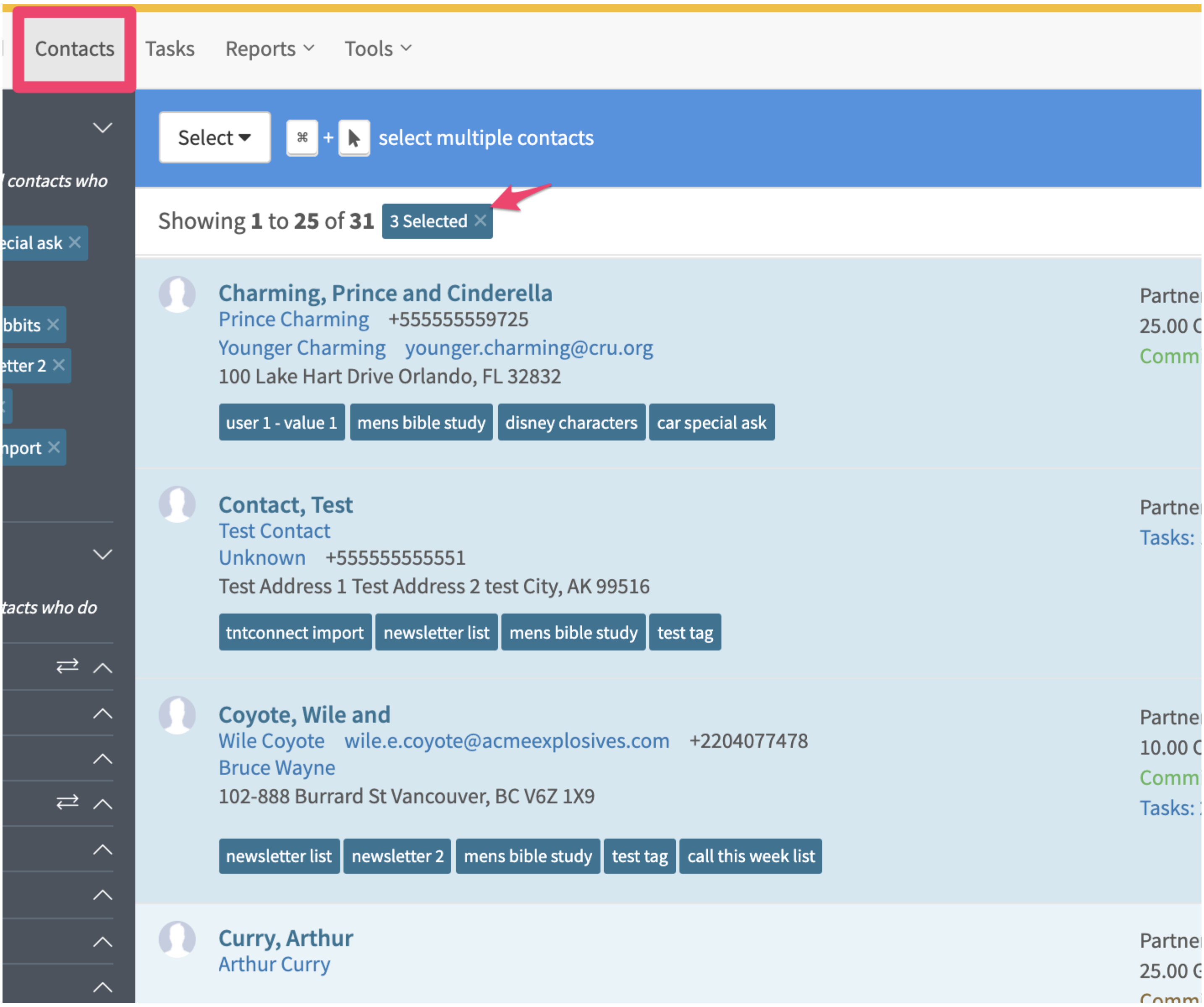
To change the status for one contact:

- Click on the Contact tab.
- Go to the Status drop down list.
- Select an inactive status.

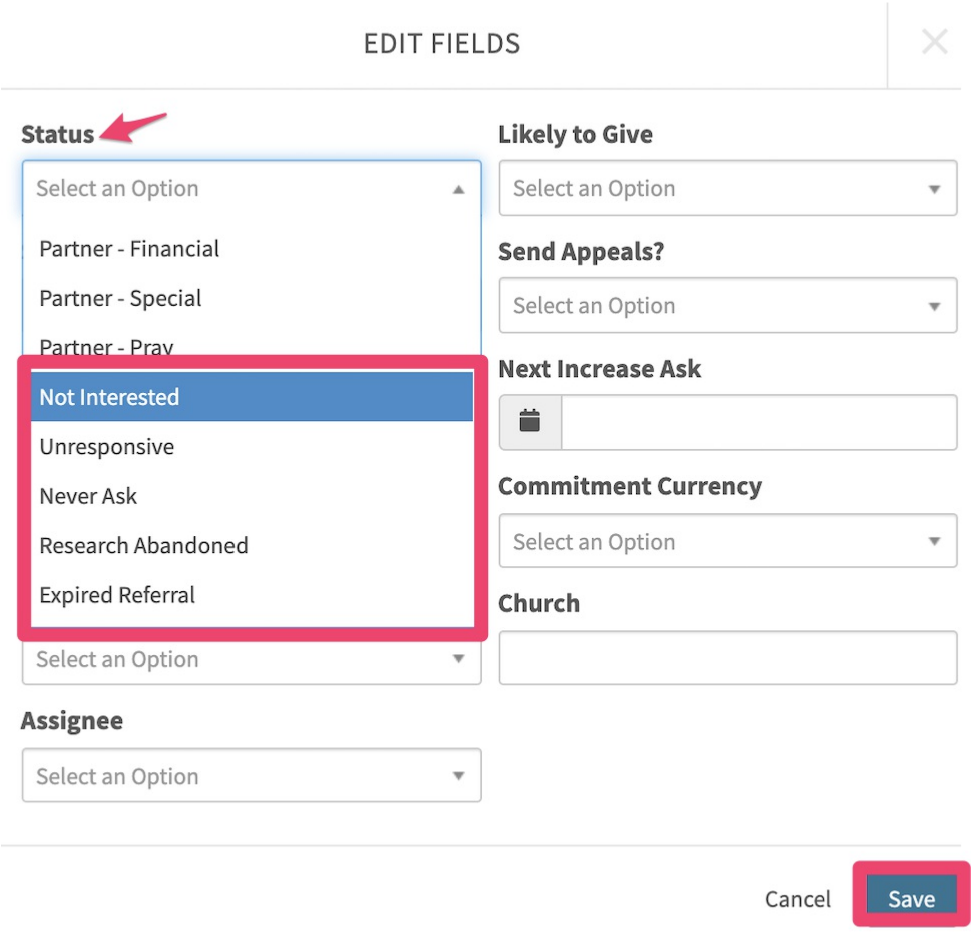


To change the status of multiple contacts:

- Click the Contact Name once to highlight the contacts you wish to hide.
    - They will be *highlighted in light blue*.
- Hold the shift key to select more than one record at one time.
    - The number of Selected Contacts will be listed next to the Select button.
- On the top right, click on the Actions button and select "Edit Fields."



- Click the dropdown arrow to the right of **Status**.
- Select any of the **Hidden Status** types.
- Click **Save**.



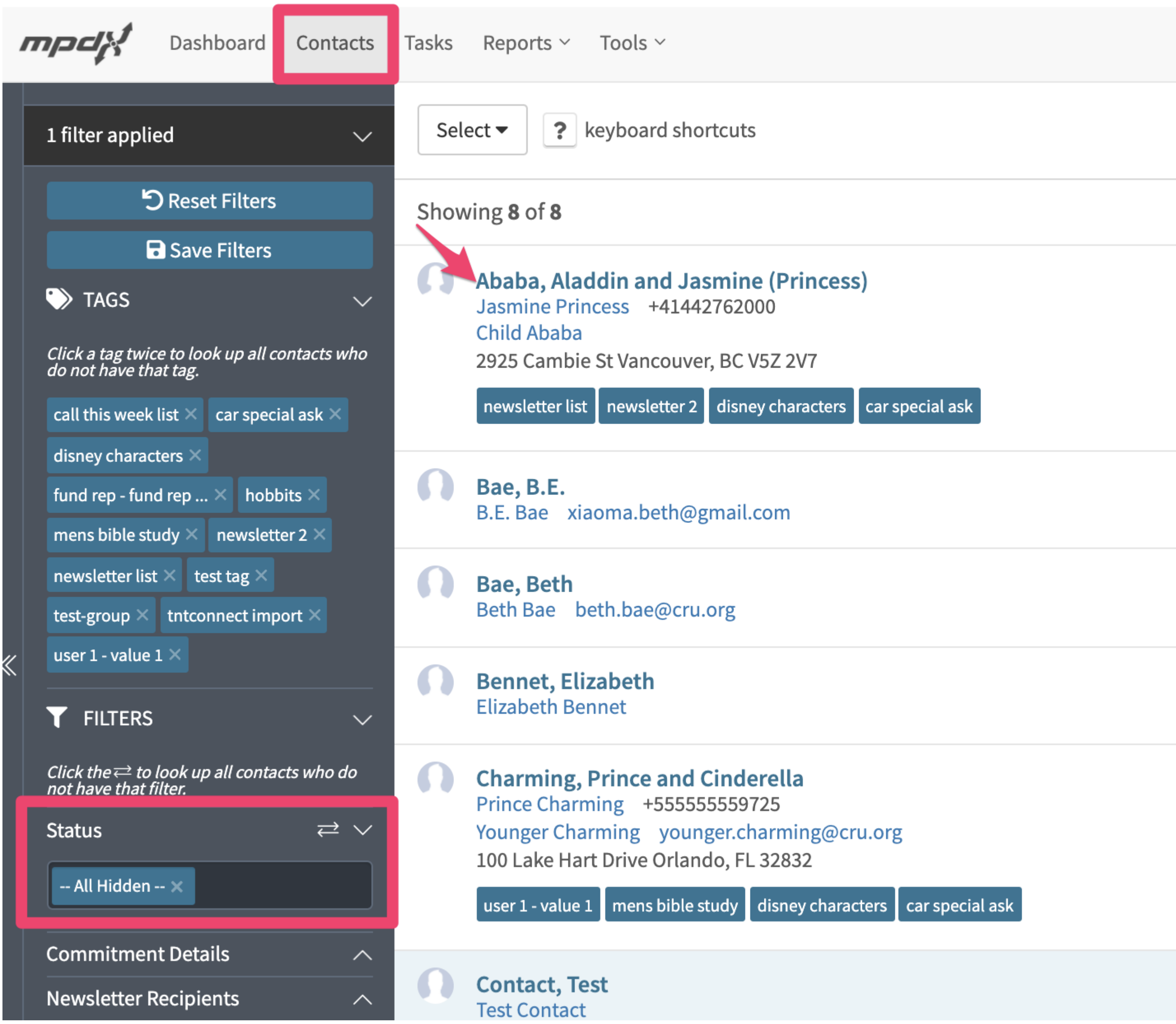
Note: You can filter on any hidden status to get a list of hidden contacts.

Unhiding Contacts

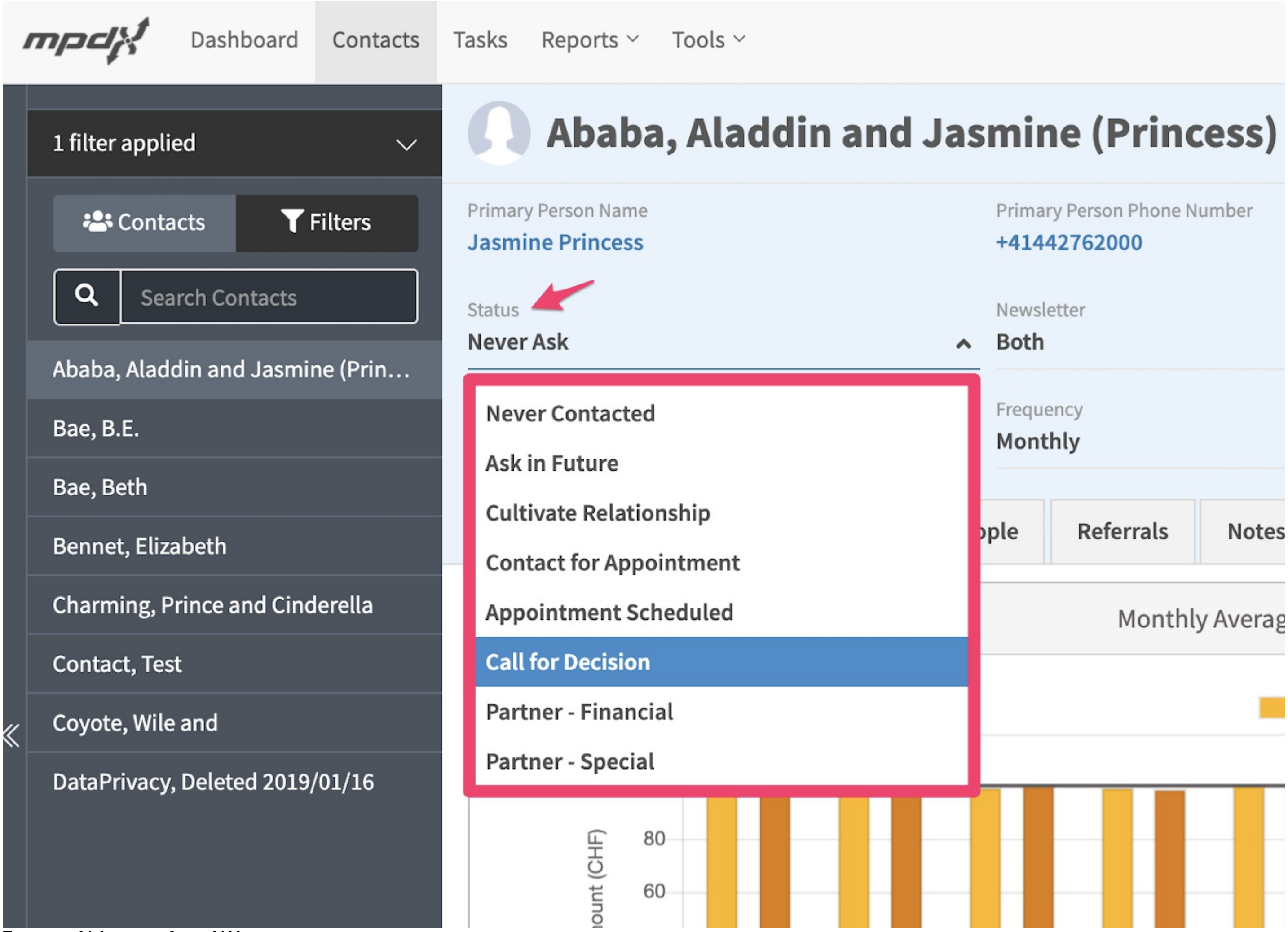
A hidden contact or multiple hidden contacts can be moved from a hidden status back to an active status.

To move a contact from a hidden status:

- Click on the **Contacts** tab.
- Use the **Filters** on the left to enter the Status, "**Hidden.**"
- All hidden contacts will be displayed.

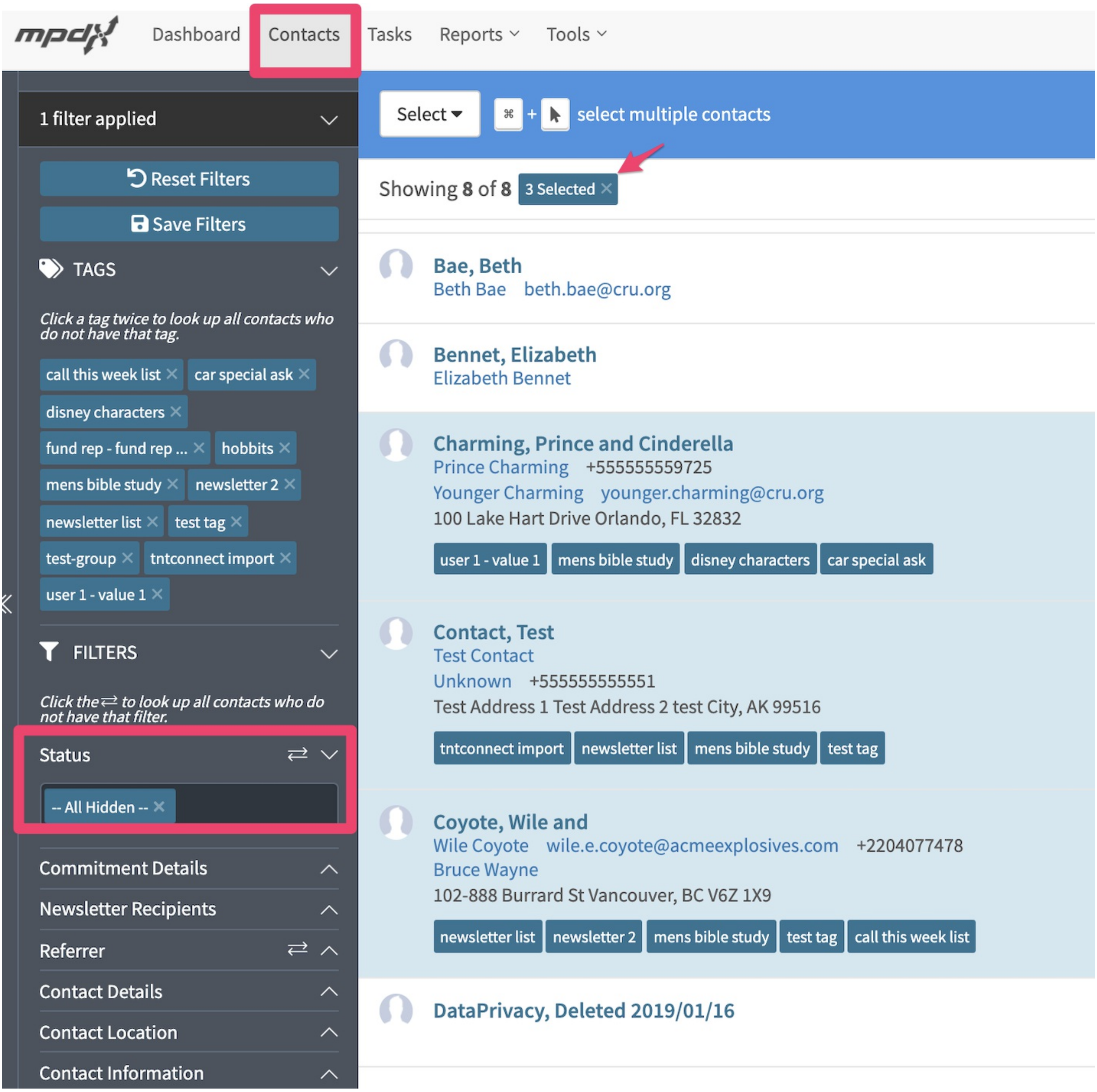


- Next, click on the **Contact** name.
- Select an Active status from the list of **Statuses**.
    - This will move the contact from the 'Hidden' status to an 'Active' status.

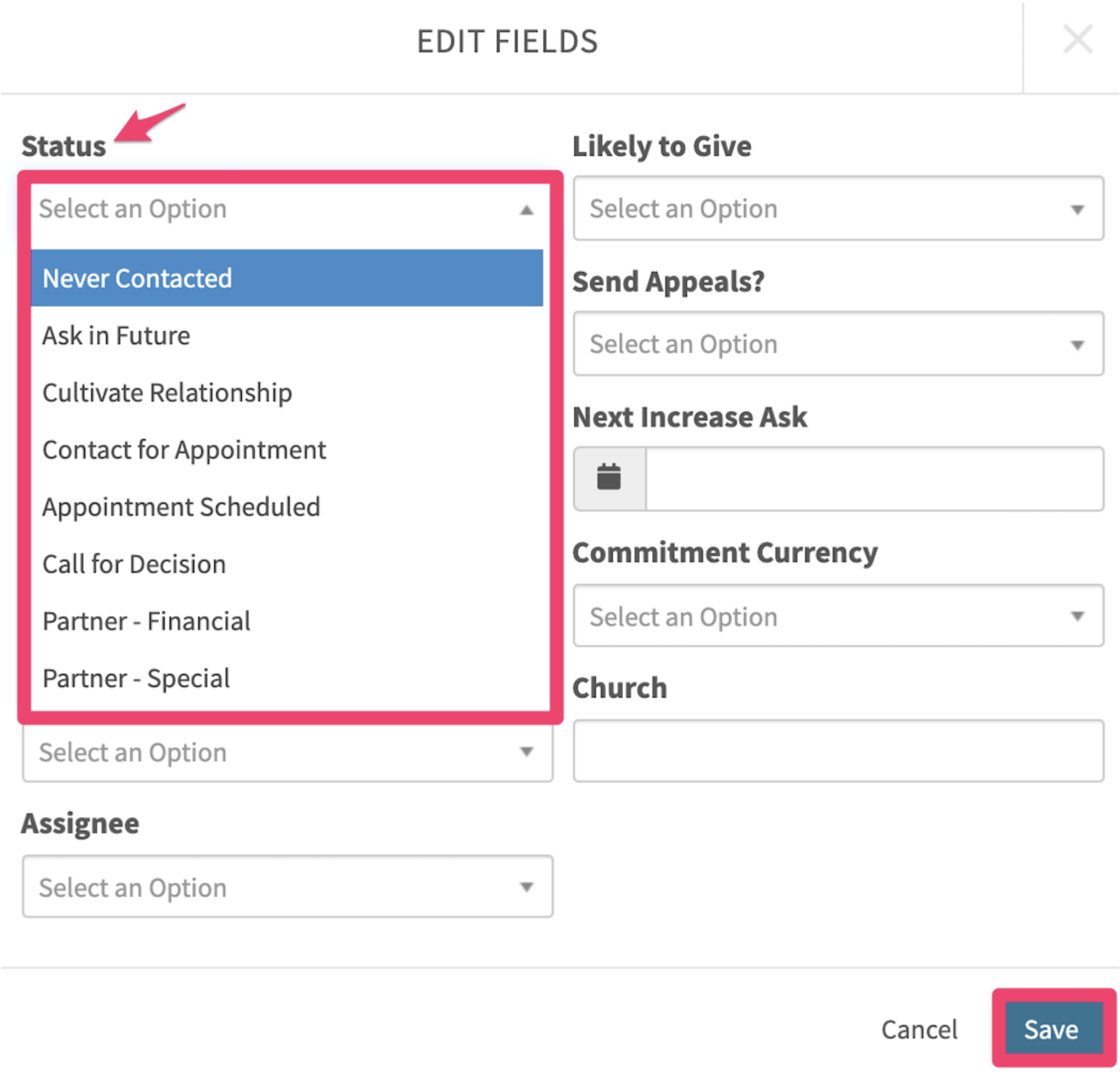


To move multiple contacts from a hidden status:

- Click on the Contacts tab.
- Use the Filters on the left to enter the Status, "Hidden."
- All hidden contacts will be displayed.
- Click the Contact row once to highlight the contacts you wish to hide.
  - They will be *highlighted in light blue*.
- Hold the shift key to select more than one record at one time.
  - The number of Selected Contacts will be listed next to the Select button.
- On the top right, click on the Actions button and select "Edit Fields.

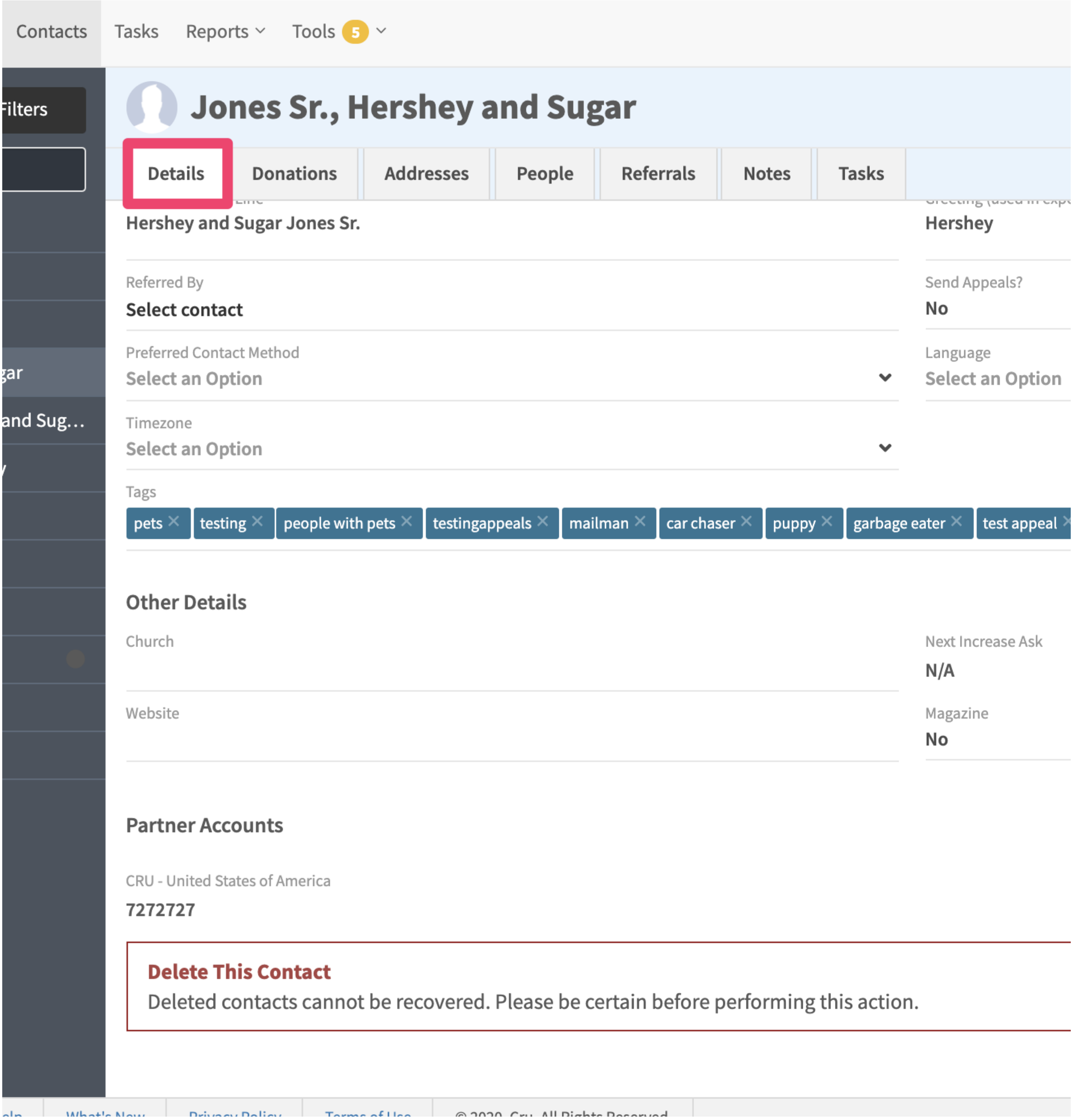


- Click the drop-down arrow to the right of **Status.**
- Select one of the active statuses from the list.
- Click on the **Save** button.

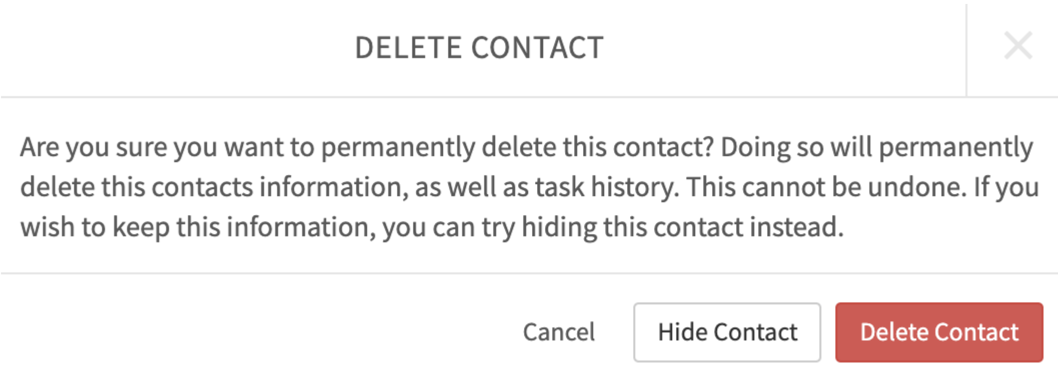


*NOTE: When you **manually** enter a contact into MPDX and the contact is not synced from a donor system, you are able to delete the contact record.*

- *Click on the contact's name.*
- *Click on the Detail tab.*
- *Scroll down to the bottom of the page.*
- *Click the 'Delete' button.*

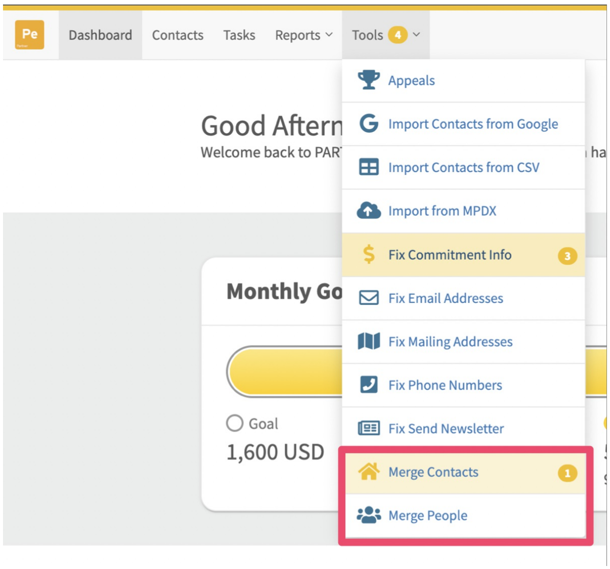


- A message will show on the screen confirming you want to delete the contact. This action cannot be undone.



When you **Merge Contacts**, you are joining an entire contact record with another. When you **Merge People,** you are joining individuals within a contact.

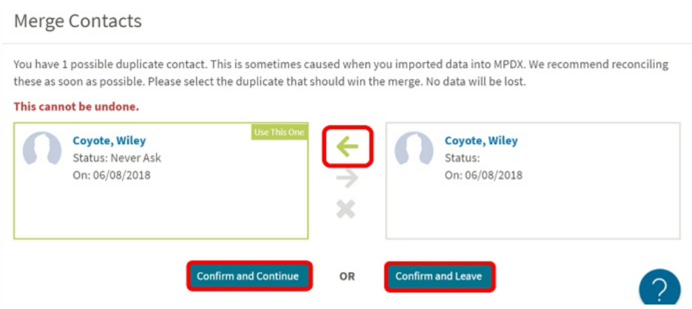
Merging contacts or merging people can be done from the the **Tools** dropdown menu.



Tools: Merging Contacts or People

From the **Tools** dropdown menu, scroll down to find **Merge Contacts** or **Merge People**. Any Fix Tool highlighted in gold means there are possible duplicates that need to be merged.

- Click on **Merge Contacts**. NOTE: If there are no duplicates available, make sure the names of two contacts are identical and refresh the page to try again.
- Click on the **Arrow** (left or right) to highlight the "winner" aka **Use This One**.
- Click on the **X** if you would like to leave two separate contact records, keeping both.
- Click **Confirm and Continue** when merging multiple contacts.
- Or click **Confirm and Leave** to exit the "Merge contacts" tool.

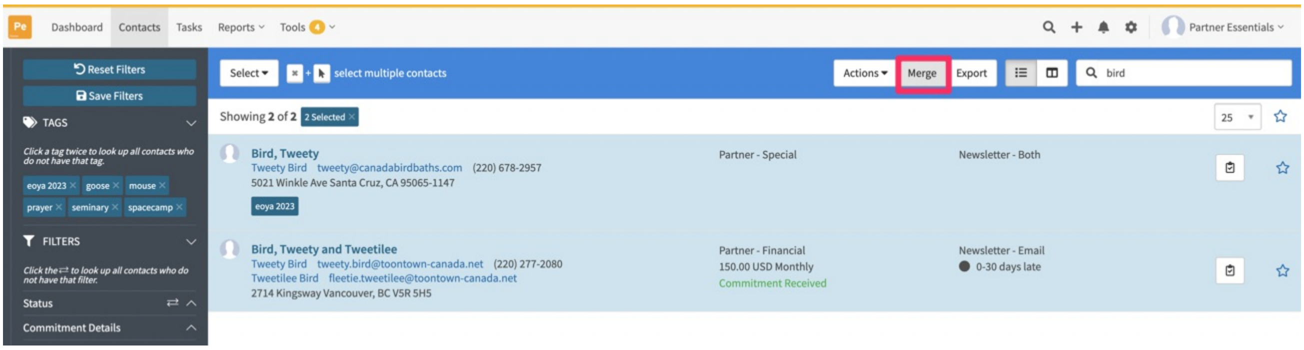


Note: You should regularly check for duplicate contacts or people, especially after each import.

Contacts Menu: Merging Contacts

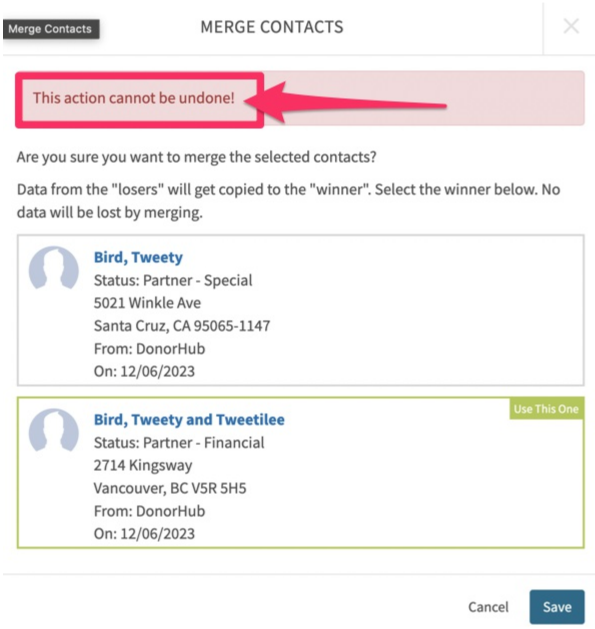
Duplicates can be merged from the **Contacts** page.

- Click and type to search by the contact name of someone you know has a duplicate.
- **Select** the Contacts you want to merge by marking the checkbox to the left of their name.
  - Note the **# Shown**, i.e. *Showing 2*, next to the search box.
- Then click the **Merge** button.



- Another **Merge Contacts** window will appear, asking you confirm your choice.
- Choose the "winner" of these contacts and then click **Save** to complete the merge.

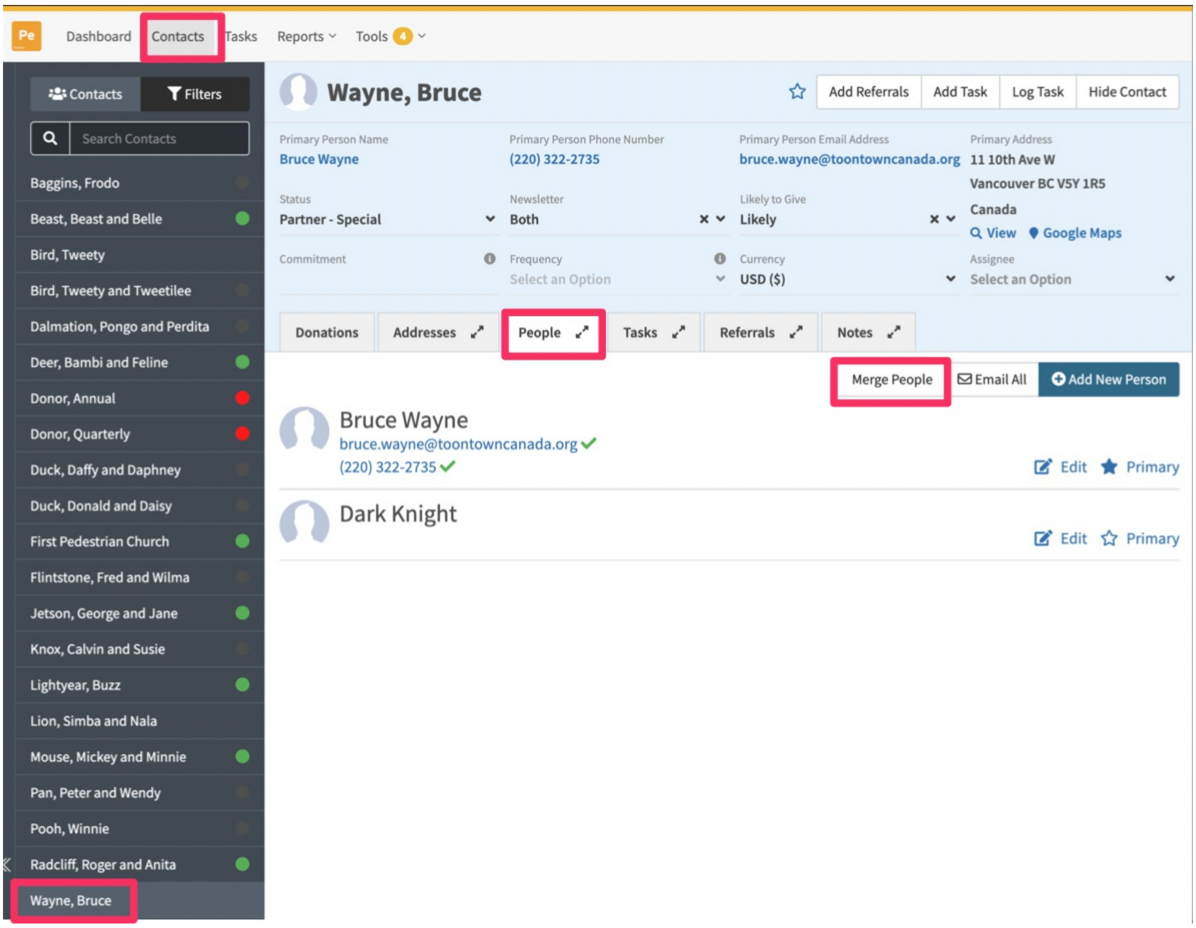
Note: This action cannot be undone!



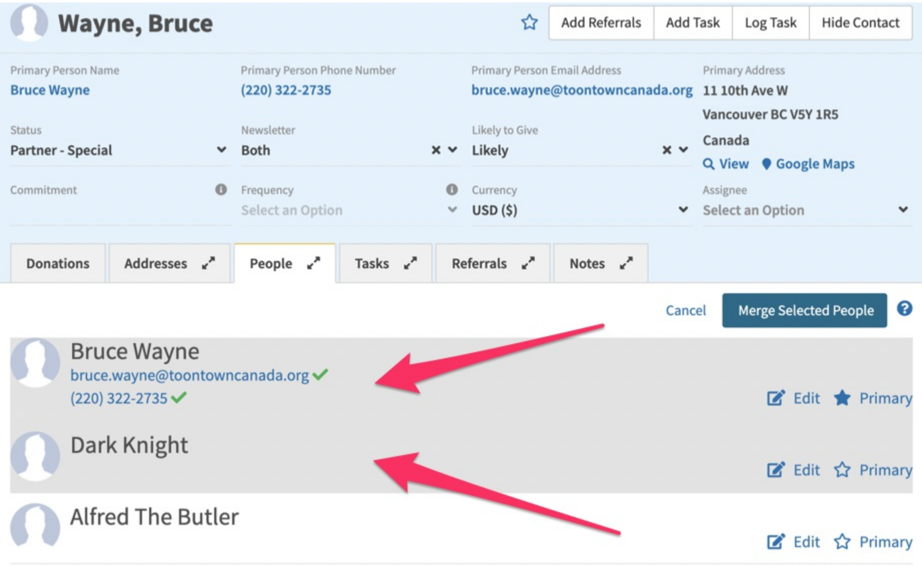
Merging People

Within a contact are you can Merge People duplicates.

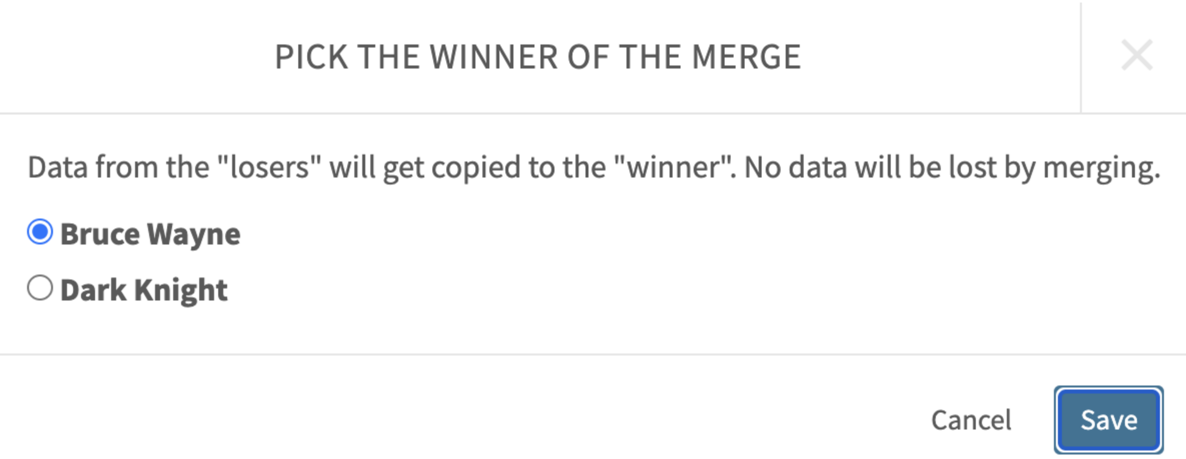
- From the **Contacts** page, click on the **Contact Name** in question.
- Within the selected contact, click on the **People** tab.
- Then click on the **Merge People** button.



- Click on all **Duplicate People** (clicking on each row will highlight in gray).
- The click on **Merge Selected People**.



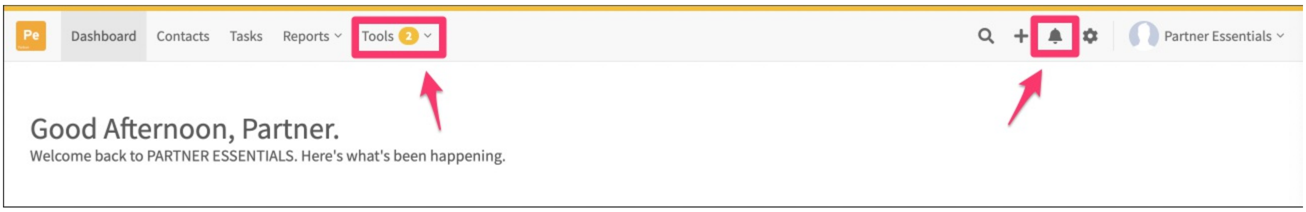
- Click to choose the **Winner** and then click **Merge**.



Note: Any phone numbers, emails, or other personal data will be copied into the person you selected to be the winner.

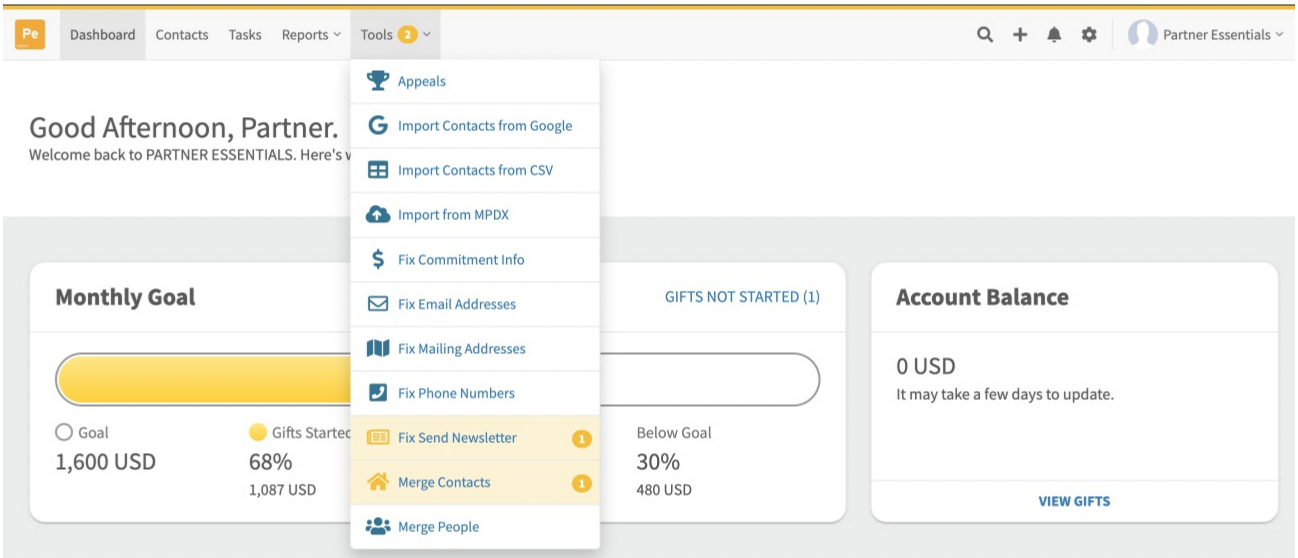
Fix Your Data

Partner Essentials will notify you to fix your data using “Fix Notifications”:



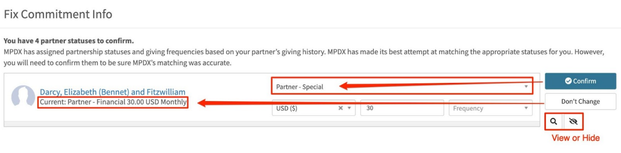
- Click on the **Notification Bell** on the top right of the top menu bar
- Click on the **Tools dropdown menu** to navigate to the **Tools** options.
  - Any **Fix Category** requiring attention will be highlighted in a gold box with a number.

*Note: These **Fix Notifications** are typically generated after a data import.*



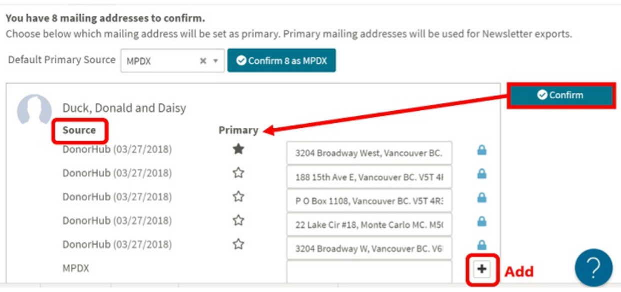
Fix Commitment Info

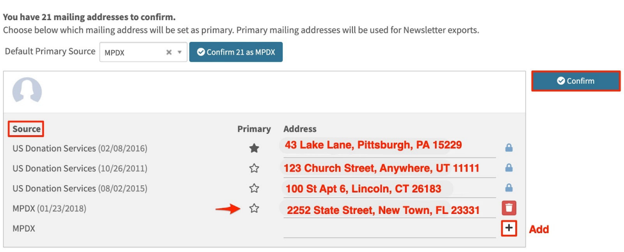
- Click on the **Fix Commitment Info** gold box.
- Under the contact name is the **Current Commitment Status**.
- Click **Don't Change** to keep the current status.
- In the middle is the **Suggested Commitment Status** dropdown, i.e. *Partner - Special.*
- Click **Confirm** to update the status.
- Click the **View** (spyglass) to view the contact details.
- Click **Hide** (line through the eye) to hide the contact from the active list view.



Fix Mailing Addresses

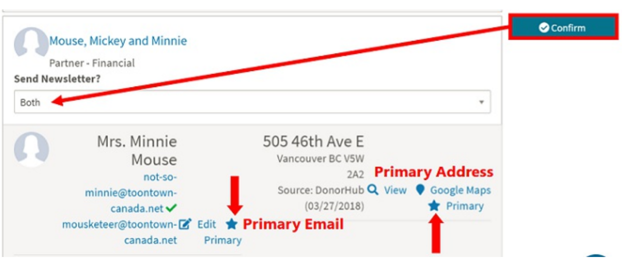
- Click on the **Fix Mailing Addresses** gold box.
- Select a **Primary** mailing address by clicking on the star outline next to the correct option. When the star is filled in, it means that the mailing address is selected as primary.
- Click the **+ ("Add")** icon to add a new mailing address.
- Click the **Confirm** button to save changes.
- Repeat this process for each contact listed.





Fix Send Newsletter

- Click on the **Fix Send Newsletter** gold box.
- The **Primary Star** icon indicates the primary mailing address and primary email address.
- Verify or change the **Send Newsletter Status** by clicking on it.
- Click **Confirm** the button to save the changes.



Merge Contacts

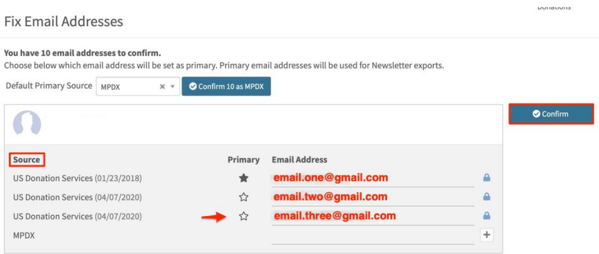
- Click the **Merge Contacts** gold box.
- Click on the **Merge to Name** (Use This One).

- Click on the **Confirm and Continue** or **Confirm and Leave** to complete the merge.

Note: The Merge Contacts tool is for combining individuals in a household, i.e., husband and wife.

Fix Email Addresses

- Click on the **Fix Email Addresses** gold box.
- Select a **Primary** email address by clicking on the star outline next to the correct option. When the star is filled in, it means that the email address is selected as primary.
- Click on the **Confirm** button to save changes.
- Repeat this process for each individual listed.

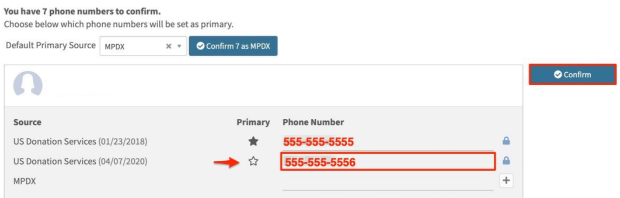


Note: Partner Essentials syncs with MailChimp as you send out email prayer letters. Each tool will inform you of where the differing pieces of information came in from and allow you to choose which information you want to have as the primary.

Partner Essentials will ask you to choose only one primary address for each person within a contact.

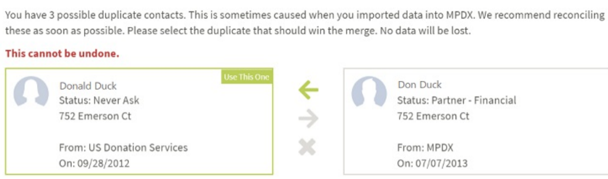
Fix Phone Numbers

- Click on the **Fix Phone Numbers** gold box.
- Select a **Primary** phone number by clicking on the star outline next to the correct option. When the star is filled in, it means that the number is selected as primary.
- Click on the **Confirm** button to save changes.
- Scroll down the page to repeat this process for each person listed.



Merge People

- Click on the **Merge People** gold box.
- Click on the **Merge To Name** (Use This One).



- Click on the **Confirm and Continue** or **Confirm and Leave** to complete the merge.

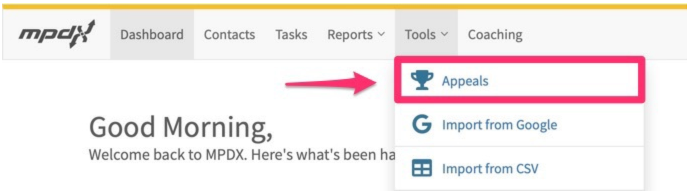
Note: The Merge People tool is used for combining individuals with the same name.

Delete Donations From Appeal

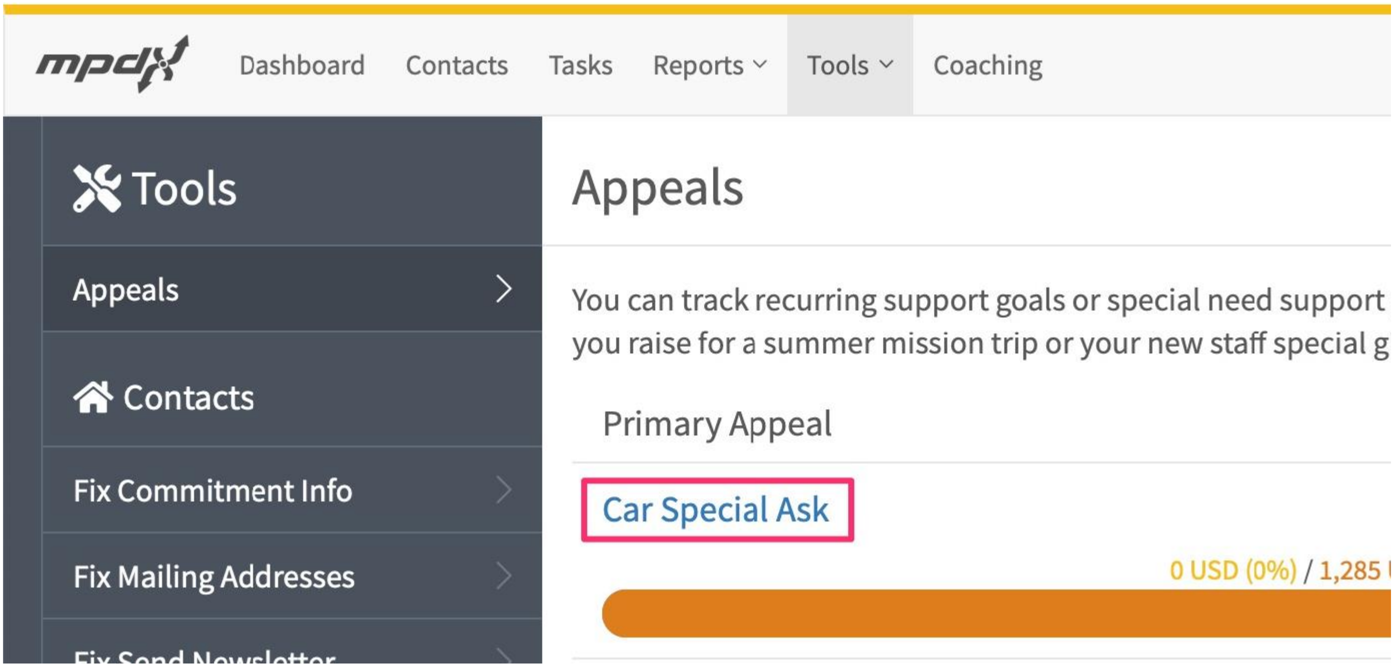
**** We would like to thank Cru for providing this article from their help library. This article has been reviewed and updated as needed to ensure it provides assistance for you and your Partner Essentials account. ****

If you need to delete donation from an appeal:

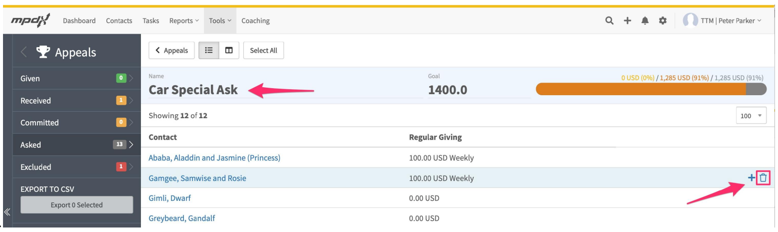
- Click on the **Tools** page.
- Then click on the **Appeals** box.



- Click on the **Appeal**, i.e., *Car Special Ask*, to view the details.



- Hover your mouse over the **Donation to Be Deleted**.



- A **Trash icon** will appear; click it to delete the donation.