



Topic: Using MPD Tracking Software for Your
Staff and Organization
Guest Speaker: Troy Wolbrink

August 29, 2017 1:00 pm



Aaron Babyar

Moderator

SRS Director



Full Sail

SUPPORT RAISING
LEADERS CONFERENCE

FEB 6-9, 2018 ~ ORLANDO, FL

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Fall Facilitator Training Dates Set!



September 10th – 12th in Rogers, AR

<http://supportraisingsolutions.org/facilitatortraining/>

Prayer

Questions

During the presentation, please submit your questions for the upcoming Q&A time.



Troy Wolbrink

Guest Speaker

Director of TntWare and
creator of TntConnect



Using MPD Tracking Software for Your Staff and Organization

Review of software options available



Managing Newsletter List

TntConnect

Send Newsletter Paper (w/ email backup) ▼

Gifts

Date	Amount
5/1/2014	\$125.00
4/30/2013	\$75.00

- Paper (w/ email backup)
- Email (w/ paper backup)
- Paper Only
- Email Only
- Paper and Email

MPDX

Newsletter

Creating Name

Editing Name

- None
- Physical
- Email
- Both

Karani

Groups

- Paper Newsletter
- Email Newsletter

DonorElf

Groups

- Donor
- Paper Newsletter ✕
- Email Newsletter ✕

Managing Pledges

TntConnect

Pledge \$100.00 monthly Currency CAD Canadian dollar

MPDX

Commitment Start Date



Commitment Amount

50

Commitment Frequency

Monthly

Commitment Currency

USD (\$)

Karani

Pledges

\$1000.00 yearly STARTED 10/10/16

\$30.00 monthly 10/10/16 - 12/31/17

\$5000.00 one time 10/10/16

DonorElf

Pledge disclaimer

Frequency

Monthly

Start Date

01/01/2015


Amount


\$ 10.00


End Date

Tasks/Interactions

TntConnect

 History

 Lookup all these contacts
















 Export all rows to Excel

Date Range

- Last Week
- Last 31 Days
- Last 12 Months
- Last Two Years
- All
- Custom

10/10/2015

10/10/2016

Name	D...	Time	Type	Result	Appeal	By	Description
 Deer, Bambi and Feline	9/15/2016	3:00 PM	Appointment	Done		Clark	Explain Ministry
 Kent, Jonathan and Martha	9/15/2016		Pre Call Letter	Done		Clark	sent pre call letter
 24 contacts	9/15/2016		Newsletter	Done		Clark	sent sep newsletter
 Rabbit, Rabbit	9/7/2016	11:58 AM	Note	Done		Clark	 The donor phone ((220) 474
 Rabbit, Rabbit	9/7/2016	11:58 AM	Note	Done		Clark	 The donor address was appl
 d'Armorica, Asterix	9/7/2016	11:58 AM	Note	Done		Clark	 The donor phone (+33 (892
 d'Armorica, Asterix	9/7/2016	11:58 AM	Note	Done		Clark	 The donor address was appl
 Ababa, Aladdin und Jasmine (Prin...	9/7/2016	11:57 AM	Note	Done		Clark	 The donor phone (+41 (44)
 Ababa, Aladdin und Jasmine (Prin...	9/7/2016	11:57 AM	Note	Done		Clark	 The donor address was appl

Tasks/Interactions

MPDX

New Task

Tomorrow

Show: 25

☆ Call call to say hello - 10/11/16 12:32 PM  0 

← Previous 1 Next →

Displaying 1 - 1 of 1

No Due Date

Show: 25

☆ Thank [Kenton, Autumn and Autumn](#) gave a Special Gift of \$40.00 on September 05, 2016. Send them a Thank You. ([Kifer](#), [Kenton and Autumn](#))  0 

☆ Thank [Chloe, Allan and Deb](#) gave a Special Gift of \$50.00 on September 05, 2016. Send them a Thank You. ([Chloe, Allan and Deb](#))  0 

Tasks/Interactions

Karani

Tasks

INCOMPLETE COMPLETE ALL

Type to Create a New Task

1-15 of 17 PREV 1 2 NEXT

call to reconnect

MR. FRED  CALL DUE 10/10/16

write letter

ZAC WINE  REPEATS TASK DUE 10/10/16

Tasks/Interactions

DonorElf

Unfinished To-dos

+ Add

Summary	Due	
call to say hi	10/17/16 (in 6 days)	Edit

[See all To-dos](#)

Communications

+ Add

Date	Reason	Medium	Summary
17 days ago	Newsletter	Call	sept 2016 newsletter

Downloading Gifts from Organization

TntConnect



The screenshot shows a software window titled "Update Gift Info" for "ToonTown Ministries". The window has a dark header with the organization name in white. Below the header, there is a red banner with white text listing items: "✓ Cape", "✓ Mask", "✓ Boots", and "✓ Bible". To the right of the banner, it says "Hope for cartoon characters everywhere". Below the banner, the text "1. Setup account information." is displayed. There is a download icon (a green square with a white arrow pointing down) next to a "Download Organization List" button. Below this are four dropdown menus: "Organization" (selected: ToonTown Ministries), "Login" (selected: clark.kent@mygcx.net), "Password" (masked with dots), and "Profile" (selected: Staff Account). Below the dropdowns is a link: "(Click here if you need a User Name and Password.)". At the bottom of the form area are three buttons: "Cancel", "Retry Last Download", and "Next >>". At the very bottom of the window, a yellow bar displays "Account Balance: n/a (no account)".

Update Gift Info

ToonTown Ministries

✓ Cape ✓ Boots
✓ Mask ✓ Bible *Hope for cartoon characters everywhere*

1. Setup account information.

 Download Organization List

Organization: ToonTown Ministries

Login: clark.kent@mygcx.net

Password: ●●●●●●

Profile: Staff Account

(Click here if you need a User Name and Password.)

Cancel Retry Last Download Next >>

Account Balance: n/a (no account)

Downloading Gifts from Organization

MPDX



Staff Account ▾

Search contacts...



Dashboard

Contacts

Tasks

Donations

Reports

Help

Balance: \$0

+ Quick Add

+ Add a donation

Contribution Report

[Sync Donations Now](#)

0.1%/0.1%

Donation sync initiated successfully and will start soon

Downloading Gifts from Organization

Karani

DONORHUB ONLINE SYNC (FORMERLY TNTMPD.DATASERVER)

Would you like to sync your account with a DonorHub Online server?

Yes No

NOTE: The first contact and gift downloads could take a very long time. Currently, it'll download all of your contacts and the last 2 years of your giving history, but even that can take several minutes, depending on the server. Please be patient, and if you have any trouble, feel free to contact us.

Actions

- [Configure Server](#)

Global Service Network

TntMPD Username:

troy@tntware.com

TntMPD Password: (Left blank for safety--be sure to re-type if updating)

●●●●●●●●●●

update

Downloading Gifts from Organization

Karani

Custom Importers

Interested in a custom import for your organization? Send us a message by clicking on the red circle on the bottom right.

INTERVARSITY MONTHLY PTR IMPORTER (FORMERLY A TERTIARY IMPORTER)

Would you like to open your account with us? (Formerly a Tertiary Importer)

Yes No

NOTE: The first custom import download must be done within 30 days of the date of the download of all your content and for all users of your group. There is no limit on the number of custom imports you can download. Please contact us if you have any questions. We'll be happy to help you.

Actions

- [Custom Import](#)
- [Custom Import](#)
- [Download Gifts](#)
- [Download Contacts](#)

INTERVARSITY MONTHLY PTR IMPORTER



Downloading Gifts from Organization

DonorElf

The screenshot shows the DonorElf user interface. At the top is a dark navigation bar with the DonorElf logo and menu items: Dashboard, Contacts, and Reports. The user is logged in as Troy. Below the navigation bar is a light gray header for the 'Settings' page, which displays a balance of \$0.00, last updated today. On the left is a sidebar menu with 'Email Notifications', 'MailChimp', and 'DonorHub Login'. The 'DonorHub Login' item is highlighted with a dotted border. The main content area shows a 'DonorHub Login' section with a success message: 'It looks like the connection with DonorHub is working great!' and a note: 'We last uploaded your data about 11 hours ago.'

DonorELF [Dashboard](#) [Contacts](#) [Reports](#) Welcome, Troy

Settings Balance **\$0.00**
last updated today

- Email Notifications >
- MailChimp >
- DonorHub Login** >

DonorHub Login

It looks like the connection with DonorHub is working great!

We last uploaded your data about 11 hours ago.

Downloading Gifts from Organization

What accounting systems does DonorElf work with?

DonorElf can work with just about any accounting or donation processing system.

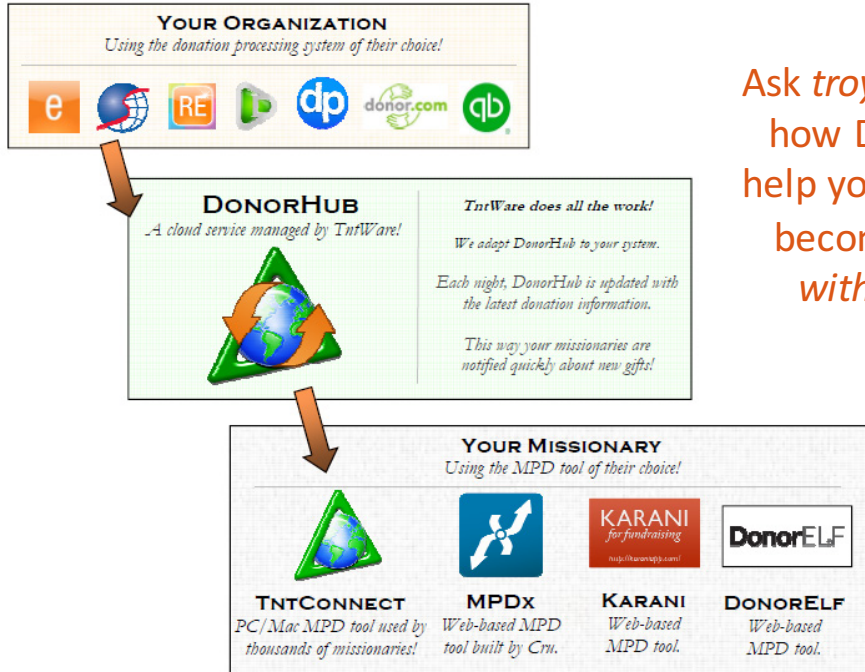
We currently integrate with the following systems:

- Raiser's Edge (including the hosted version)
- Financial Edge (including the hosted version)
- QuickBooks (Windows Premiere or Enterprise edition)
- eTapestry
- Power Church
- Serenic Navigator
- MPower MPX
- ACS

If your accounting system isn't listed above, then we'll work with you to add its integration with DonorElf.

Downloading Gifts from Organization

DonorHub Online



Ask troy@tntware.com how DonorHub can help your organization become *integrated with MPD tools!*

Accounting/Donation Systems

Support Raising Tools

Pricing

Compatible Donation Systems

- Abila MIP (Accounting)
- Affinaquest
- Blackbaud eTapestry
- Blackbaud Financial Edge (on-premise, hosted/NXT)
- Blackbaud Raiser's Edge (on-premise, hosted/NXT)
- Campwise
- Community Church Builder
- Donor.com DASCO
- Denari Software
- DonorPerfect
- DonorWise
- GiftWorks
- GivingFuel
- Intacct
- Microsoft Dynamics CRM
- Microsoft Dynamics SL (Accounting)
- NeonCRM
- OPTIGEM
- Orange Leap MPX
- QuickBooks (Online, PC and Mac)
- Salesforce.com
- thankQ









Automatic Thank You Reminders

TntConnect

Name	Date ▲	Time	Recurs	Type	Appeal	For	Description
<input type="checkbox"/>  Deer, Bambi and Feline	10/10/2016			Thank			Send thank-you for EXTRA gift of \$90.
<input type="checkbox"/>  Devil, Tasmanian	10/10/2016			Thank			Send thank-you for SPECIAL gift of 250.
<input type="checkbox"/>  McQueen, Lightning	10/10/2016			Thank			Send thank-you for SPECIAL gift of 100.

Automatic Thank You Reminders

MPDX

- ★ Thank Picapiedra, Pedro and Vilma gave a Special Gift of \$25.00 on August 08, 2016. Send them a Thank You. (Picapiedra, Pedro and Vilma)  0 
- ☆ Thank Rivera, Diego and Frida (Kahlo) gave a Special Gift of \$175.00 on August 08, 2016. Send them a Thank You. (Rivera, Diego and Frida (Kahlo))  0 
- ☆ Thank Meirelles, Henrique gave a Special Gift of \$75.00 on August 08, 2016. Send them a Thank You. (Meirelles, Henrique)  0 
- ☆ Thank Guevara, Che gave a Special Gift of \$175.00 on August 08, 2016. Send them a Thank You. (Coelho, Paulo and Christina)  0 

Automatic Thank You Reminders

Karani

Report: Donors Unthanked in the Past 6 Months

Months: [24](#) | [12](#) | [6](#) |

Donor	Date Last Thank You
[Redacted] Sarah	Never
[Redacted] Dot	Never
[Redacted] Kari	Never
[Redacted] Lynda	Never
[Redacted] Unlimited	Never
[Redacted] Karen	Never

Automatic Thank You Reminders

DonorElf

News Feed

Late Donor on 10/09/16 - [\[Name\] - Harrisburg, PA](#)

Address Changed on 09/28/16 - [Pam - Mitchell, SD](#)

Old Address

New Address

Mitchell, SD 57301

Mitchell, SD 57301

Returning Late Donor on 09/26/16 - [Thomas - Mobile, AL](#)

New Donor on 09/15/16 - [Jeff - Nacogdoches, TX](#)



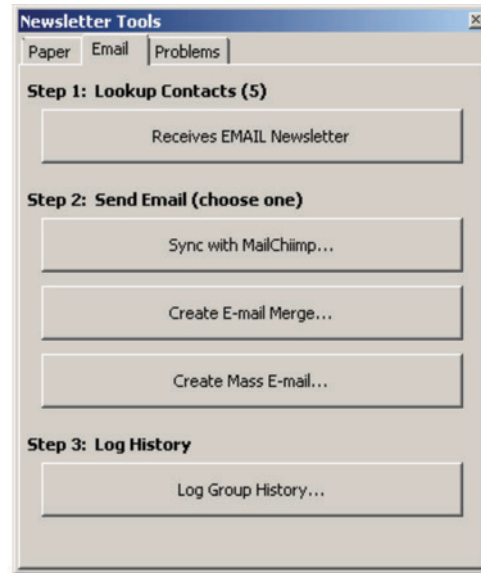
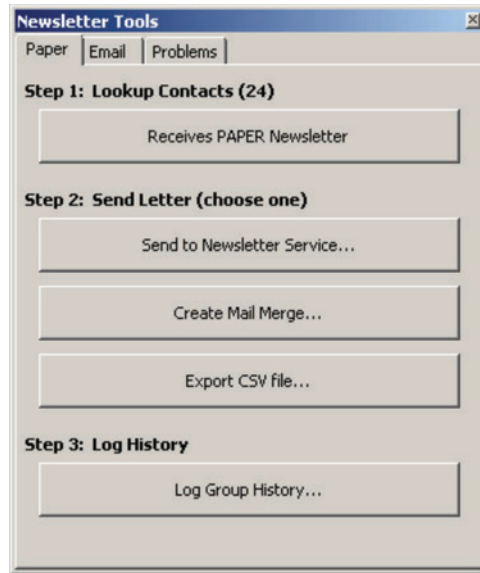
News Feed Events

Select which News Feed Events you would like to be notified about:

- | | |
|--|--|
| <input checked="" type="checkbox"/> New Donor | <input type="checkbox"/> New Pledge |
| <input checked="" type="checkbox"/> Late Donor | <input checked="" type="checkbox"/> Above Regular Amount |
| <input checked="" type="checkbox"/> Stopped Giving Donor | <input checked="" type="checkbox"/> Below Regular Amount |
| <input type="checkbox"/> Address Changed | <input checked="" type="checkbox"/> Returning Late Donor |
| <input checked="" type="checkbox"/> New Monthly Donor | <input checked="" type="checkbox"/> Returning Stopped Giving Donor |
| <input type="checkbox"/> Increased Pledge Amount | <input checked="" type="checkbox"/> Pledge Catch-up Gift |
| <input type="checkbox"/> Decreased Pledge Amount | <input checked="" type="checkbox"/> Extra Gift |

Helping you get out your Newsletter

TntConnect




Helping you get out your Newsletter

MPDX

> MAILCHIMP

▼ PRAYERLETTERS.COM



Enabling or Syncing will replace your prayerletters.com lists

You can keep PrayerLetters.com updated with all your MPDX contacts. Click Enable to begin.

[Enable](#)

> CHALKLINE

Helping you get out your Newsletter

Karani

Available Connections	
PrayerLetters.com	<p>You'll be redirected to PrayerLetters.com to authorize this connection.</p> <p>Connect</p>

Helping you get out your Newsletter

DonorElf

Sync with MailChimp

You have connected your MailChimp account with DonorElf.
Now you need to choose which MailChimp list you want to sync with DonorElf.

Choose your MailChimp list to sync

Sync with MailChimp

Helping you get out your Newsletter

DonorElf

Actions

[Add Contact](#)

[Add Communication](#)

Filter Contacts

Name, City or State

Exclude Expense Only ?

Groups

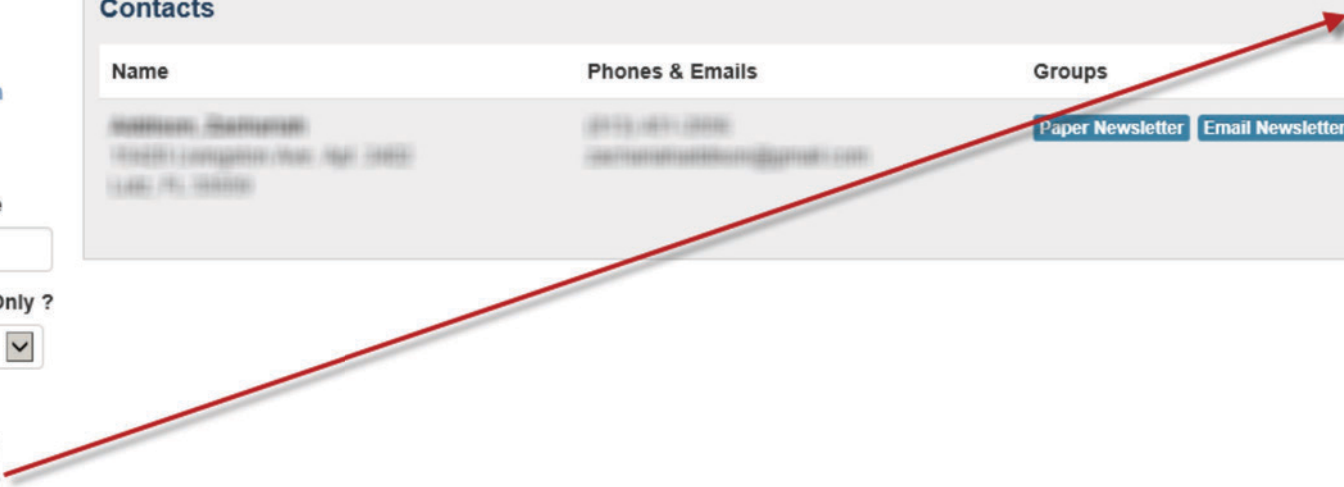
Email Newsletter

Paper Newsletter

Contacts

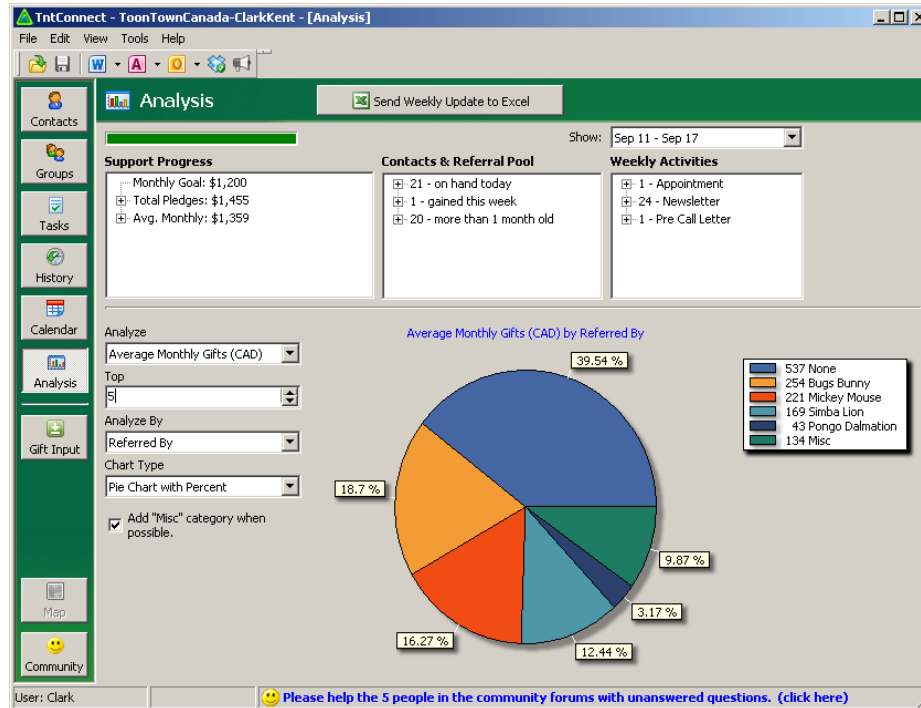
[Download Contacts](#) 

Name	Phones & Emails	Groups
William Ziemann 110221 Longwood Blvd, Apt 1000 Lubbock, TX 79409	(817) 451-1000 ziemannwilliam@gmail.com	Paper Newsletter Email Newsletter



Analysis

TntConnect



Analysis

MPDX

mpdx Staff Account - Search contacts... ⚙️

Dashboard Contacts Tasks Donations Reports Help Balance: \$0 Quick Add

0.96%

Hi Troy! Here's whats happening...



CONNECT

Tasks overdue or due today

78 Thanks

See all 78 tasks

Add a New Task

COMMITMENTS UNFULFILLED

0 first gift not received

0 partners 30 days late

0 partners 60 days late

CARE

LOG PHYSICAL NEWSLETTER

1 day since your last physical newsletter

BIRTHDAYS THIS WEEK

No birthdays this week!

ANNIVERSARIES THIS WEEK

No anniversaries this week!

Progress

Oct 10 — Oct 17 < >

CONTACTS

4 Active 0 Referrals On-hand 0 Gained

APPOINTMENTS

0 Completed

PHONE DIALS

0 Outgoing 0 Talked To 0 Appointments Produced

Completed: 0

Attempted: 0

Received: 0

APPEALS

Create New Appeal

ELECTRONIC CONTACTS

0 Sent 0 Received 0 Appointments Produced

Email: 0 Sent / 0 Received

Facebook: 0 Sent / 0 Received

Text Message: 0 Sent / 0 Received

CORRESPONDENCE

0 Pre-call Letters 0 Support Letters 3 Thank You Notes 0 Reminders

Analysis

Karani

Finances

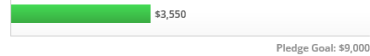
[All Gifts](#) | [Gifts Report](#) | [Fiscal Year Giving By Donor Report](#) | [All Pledges](#) | [Current Pledges](#) | [Financial Settings](#)

Percent Funded

THIS FISCAL YEAR
86% pledged



NEXT FISCAL YEAR
39% pledged



Left To Raise

THIS FISCAL YEAR
\$1,290 (\$108/mo) in pledges

NEXT FISCAL YEAR
\$5,450 (\$454/mo) in pledges

Pledges

	This Fiscal Year	Next Fiscal Year
Repeating Pledges	\$1,710 (19%)	\$3,550 (39%)
One Time Pledges	\$6,000 (67%)	\$0 (0%)
Total Pledged	\$7,710 (86%)	\$3,550 (39%)
Pledge Goal	\$9,000	\$9,000

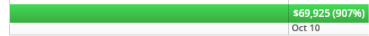
Gifts

GIVEN VS. GOAL THIS MONTH



Monthly Giving Goal: \$642

GIVEN VS. GOAL THIS FISCAL YEAR



Yearly Giving Goal: \$7,710

Gifts This Fiscal Year vs. Last Year

	Last Year	This Fiscal Year
Year To Date	\$72,030	\$69,925
October MTD	\$1,498	\$160
Total	\$111,808	\$69,925

Report: The Grid

Refine Grid

Group By

Display Fields

Given This Year To Date Pledg(s) Latest Interaction Next Task

Search Cont

EXPORT

\$0 - 99

Name	Given This Year To Date	Pledge(s)	Latest Interaction	Next Task
Madison, De. (Madison)	\$90	<ul style="list-style-type: none"> \$30.00 monthly STARTED 9/24/16 \$30.00 monthly STARTED 9/24/16 \$1000.00 one time 9/24/16 		
Stephan, De. (Stephan)	\$90			
Lorenza, De. (Lorenza)	\$80			
Loren, De. (Loren)	\$75			
Loren, De. (Loren)	\$69			

\$101 - 499

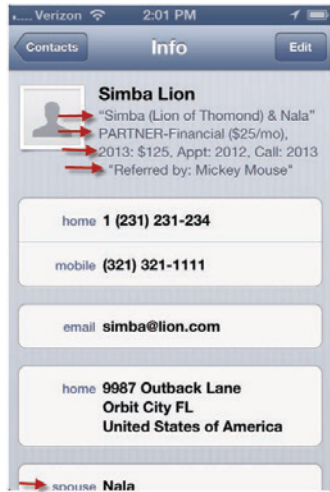
Name	Given This Year To Date	Pledge(s)	Latest Interaction	Next Task
Alan, De. (Alan)	\$450	<ul style="list-style-type: none"> \$1000.00 yearly STARTED 10/10/16 \$30.00 monthly 10/10/16 - 12/31/17 \$5000.00 one time 10/10/16 		
Alan, De. and Mrs. Alan and Barbara	\$450			
Barbara, De. (Barbara)	\$450			
Barbara, De. and Mrs. Barbara and Alan	\$450			
Barbara, De. and Mrs. Barbara and Alan (1)	\$450			

\$500 - 1,999

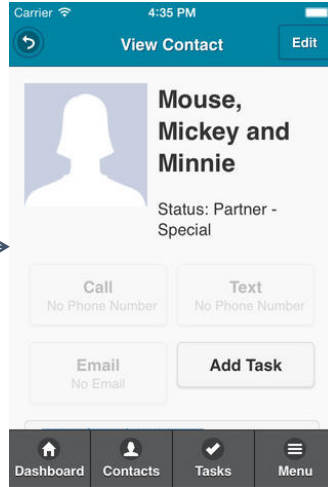
Name	Given This Year To Date	Pledge(s)	Latest Interaction	Next Task
Barbara, De. and Mrs. Barbara and Alan	\$1,900			

Mobile

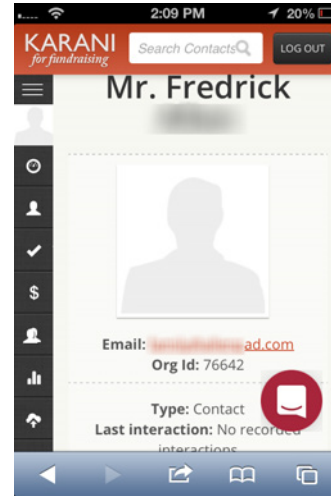
TntConnect



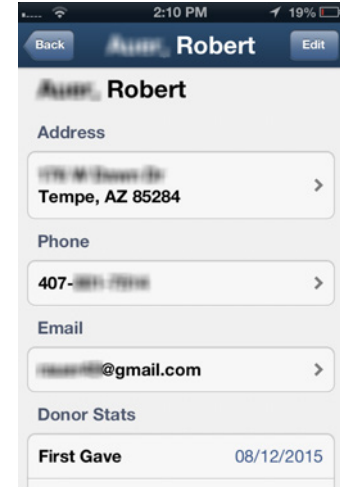
MPDX



Karani



DonorElf



(requires Outlook)
Outlook syncs with
iCloud, MS Exchange,
Google Apps or iPhone
via iTunes and USB.

Works in "Airplane Mode"

What I like about TntConnect

- Fast and works with or without internet access
- The integrated Google Map
- Easy mail merge with Microsoft Word
- Powerful lookups and history analysis



What I like about MPDX

- Task Automation feature
- Syncs with Google Contacts/Calendar
- Dashboard had great next step suggestions
- As a TntConnect user, MPDX felt most similar (conceptually)



What I like about Karani

- Great features for importing contacts, gifts, tasks, and pledges.
- Sophisticated pledge tracking for recurring and one-time.
- “The Grid” for power analysis
- Great tech support with chat-based option in app.

The logo for Karani for fundraising is centered within a thin blue rectangular border. It consists of a dark red rectangular box containing the word "KARANI" in a white, bold, sans-serif font. Below "KARANI", the words "for fundraising" are written in a smaller, white, italicized serif font.

KARANI
for fundraising

What I like about DonorElf

- Easy for new users to learn
- The News Feed feature (artificial intelligence) and daily email
- The mobile app works in airplane mode.
- Great tech support.

DonorELF

How the **organization** should take an active role

• Integration

• Why?

- So missionaries can thank their partners more quickly (or at all).
- So missionaries spend less administrative time.
- Your finance team spends less time preparing reports.
- It's not difficult or expensive. (And it will actually save you money.)

• Commercially supported solutions:

- TntWare's DonorHub Online
- DonorElf
- Karani

How the **organization** should take an active role

- Training

- Why?
 - It's practical!
 - It's effective!
 - It can help with support coaching.

How the **organization** should take an active role

“We in Agape Europe have seen a turn-around in MPD over the last ten years because of focusing on five pillars. One of those pillars has been implementing TntConnect, having it **linked to our accounting** department to provide timely donation information, **including TntConnect training** in all initial MPD training, and **embedding its usage in MPD coaching** on the field for new staff and long-term staff.”

- Martha Conrad, Agape Europe Executive Agent MPD



Conclusion

- There are many good options for MPD software. MPD software can help your staff:
 - Demonstrate **gratitude**.
 - **Follow-up** with partners.
 - Maintain their **newsletter** list and **relationships** over time.
- The organization should take an active role in helping their staff with MPD software:
 - **Integration** ... so gifts flow seamlessly into the MPD software.
 - **Training** ... so staff know how to practically use the MPD software to help them “live out” MPD.



Q & A



Full Sail

SUPPORT RAISING
LEADERS CONFERENCE

FEB 6-9, 2018 ~ ORLANDO, FL



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Network™