

ANOTHER  
"MP"  
WEBINAR

# YOUR MP TOOLBOX

Grab your toolbox and let's get to work!



## TOOLS MAKE EVERYTHING EASIER:

- Keep data clean
- Prepare data
- Speed up data entry

2:48 5G

int.cloudapps.ministryplatform.cloud

### Add/Edit Family

Search

New Family

Last Name: \*

Congregation: \*

Home Phone:  Source: \*

Country:  Address Line 1:

2:47 5G

int.cloudapps.ministryplatform.cloud

### Connection Card

Selected Contacts 0

Search

Select Congregation \*  Effective Date \*

– Milestones

– Opportunities

– Events

– Feedback

– Publication Subscription



# ADD/EDIT COMPANY TOOL

Easily add or edit a Company record

Fav: Search first!

New: Address auto-complete!

Bonus: On mobile!

### Add/Edit Company

Search

**Company Name: \***

**Website:**

**Country:**

**Email:**

**Address Line 1:**  **Address Line 2:**

**Phone:**

**City:**  **State:**  **Zip Code:**

**Congregation:**

Create Donor Record

**Source:**



# ADD/EDIT FAMILY TOOL

Easily add or edit  
Households and Individuals

Fav: One-stop shop!

New: Alternate Address!

Bonus: On mobile!

**Add/Edit Family** ⓘ

Search

Last Name: \*  Congregation: \*  Home Phone:  Source: \*

**Main Address** **Alt Address**

Country:  Address Line 1:  Address Line 2:

City:  State:  Zip Code:

— **Head of House 1** —

Gender  First Name \*  Household Position \*  Participant Type \*

Email Address  Mobile Phone

— **Head of House 2** —  Heads are Married

Gender  First Name \*  Household Position \*  Participant Type \*



# ASSIGN DONOR TOOL

Quickly review and assign  
Donations to an appropriate  
Donor record

Fav: Clean donor data!

New: Address auto-complete!

### Assign Donor

Selected Donations **1**

Donations to Review

5/9/2022 10:15:00 AM: 0, Cash

Notes

First Name: Carl Last Name: Winslow Phone: +5555555555  
Email:a@a.com Address1:123 Family Matters Drive Address2: City,  
State Zip: Chicago,IL 123456 Country: USA

Possible Matches

- Winslow, Carl**  
Head of Household M: 5555555555  
123 Family Matters a@a.com **Assign**  
IL123456
- Winslow, Carl**  
Head of Household M: +5555555555  
123 Family Matters a@a.com **Assign**  
IL123456
- Winslow, Carl Jr.**  
Head of Household H: 555-121-2121  
123 Family Matters M: 608-216-6173 **Assign**  
IL kristin@acst.com
- zebr, Zack**  
Head of Household H: 555-555-5555  
M: 555-555-5555 **Assign**  
devtesting@ministrypl
- Adams, Wally**  
Minor Child M: 555-555-5555  
12871 County Road devtesting@ministrypl **Assign**  
TX

Create new Donor Close



# ASSIGN ENVELOPE NUMBER TOOL

Quickly add the next envelope number to a Donor record

Fav: Multiple at once!

New: Clear issue list!

**Assign Envelope Number**

Selected Donors **10**

Count of records that can have numbers added: 9

Count of records that will not have numbers added: 1

Donor Name	Issue
Flowers by Fern	
Hafner, Wait	
Harbisher, Aurthur	
Kittleby, Jethro	Donor is Inactive
Lindberg, Hew	
Mardlin, Berri	
Smith, John	
StewardshipSheila	
Trainer, MP	
Watkin, Jasmina	

Close Assign



# CONNECTION CARD TOOL

Easily log multiple contact points for one person at the same time

Fav: Save and repeat or reset!

New: Publication Subscriptions!

Bonus: On mobile!

The screenshot shows a web application titled "Connection Card". At the top, there is a search bar with the text "Aaronson, Odette ofransionibs@meetup.com" and a magnifying glass icon. Below the search bar, there are two dropdown menus: "Select Congregation \*" with "Central Campus" selected, and "Effective Date \*" with "05/25/2022" selected. Below these is a section titled "Milestones" with a minus sign to collapse it. It contains a table with four columns: "Milestone Name \*", "Programs \*", "Witness \*", and "Notes". The first row has "Orientation Class" in the first column, "Central Campus Facilities (PF" in the second, "Kittleby, Krissy" in the third, and an empty text box in the fourth. Below the table are five sections, each with a minus sign and a plus sign to add a new entry: "Opportunities" (+ Add Opportunity), "Events" (+ Add Event), "Feedback" (+ Add Feedback), and "Publication Subscription" (+ Add Publication). At the bottom of the form, there are three buttons: "Reset Form", "Close", and "Save".



# CONTACT LOG TOOL

Quickly add a Contact Log record for one or multiple individuals

Fav: Capture touchpoints!

New: Standard setter!

Bonus: On mobile!

### Contact Log

Selected Contacts **13**  Search

**Choose Contact Type \***

**Choose Log Date \***

**Contact Made By \***

**Planned Contact**

**Notes \***

101/2000





# COPY/REVERSE DONATION TOOL

Easily copy or reverse a Donation

Fav: Optional finalize and deposit!

New: Tool (not report)!

### Copy Donation

**Selected Donations** 1

<b>Donation Date *</b>	05/25/2022
<b>Reverse Amounts</b>	Yes (NSF/Correction)
<b>Batch Name *</b>	5/25/2022 Reversal

**Create Batch**

Create Batch for Reversed Donations

**Finalize And Deposit**

Finalize And Deposit The Batch

**Summary**

<b>Total Number of Donations</b>	1
<b>Total Amount of Donations</b>	\$85.00
St. Jude Mass Services	\$85.00

[Close](#) [Copy Donations](#)



# COPY/REVERSE PAYMENT TOOL

Easily copy or reverse a Payment

Fav: Saves TONS of manual steps!

New: Everything!

### Copy Payment

**Selected Payments** 1

<b>Payment Date *</b>	05/25/2022
<b>Reverse Amounts</b>	Yes (NSF/Correction)
<b>Merchant Batch *</b>	5/25/2022 Reversal

**Summary**

<b>Total Number of Payments</b>	1
<b>Total Amount of Payments</b>	\$260.00
Summer Retreat	\$260.00

Close Copy Payments



# CREATE BATCH TOOL

Quickly create a Batch for the selected Donations

Fav: Optional finalize and deposit!

New: Tool (not report)!

### Create Batch

**Selected Donations** 38

**Congregation \***  
Central Campus

**Batch Name**  
Sunday CC

**Batch Entry Type \***  
Online Giving

**Finalize And Deposit**  
 Finalize And Deposit The Batch

**Deposit Date \***  
05/25/2022

**Summary**

<b>Total Number of Donations</b>	<b>38</b>
<b>Batch Total Amount</b>	<b>\$6,880.89</b>
Central Campus Weekend Worship	\$5,530.89
Further With Him Campaign	\$1,200.00
Student Ministries Activities	\$150.00

[Close](#) [Create Batch](#)



# CREATE DEPOSIT TOOL

Quickly create a Deposit for the selected Batches

Fav: Optional one Deposit per Batch!

New: Tool (not report)!

### Create Deposit

Selected Batches **1**

Deposit Name

Deposit Date \*

One Deposit Per Batch  
 One Deposit Per Batch

Summary

<b>Number Of Batches</b>	<b>1</b>
<b>Deposit Total Amount</b>	<b>\$52,850.00</b>
Missions & Outreach Activities	\$15,100.00
South Campus Weekend Worship	\$15,000.00
Special Events: Haiti Disaster Relief	\$22,650.00
St. Gabriel's Building Projects	\$100.00

[Close](#) [Create Deposit](#)



# CREATE HOUSEHOLD CARE LOG TOOL

Quickly add a Household Care Log record

Fav: Equip staff or volunteers to enter without access to Care Case details!

New: Everything!

The screenshot shows a web form titled "Create Household Care Log" with a dark header bar. Below the header, there is a search bar with "Abad" entered and a magnifying glass icon. To the left of the search bar, it says "Selected Households 0". The form contains several fields: "Care Type \*" with a dropdown menu showing "Benevolence"; "Care Case" with a dropdown menu showing "Apr 7 2021 12:00AM"; "Contact" with a dropdown menu showing "kristin@acst.com"; "Provided by \*" with a dropdown menu showing "kristin@acst.com" and a magnifying glass icon; "Action Date" with a date input field showing "06/02/2022" and a calendar icon; and "Completed" with a checked checkbox. Below these fields is a "Notes" section with a text area containing "sadsad" and "sss". At the bottom right of the form, there are "Close" and "Save" buttons.



# CREATE PLEDGE TOOL

Quickly add a Pledge record

Fav: Empower staff or volunteers to enter without access to Campaign or Donation details!

New: Everything!

### Create Pledge

Selected Contacts **0**  Search

<b>Pledge Campaigns *</b>	<b>Pledge Statuses *</b>	<b>Total Pledge *</b>
<input type="text" value="Build to Reach"/>	<input type="text" value="Active"/>	<input type="text" value="10000.00"/>
<b>Installments Planned *</b>	<b>Installments Per Year *</b>	<b>First Installment Date *</b>
<input type="text" value="12"/>	<input type="text" value="12"/>	<input type="text" value="06/01/2022"/>

**Notes**

0/500



# DECEASED PERSON TOOL

Quickly identify and update records to update when an individual passes away

Fav: One-stop shop!

New: Explicit Date of Death!

Bonus: On mobile!

### Deceased Person

Contact to be marked as deceased - Aizikovitch, Jarrad

**Remove Personal Data**

- Email
- Cell Phone
- Remove From Household
- Change Status to Deceased
- End Date Participant Record
- End Date Groups ( 1 )
- Future Events ( 0 )
- Close Open Responses ( 0 )
- Unsubscribe Publications ( 0 )
- Opt Out All Communications

**Participant Type**

Church Family

**Update Family Data**

- Change Spouse Status to Widowed
- Add Missing Child Relationships

**Transfer Donation Data to Spouse - Aizikovitch, Stacia**

**Donations - 0**

- Transfer Donations
- Transfer Donor Accounts
- Transfer Envelope
- Cancel Envelope Number
- Transfer Pledges ( 2 )
- Discontinue Pledges ( 2 )

Close Save



# EVENT METRICS TOOL

Quickly enter metric information for an Event

Fav: Save and repeat or reset!

New: Multiple metrics!

Bonus: On mobile!

### Event Metrics

Search

Metric *	Group	Number *
<input type="text" value="Headcount"/>	<input type="text"/>	<input type="text" value="232"/>
<input type="text" value="Cars in Parking Lot"/>	<input type="text"/>	<input type="text" value="156"/>

[+ Add Event Metric](#)

[Reset Form](#) [Close](#) [Save](#)





# INACTIVATE TOOL

Quickly inactivate individuals or companies that no longer participate in your church

Fav: One-stop shop!

New: Unsubscribe from Publications!

Bonus: On mobile!

**Inactivate**

Selected Contacts 0

Search JaineAbbitt

Contacts Status \*  
Inactive

Participant Type  
Dropped

Participant / Group End Date \*  
06/01/2022

Unsubscribe Publications Yes

Discontinue Donor Pledges No

Cancel Donor Envelopes No

Notes  
Input text here...  
0/500

Close Save



# MAP MY SELECTION TOOL

Easily visualize and interact with records on a map

Fav: Color coding!

New: Up to 1,000 records!

**Map Selection Tool**

<< Contacts  
Selected 23 out of 23

Engagement Level (2/2) ^

Partially Engaged (16)

None (7)

Congregations (2/2) v

Participant Types (2/2) v

Genders (3/3) v

Close Save Selection



# PROCESS PAYMENTS TOOL

Quickly review a selection of payments and process them, if desired

Fav: Optional include free!

New: Tool (not report)!

### Process Payments

**Selected Contacts** 53

**Assign Merchant Batch \***  
Week of 06.04.2022

**Include Free Options**  
 Include Free Options

**Summary**

<b>Total number of Payments</b>	<b>51</b>
<b>Total amount of Payments</b>	<b>\$7,267.50</b>
Student Enrichment	\$1,037.50
Student Retreat	\$3,440.00
Summer Retreat	\$1,910.00
VBS	\$500.00
Women's Bible Studies	\$280.00

[Close](#) [Process Payments](#)



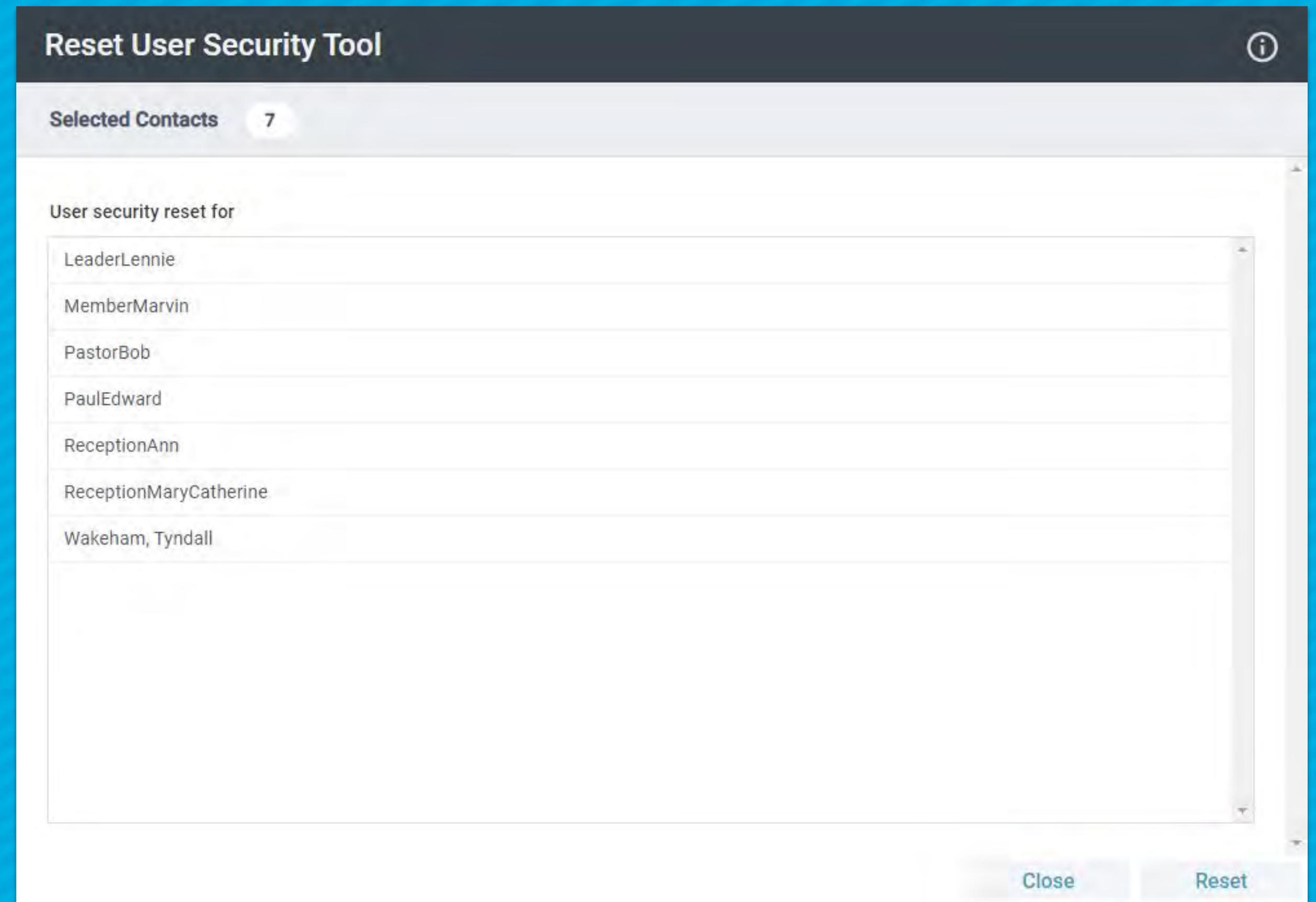
# RESET USER SECURITY TOOL

Quickly reset the User and Contact GUIDs on desired records

Fav: Security!

New: Audit Log!

Bonus: On mobile!





# RESPONSE FOLLOW UP TOOL

Quickly add a Response Follow-Up record for one or multiple individuals

Fav: Manage Opportunity responses more easily!

New: Everything!

Bonus: On mobile!

### Response Follow Up

Selected Responses 9

Made By \*  
Administrator, MinistryPlatform

Follow Up Type \*  
Meeting

Follow Up Date \*  
06/01/2022

Notes \*  
Met with interested volunteers for a Q&A and to go over expectations and process.

81/2000

Close Save



# TEMPLATE EDITOR TOOL

Easily create beautiful,  
responsive Templates

Fav: Without using HTML!

The screenshot shows the 'Template Editor' interface. At the top, there are fields for 'Template:' (set to 'Invitation to Marriage ...') and 'Name: \*' (set to 'Invitation to Marriage Retreat'). Below that is a 'Subject: \*' field containing 'You're invited to our Widget Church Marriage Retreat'. The main area displays a preview of the template, which features a heart-shaped graphic with the text 'Marriage Retreat' in a cursive font. Below the graphic, there is a 'Welcome [Nickname]!' greeting, followed by two paragraphs of text: 'We want to invite you to our Marriage Retreat coming up next month.' and 'We are planning our yearly marriage retreat. Come get away with your spouse for a weekend of reconnecting with your spouse and with Christ. Enjoy the weekend with great fellowship'. To the right of the preview is a toolbar with icons for 'COLUMNS', 'BUTTON', 'DIVIDER', 'HEADING', 'HTML', 'IMAGE', 'MENU', 'TEXT', and 'VIDEO'. A vertical sidebar on the far right contains icons for 'Content', 'Blocks', 'Body', 'Images', and 'Uploads'. At the bottom right, there are three buttons: 'Close', 'Save', and 'Save As New'.



Thanks for joining us!