

# Active Contacts

How to get an A: 85% or more of your Contacts with a Contact Status of Active also have Activity in the last year.

Ways to fix: Build a view to see all Contacts with a Household activity date that is over a year old.

Pro-Tip: Use “Get date” to always show people whose activity is over 365 days old.

<http://www.thinkministry.com/kb/ministryplatform/extending/sql/functions/getdate/>

Then use the inactivate tool as appropriate

Advanced Search x

- Home Address Unistea
- Bulk Mail Opt Out
- First Donation
- Last Donation
- Last Activity
- Seasonal Alternate Address Se
- Alternate Mailing Address
- Season Start
- Season End
- Repeats Annually
- End Seasonal Alternate Adresse
- Household Position
- Anniversary Date

View: New View Delete

Title: Activity since 3/13/2019 User Group:  ...

Description:

Form Layout **SQL Layout**

	Column Name	Comparison	Search Term
	Display Name	<span>▼</span> N/A <span>▼</span>	Not Filtered
	Nickname	<span>▼</span> N/A <span>▼</span>	Not Filtered
	Contact Status	<span>▼</span> Exact Match <span>▼</span>	Active

<input type="checkbox"/>		Display Name	Nickname	Contact Status	Last Activity	
<input type="checkbox"/>	●	Admin, Quality	Quality	Active	1/17/2018 6:11...	
<input type="checkbox"/>	●	Dell, Judy	Judy	Active	2/8/2018 2:24 ...	

# Duplicate Contacts

How to get an A: Less than 2% of your Contacts with the Duplicate of Contact Relationship also have Activity in the last year.

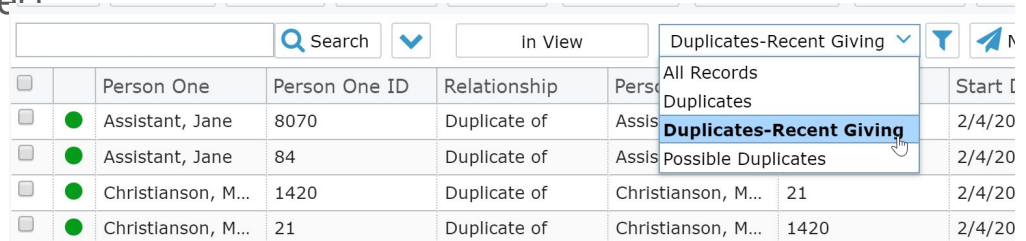
Ways to fix: Use the Combine Contacts tool

Ways to prevent:

- ALWAYS search more than once
- Have a data minimum (name plus 2 pieces of information)
- Try to gather birthdate via paper and custom form

Wondering where to see them all?

- Contact Relationships (People list folder)
- Use Views:
  - Duplicates
  - Duplicates - recent giving



The screenshot shows a CRM interface with a table of duplicate contacts. The table has columns for checkboxes, Person One, Person One ID, Relationship, Person Two, and Start Date. A dropdown menu is open over the table, showing options: 'All Records', 'Duplicates', 'Duplicates-Recent Giving' (highlighted), and 'Possible Duplicates'. The table contains four rows of duplicate contacts, each with a green dot in the Person One column.

	Person One	Person One ID	Relationship	Person Two	Start Date	
<input type="checkbox"/>	Assistant, Jane	8070	Duplicate of	Assis	2/4/20	
<input type="checkbox"/>	Assistant, Jane	84	Duplicate of	Assis	2/4/20	
<input type="checkbox"/>	Christianson, M...	1420	Duplicate of	Christianson, M...	21	2/4/20
<input type="checkbox"/>	Christianson, M...	21	Duplicate of	Christianson, M...	1420	2/4/20

# Contacts No Household

**How to get an A: Less than 2% of your Contacts with a missing Household field also have Activity in the last year.**

Ways to fix: Use the Transfer Selection Tool and use the “Add missing record” option

Ways to prevent:

- ALWAYS use a tool when creating Contact records
- Use the tool in cases of divorce or other family separations

Wondering where to see them all?

- Make a View on Contacts - Contacts without a household

NOTE: Deceased people are not included in this report card item.

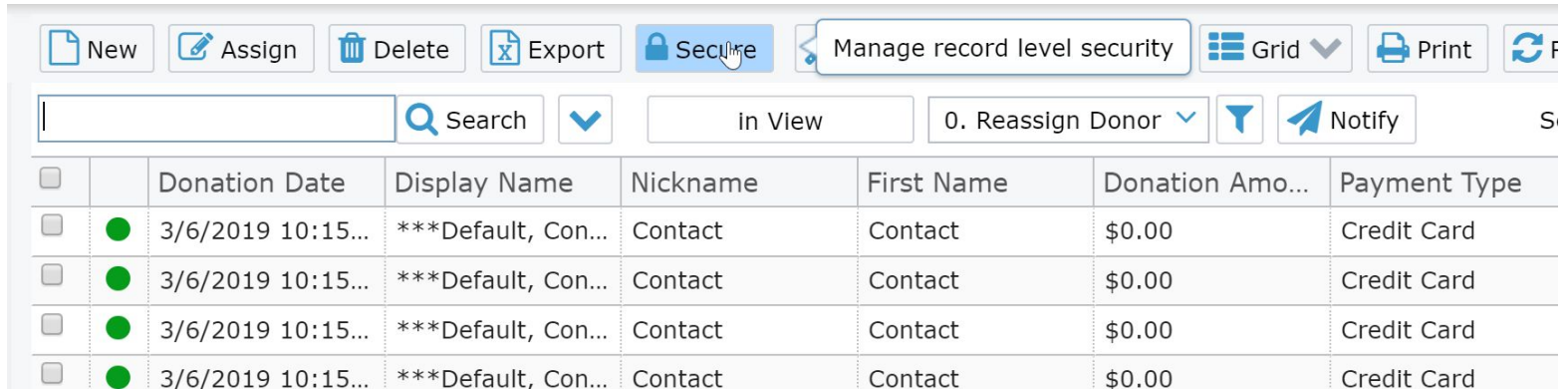
# Default Donor Donations

How to get an A: Less than 2% of your Donations are associated with Default Contact compared to number of Contacts with Activity in the last year or none.

Ways to fix: Use the Assign Donor tool on the Donations page

Wondering where to see them all?

- Donations: 0. Reassign Donor



	Donation Date	Display Name	Nickname	First Name	Donation Amo...	Payment Type
<input type="checkbox"/>	● 3/6/2019 10:15...	***Default, Con...	Contact	Contact	\$0.00	Credit Card
<input type="checkbox"/>	● 3/6/2019 10:15...	***Default, Con...	Contact	Contact	\$0.00	Credit Card
<input type="checkbox"/>	● 3/6/2019 10:15...	***Default, Con...	Contact	Contact	\$0.00	Credit Card
<input type="checkbox"/>	● 3/6/2019 10:15...	***Default, Con...	Contact	Contact	\$0.00	Credit Card

# Default Event Participants

How to get an A: A decrease of at least 10% month over month or none.

Ways to fix: Use the Assign Participant tool on the Events page (will fix the Event Participant, Form response, Group participant records where applicable)

Wondering where to see them all?

- Events: Fix Assign Participants
- Event Participants: 1. Reassign Participants

What to do when you don't have enough information?

- Use the "Unassigned Contact" record (more later)

The screenshot displays a software interface for managing event participants. At the top, there is a search bar with a magnifying glass icon and a dropdown arrow, followed by a filter menu set to "in View" and a "Fix: Assign Participants" dropdown with a funnel icon and a refresh icon.

Below this are two data tables. The first table has columns for "Event Start Da...", "Event Title", "Event Type", "Congregation ...", and "Program Name". It shows two rows: one for "Let's Make a Me..." on 2/23/2019 and another for "Stephen's Samp..." on 2/8/2019.

The second table is more detailed, with columns for "Setup Date", "Event Title", "Event Start Da...", "Last Name", "First Name", "Participation S...", and "Program N". It shows three rows of participant data, all with "\*\*\*Default" as the last name and "Contact" as the first name.

At the bottom right of the second table, there is another search bar, a filter menu set to "1. Reassign Participants", a funnel icon, a "Notify" button with a bell icon, and a "Selection: All" dropdown.

# Other Default Records

Default Donor Pledges - Less than 2% of your Pledges are associated with Default Contact compared to number of Contacts with Activity in the last year or none

Default Form Responses - A decrease of at least 10% month over month (or none).

Default Group Responses - A decrease of at least 10% month over month or none.

Default Opportunity Responses - A decrease of at least 10% month over month or none.

Default Group Inquiries - A decrease of at least 10% month over month or none.

How to fix:

Make views! Set up view notifications.

# Helpful Tips for Defaults:

Set up View notifications! Use the new and improved “Do not send if empty” option!!!

Use the Unassigned Contact:

- On records where you don't have enough information
- On records where you have bad information
- On records where you are purposefully NOT adding those people to MP (such as an event where you invite pastors from other churches)

**Add Notification**

**Items To Watch:**

Current Record: N/A

Selected Records: Current/Unsaved Selection

Contents of View: 1. Reassign Participants

**Deliver To:**

My User Record: Kirscher, Melissa

User Group Members: Select Group

Results Using Template: Select Template

**Send Notification:**

Immediately (When Updated)

Using Existing Schedule: Select Notification Schedule

Using New Schedule

Daily/Weekly

Sunday  Monday  Tuesday  Wednesday

Thursday  Friday  Saturday

Time: 12:00 AM

Send Empty Views:  Notify me even when there are no results

Save Close

Close Edit Delete Secure Attach File Print Tools Reports Notify

**\*\*\*Unassigned, Contact** Contact #4

Contact Type: Individual

**Individual**

Prefix: First Name: Middle Name: Last Name: Suffix:  
Contact Contact \*\*\*Unassigned

Nickname: Date of Birth: Age: Gender: Marital Status:  
Contact

Display Name: \*\*\*Unassigned, Contact

Contact Status \*: Active

Household: Your Church - 1595 Peachtree Pkwy Ste 204-212

Household Position: Company

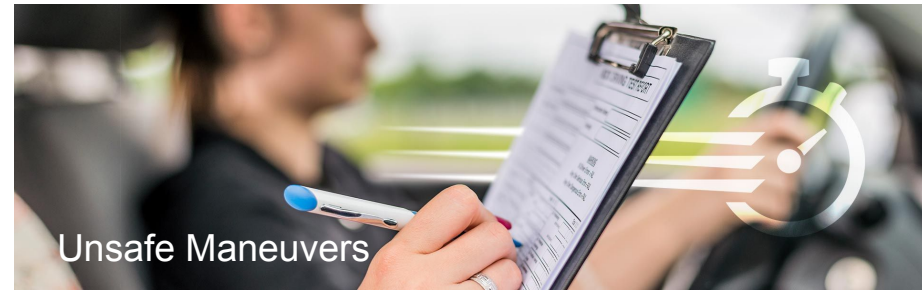
Tasks

Files

Contact Card

# Major Data Issues

How to get an A: No Contact records with a major data issue.



Unsafe Maneuvers

Ways to fix: Use the view and jump to various records to determine cause

Ways to prevent:

- Use the tools to create new records. Do not click on “New” on the Donor, Participant, User or Household pages. Use the transfer selection tool instead.
- Don’t “Edit” a record’s Contact, Participant, Donor, User or Household field (in the rare cases when this is needed, proceed carefully).

Need Help?

- Engage a coach. Due to the fact that these records can represent a number of complex scenarios - if you do not know where to begin, you will want to engage a coach to help you research how things are incorrectly corrected so that you can correct them.