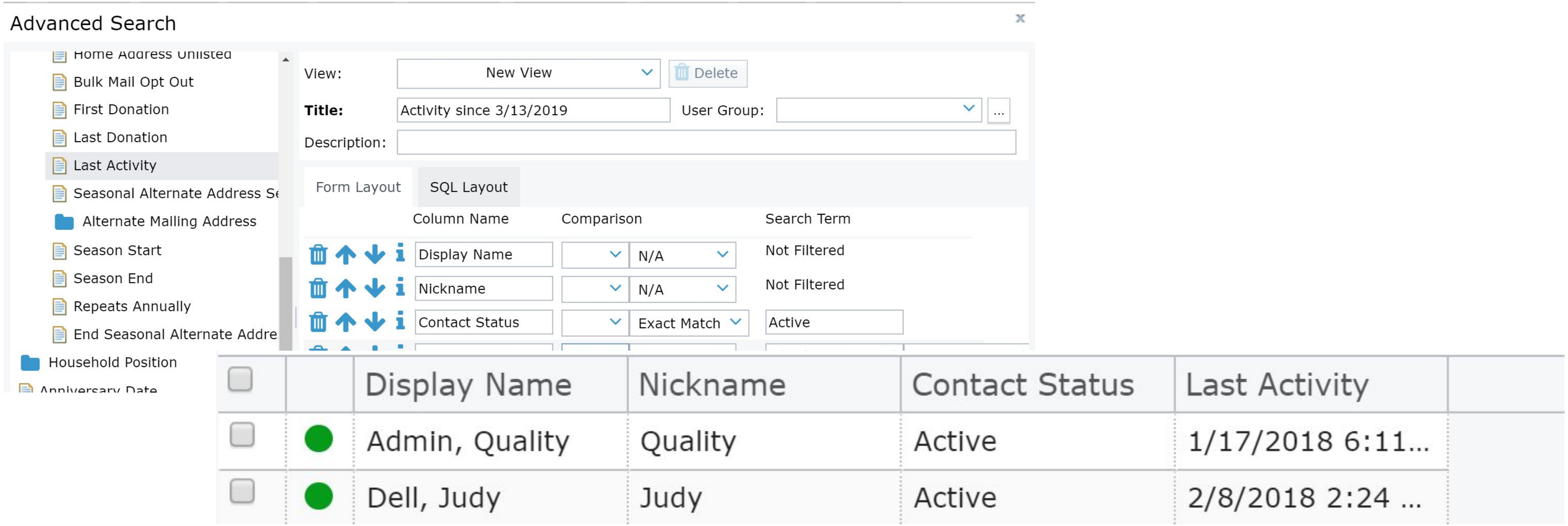
Active Contacts

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



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.

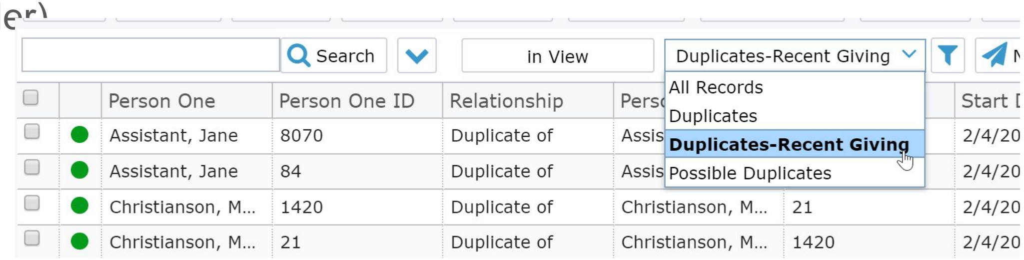
Ways to fix: Use the Combine Contacts tool

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



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.

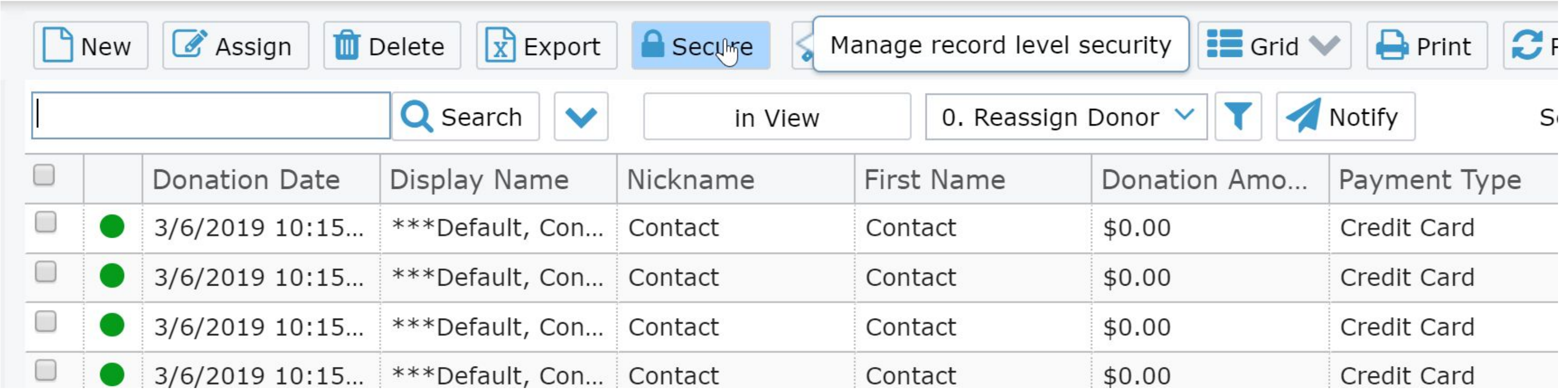
Default Donor Donations

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



Default Event Participants

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

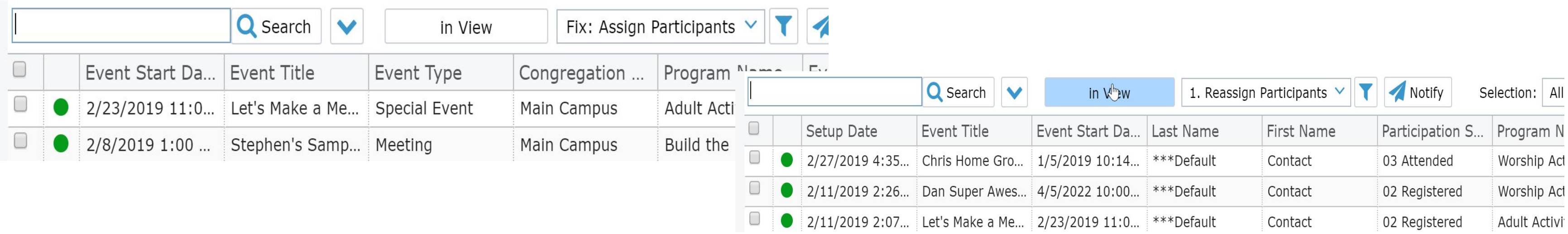
Ways to fix: Use the Assign Participant tool on the Events page (will fix the Event Participant, Form response, Group participant records where applicable)

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)



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.

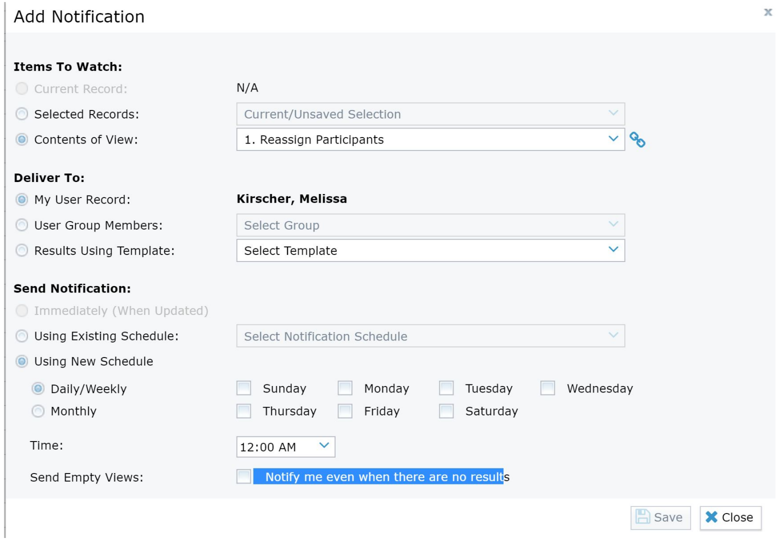
Default Group Inquiries - A decrease of at least 10% month over month or none.

How to fix:

Make views! Set up view notifications.

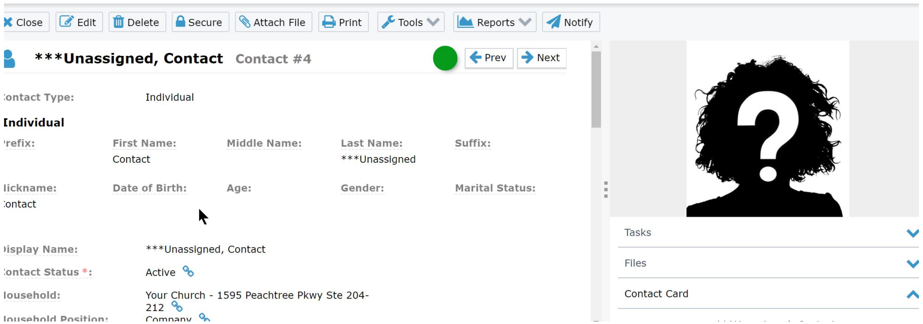
Helpful Tips for Defaults:

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)



Major Data Issues

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

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.