Existing Tntconnect User Initial Datasync

> (i) **Tntconnect Users!**
>
> Tntconnect 4.x version and beyond no longer supports the datasync function. As long as long as you don't upgrade to version 4.x or later (in other words stay at version 3.x), Tntconnect will work just fine and continue to import the datasync files. If you have already updated to a 4.x or beyond you can try to revert to the older version if possible, continue using your current version that can't do the data sync (not recommended), or switch to another database.

Introduction

This document is aimed at staff already taking advantage of Tntconnect, and who have existing data in their local Tntconnect database. If you have never used Tntconnect, please refer to the New Tntconnect User document. **If you did not download this file from Reliant's Tntconnect DataSync page close it now and go grab the latest version**. You don't want to follow instructions in and old file and take a chance that we've updated something important! https://toolbox.reliant.org/mtd/datasync

Backup your existing Tntconnect database!

- **Backup your existing database before you start!**
- Launch Tntconnect, Click on the "File" menu, and choose the "Backup…" option. (You can also go to the location of your Tntconnect database file and simply make a copy of it)
- **We can't stress this enough! Back it up. Do it now!**

Getting the DataSync party started!

The Tntconnect DataSync file is the easiest and fastest way to sync all of your donor and gift information in one easy step. One easy step, then why all the warnings and hoopla?! Well, once you've finished this inital DataSync all of your following DataSync's will be easy cheesy!

1. Go to the current Tntconnect page on Toolbox. If you aren't logged in already it will take you to the login page first.
   https://toolbox.reliant.org/mtd/datasync

2. Click on the "**Download File**" button to download your personal Tntconnect DataSync file. This file is created the moment you click the button and is a personalized data file for you. It will always have the most up to date data on gifts and donors that Reliant has.

3. Before we do the import, Tntconnect allows you to setup automatic tasks for newly inputted data. We do not recommend allowing automatic tasks for your first import. I f you do not turn this off, Tntconnect will create tasks for all gifts you've ever received. This could create thousands of tasks related to the donors and gifts you will be importing from Reliant. If you specifically want to have tasks created for all your Reliant imported gifts, then skip to step 4. If however, you would **not** like to have tasks created for all your Reliant imported gifts, you can temporarily disable automatic task creation in Tntconnect as follows: Select Tools in the top menu bar, and click on "Options" [Figure 1]. In the Options dialog, select the "Gifts" tag and uncheck the "Enable Automatic Actions for New Gifts" option [Figure 2].
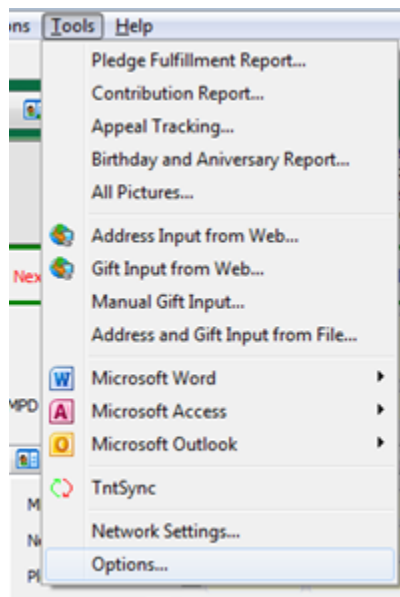
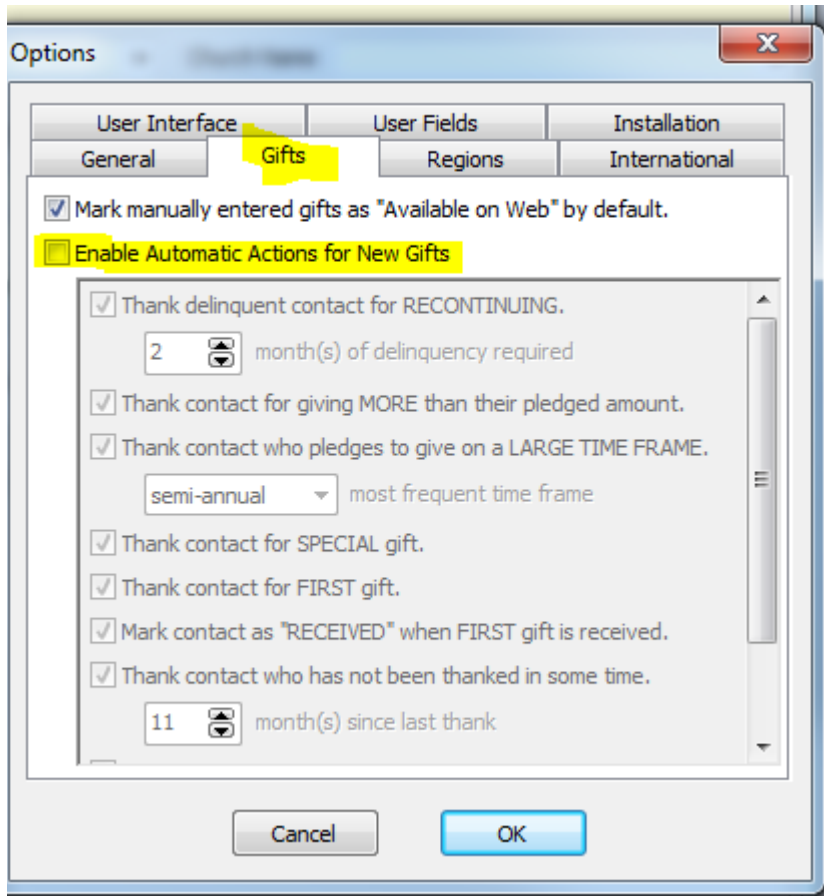**Figure 1 – Tools > Options**

Figure 2 – Automatic Actions for New Gift

4. Let's import the file! If your Tntconnect installation was associated with .tntmpd file types, you can simply double click the downloaded file. Otherwise, in the Tntconnect program, click on Tools (in the top menu bar) and select "Address and Gift Import from File," and browse to your downloaded file [Figure 3].
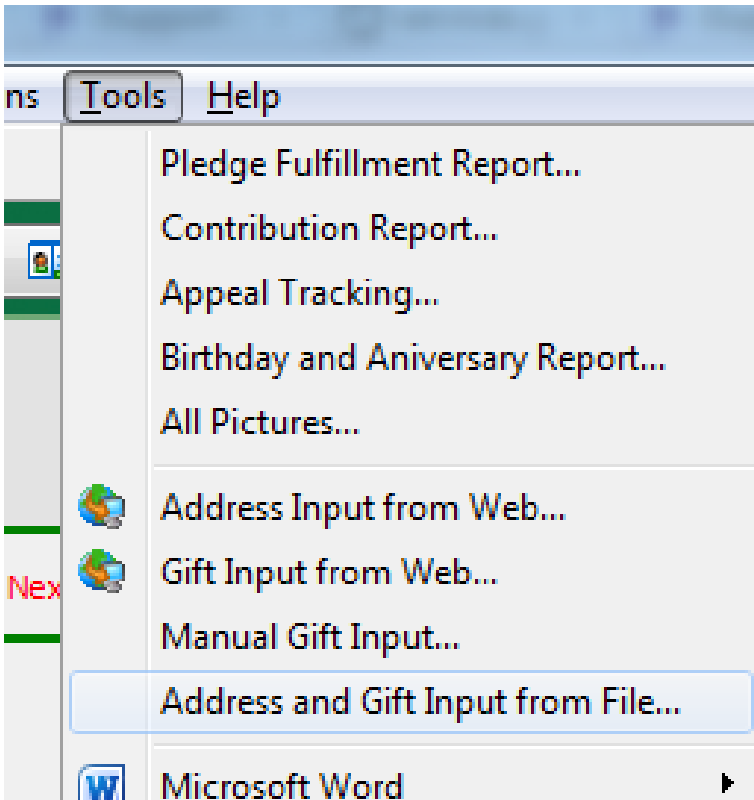
Figure 3 – Address and Gift Input from File

5. You might be prompted to find the matching country from a drop down. Select the correct option and click "OK" [Figure 4].
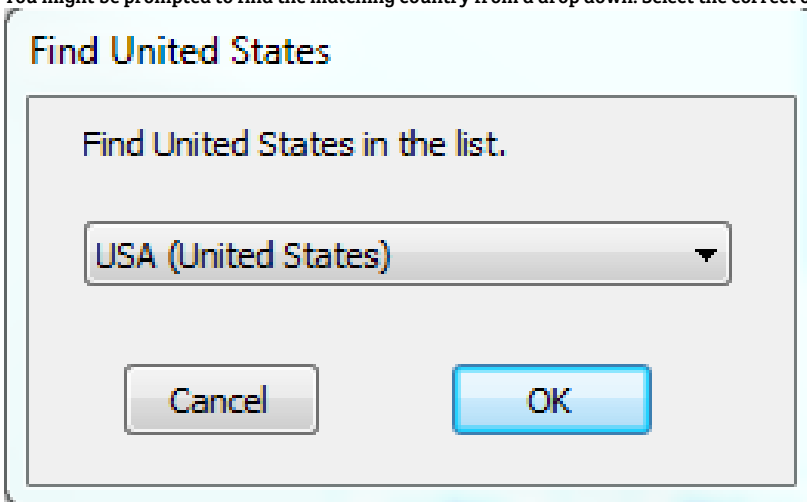

Figure 4 – Find Country Window

6. Tntconnect will analyze the DataSync file and present you with a summary view [Figure 5] which highlights the number of contacts that will be added to your Tntconnect database, the gifts associated with those contacts, the total amount of those gifts, and the dates of the oldest and most recent gifts. To sync Reliant data with your existing data, **make sure you check the "Try to match new accounts with existing contacts" option.** Click "Next" to dive in!
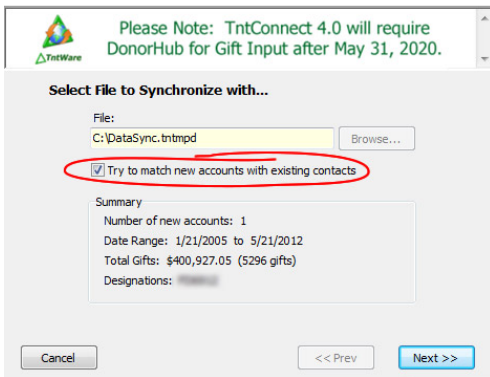
Figure 5 – DataSync Summary

Those Tricky Donors

1. Tntconnect will now present you with a screen to try and match the Reliant contact with your existing contacts. You will be presented with the screen for **each donor** in your Reliant DataSync file. *This is a lengthy process, but you only have to do it once!*

Now, let's pause here a minute, because this is the tricky part. The way Reliant records donors is legally tied in to the name by which they donated. Here are a few different scenarios that can cause issues:

- With a married couple
  - The husband might mail a check with just his name on it, and later the wife mails a check with just her name on it. These are two distinct donors according to Reliant.
  - A wife may have checks labeled "Jane and John Doe" while a husband's checks may say "John and Jane Doe". These are two distinct donors according to Reliant.
  - One member of the couple may have died, or the couple may not be divorced. You may see these donors as "John and Jane Doe" and "Jane Doe". These are two distinct donors according to Reliant.
- With a Business
  - If a donor gives through their business, Reliant will have their business as a donor. If they also give personally it is considered a separate donor.

The DataSync will prompt you for **each donor** that Reliant has recorded. The point in mentioning this is that many people would have these related donors as a single contact in Tntconnect. It is up to you to decide if you want the contacts listed separately (like Reliant) or if you want to combine them into a single Tntconnect contact. You can do it either way, but you need to remember that **if you combine them in TntMPD, they will not match what you see on Toolbox**. You might ask your MTD coach what they think you should do. Tntconnect will kindly show you when there are multiple donors associated with a single Tntconnect contact (you'll see this toward the end of these instructions). If, however, you would like to have everything identical to Reliant's records, you should head to h ttp://www.gcmstaff.net and go to MTD > Donors. From the donors page select "All Dates" in the "By Giving" drop down box. This will then give you a list of all donors who have ever given to the account you are responsible for. This list will match the list in the DataSync file, so you can use it as a guide when Tntconnect prompts you for each donor individually. Without it you may not realize that you are combining donors into a single contact until later.

Ok, moving on. After clicking "Next" a while back on the DataSync summary window a new window pops up. This will actually be one of two windows, either the "Confirm Match" window [Figure 6] or the "Find [Contact]" window [Figure 7]. The "Confirm Match" window [Figure 6] will contain a list of contacts that have information (name, address, etc) similar to the new contact. If the contact already exists, then select the correct match and press the "Yes" button. Otherwise, click on "No Match," and Tntconnect will add them as a new contact in the next step. If Tntconnect cannot find a close match, it will present you with the "Find [Contact]" window [Figure 7] showing a full list of your contacts to choose from. If there is not a match click "No Match" and Tntconnect will add them as a new contact in the next step.

Figure 6 – Confirm Match Window

Figure 7 - Find "Contact" Window

2. When matching donors to contacts is complete, you will have the opportunity to add the Donors you selected "No Match" to earlier as contacts in Tntconnect [Figure 8]. At this point, you have the option to uncheck any donors that you do not want to add to your Tntconnect database at this time. By default, all contacts in the DataSync file will be imported. Click "Next" to add all your selected donors to your contact list.

Figure 8 - Contacts to Add

The gifts are tricky too!

Once Tntconnect has imported your donors, it will scan the gift records in the DataSync file and compare them against your local Tntconnect database. You will then see one of three windows popup, and in many cases, a combination of the three.

1. If Tntconnect finds updated gift information while scanning the gift DataSync file, it will automatically adjust the information and present you with a confirmation dialog [Figure 9]. This would happen if you had previously entered a donor's gift incorrectly (or at least somehow different from how Reliant has it recorded). If there are not gifts where the amount given needs to be updated, you will not see this message.
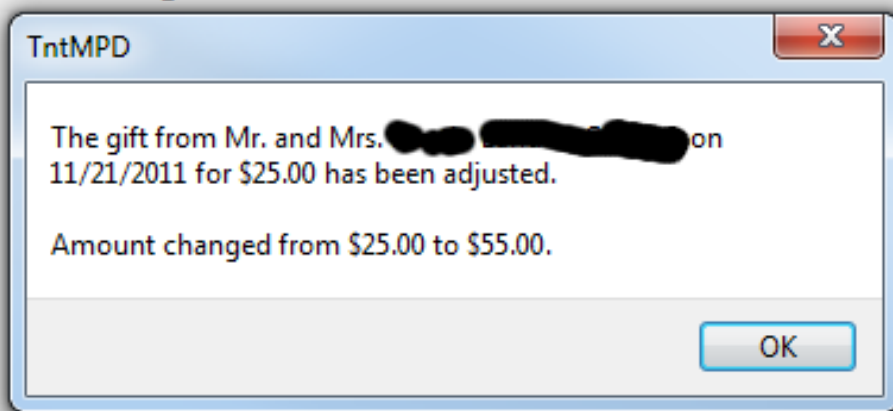

Figure 9 – Updated Gift Information

2. If Tntconnect finds new gifts that do not exist in your Tntconnect database, it will present you with list of all new gifts to be imported [Figure 10]. At this point, you have the option to uncheck any gifts that you do not want to add to your Tntconnect database at this time; by default, all new gifts are checked and will be imported. Clicking "Next" will bring up a summary of the gifts to be added to your Tntconnect database. [Figure 11]. Click on "Sync" to finish adding the gifts.
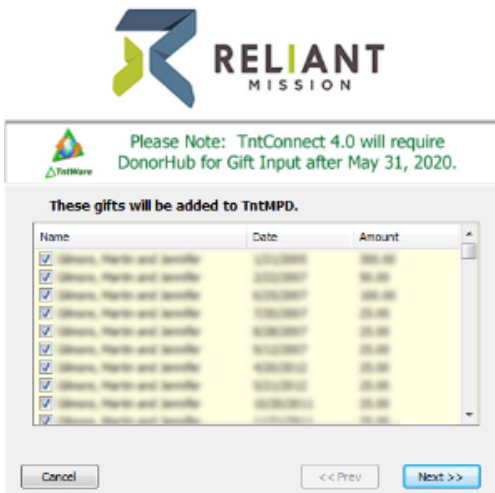
Figure 10 – DataSync Gift Summary

Figure 11 - Gift Import Summary

3. If Tntconnect finds no updated gifts and no new gifts, or if it has finished updating and importing from the steps above, Tntconnect will tell you that you have successfully synchronized your gift information [Figure 12].
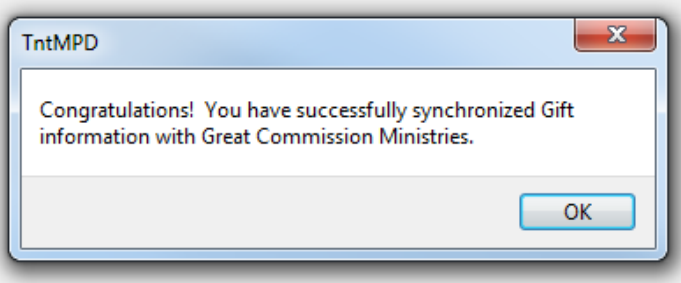

Figure 12 – Successful synchronization

That's it, you're done!   well, almost... there's still a few more important things to know/do!

Let's turn Tntconnect's "Actions" back on

Select Tools in the top menu bar, and click on "Options" [Figure 13]. In the Options dialog, select the "Gifts" tag and check the "Enable Automatic Actions for New Gifts" option [Figure 14].
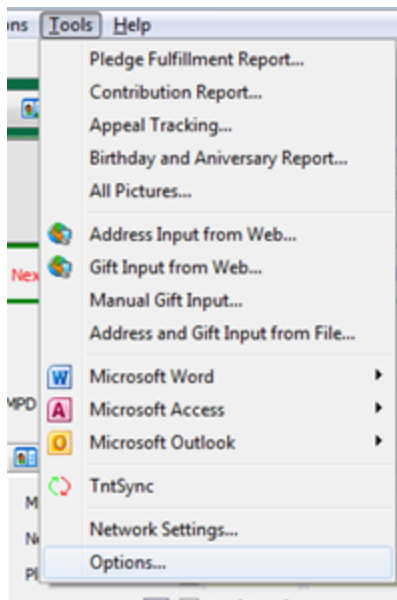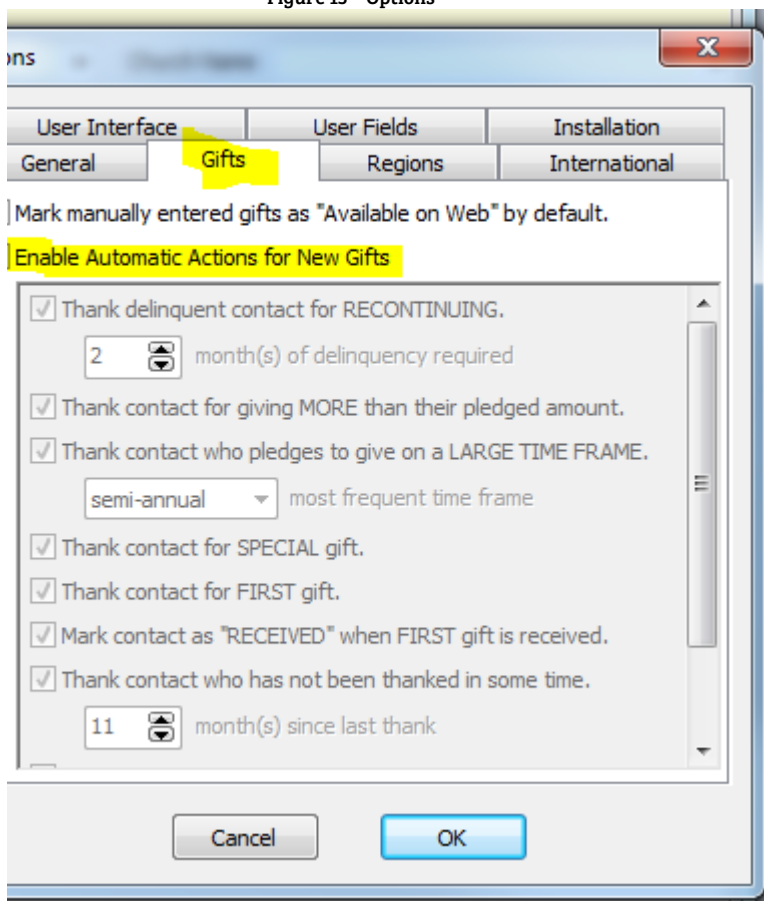
Figure 13 – Options

Figure 14 - Enable Automatic Actions

You mean there's more?!!

Yes, there's more. **Tntconnect will never automatically update a contact's information with donor data from Reliant.** **You have to manually go contact by contact to accept changes from the DataSync. This is not true of gifts, only of a contact's primary address and primary phone number. It does not allow for email updates either!!**

1. Ok, so, you're sync'ed, but what does that mean exactly? Did Tntconnect just update all of your contact's contact information with Reliant's data? The DataSync you just completed associated your Tntconnect contact with a Reliant donor, and it did this using Reliant's donor number (RE######). If you take a look at the top right of a contact who has **not** been associated with a donor, you will see "No Org Account" [Figure 15]. If you click on "No Org Account" a blank contact information screen will popup [Figure 16].
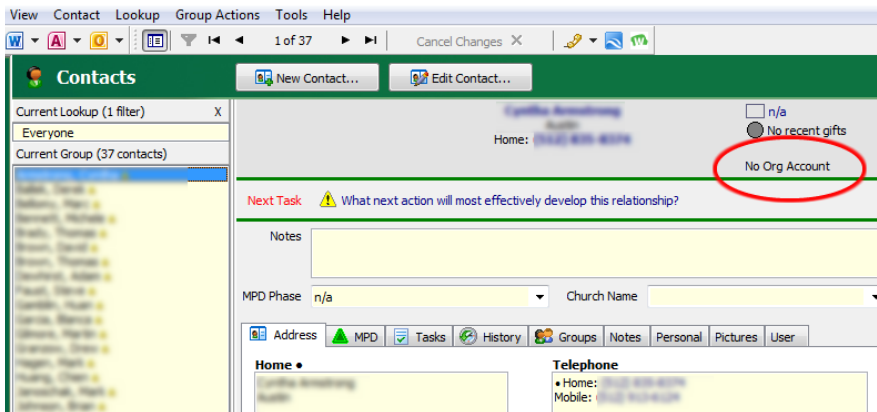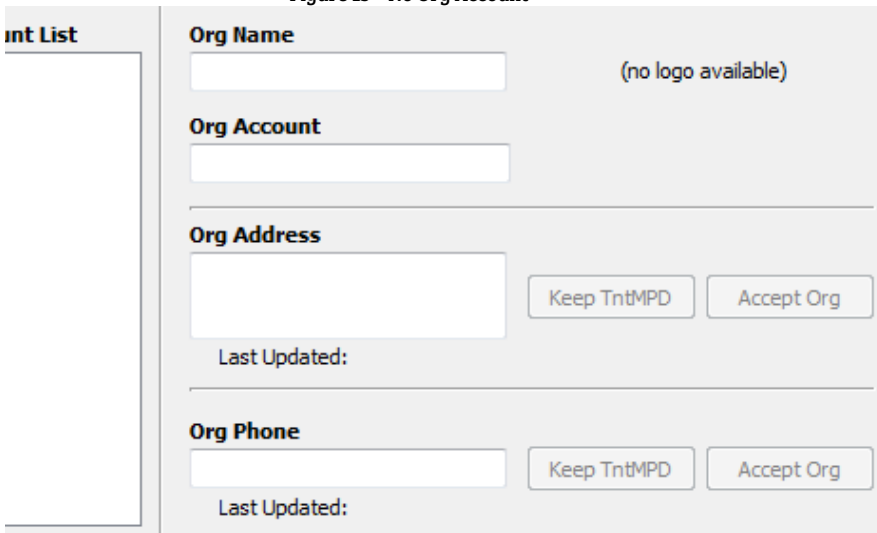

Figure 15 – No Org Account

Figure 16 - Blank Org Info

2. Once you have run the DataSync and a contact has been connected with a donor you will see the Reliant's donor number (RE######) instead of "No Org Account" [Figure 17a]. After a DataSync, **IF** there are updates from Reliant to a Donor's data, Tntconnect will display the updateable data in red [Figure 17b & c]. Any data from Reliant that has not changed will display in Tntconnect's normal black/blue colors [Figure 12d]. When you click on Reliant's Donor Number (RE######) [Figure 17a] a window will popup showing the Donor data from Reliant [Figure 18]. For new data from Reliant, Tntconnect will enable the buttons on this screen [Figure 18a]. If Reliant's data has not changed, these buttons will be disabled [Figure 18b]. If you click "Accept Reliant" then Tntconnect will update the contact's data with the data from Reliant. If you click "Keep Tntconnect", it will disregard the data from Reliant. Once you have clicked "Keep Tntconnect" or "Accept Reliant" Tntconnect will not show any data to update until a Donor actually updates there data with Reliant. This means that after clicking one of these buttons, even if you change a donor's data within Tntconnect and try to update it with Reliant's data, Tntconnect will not activate these buttons again until a donor updates their data with Reliant.
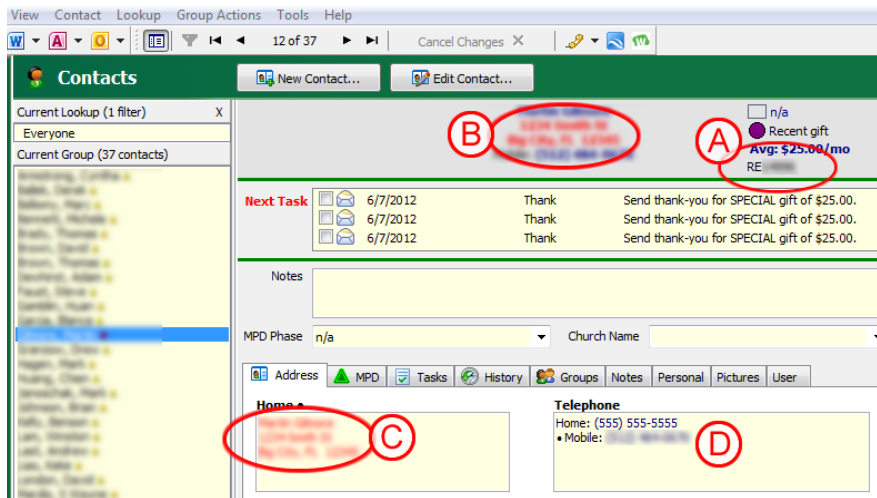
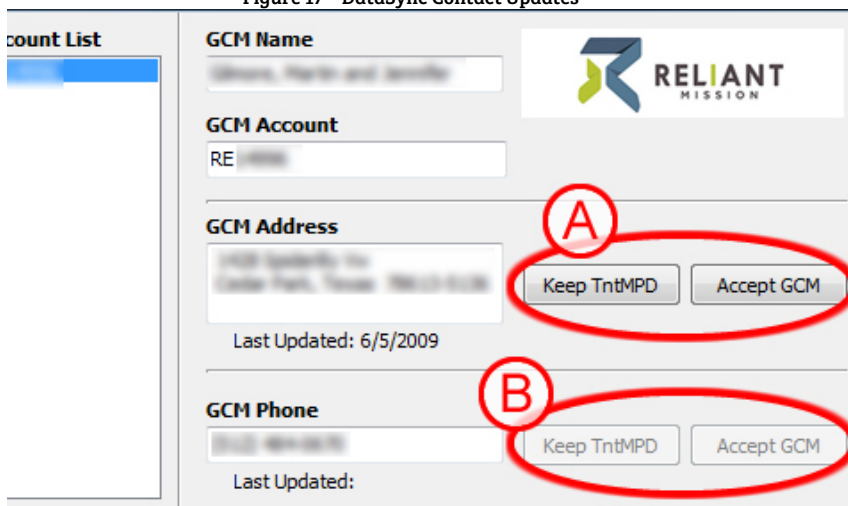**Figure 17 – DataSync Contact Updates**

Figure 18 - Reliant Donor Info

3. If you happened to have had any of those extra tricky donors mentioned early on you may encounter this situation and you did decide to associate two (or more) Reliant Donors with the same Tntconnect contact, you will notice that the contact will now show all of the Reliant Donor Numbers in the top right corner (RE#####, RE#####, etc.) [Figure 19]. If you click on either of those numbers it will bring up a similar popup as with a single association, but this time you will have access to both Reliant Donor's address and phone number info [Figure 20]. You can then click on either of the Reliant Donor Numbers to show and accept the corresponding Reliant data.
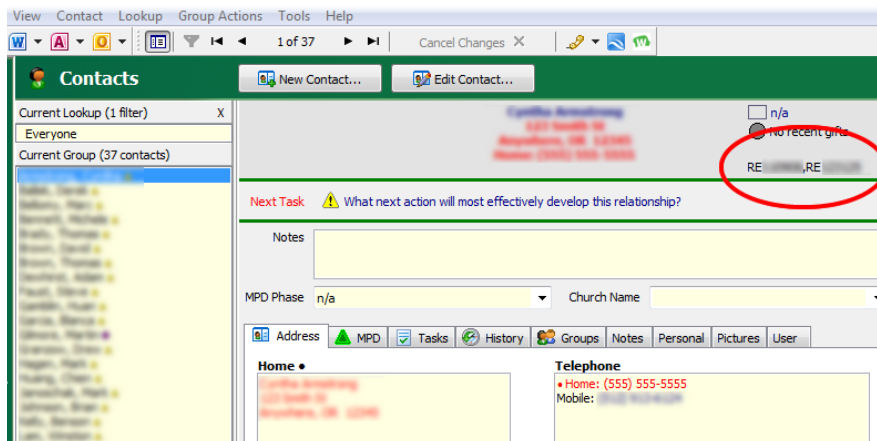

Figure 19 – Reliant Donor Numbers

Figure 20 - Reliant Donor Info

Problems?

1. **What do I do if I accidentally deleted some donor information and want to use Reliant's data to restore it?**
Assuming you already choose to accept Reliant's data, you won't be able to just click the "Accept Reliant" button, because it will be greyed out (unless the donor has updated their information with Reliant). What you can do is drag the donor info off the the side a little without closing it [Figure 21a]. Then, on Tntconnect's main window, 1) click the "Address" tab if it's not already open, 2) click on the address itself to bring up the edit button (pencil), and 3) click the edit button [Figure 21b]. This will bring up Tntconnect's address edit window [Figure 21c]. From here you can manually edit the address to match Reliant's address.
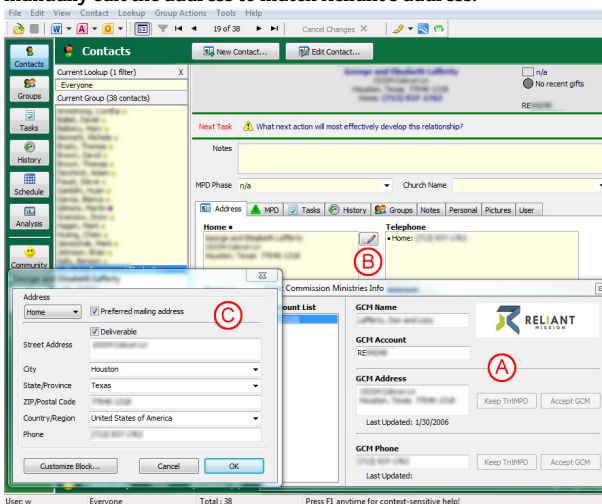

Figure 21

2. **What do I do if I accidentally linked a donor to an account incorrectly?**
Thankfully, Tntconnect makes this fairly painless to change. Simply click on a contact's Reliant Donor Number to bring up the Donor Information Window. Then you can right click their Reliant Donor Number in the popup to bring up the option to link the account to a different contact [Figure 22]. If you choose "Link Account to Different Contact..." it will bring up a "Select a Contact..." window [Figure 23] where you can link the Reliant donor to a different Tntconnect contact.

Figure 22 – Link Account to Different Contact

Figure 23 - Select Contact

Whew... The End.