Toolbox FAQs

We have made some significant changes to Toolbox over the last 6 months to create a better tool structure for everyone! However, we know it can be hard to navigate new systems so we wanted to give quick answers to some of the questions we have gotten from many people. If there's something else we should add to this page, email it to us at mtd@reliant.org

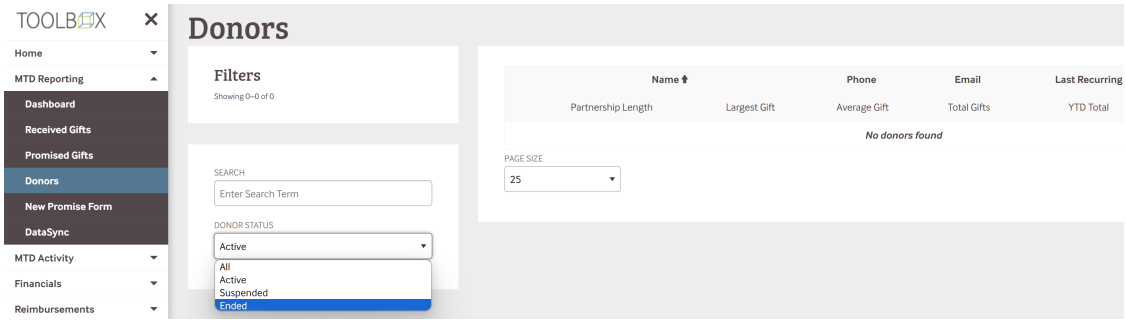
"Where do I find an individual donor's history?"

1

After logging into Toolbox, open the menu item labeled "MTD Reporting" on the left.

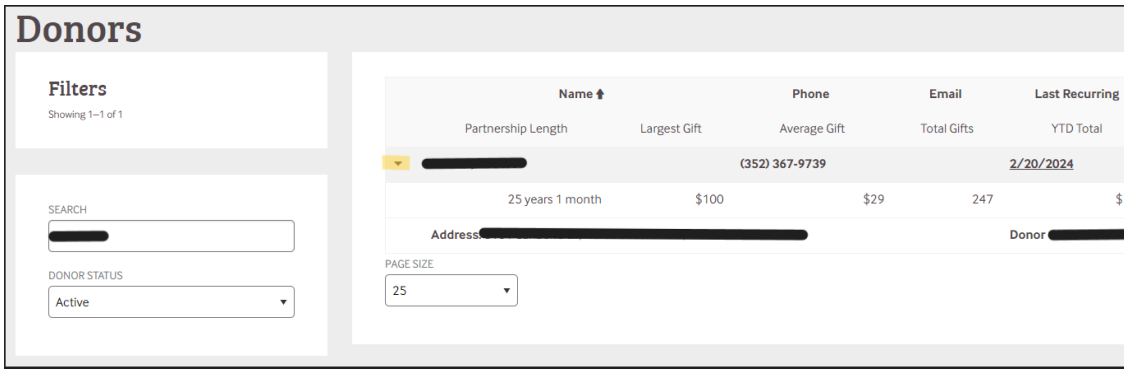
2

Scroll down and select "Donors". This will pull up a list of your donors. The basic settings are set on "Active" donors, but you can select "Suspended," "Ended," or "All" to see other categories of donors.



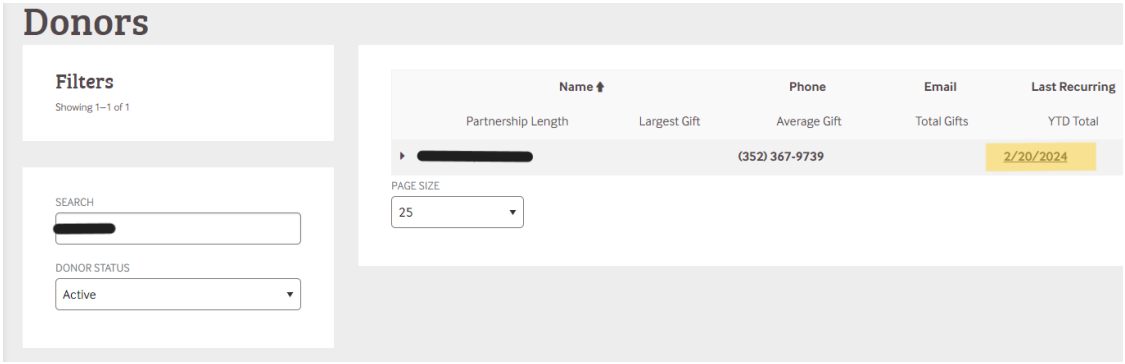
3

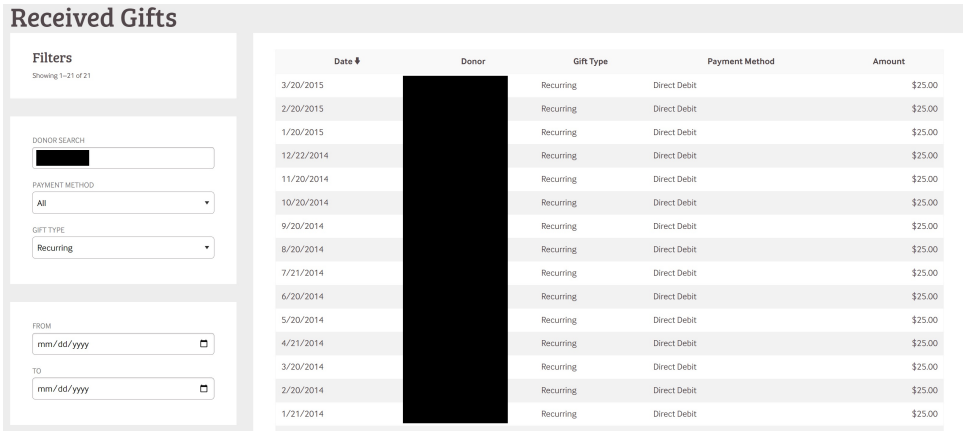
To see an individual donor's overall giving history, click on the caret next to their name:



4

You can dive in further by clicking on the **date** of the Last Recurring or Last One-Time gift. This will show you all the ongoing and one-time gifts from a specific donor with the date on the left and the amount on the right. This is a great way to see if an individual has changed their giving.





1.

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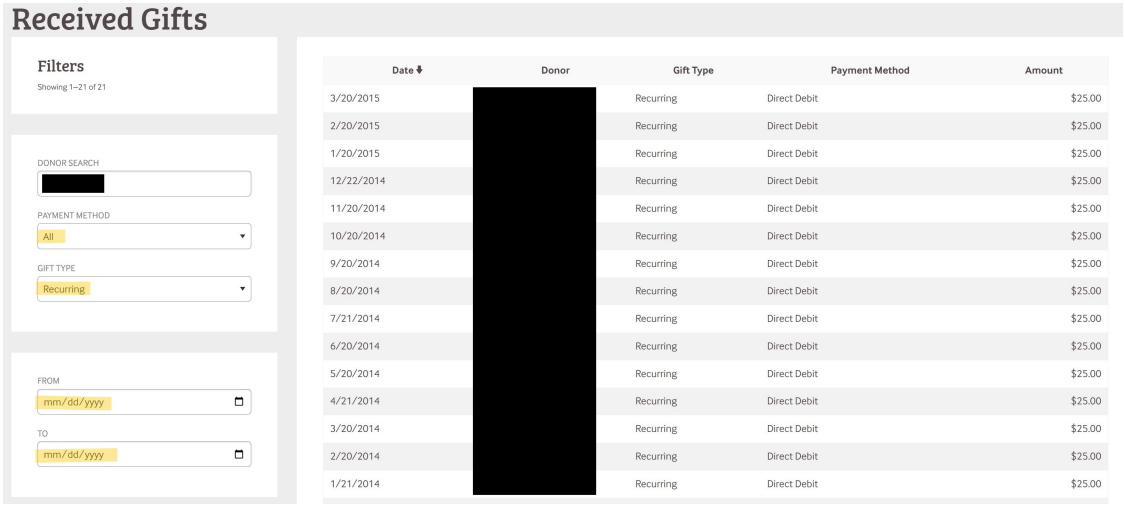
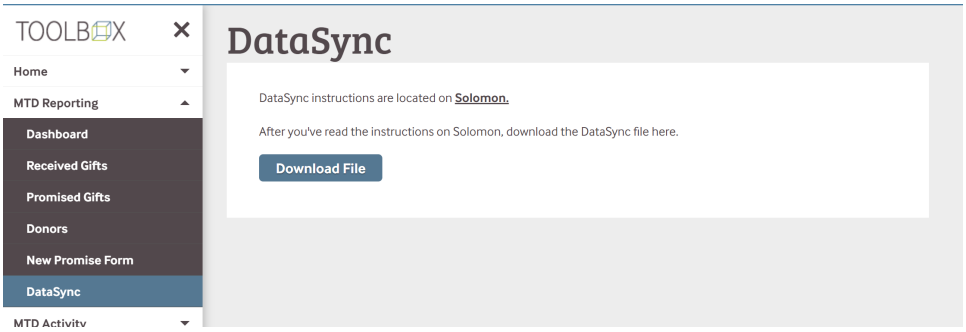
Within that individual donor's data, you can also filter on the left by Payment Method (Direct Debit, Credit Card, Check), gift type (Recurring or One-Time), and filter to understand your partner's giving tendencies, look for special gifts, or to understand better which payment methods the donor uses.



"Where is the Datasync file now located?"

1. After logging into Toolbox, open the menu item labeled "MTD Reporting"
2. Scroll down and select "Datasync".
3. This will pull up the page where you can download your own personal datasync file to use with different Database platforms
    a. Here is a page that talks about how to use this file with different systems.

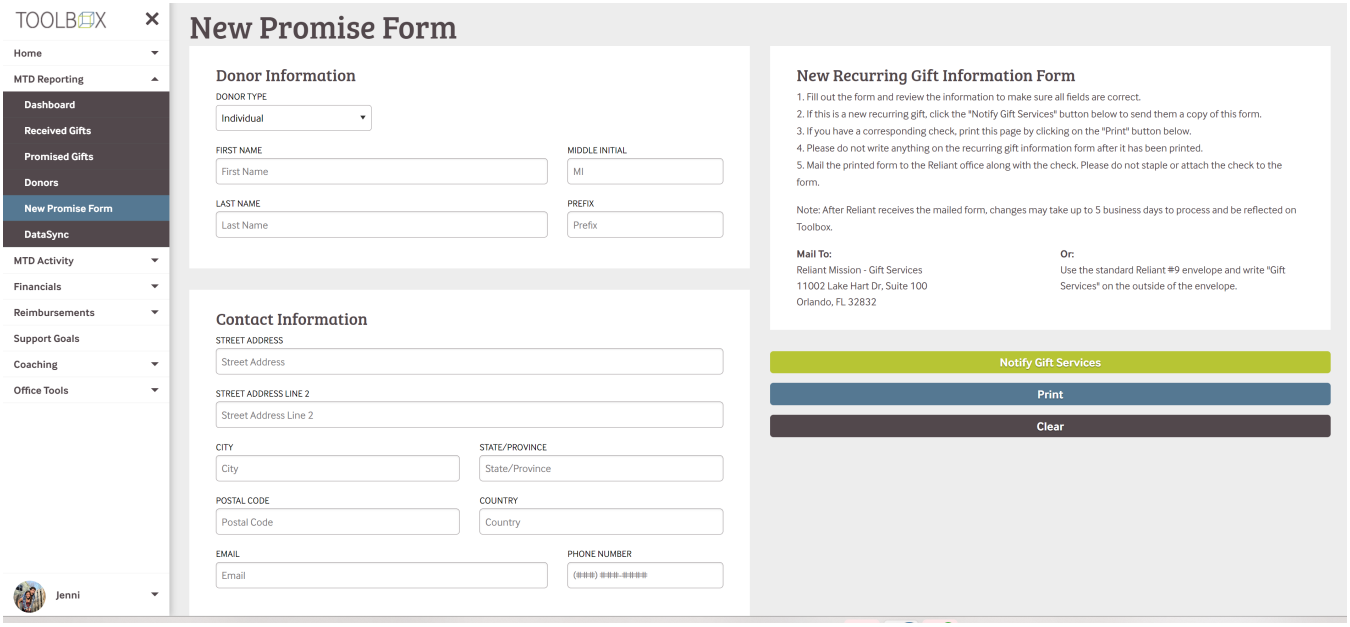


"Where do I go to find the New Promise Gift form?"

One of the forms that has lived solely on Staffnet until now was the New Promise Gift form. This form allows you to notify gift services when someone has verbally committed to giving a certain amount through a certain time frame but isn't able or willing to go through our recurring gift structure. Sometimes this can look like a check donor committing to give $25 a month; sometimes, this can look like a donor committing to give a large gift of $2,000 every July. Regardless of the situation, this form can notify gift services that this is the plan, and we can make that change in the background once the first gift is received to allow it to show up in your ongoing percentage.

This now lives on Toolbox as well, Under the MTD Reporting Menu. Click that menu item, and it will take you to a page with clear instructions on how to send in that information.

NOTE: Making any change using the New Promise Gift form is a manual process, this could take 2-5 business days to reflect on your percentage on Toolbox.

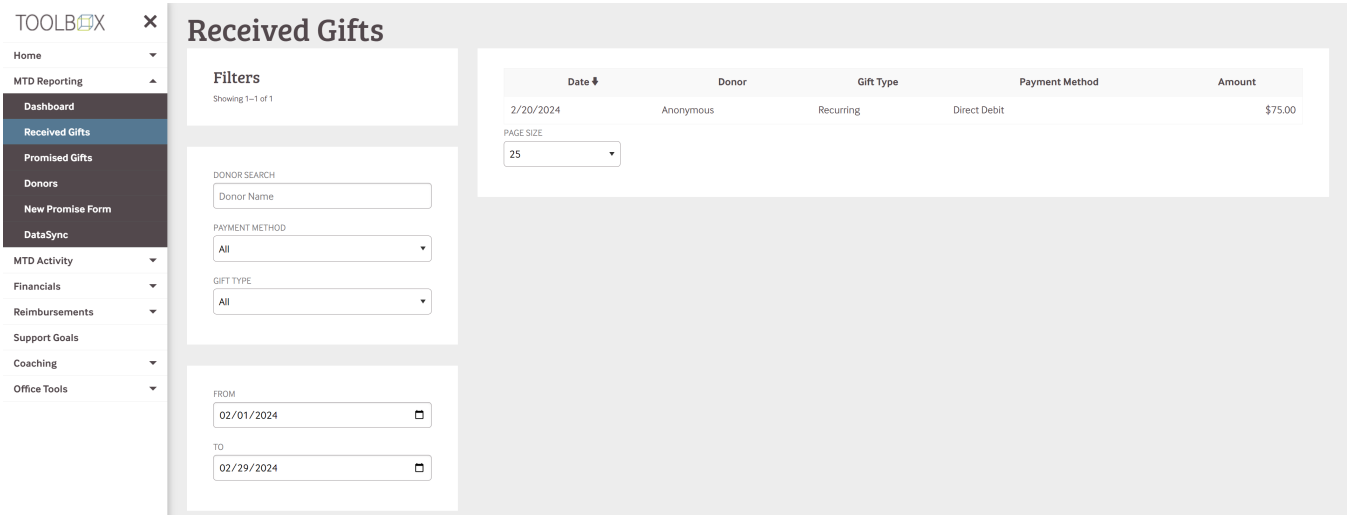


"How can I see my most recent gifts?"

Currently, the best way to see your most recent gifts would be to go to MTD Reporting > Received gifts.

This will autofill ALL of your previous gifts. To see gifts in a specific timeframe, you can filter to see during a certain timeframe (See below for February 2024).

Additional filters are available. Selecting by payment method will allow you to see check donors more easily. You can also filter by One-Time or Recurring.



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