

# Partner Essentials Transition

## **\*\*March 17 Update\*\***

**The upload tool is live on Toolbox!** You can go to <https://toolbox.reliant.org/mtd/datasync> and upload the file that has been, or will be, provided to you by Partner Essentials.

As a reminder, please email [mtd@reliant.org](mailto:mtd@reliant.org) if you are or have been a PE user. This way we can send dedicated updates to only those staff affected by this transition and ensure we assist everyone.

We do not yet have a final timeline for importing into MPDx, we are waiting to hear back with some additional information from Cru (who owns MPDx).

The file that Partner Essentials will provide to you **includes all data**, including notes, tasks, and comments related to tasks. If you had received a data file from them a few weeks ago and it appears to be missing any notes or comments, please contact PE again for an updated file. **The most current exports include everything in the account.**

When you request your data to be exported from Partner Essentials, they will send you a spreadsheet containing all of your data, and then they will close your account. Since we do not have a final timeline from Cru, it could be a few weeks of downtime with no MTD tool until it is live on MPDx. You can wait until later in March before requesting the data file from Partner Essentials to lessen the downtime between systems.

Lastly, if you'd rather **manually copy your PE data into MPDx**, you will need to do that before PE shuts down. To give yourself a head-start in MPDx, you could import the latest [Datasync file](#) from Reliant. This will give you a full history of all donors and gifts. *\*It's advisable to still get an export of your data from PE as a backup. But, upon exporting, PE will lock your account and it will no longer be accessible. So, plan accordingly.*

## **What do I need to do next to make the transition to MPDx?**

First, please read this Partner Essentials Transition page thoroughly. We will post updates here, so be sure to check back regularly.

Second, please email [mtd@reliant.org](mailto:mtd@reliant.org) if you are or have been a PE user. This way we can send dedicated updates to only those staff affected by this transition and ensure we assist everyone.

Third, please notify Partner Essentials directly that you would like to have them export your account and that you will not be making the move to Epistle. They will email you a spreadsheet containing your data that you will then upload to [Toolbox](#). *\*You can wait until later in March before requesting the data file from Partner Essentials to lessen the downtime between systems.*

Fourth, (and last!) we have created an upload tool on Toolbox where you will then upload that data (<https://toolbox.reliant.org/mtd/datasync>). Our plan is to convert the data so that your notes, tasks, and contacts may be properly imported into MPDx. The file PE is providing cannot be directly imported into MPDx and so this conversion step is necessary.

## **Are Notes & Tasks included in the export from PE?**

Yes, they are now providing a spreadsheet with multiple tabs. Notes and tasks *are* included. If you requested a download a while ago and it does not include notes and tasks, request again from PE to resolve this.

Unfortunately, this export spreadsheet is not able to be directly imported into MPDx.

***\*Once you export your PE info, your PE account will be locked and you will no longer have access to your notes or tasks***

## **How quickly will our most recent data (from PE) be in our MPDx accounts?**

Unfortunately, PE has not been as helpful as we hoped when they first announced they had sold their customer base. While we were hoping we could help with a bulk export/import of data for Reliant staff, it does not look like that is going to be able to happen without cooperation from PE, which we are not getting. This is why we're asking you to request your data export so we can convert your data into a usable format that Cru can help upload into MPDx.

## **If I have started manually moving data to MPDx now, will an import with PE data cause problems?**

Databases sync based on unique identifiers such as a contact ID, phone number or email address. We don't anticipate issues, but there could be duplicates created once we upload your PE data to MPDx.

If you want to start using MPDx, you could import the latest [Datasync file](#) from Reliant to give you a full history of all donors and gifts. MPDx compares gifts/ dates/ donors to what you have previously imported in order to identify any new activity.

## **How is Reliant advising us to do MTD until our PE data is moved to MPDx?**

One step you could take is to do a [Datasync](#) with MPDx. This will upload current donor data into your MPDx and at least get you started. If there are people you're actively contacting that aren't current donors, consider manually copying that contact from PE into MPDx.

While it might be more manual work than we were hoping, the MTD Health Team is choosing to see this as a gift from the Lord and an opportunity to do some needed pruning to our MTD contacts. We encourage you to consider this an opportunity to pray over each contact as you move over info from PE to MPDx. *\*more on that below*

## What if I don't want to use MPDx? Are there other database options?

This whole situation has affirmed we need these tools integrated directly with Toolbox, so we are committed to that in the long term. But, it will take time to develop. In the meantime, MPDx will be the only approved CRM (database) that syncs with our Reliant data. You are welcome to use other software for prayer lists or email lists, but for security reasons, we are not authorizing a datasync with any other platforms at this time.

## Can we humbly request more frequent communication updates from Reliant on this? Ideally weekly since we are just a few weeks out from PE shutting down.

Yes, we will add weekly updates to this page on the Field Manual (now also in beta on Toolbox!) <https://toolbox.reliant.org/field-manual/fieldtech?pageid=81234810>

We would also like to create a list of those who had been using Partner Essentials. Please email [MTD@Reliant.org](mailto:MTD@Reliant.org) if you are a PE user. We will send email updates to that group.

## Do I have any other options?

Yes!

1. You can [datasync](#) with your MPDx account to refresh donor info, then manually check each profile and add notes or tasks from PE. *\*While this option is time-consuming, it would be a good opportunity to pray for each donor or prospect as you go through one by one.*
2. Forget technology and go back to contact cards in a box. 😊

## What would be the harm in transitioning to Epistle until MPDx or Toolbox is ready?

Reliant is not approving it at this time as a partner for our donor datasync or donation data. This means you won't be able to get donor notices through Epistle as it won't have access to Reliant's database and you should not upload or enter donation data into Epistle. Epistle's product before purchasing PE was a communication platform for missionaries to communicate with supporters. You may use this function as a communication tool similar to the way you might use Mailchimp or Substack. It appears they may be integrating MTD/MPD tools with the communication platform. If so and if you wish to use this as a communication platform you should not transfer your donor list through PE conversion. You would build your contact list in Epistle from scratch, from your own address books and contact information, and then manage it separately from donor and donation data as you would in software like Mailchimp or in your own contact lists in Gmail or Outlook.

Given some of our current challenges, we only want to work with partners that have a data agreement directly with Reliant. We have that in place solely with Cru for MPDx. In addition, our understanding is that Epistle is using a different data structure and will not have an export that is compatible with MPDx. We are committed to finding a path for transition from PE to MPDx, and eventual features on Toolbox.

*Pro-tip:* Substack is free to publish on, allows you to have private substacks so only your supporter and prayer lists can read it, and has video post options. If any of you are using it already, we would love to hear about your experience and any pro's and con's you have encountered:

- <https://support.substack.com/hc/en-us/articles/360037607131-How-much-does-Substack-cost>
- <https://support.substack.com/hc/en-us/articles/360044389731-Can-I-make-a-private-Substack-publication>
- <https://support.substack.com/hc/en-us/articles/21093671091220-Guide-to-video-posts-on-Substack>