

# MissionsPortal.ag.org

Welcome to the new U.S. Missions Portal! Thank you for your patience!

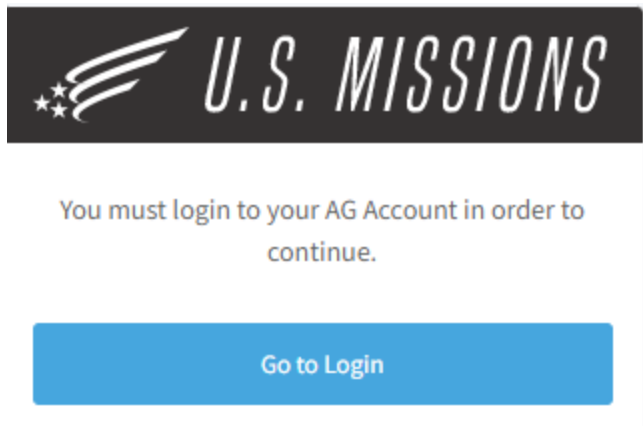
(DISCLAIMER: WE HAVE DECIDED TO RELEASE THIS AS WE DO NOT WANT TO DELAY THIS SYSTEM ANY FURTHER. WE HAVE ALREADY STARTED TO MAKE CHANGES FOR PHASE 2. IF YOU FIND ANYTHING THAT IS NOT WORKING CORRECTLY OR HAVE SUGGESTIONS, PLEASE SEND AN EMAIL TO RAMONA EDGMAN AT [redgman@ag.org](mailto:redgman@ag.org). PLEASE DO NOT CALL. THIS SYSTEM WAS BEING BUILT BY ANOTHER PROGRAMMING TEAM AND THE MANAGER PASSED AWAY DURING COVID SO THERE COULD BE FUNCTIONALITY WE MISSED BY SWITCHING PROGRAMMING TEAMS EVEN THOUGH WE HAVE TRIED TO REVIEW AND TEST EVERYTHING.)

I apologize in advance that some of these examples are small. As we need to release this as soon as possible we are trying to get documentation together to send out. We will continue to work on this documentation. Please excuse me in advance for any errors.


At this time U.S. Missions Accounting cannot help you with this system. You will need to contact Ramona's office (email is the best) and Ramona or Stephanie Majors will help you. We will be rolling out training to our staff at later date and we are not sure who will be working with this. We are implementing several new systems, so we are all working with other programming needs and updates to bring better service to YOU!

**LOGGING IN AND CREATING YOUR ACCOUNT IF NEEDED**

[AG Missions Portal](https://missionsportal.ag.org) missionsportal.ag.org



Same sign on as Giving.ag.org (not as AG Passport)

  
ASSEMBLIES OF GOD  
*ACCOUNT LOGIN*

EMAIL

PASSWORD

Remember me      [Forgot Password](#)

By logging in, you agree to our [Privacy Policy](#)  
and [Terms of Use](#)

OR

[Contact Us](#)

## REGISTER YOUR ACCOUNT

FIRST NAME

LAST NAME

EMAIL

PASSWORD

CONFIRM PASSWORD

REGISTER



Donald Duck

*gx2agtest+documentation@gmail.com*

[UPDATE NAME AND EMAIL](#)

[CHANGE PASSWORD](#)

[CONTACT US](#)

## COMPLETE REGISTRATION

An account has been created and registered for:

Donald Duck

*gx2agtest+documentation@gmail.com*

Are you an Assemblies of God minister, missionary, or donor?

YES

NO

Since you have a U.S. Missions account, check YES

UPDATE NAME AND EMAIL

CHANGE PASSWORD

CONTACT US

## COMPLETE REGISTRATION

An account has been created and registered for:

Donald Duck  
gx2agtest+documentation@gmail.com

Are you an Assemblies of God minister, missionary, or donor?

Enter your AG account number and postal code on file below. If you do not have an account number but would like to request one, [click here](#).

If you have an international address without a postal code or have a need for other assistance, please email [accounts@ag.org](mailto:accounts@ag.org).

AG ACCOUNT NUMBER

POSTAL CODE

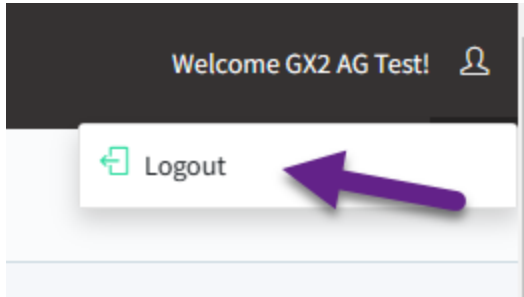
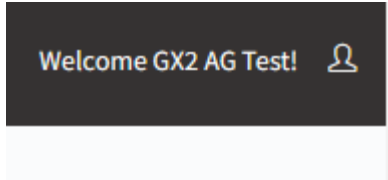
ADD ACCOUNT NUMBER

SKIP

The screenshot shows the U.S. MISSIONS dashboard. The top navigation bar includes the logo and a user profile for Donald Duck. A sidebar on the left lists navigation options: Dashboard, Contacts, Groups, Tasks, Donations, Communications, and Settings. The main content area is titled 'Onboarding' and features a 'Welcome' message with a placeholder text. Below the welcome message is the 'Auto-Thank Settings' section, which contains four checked checkboxes for automatic task creation and a text input field set to '7' days. A 'Begin' button is located at the bottom right of the settings section.

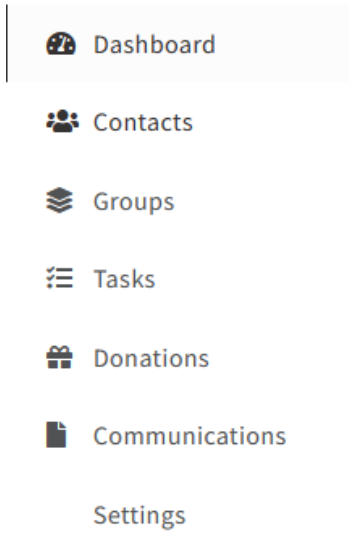
First Sign on you can set your Auto Thank you settings (tasks). You can always update this later on Settings.

Hit begin to continue!

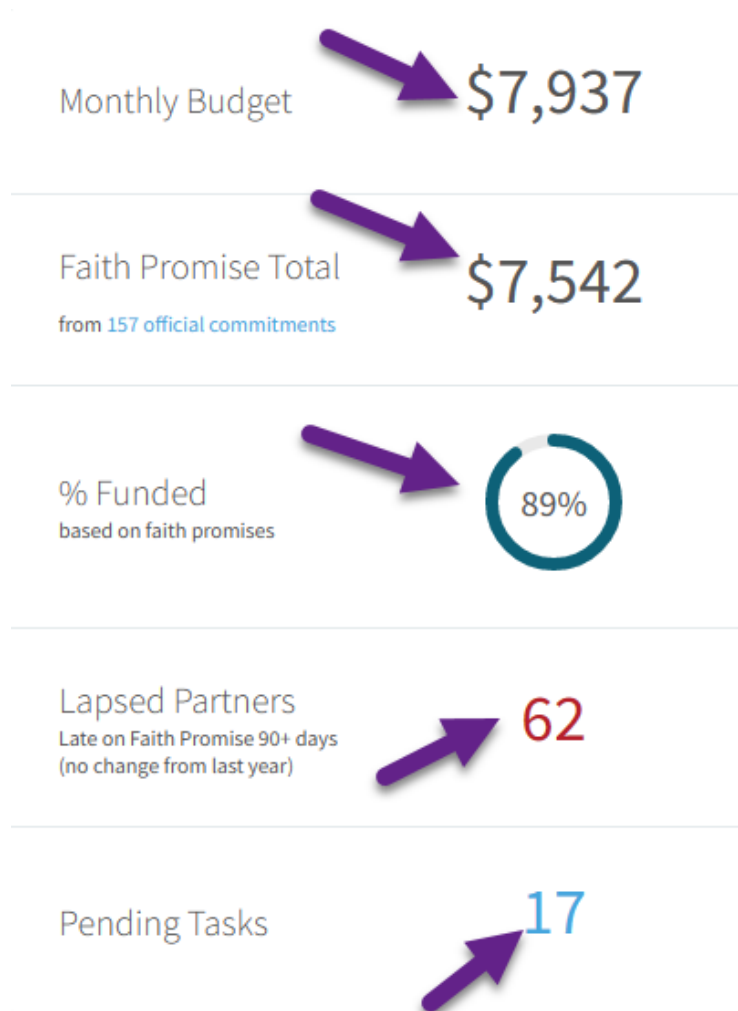


***DASHBOARD:***

On the Dashboard you will find the Navigation in the left pane (left side of screen). The Dashboard gives you an overview of your account. Most numbers are rounded off on this view so do not let that concern you.



**DONOR MAINTENANCE SCREEN:**



**MONTHLY BUDGET:**

The monthly budget will be the most current budget you have approved on file. To update your budget, you will need to contact your department. Otherwise, your budget is changed at your renewal time (for appointed missionaries) and when other major changes occur like changes in salary, assignment, etc.

Note: At this time Missionary Associates (MA) and Missions Intern (MI) do not have an official budget on file.

### ***FAITH PROMISE TOTAL:***

These are the most current total of Faith Promises that have been entered into the Missions Faith Promise system. To change any Faith Promises your donor must contact U.S. Missions to ask for an increase or they can change it on giving.ag.org. Note: Changing a recurring gift does NOT change a Faith Promise automatically. The funding and recording of promises are two different systems. The same as changing a Faith Promise will not change the recurring giving.

It is important for you to clean/purge your Faith Promise list we send out each year. This keeps your records current.

### ***% FUNDED:***

This is the percentage of budget you have raised figuring against your Faith Promises.

Lapsed Partners:

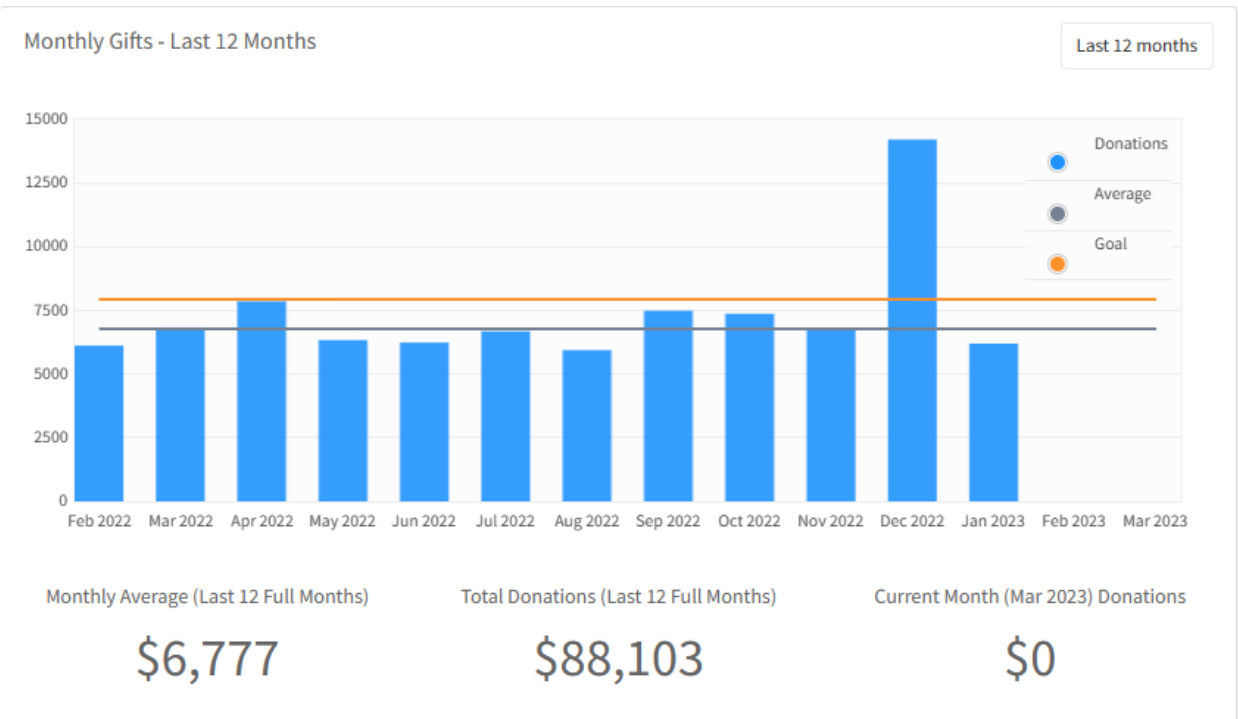
These are donors that have lapsed in giving so you can follow up with them. We suggest you review your records to see if they gave all at once instead of monthly. If they have lapsed in giving you should follow up with them.

Tasks:

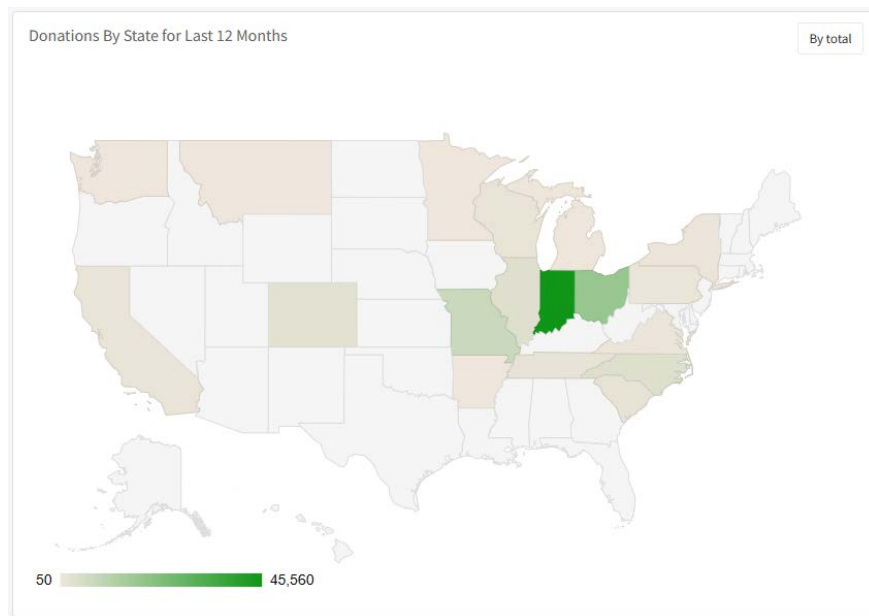
This is dependent on how you set up your portal. This may be a reminder to follow up, send a thank you, etc. You can change these reminders under Settings.

The next view lets you view your support over a 12-month period. Please note that it may show your current month a month later. (this is being fixed).

The blue bars represent actual donations by month. The grey line is the average that shows across the bottom. The orange line represents the budget goal. It also shows donations for the last 12 months.



The below chart was not meant to be released with Phase 1. However, we liked the way it filled the space, so we left it. In the future you will be able to drill down on each state. For now, you can see the totals by state, and it gives you a nice overview of where your support is coming from. There are two more graphs included.



## CONTACTS:

This is where your present contacts will load, and you can add new contacts that do not necessarily support you. The good news is that we have been able to add the phone numbers and email addresses if they are on file.

There are many filters by which you can sort. You can also search by name or account number.

Contacts  
386 contacts

Search name or account #

Filters: Demographics Donations Faith Promise Groups Phases

Table Actions Create Contact

Clear filters

<input type="checkbox"/>	Acct # ↑↓	Name ↕ 1	Phase ↑↓	Faith Promise ↑↓	Faith Promise Date ↑↓	Last Donation ↑↓	Total Donations ↑↓
<input type="checkbox"/>	MA 463020	[Redacted] Ballwin, MO	Partner	\$31.00/mo	1/29/09	1/20/23 (\$50.00)	\$
<input type="checkbox"/>	102715	[Redacted] Indianapolis, IN	Donated	None		12/11/14 (\$50.00)	\$
<input type="checkbox"/>	110685	[Redacted] Warsaw, IN	Partner	\$50.00/mo	7/10/19	1/19/23 (\$50.00)	\$
<input type="checkbox"/>	102697	[Redacted] Lebanon, IN	Donated	None		4/21/10 (\$100.00)	\$

There are many filters by which you can sort. You can also search by name or account number.

444198

Filters: Demographics Donations Faith Promise Groups Phases

Table Actions Create Contact

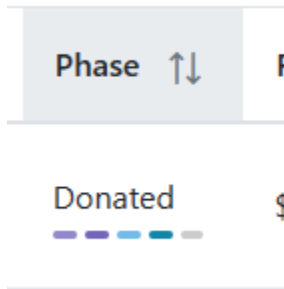
Clear filters

<input type="checkbox"/>	Acct # ↑↓	Name ↕ 1	Phase ↑↓	Faith Promise ↑↓	Faith Promise Date ↑↓	Last Donation ↑↓	Total Donations ↑↓
<input type="checkbox"/>	RE 444198	<b>Edgman, Ramona</b> Clever, MO	Donated	\$50.00/mo	6/21/22	1/20/23 (\$25.00)	\$275.00

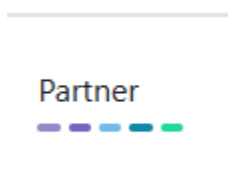
Showing 1 to 1 of 1 contacts << < 1 > >> 50

You will also see arrows up and down that you can use as a further sort.

Phase means where they are at in the process.

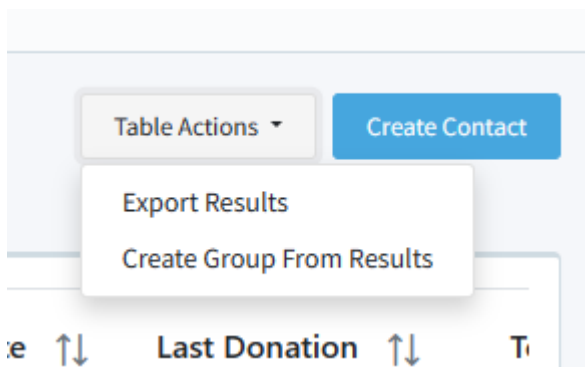


You can hover over the colored line, and it will tell you what each color means. In this case the donor has donated, but not a partner yet. Partner – meaning has a Faith Promise.



- Lavender – new prospect
- Purple – contacted
- Light blue – interested
- Aqua – donated
- Light green – partner (Faith Promise)

**TABLE ACTIONS:**



You can export results and it will give you a CSV file you can use for mailing, etc.

You can also click on Create Contact and add all your prayer warriors, new prospects, etc.

### New Contact

#### Basic Information

Contact Type: Individual

First Name:  Last Name:

Spouse First Name:  Spouse Last Name (if different):

Display Name:

Phase: None

#### Contact Information

Email:  Label:

Phone Number:  Label:

To edit a contact, click on their name from the list.

**FULL CONTACT INFO:**

**RE**  
Ramona R Edgman  
Donated  
[Edit](#)

Account #444198

**Addresses**  
Official [Mailing](#)  
154 Lilac Ln  
Clever, MO 65631

**Emails**  
No emails.

**Phones**  
417-343-9628 [preferred](#)

Activity Dates Notes Tasks Donations

Nov 2022

Thank - Send thank-you for a new commitment of \$50.00 11/30/22

Mark Completed

Jun 2022

Faith Promise changed 6/21/22  
Ramona changed their Faith Promise.

Phase changed 6/20/22  
Ramona changed from "" to "Donated".

Contact created 6/20/22  
This contact was created by GX2 AG Test Test.

**\$50.00/mo Faith Promise**

Total Donations	\$275.00
First Donation	\$50.00 on 6/20/22
Last Donation	\$25.00 on 1/20/23

**Groups**  
No groups [Manage](#)

**Recent Donations**

Date	Amount
01/20/2023	\$25.00
12/20/2022	\$25.00
11/20/2022	\$25.00
10/20/2022	\$25.00
09/12/2022	\$25.00
08/20/2022	\$50.00

This page gives you all contact info for a specific donor and you can enter in notes, tasks that will come up as reminders. You can see the donations that will go back two years from their last donation on the drop down of donations. The donations on the right panel will go back to 2005. We cannot go back further than 2005.

You can choose Edit from the left side and put in the name you may know this person as more informally or a nickname. It will retain the official name from Name/Address. You can add addresses, emails, and phone numbers.

### New Special Date ×

E.g., -Johnny's birthday, Bob & Sue's Anniversary, etc.

Does this date occur annually?

Remind me

## NOTES:

You could put these in all different notes OR added the birthdays under dates. It depends how far you want to drill down on each. On this example I would put a reminder in 2026 to follow up on the building project.

Activity Dates **Notes** Tasks Donations

Past Notes

Note

Ruthy loves vanilla ice cream.

She has 3 kids.

Susie - Birthday is 1-5-2020 (Susie collects precious moments)

Brian - Birthday is 5-7-1997 (Brian loves chocolate)

Husband owns his own business

They have 4 dogs.

In 2027 they would like to help us with a building project.

## TASKS:

Activity Dates Notes **Tasks** Donations

Create a task

### Active Tasks

Thank - Send thank-you for a new commitment of \$50.00 **Due Date: 11/30/22**

✓ Mark Completed Edit

## Task Lists:

You can view the tasks outstanding and then remove them from list as done or no longer needed.

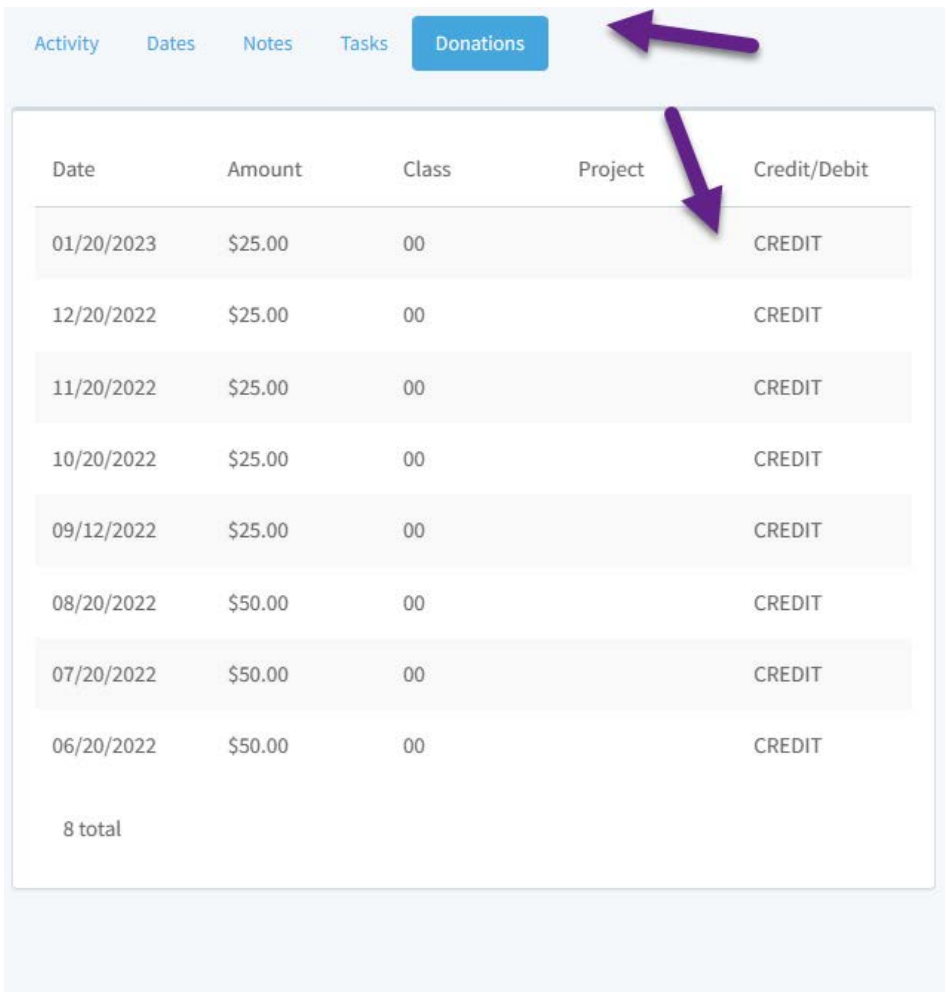
## DONATIONS:

Activity Dates Notes Tasks **Donations**

Date	Amount	Class	Project	Credit/Debit
01/20/2023	\$25.00	00		CREDIT
12/20/2022	\$25.00	00		CREDIT
11/20/2022	\$25.00	00		CREDIT
10/20/2022	\$25.00	00		CREDIT
09/12/2022	\$25.00	00		CREDIT
08/20/2022	\$50.00	00		CREDIT
07/20/2022	\$50.00	00		CREDIT
06/20/2022	\$50.00	00		CREDIT
8 total				

Donations goes back two years from most current donation. On Credit/Debit that DOES NOT mean credit or debit card. This is talking in accounting terms. Credit to the account. A debit would mean money taking back that was adjusted out.

Reminder: Donors are reminded if credit cards are expiring or decline.  
Contributor Services cannot talk to you about a donor's payment method.

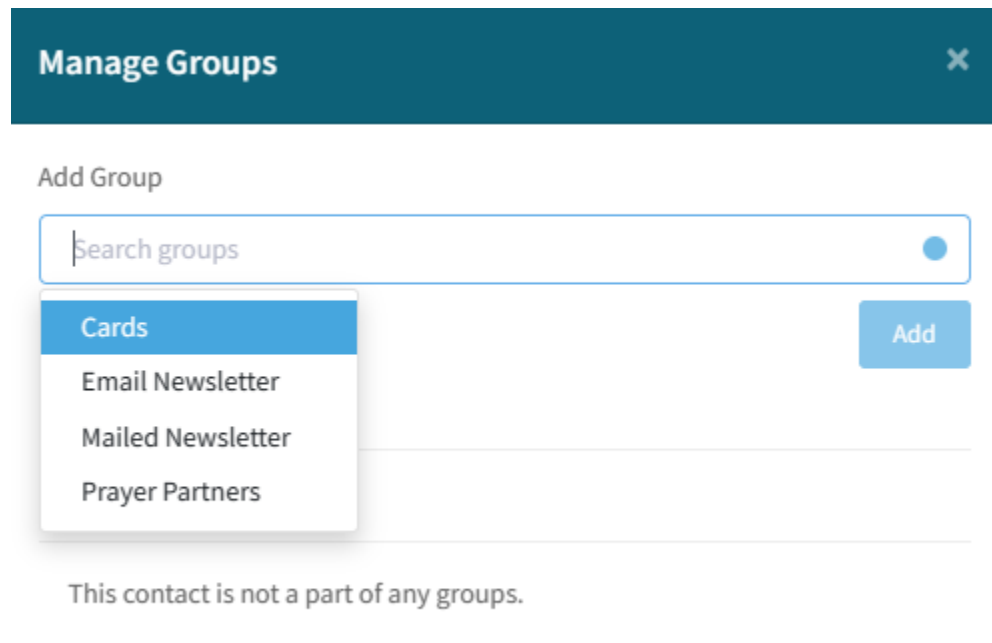


Date	Amount	Class	Project	Credit/Debit
01/20/2023	\$25.00	00		CREDIT
12/20/2022	\$25.00	00		CREDIT
11/20/2022	\$25.00	00		CREDIT
10/20/2022	\$25.00	00		CREDIT
09/12/2022	\$25.00	00		CREDIT
08/20/2022	\$50.00	00		CREDIT
07/20/2022	\$50.00	00		CREDIT
06/20/2022	\$50.00	00		CREDIT
8 total				

## **GROUPS:**

Want to put this donor in a group?

You can add them to a standard mail group to export for newsletters OR you can create a new group from the Dashboard page under Groups. You could make Monthly groups for birthdays. You can produce any type of pull you would like.



## Create a Group



Group Name

Add

Cancel



Name	Members
Cards	1
Email Newsletter	0
Mailed Newsletter	1
Prayer Partners	3
Star trek Fans	0
Star War Fans	0






## Prayer Partners Group

3 members

Search

Actions ▾

Export list

<input type="checkbox"/>	Name ▾	Contact	Phase ▾	Total Gifts ▾
<input type="checkbox"/>	 [Redacted] Columbus, OH		Donated	\$100.00
<input type="checkbox"/>	 [Redacted] Ballwin, MO	636-220-6526	Partner	\$2,040.00
<input type="checkbox"/>	 <b>Ramona R Edgman</b> Clever, MO	417-343-9628	Donated	\$275.00

Selected / 3 total

### Groups

Prayer Partners

### Donations:

Your new donations will load nightly. Here you can see where offerings from January are actually being entered in February. These will show up on your January cash receipts but it takes a few days after month end for them to enter the hundreds of thousands of dollars that come into General Council.

Batch Date ▾	Amount ▾	Class ▾	Donor ▾	Created Date ▾
01/24/2023	\$55.00	00	[Redacted]	02/03/2023
01/31/2023	\$150.00	00	[Redacted]	02/03/2023
01/24/2023	\$25.00	00	[Redacted]	02/03/2023
01/31/2023	\$100.00	00	[Redacted]	02/02/2023
01/19/2023	\$150.00	00	[Redacted]	02/01/2023
01/26/2023	\$100.00	00	[Redacted]	01/28/2023
01/27/2023	\$10.00	00	[Redacted]	01/28/2023

## Donations not yours?

If you receive a donation that is not yours and it gets posted and creates a contact.....then we remove the donation and now you have this donor in your records that you do not know. Instead of you have to look at this month after month please email Ramona or Dawn [redgman@ag.org](mailto:redgman@ag.org) or [deoff@ag.org](mailto:deoff@ag.org) and we can get it removed.

## **SETTINGS:**

The first time you log into this system you can choose your settings OR select Settings from the left side at any time. (We realize now we need to make some changes on this, and they will be forthcoming (adding numbers of days to other tasks) This also doesn't have an icon image yet. (coming soon)

### Settings

#### Auto-Thank Settings

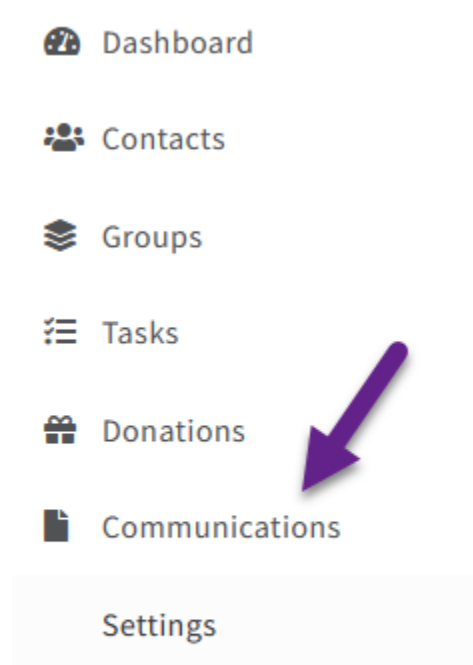
- Automatically create a task to thank donors with new commitments.
  - Automatically create a task to thank donors for a special gift.
  - Automatically create a task to follow up on lapsed donors.
  - Automatically create a task to review import duplicates.
- Automatically create a task to create thank you in number of days.

### **MISSIONS PORTAL – COMMUNICATIONS POD:**

This is where you will find your dailies and everything else that was previously emailed to you. This will refresh nightly. (Emails will be closed mid March)

We are also adding our newsletters, delinquent reminders, etc.

Select communications from the left side of the portal:



To start we have set this up extremely basic. You will notice changes as we move further down the road.

You can select a date range so you can pull the reports you wish to see.

(Note: the TNT Sync Data will still appear, however, if they should implement more changes, we will discontinue supplying this special file).

<b>Monthly Statements</b> <a href="#">253599_20221231_Statement.pdf</a> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>Daily Cash Receipts</b> <a href="#">253599_20230203_DailyFaithPromiseCashReceipt.xls</a> <a href="#">253599_20230202_DailyFaithPromiseCashReceipt.xls</a> <a href="#">253599_20230131_DailyFaithPromiseCashReceipt.xls</a> <a href="#">253599_20230128_DailyFaithPromiseCashReceipt.xls</a> <a href="#">253599_20230127_DailyFaithPromiseCashReceipt.xls</a> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>Monthly Cash Receipts PDFs</b> <a href="#">253599_20221231_CashReceipt.pdf</a> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>
<b>Monthly Cash Receipts RTFs</b> <a href="#">253599_20221231_CashReceipt.rtf</a> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>Faith Promise Cash Receipts YTD</b> <a href="#">Missionary Faith Promise and Cash Receipts YTD 253599 December-2022.csv</a> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>TNT Sync Data</b> <a href="#">253599_20230203_tntMPD.tntdatasync</a> <a href="#">253599_20230202_tntMPD.tntdatasync</a> <a href="#">253599_20230131_tntMPD.tntdatasync</a> <a href="#">253599_20230128_tntMPD.tntdatasync</a> <a href="#">253599_20230127_tntMPD.tntdatasync</a> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>
<b>Newsletters</b> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>Reminders / Notifications</b> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>Annual Reviews</b> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>
<b>Files</b> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	<b>1099s</b> Start Date: <input type="text"/> End Date: <input type="text"/> <input type="button" value="Search"/>	

If you chose to receive your 1099s digitally, you can pick them up in the portal and retrieve them whenever needed. This will allow you to get them as soon as they are loaded instead of receiving them in the email. Soon, if we have your permissions signed, the 2022 1099s will appear here. If you are interested in this for the future, you will need to fill out the release form. It can be found on our website at [www.usmissions.ag.org/missionaries](http://www.usmissions.ag.org/missionaries)

The intent that we will be adding additional functionality and you will be able to pick up forms here, file reports, etc.

One last reminder: If you have not sent your preferred email to accounting, please do so at your earliest convenience as the U.S. Missions email addresses are getting ready to shut down.

Thank you for your patience.

*Ramona*

Administrator