

Inbox / Kardia pane

Click email message to view partners participating in that email

Drag the separator line to resize or collapse the pane

Select partner to view from dropdown menu

View information about partner: name, ID, contact info, engagement tracks, recent activity, to-do items, notes/prayer, collaborators, documents

Click pencil to edit contact info item or set it to "obsolete"

Click email address to compose message

Right-click for additional options: convert to task/event in Lightning (does not sync with Kardia), copy email address, quick filter emails

Click website to open it in your default web browser

Right-click for additional options: convert to task/event in Lightning (does not sync with Kardia), copy link location

Add new contact info

Edit engagement track

Add new engagement track

Check to-do item to set it as "complete"

Edit note/prayer

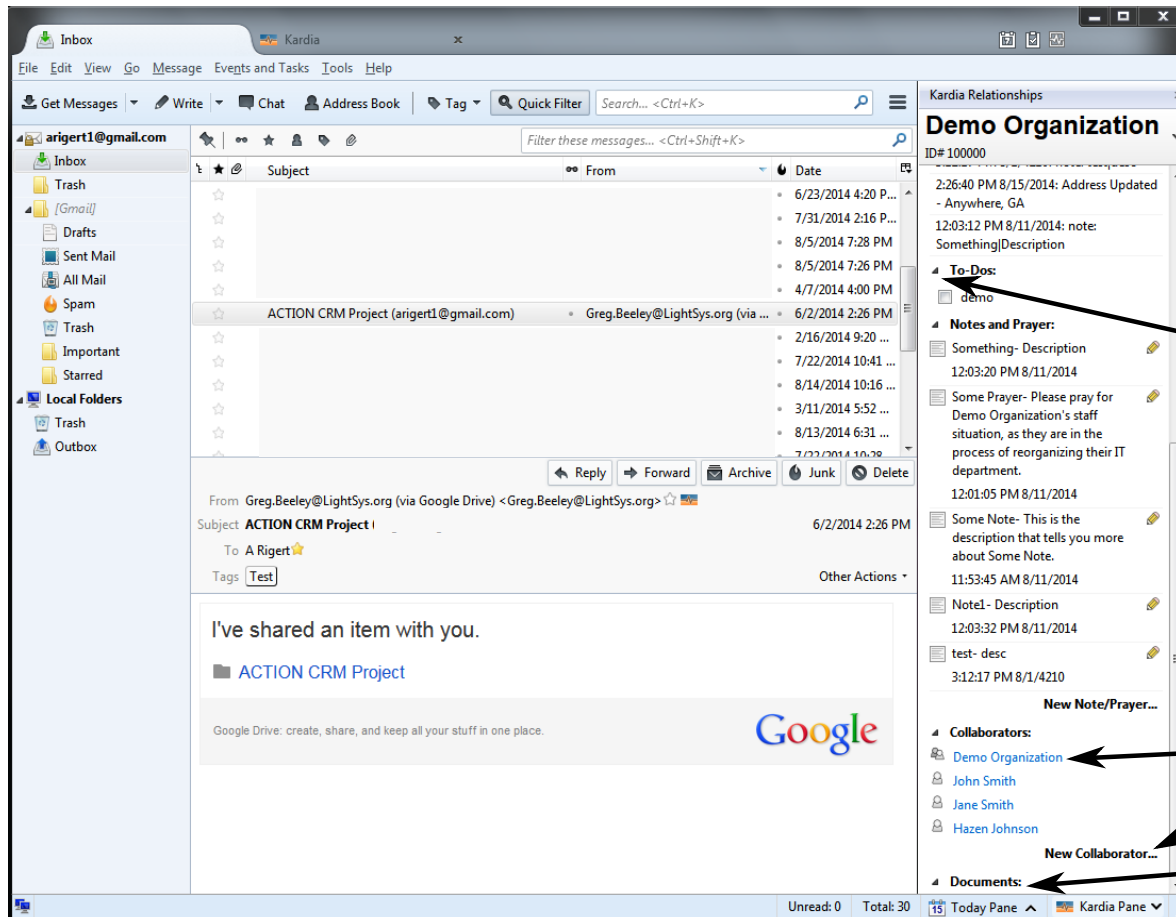
Right-click anywhere in the pane and select "Print" to print the user's information

Click Kardia icon in message to view that partner

Click to show or hide the Kardia pane

The screenshot shows the Outlook interface with the Kardia pane open on the right. The inbox list shows an email from Greg.Beeley@LightSys.org with the subject 'ACTION CRM Project'. The Kardia pane displays information for 'Demo Organization' (ID# 100000), including contact information, engagement tracks, recent activity, to-do items, and notes/prayer. Annotations with arrows point to various elements: the email in the inbox, the separator line between the inbox and Kardia pane, the Kardia Relationships dropdown, the Demo Organization header, the contact information section, the engagement tracks section, the recent activity section, the to-do items section, the notes/prayer section, the Kardia icon in the email header, and the Kardia pane tab at the bottom.

Inbox / Kardia pane



Click a twisty triangle to minimize that section

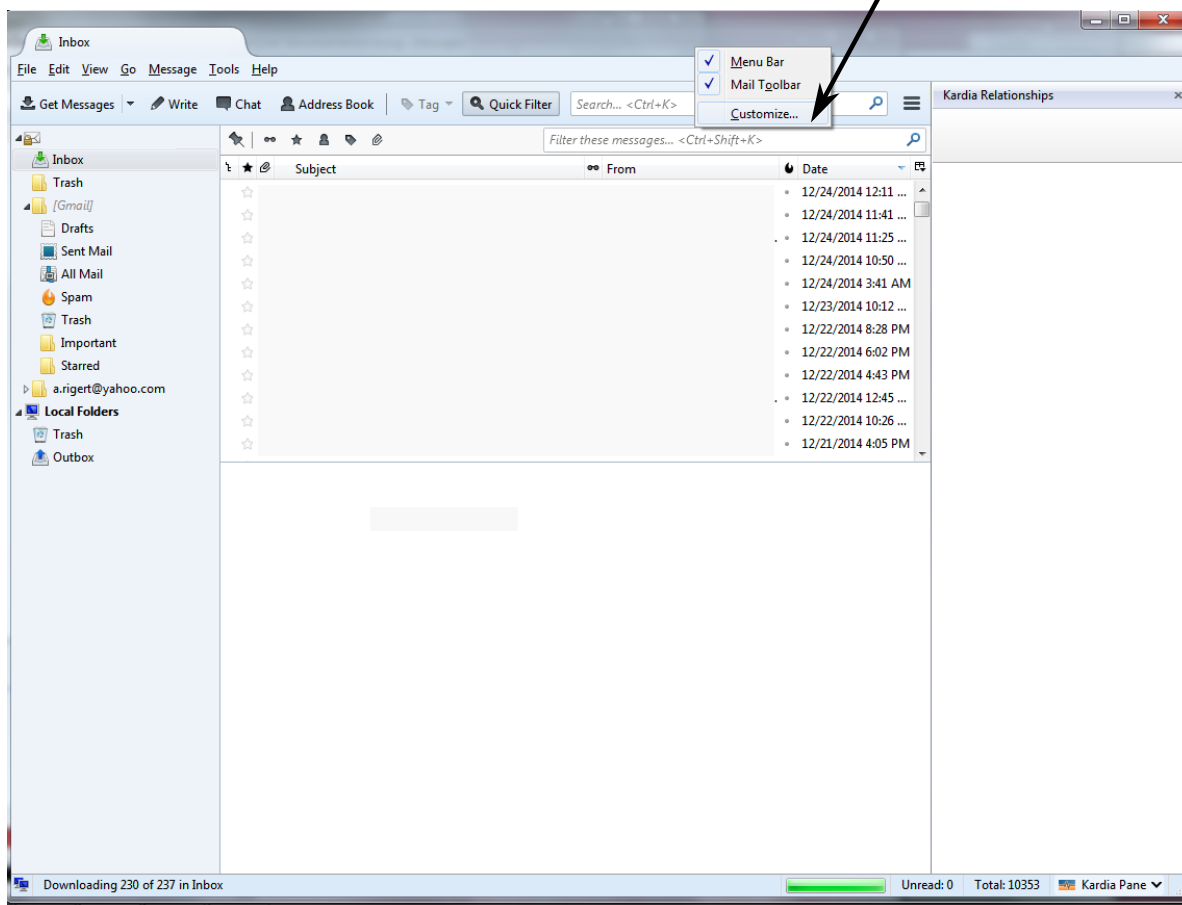
Click collaborator to view them

Add collaborator

User's documents will be listed here;
click a document to open in the default program
Right-click for additional options: convert to task/event in Lightning
(does not sync with Kardia), copy link location, save document

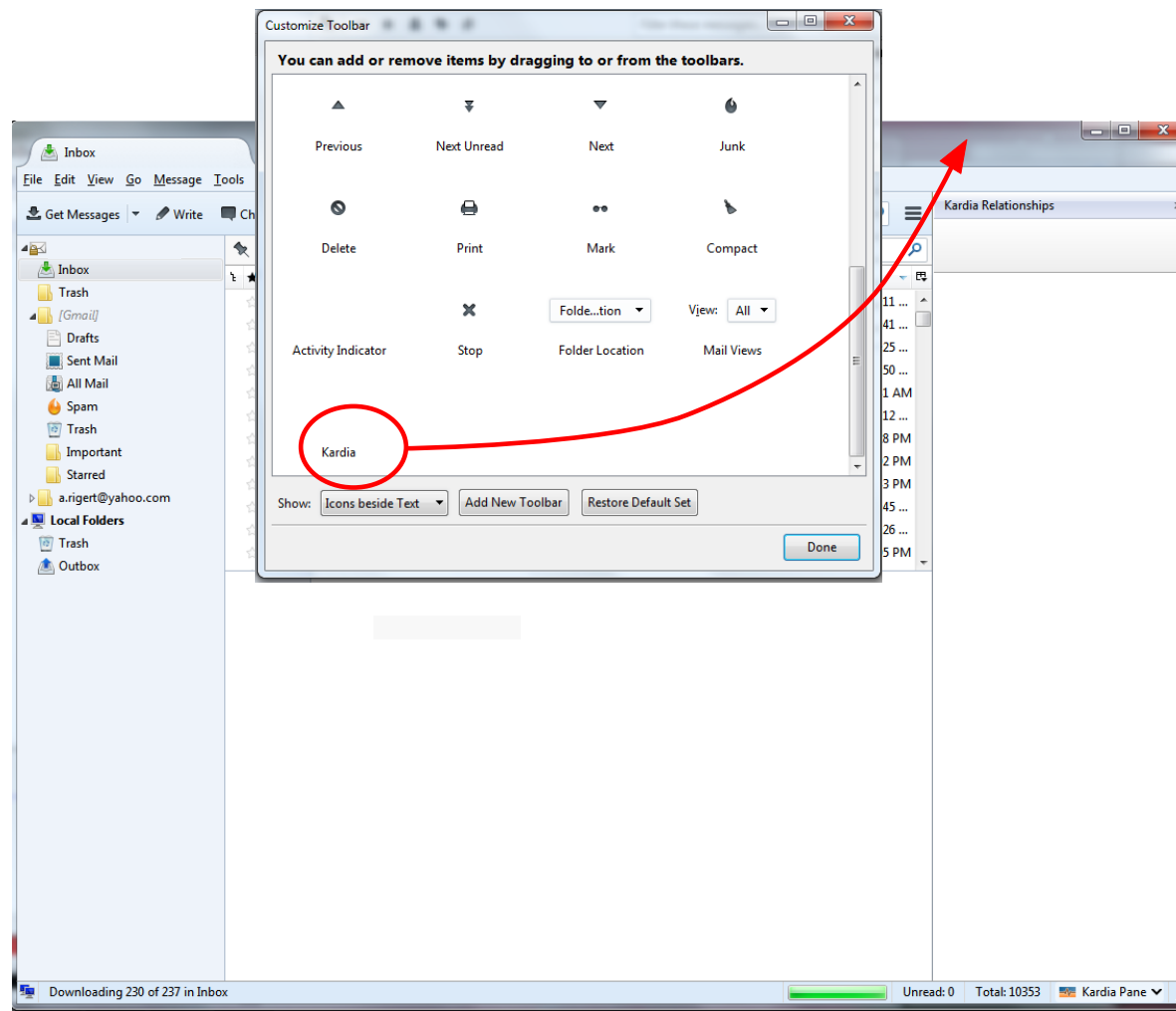
Making the Kardia tab visible

To view the Kardia tab, you have to add the Kardia icon to the upper area.
Right-click in the upper area and select "Customize..."



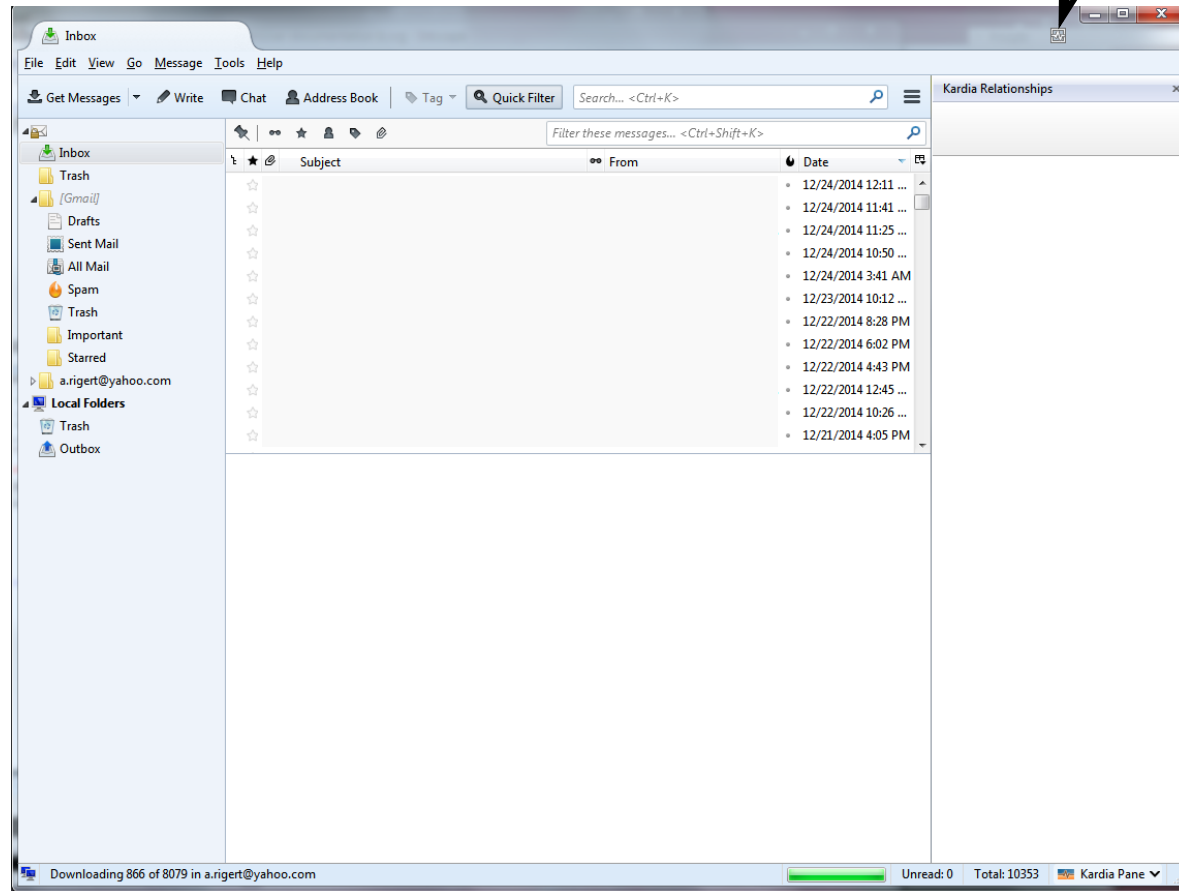
Making the Kardia tab visible

Scroll to the bottom of the popup window and drag "Kardia" to the upper panel of the main window, then click "Done."



Making the Kardia tab visible

Clicking the Kardia icon will now open the Kardia tab.



Kardia tab

View the partners for whom you're listed as a collaborator

When filtering, choose whether to display partners that meet any or all criteria

Click on engagement tracks and tags to select them as filters; when no filters are selected, all partners will be displayed

When filtering, choose whether to consider only tags that are a given interest level or certainty

Click an engagement track to add it as a filter

Open this address in Google Maps

Select the address to view as map

Select the email address to view in inbox

Add a new tag

View all messages that include this email address

Click a partner's box to view them in detail

Click the currently selected button to reverse the sort order

Choose how to sort your partners

Click to open the Kardia tab, or to switch to it if already open

Click a data item to add it as a filter

Use separator lines to resize or collapse areas

Click a group to view data items in that group

Click a fund to add it as a filter

Control which gifts are displayed

The screenshot shows the Kardia web application interface. At the top, there's a navigation bar with 'Inbox' and 'Kardia' tabs. Below this is a 'Collaborating With...' section with filters for 'Filter by...' (Any of, All of), 'Track' (Full-Time Staff, Summer Intern, Donor), and 'Tag' (Uganda, Wells in Uganda, Children in Uganda, Clean Water, Children's Ministry). It also includes options for 'Only filter using tags with' and 'Data items'. The main content area displays a list of partners, with 'Greg Beeley' selected. His details are shown in a sidebar, including contact information, engagement tracks, and recent activity. The 'Giving' section shows a table of gifts with columns for Date, Amount, Fund, and Type. The 'Tags' section on the left allows users to select tags like 'Children's Ministry', 'Uganda', 'Wells in Uganda', and 'Clean Water'. The 'Data Items' section shows two groups, 'Group 1...' and 'Group 2...'. The 'Filter gifts by...' section allows users to filter gifts by fund (General Fund, Demo Project) and type (Cash, Check). The 'Filter partners by fund' section allows users to filter partners by fund (General Fund, Demo Project). The 'Notes and Prayer' section includes a checkbox for 'Office space - Please pray that the conference room table top would be completed soon to give'.

Kardia tab

Drag panel border to resize it

The screenshot displays the Kardia software interface, which is divided into several panels. At the top, there is a menu bar with options: File, Edit, View, Go, Message, Events and Tasks, Tools, and Help. Below the menu bar, the main area is titled "Collaborating With..." and includes a "Filter by..." section with options for "Any of" and "All of". The "Track" section lists "Full-Time Staff", "Summer Intern", and "Donor". The "Tag" section lists "Uganda", "Wells in Uganda", "Children in Uganda", "Clean Water", and "Children's Ministry". The "Data items" section includes a link to "click a data item to add it as a filter". The "Fund contributions" section includes a link to "click a fund to add it as a filter".

The main list of contacts is shown below the filter section. Each contact entry includes a name, ID number, role, engagement step, and a list of activities. For example, Greg Beeley (ID# 100003) is a Full-Time Staff member with an engagement step of "Raise Support". His activities include "Began engagement track Full-Time Staff step Raise Support" and "Began engagement track Donor step Donate".

On the right side of the interface, there is a "Kardia Relationships" panel for Greg Beeley (ID# 100003). This panel includes sections for "Contact Information" (address, phone, email), "Engagement Tracks" (Full-Time Staff, Donor), "Recent Activity" (list of recent events), "To-Dos" (list of tasks), and "Notes and Prayer" (list of notes).

At the bottom of the interface, there is a "Greg Beeley" section with a "Tags" list (Children's Ministry, Children in Uganda, Uganda, Wells in Uganda, Clean Water), a "Data Items" table (Group 1, Group 2), and a "Giving" table (Date, Amount, Fund, Type). The "Giving" table shows a donation of \$20.01 to "Demo Pr..." on 7/18/2014, and a donation of \$499.09 to "General ..." on 7/18/2014.

An arrow points to the border of the "Greg Beeley" section, with the text "Drag panel border to resize it".

Kardia tab

Filter example:
Select "Any of," "Summer Intern," "Wells in Uganda"
to view only partners that are either summer interns
or are interested in wells in Uganda.
Choosing "All of" would return all partners that are
both summer interns AND interested in wells.

The screenshot shows the Kardia software interface. At the top, there's a menu bar with 'File', 'Edit', 'View', 'Go', 'Message', 'Events and Tasks', 'Tools', and 'Help'. Below the menu bar, there's a 'Collaborating With...' section with a 'Filter by...' dropdown set to 'Any of'. The 'Track' dropdown is set to 'Full-Time Staff', 'Summer Intern', and 'Donor'. The 'Tag' dropdown is set to 'Uganda', 'Wells in Uganda', 'Children in Uganda', 'Clean Water', and 'Children's Ministry'. Below the filter section, there's a list of partners with their details, including 'Demo Organization', 'Greg Beeley', 'Hazen Johnson', and 'Justin Southworth'. Each partner entry shows their ID, track, engagement step, and a list of activities. The 'Greg Beeley' entry is highlighted. Below the partner list, there's a 'Tags' section with a list of tags: 'Children's Ministry', 'Children in Uganda', 'Uganda', 'Wells in Uganda', and 'Clean Water'. The 'Email' field is set to 'greg.beeley@lightsys.org'. The 'Data Items' section shows a table with columns 'Date', 'Amount', 'Fund', and 'Type'. The 'Giving' section shows a table with columns 'Date', 'Amount', 'Fund', and 'Type'. The 'Filter gifts by...' dropdown is set to 'Any of'. The 'Kardia Relationships' panel on the right shows 'Greg Beeley' with ID# 100003. It includes sections for 'Contact Information', 'Engagement Tracks', 'Recent Activity', 'To-Dos', and 'Notes and Prayer'.

Collaborating With...

Filter by... Any of All of

Track: Full-Time Staff Summer Intern Donor

Tag: Uganda Wells in Uganda Children in Uganda Clean Water Children's Ministry

Only filter using tags with -100% to 100% interest and at least 0% certainty

Data items: click a data item to add it as a filter

Fund contributions: click a fund to add it as a filter

Demo Organization Donor 3:12:17 PM 8/1/4210: note: test|desc
ID# 100000 Engagement Step: Donate 2:26:40 PM 8/15/2014: Address Updated - Anywhere, GA

Greg Beeley Full-Time Staff 4:13:36 PM 8/15/2014: Began engagement track Full-Time Staff step Raise Support College/University: Taylor University
ID# 100003 Engagement Step: Raise Support Data Item 2: ICCM
Donor 9:24:38 AM 8/15/2014: Began engagement track Donor step Donate
Engagement Step: Donate

Hazen Johnson Summer Intern 11:05:22 AM 8/6/2014: Began engagement track Summer Intern step Apply
ID# 100004 Engagement Step: Apply 10:54:58 AM 8/6/2014: Began engagement track Summer Intern step Raise Support

Justin Southworth Summer Intern 4:16:57 PM 8/15/2014: Began engagement track Summer Intern step Apply College/University: Taylor University
ID# 100005 Engagement Step: Apply 10:40:51 AM 8/11/2014: Began engagement track Full-Time Staff step Submit Application

Greg Beeley

Tags: Children's Ministry Children in Uganda Uganda Wells in Uganda Clean Water

Ht: 1234 Some Street Colorado Sprin... View map...

Email: greg.beeley@lightsys.org View in inbox...

Data Items

Group 1... Group 2...

Giving

Date	Amount	Fund	Type
7/18/2014	\$20.01	Demo Pr...	Cash
n/a	\$499.09	General ...	Check (#5678)

Filter gifts by... Any of All of

Kardia Relationships

Greg Beeley
ID# 100003

Contact Information:
Ht: 1234 Some Street
Colorado Springs, CO 80918
United States
W: 5555 Erindale Dr
Colorado Springs, CO 80918
United States
P: (719) 222-3333
E: greg.beeley@lightsys.org
E: dorinda.beeley@lightsys.org

Engagement Tracks:
Full-Time Staff
Engagement Step: Raise Support
Donor
Engagement Step: Donate

Recent Activity:
4:13:36 PM 8/15/2014: Began engagement track Full-Time Staff step Raise Support
9:24:38 AM 8/15/2014: Began engagement track Donor step Donate
9:23:47 AM 8/15/2014: Address Updated - Colorado Springs, CO

To-Dos:
This is a description for Greg's to-do

Notes and Prayer:
Office space- Please pray that the conference room table topper would be completed soon to give

arigert1@gmail.com is up to date

Today Pane Kardia Pane

Data Items tab

Click a data item to add it as a filter
and view the results in the Kardia tab

The screenshot displays the Kardia software interface. The main window has a menu bar with 'File', 'Edit', 'View', 'Go', 'Message', 'Events and Tasks', 'Tools', and 'Help'. Below the menu bar, there are three tabs: 'Inbox', 'Kardia', and 'Greg Beeley: Group 1'. The 'Greg Beeley: Group 1' tab is active, showing a list of data items. The first item is 'College/University: Taylor University', which is highlighted in yellow. Below it is 'Data Item 2: Some Data'. An arrow points from the text 'Click a data item to add it as a filter and view the results in the Kardia tab' to the highlighted item. On the right side of the window, there is a pane titled 'Kardia Relationships' for 'Greg Beeley' (ID# 100003). This pane contains several sections: 'Contact Information' with fields for H, W, and P; 'Engagement Tracks' with 'Full-Time Staff' and 'Donor' options; 'Recent Activity' with a list of events; 'To-Dos' with a description for Greg's to-do; and 'Notes and Prayer' with a note about the conference room table topper. The status bar at the bottom shows 'arigert1@gmail.com is up to date' and 'Today Pane' and 'Kardia Pane' buttons.