

# 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

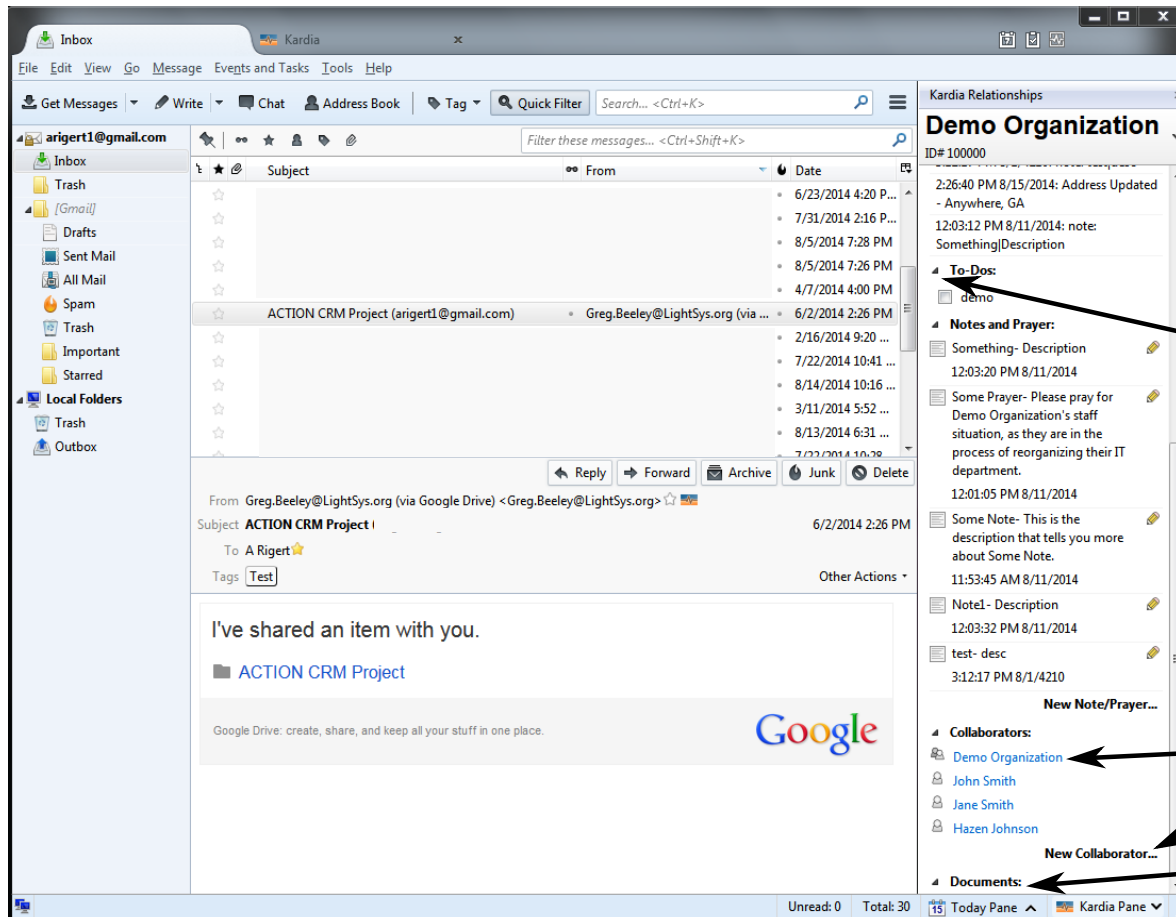
Right-click anywhere in the pane and select "Print" to print the user's information

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 on the left shows a list of emails. The selected email is from Greg.Beeley@LightSys.org with the subject 'ACTION CRM Project'. The Kardia pane displays information for 'Demo Organization' (ID# 100000). The contact information includes address, phone, and email. Engagement tracks show a 'Donor' track with a 'Donate' step. Recent activity and to-do items are also listed. The to-do item 'demo' is checked. The notes and prayer section contains a note about the organization's IT department reorganization. The Kardia pane is titled 'Kardia Relationships' and 'Demo Organization'.

# 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

# 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 shows the Kardia software interface. At the top is a menu bar with 'File', 'Edit', 'View', 'Go', 'Message', 'Events and Tasks', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'Inbox', 'Kardia', and window management. The main area is divided into several panels.

**Collaborating With...** panel:

- 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

**Contacts List:**

Organization	Donor	Engagement Step	Date	Description
Demo Organization	Donor	Engagement Step: Donate	3:12:17 PM 8/1/4210	note: testdesc
Greg Beeley	Full-Time Staff	Engagement Step: Raise Support	4:13:36 PM 8/15/2014	Began engagement track Full-Time Staff step Raise Support
Greg Beeley	Donor	Engagement Step: Donate	9:24:38 AM 8/15/2014	Began engagement track Donor step Donate
Hazen Johnson	Summer Intern	Engagement Step: Apply	11:05:22 AM 8/6/2014	Began engagement track Summer Intern step Apply
Hazen Johnson	Summer Intern	Engagement Step: Apply	10:54:58 AM 8/6/2014	Began engagement track Summer Intern step Raise Support
John Smith	Full-Time Staff	Engagement Step: Submit Application	2:19:37 PM 8/15/2014	Address Updated - Miami, FL
John Smith	Full-Time Staff	Engagement Step: Submit Application	9:15:59 AM 8/15/2014	Address Updated - Somewhere, CA
Justin Southworth	Summer Intern	Engagement Step: Apply	4:16:57 PM 8/15/2014	Began engagement track Summer Intern step Apply
Justin Southworth	Summer Intern	Engagement Step: Apply	10:40:51 AM 8/11/2014	Began engagement track Full-Time Staff step Submit Application

**Greg Beeley** (ID# 100003)

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

**Email:** greg.beeley@lightsys.org

**Data Items:**

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

**Giving:**

Filter gifts by: Any of, All of

**Kardia Relationships:**

**Greg Beeley** (ID# 100003)

**Contact Information:**

- H: 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

**Footer:** ariger1@gmail.com is up to date

# 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 filter criteria are 'Track: Full-Time Staff, Summer Intern, Donor' and 'Tag: Uganda, Wells in Uganda, Children in Uganda, Clean Water, 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. To the right of the partner list, there's a detailed view for 'Greg Beeley' (ID# 100003). This view includes 'Contact Information' (address, phone, email), 'Engagement Tracks' (Full-Time Staff, Donor), 'Recent Activity' (a list of activities with timestamps), 'To-Dos' (a list of tasks), and 'Notes and Prayer' (a list of notes). At the bottom of the Greg Beeley view, there's a 'Giving' section with a table showing donations. The table has columns for 'Date', 'Amount', 'Fund', and 'Type'. The first row shows a donation of \$20.01 on 7/18/2014 to 'Demo Pr...' via 'Cash'. The second row shows a donation of \$499.09 on n/a to 'General ...' via 'Check (#5678)'. Below the giving table, there's a 'Filter gifts by...' dropdown set to 'Any of'.

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

Sort by... Name ID Date

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  
ID# 100003

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

Greg Beeley Relationships  
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  
New Contact Info...  
Engagement Tracks:  
Full-Time Staff  
Engagement Step: Raise Support  
Donor  
Engagement Step: Donate  
New Track...  
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. The right pane is titled 'Kardia Relationships' and shows details for 'Greg Beeley' (ID# 100003). The details include:

- Contact Information:**
  - H: 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](mailto:greg.beeley@lightsys.org)
  - E: [dorinda.beeley@lightsys.org](mailto:dorinda.beeley@lightsys.org)
- New Contact Info...**
- Engagement Tracks:**
  - Full-Time Staff** (Engagement Step: Raise Support)
  - Donor** (Engagement Step: Donate)
- New Track...**
- 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

The status bar at the bottom shows 'arigert1@gmail.com is up to date' and 'Today Pane' and 'Kardia Pane' buttons.