# TPxi Go

Everyone in your church directory, on your phone, in your browser and inside Outlook.

START HERE

## Tap

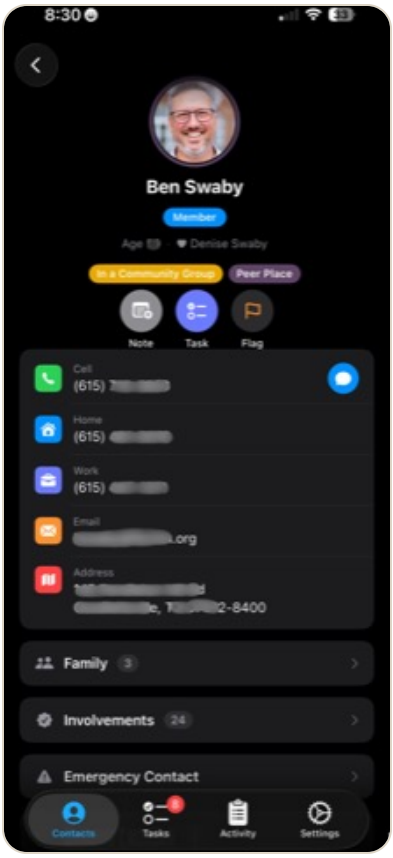
Does the obvious thing. Dials the number, opens the person.

## Hold

Right-click on a computer. Opens the menu, where everything else lives.

**Cannot find something? Hold it.**

| | |
|---|---|
| **Find someone** | Search a name, number or email. Open an email and it already knows the sender. |
| **Call or text** | Tap the number to dial. Hold it to text, copy it, or call through Teams. |
| **Email a family** | Pick several people, or the whole household, and send once. |
| **Save to your phone** | Tap Save to drop them into your own contacts. |
| **Write it down** | Log the call, text or email, or add a note. It lands on their record, dated today. |
| **Pass it on** | Create a task and assign the follow-up to someone. |




This is the whole app.

**iPhone: scan to install.**

Or search “TPxi Go” in the App Store.

**Everything else**

Android, Chrome, Edge, Outlook and Teams. Page 2 walks you through it.

# Getting set up

A few minutes,
once on each device.

**Have these ready:** your church's TouchPoint address (like mychurch.tpsdb.com), your TouchPoint username, and your password. The username is the one you use to sign in to TouchPoint itself, which is usually not your email address.

## 1. Install it where you work

| | |
|---|---|
| **iPhone** | Scan the iPhone code on page 1, or search "TPxi Go" in the App Store. |
| **Android** | Still in open beta, so it is not in Play Store search yet. Follow the Android steps at **tpxigo.com/guide**. |
| **Chrome or Edge** | Add TPxi Go from the Chrome Web Store (Edge uses the same one). Then click the TPxi Go icon in the toolbar to open the side panel. |
| **Outlook** | Your church admin turns it on for you. Open any email and look for TPxi Go in the toolbar, or under the "..." menu. |
| **Teams** | Your church admin adds it. Find TPxi Go in your Teams apps and pin it so it stays in the sidebar. |

## 2. Sign in

- Enter the church address, your username and your password. Sign in once on each phone and computer.
- You see the same people you can see in TouchPoint, nothing more.
- On a phone, say yes to caller ID so church members' names show when they call. Skipped it on iPhone? Settings › Phone › Call Blocking & Identification › TPxi Go. PHONE

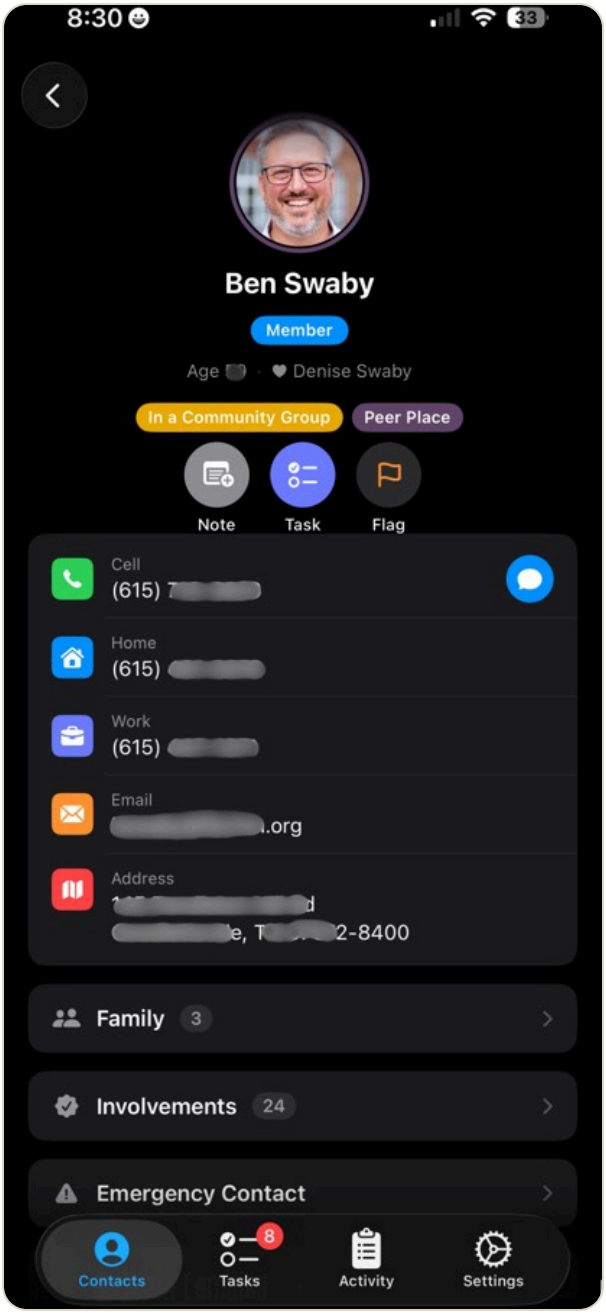
## 3. Try these first

- Search for yourself, then tap your own name to see the contact card.
- Hold (or right-click) a phone number to see everything you can do with it.
- After your next call, log it. It takes one tap and lands on their TouchPoint record.
- On an iPhone, tap **Show brief** on someone's card for a short summary before you call or visit.

**Can't sign in?** If your church signs in to TouchPoint with Microsoft, set a TouchPoint password first: in TouchPoint, open your profile, then My Account, then Change Password. Still stuck? Ask your church's TPxi Go administrator, or email support@tpxigo.com.

# The contact card

One screen holds the whole person.




### Who they are

Photo, member status, campus and age, at the top where you can see it at a glance.

### How to reach them

Cell, home and work numbers, email, and address. Tap the address to open it in Maps.

### Their family

Everyone in the household, and related families. Tap any of them to jump straight to their card.

### Where they serve

Involvements grouped by ministry type, so you can see at a glance how connected they are.

### What has happened lately

Recent activity and notes, so you are not walking in cold.

### A quick brief IPHONE

Tap Show brief for a short summary: family, groups, open tasks and recent notes. Ask a question in the Ask box, like “Who are her kids?”

### Emergency contact

Right on the card, one tap to call. No hunting for it when it matters.

### Flags and custom fields

The status flags and extra fields your church already tracks in TouchPoint, carried through as they are.

**Too much on the card?** Settings turns off anything you never use, so it only shows what matters to you.

# Calling, texting, emailing

Nearly all of this is behind Hold.

## Calling

- Tap a number and it dials with whatever your phone normally uses.
- Hold the number to choose instead: call with the phone's own dialer, call through Teams, or Vonage if you have it installed. PHONE
- Turn on Teams calling in Settings and every tap dials through Teams, without changing anything on your device.
- The emergency contact on the card is one tap to call.

## Texting

- Hold a number and choose Send Text.
- Text a group in a single thread from your phone. On a computer, texting stays one person at a time.

## Email

- Send to several people at once. Use the group option on a phone, or right-click the email row on a computer.
- The rest of the family is pulled into the picker, so emailing a household takes one step.
- Choose which email app composes it: Gmail, Outlook, or your system default. Set it once in Settings.

## Copying and maps

- Copy a phone, email or address straight from the hold menu.
- Phone numbers copy as plain digits, so they paste cleanly into any dialer or form.
- Tap an address to open it in Maps.

**Every email and text you send from TPxi Go is logged** against each person automatically. You do not have to do anything for the history to stay complete.

# Writing it down, and handing it on

## Logging what happened

- Log a call, an email or a text so the conversation lives in TouchPoint rather than in your head.
- Add a note with keyword tags. The date is set to today for you, so it lands on the timeline correctly.
- Log it as incoming or outgoing in one tap, whichever way the conversation went.
- Group emails and saved contacts record themselves. There is nothing to remember.

## Tasks and follow-up

- Create a task and assign it to yourself or to someone else on the team.
- Accept, decline or complete the tasks that come to you.
- My Tasks shows the whole list in one place, filtered by status.
- Flag anyone for follow-up with one tap, and open your Flagged list whenever you want it.

## Saving people to your own contacts

- Tap Save and they drop into your phone contacts, already filled in with name, numbers, email and address.
- Hold Save to pick which details to share, then send it by AirDrop, text or email. PHONE
- On a computer, Save downloads a file you can open into Apple, Google or Outlook contacts. COMPUTER

## Making it yours

- Show or hide any field on the card: photo, age, campus, phones, family, involvements, notes, flags and custom fields.
- Switch the log buttons, My Tasks and person tasks on or off to match how you actually work.

### Keeping it up to date

Phones update from the App Store or Google Play. Chrome and Edge update themselves. In Outlook and Teams, close the pane and open it again.

# Going further

Nobody needs this page to use the app.

## Open TPxi Go straight to a person

A link in this shape opens the app on that person's profile. The most useful place to put it is a **TouchPoint report**: make the name a link, and one tap takes staff out of the report and into TPxi Go.

```
https://tpxigo.com/people/{cmsHost}/{peopleId}
```

**cmsHost** is the part before .tpsdb.com, or your custom domain. **peopleId** is their TouchPoint id.

- Works anywhere a link works: a report column, a task, a text to a colleague, your own notes before a visit.
- If the person you send it to does not have the app, it falls through to your TouchPoint web profile. The link never breaks for anyone.
- Nothing to configure. It just needs the app installed and reasonably up to date.

## Ask your phone

- “Hey Siri, search TP Go,” then say the name.
- “Hey Siri, dial in TP Go” to call someone without opening the app.
- “Hey Siri, add note in TP Go” to log a note hands free.
- “Hey Siri, ask TP Go,” say a name, then ask: “Who are her kids?” or “Call her.” “Brief me in TP Go” reads a short summary. Needs iOS 26 and Apple Intelligence.
- “Hey Google, search TP Go for [name]” on an Android phone.

Android voice runs through Google Assistant. Phones that have moved to Gemini cannot do this yet.

## On an iPad

Contacts splits in two: the search list on the left, the person you picked on the right. Scan and jump between people without losing your place.

Useful for hospital rounds or board prep. The iPhone layout is unchanged.

**Worth knowing on Android:** the very first link you tap after an update may open the browser for a moment while Android checks the domain. Tap it again and it goes to the app.