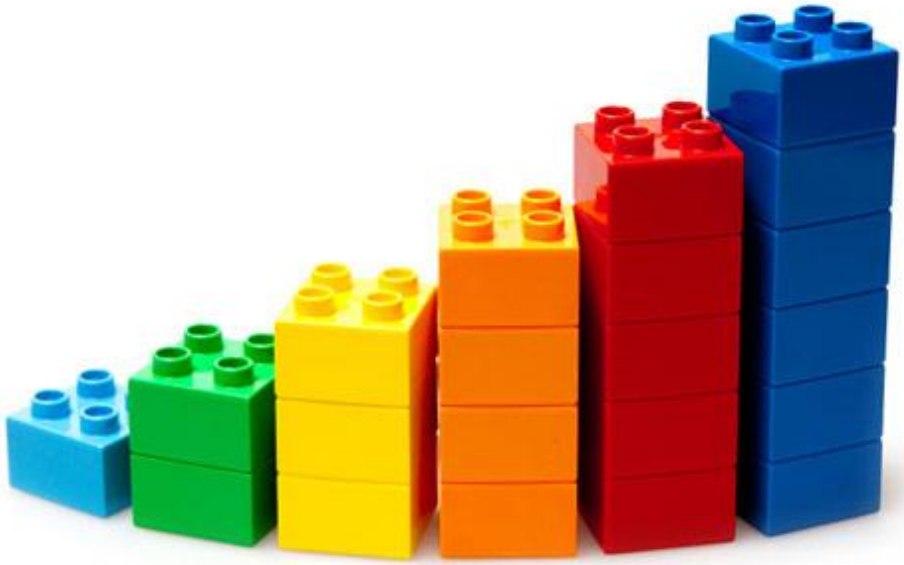
BUILDING FOR THE
FUTURE

giving your employees the tools to develop and grow

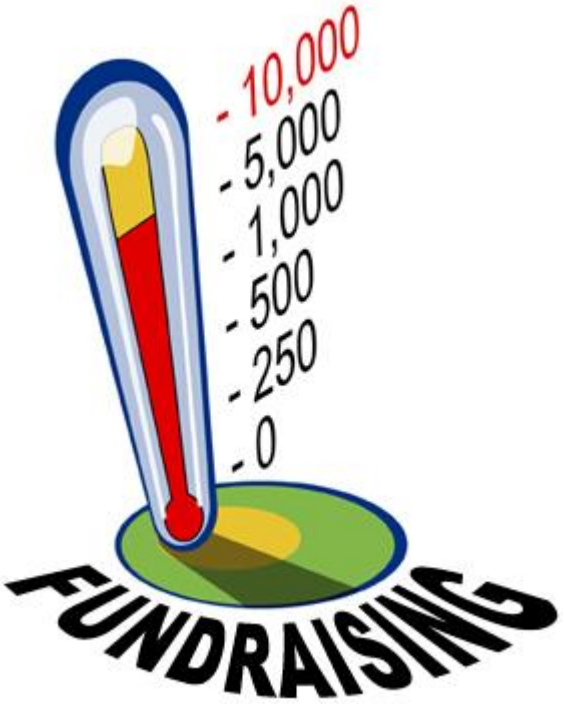


Constructing Fundraising Success

2016 DDI User Group Conference

Agenda

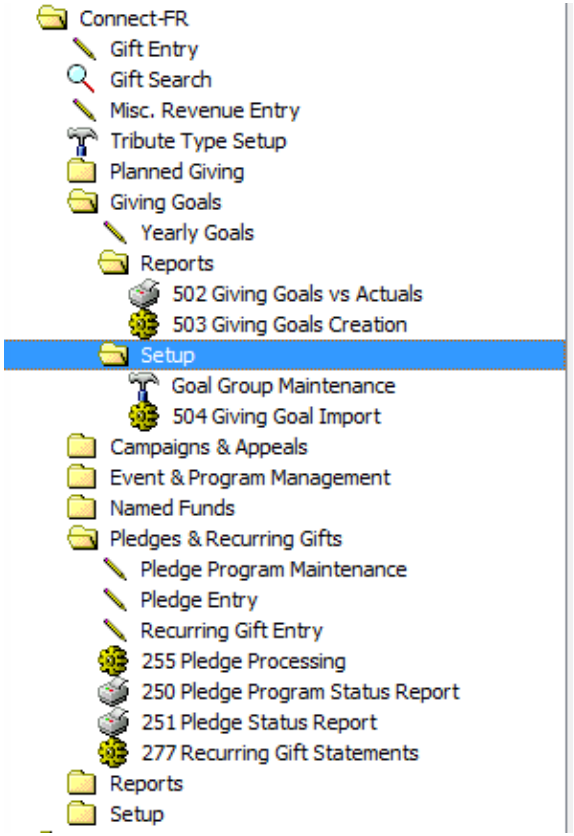
- Connect-FR Highlights
- Information Query Tool
- Auto Import Attachments
- Memo Import Tool
- Gift Receipts
- Year End Statements (New)
- Demo



Connect-FR Highlights

Menu Items

- Giving Goals
  - Individual Goals
  - New Import Tool
- FR503 – Copy Year to year
- Recurring Gift Entry



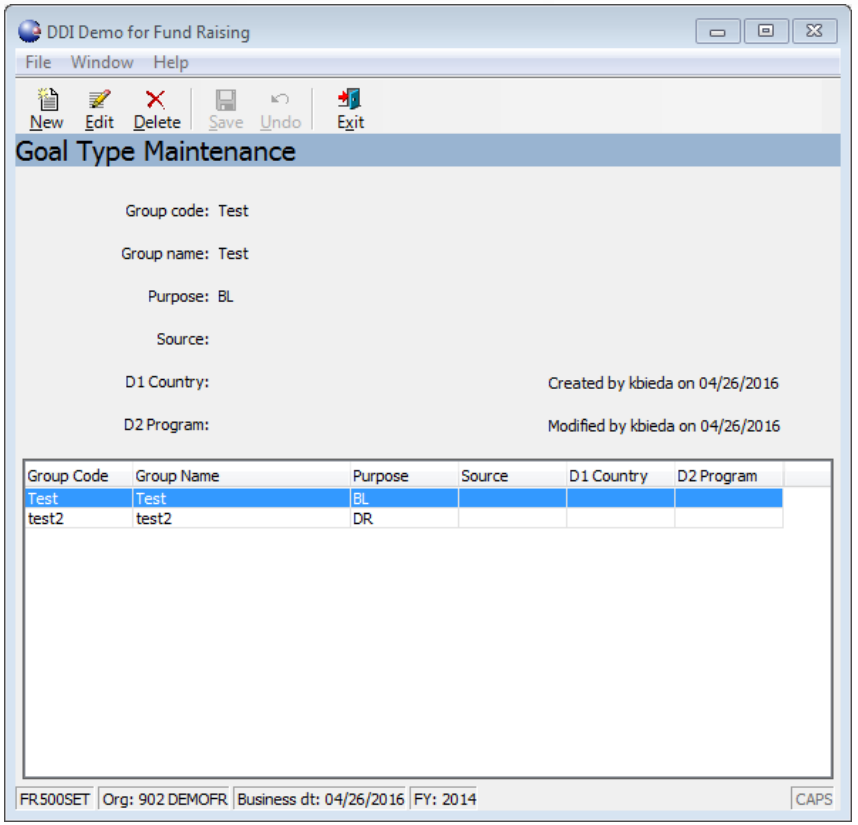
Yearly Giving Goals

- What is a giving goal?
- How are they different then pledges?
- How do you set them up?
- Ways to import goals

goals
strategy
mission
vision
work
management
team
member
business
planning
teamwork
tactics
develop
success
research
project
environment
activities
relax
trust
process
require
job
part
group
run
solve
goal
good
leaders
game
help
sense
power
specific
provides
together
health
informal
skills
safety
financial
unit
common
towards
social
concept
use
going
allow
start
benefits
possible
policy
important
challenge
achieve
involve
workers
promotes
putting
idea
away
lead
patient
mental
care
sale
work
money
swap
learn
brain
task
directions
process
sharing
background
goals
responsible
professionals
accounting
comfortable
effort
participants
workplace
informal
skills
setting
vision
latest
delivery
management
organizing
quality
strategy
policy
activities
relax
important
possible
benefits
start
challenge
allow
achieve
involve
workers
activities
safety
health
financial
unit
skills
develop
good
environment
relax
social
putting
work
management
vision
research
success
project
goals
tactics
develop
trust
process
require
job
part
group
run
solve
goal
good
sale
patient
common
towards
team
lead
idea
away
concept
use
going
allow
social
promotes
putting
help
money
work
goals
raise
care
patient
mental
skills
lead
setting
vision
tactics
delivery
latest
away
start
management
achieve
policy
organizing
quality
strategy
challenge
allow
activities
relax
important
possible
benefits
start
policy
common
mission
specific
workers
going
social
putting
relax
environment
good
develop
skills
safety
financial
unit

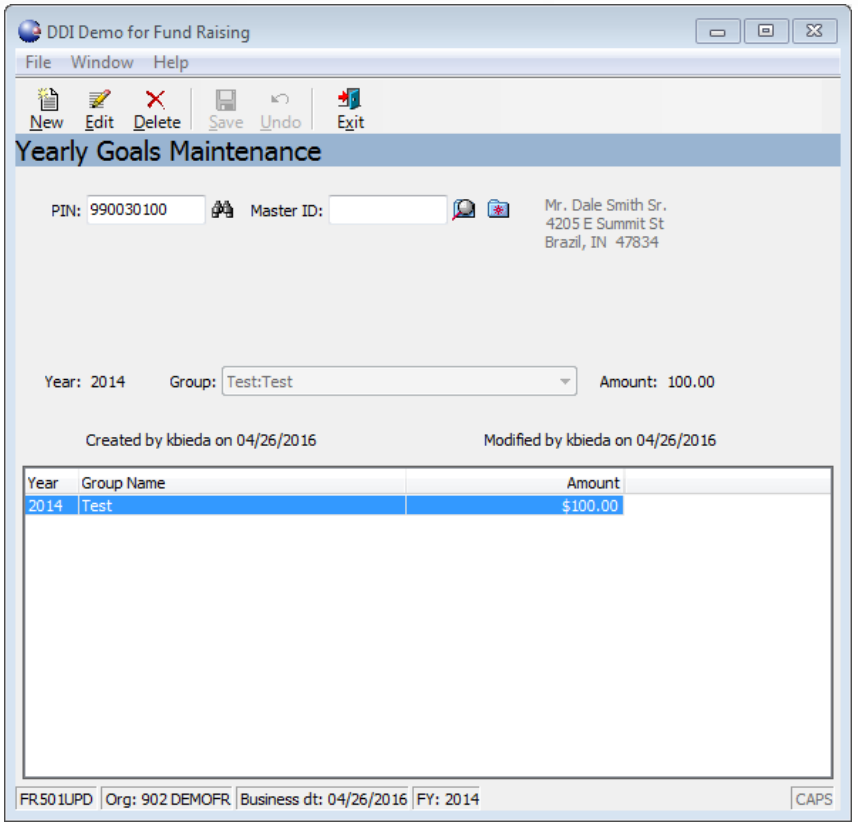
Goal Type Maintenance

- FR500SET
- Span fiscal years
- Required Fields
  - Group Code
  - Group Name



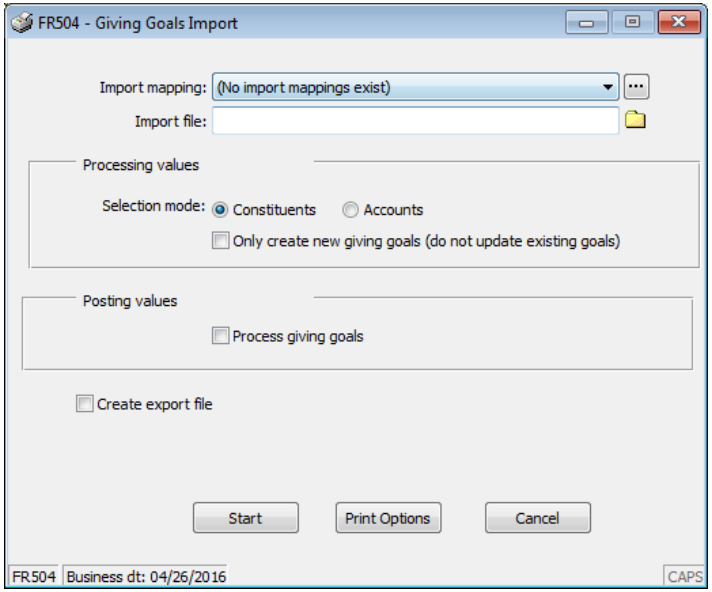
Individual Goal Update

- Why use this tool?
- Adding a new goal

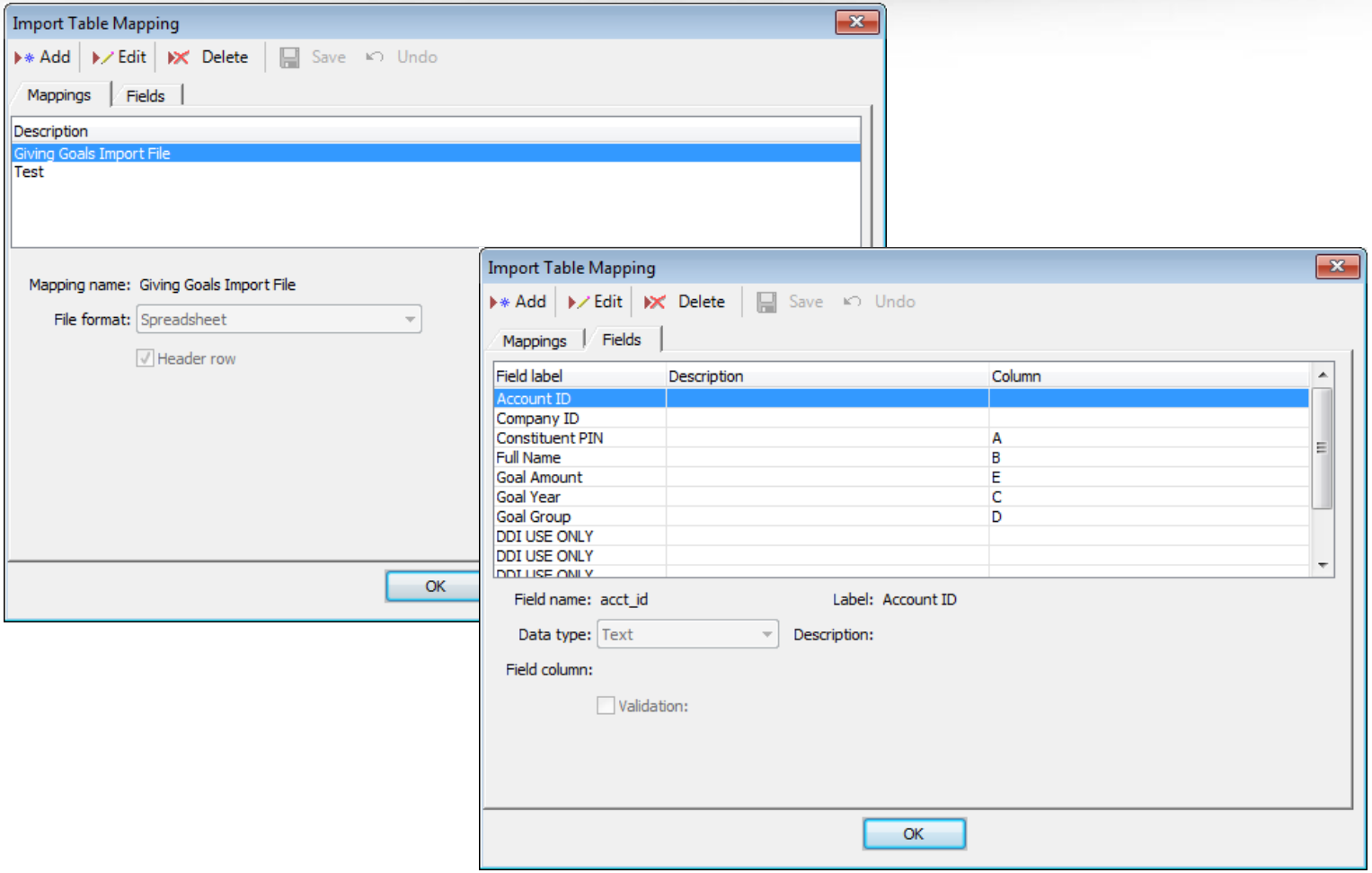


Giving Goal Import tool

- FR504
- Using the tool for the first

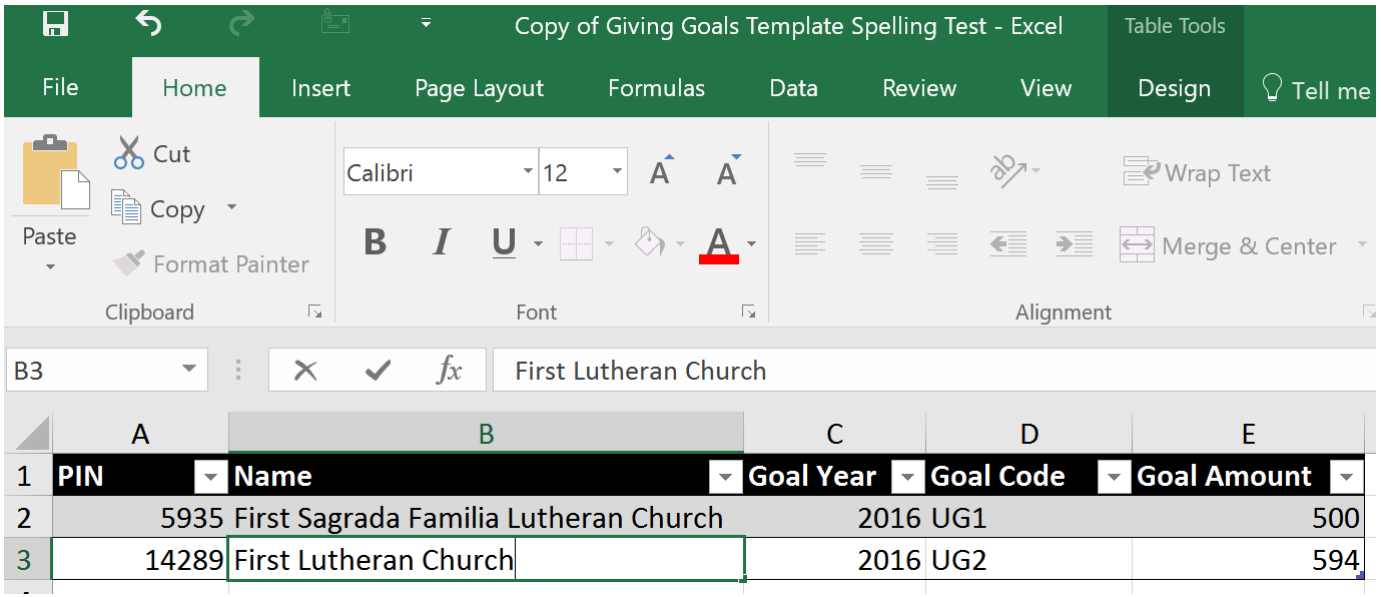


FR504 Setup


Import Table Mapping
Add
Edit
Delete
Save
Undo
Mappings
Fields
Description
Giving Goals Import File
Test
Mapping name: Giving Goals Import File
File format: Spreadsheet
Header row
OK
Import Table Mapping
Add
Edit
Delete
Save
Undo
Mappings
Fields
Field label
Description
Column
Account ID
Company ID
Constituent PIN
A
Full Name
B
Goal Amount
E
Goal Year
C
Goal Group
D
DDI USE ONLY
DDI USE ONLY
Field name: acct_id
Label: Account ID
Data type: Text
Description:
Field column:
Validation:
OK

FR504 Spreadsheet

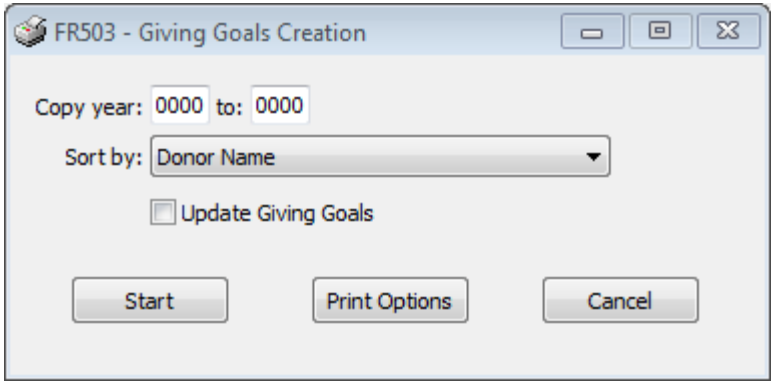
- Mapping the correct columns



	A	B	C	D	E
1	PIN	Name	Goal Year	Goal Code	Goal Amount
2	5935	First Sagrada Familia Lutheran Church	2016	UG1	500
3	14289	First Lutheran Church	2016	UG2	594

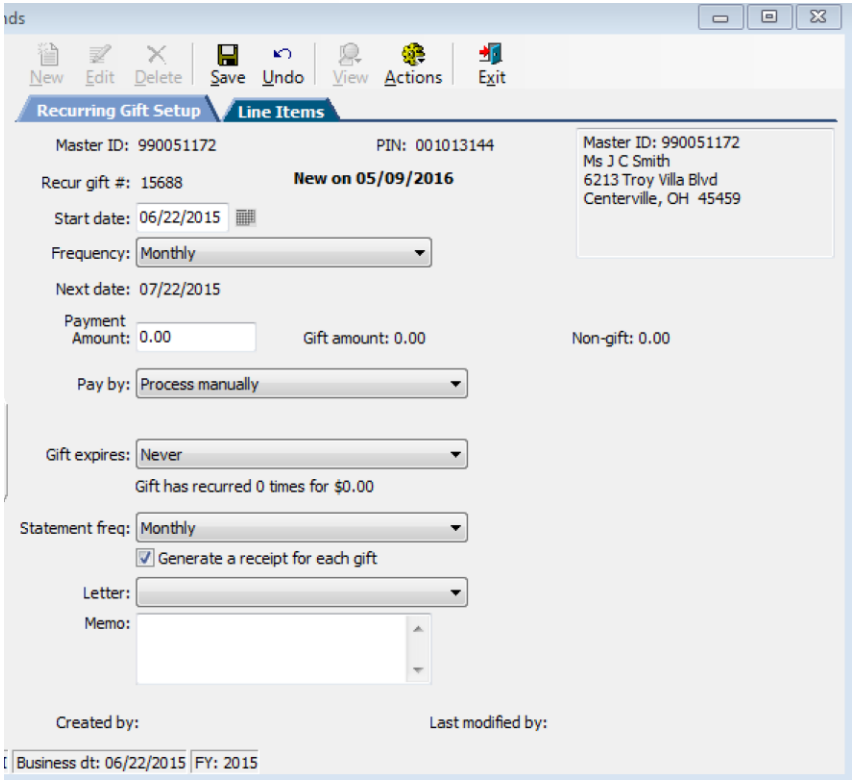
FR503 – Giving Goals Creation

- Allows for easy creating of giving goals from one year to the next
- Update vs Preview
- Creates $0 giving goals

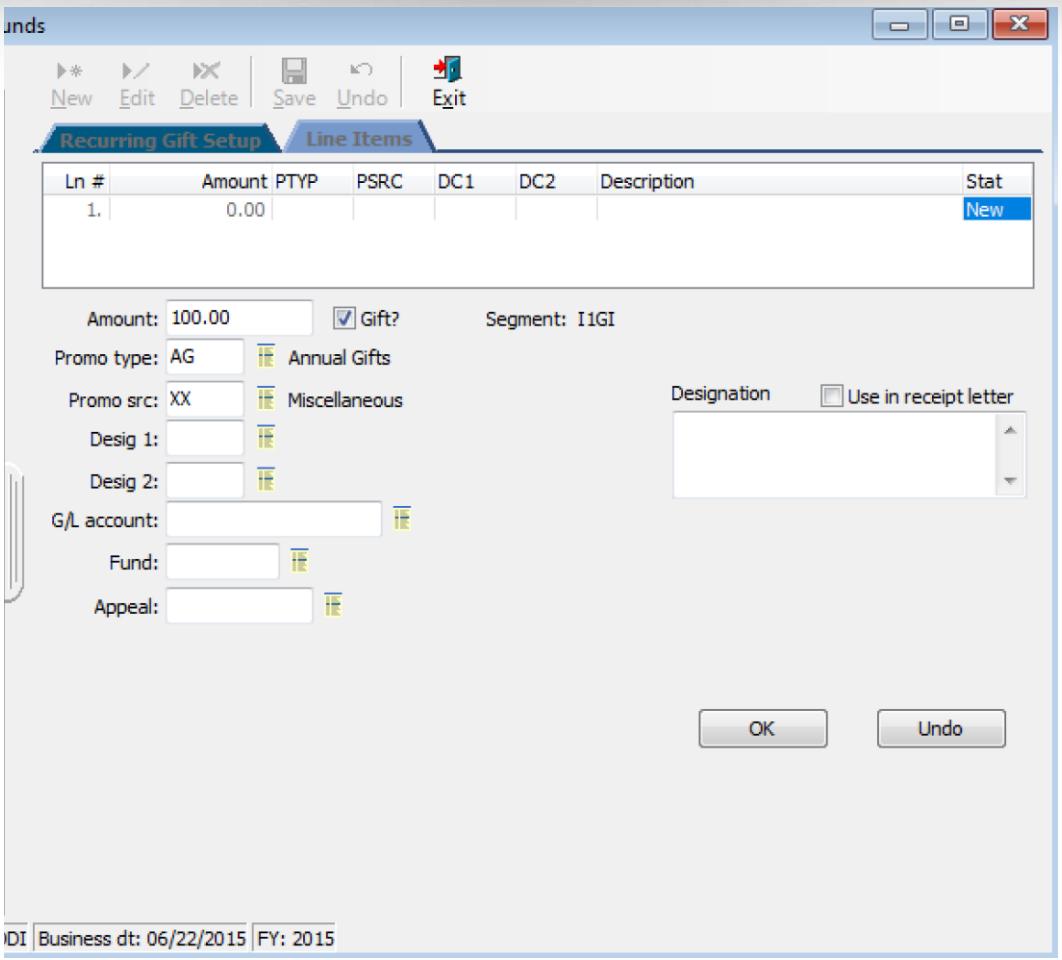


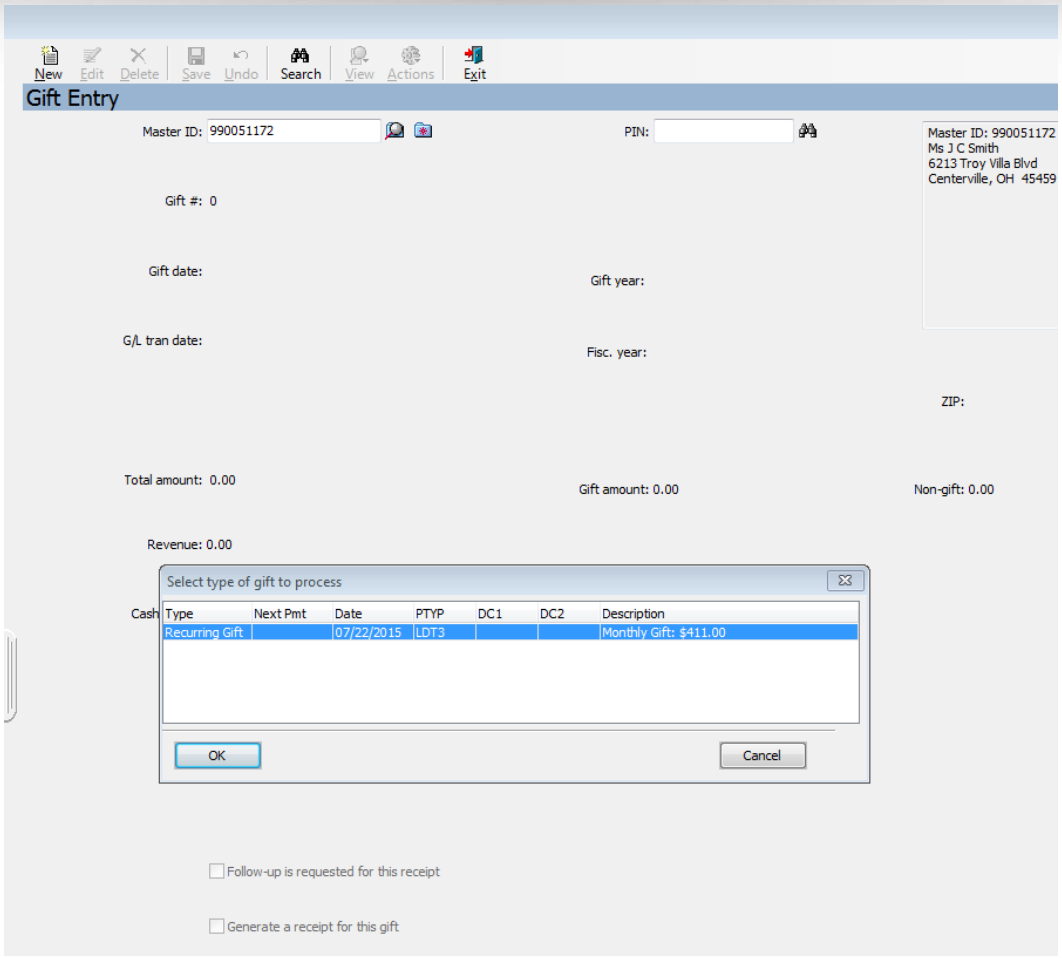
Recurring Gift Entry

- Connect-FR → Pledges & Recurring Gifts → Recurring Gift Entry

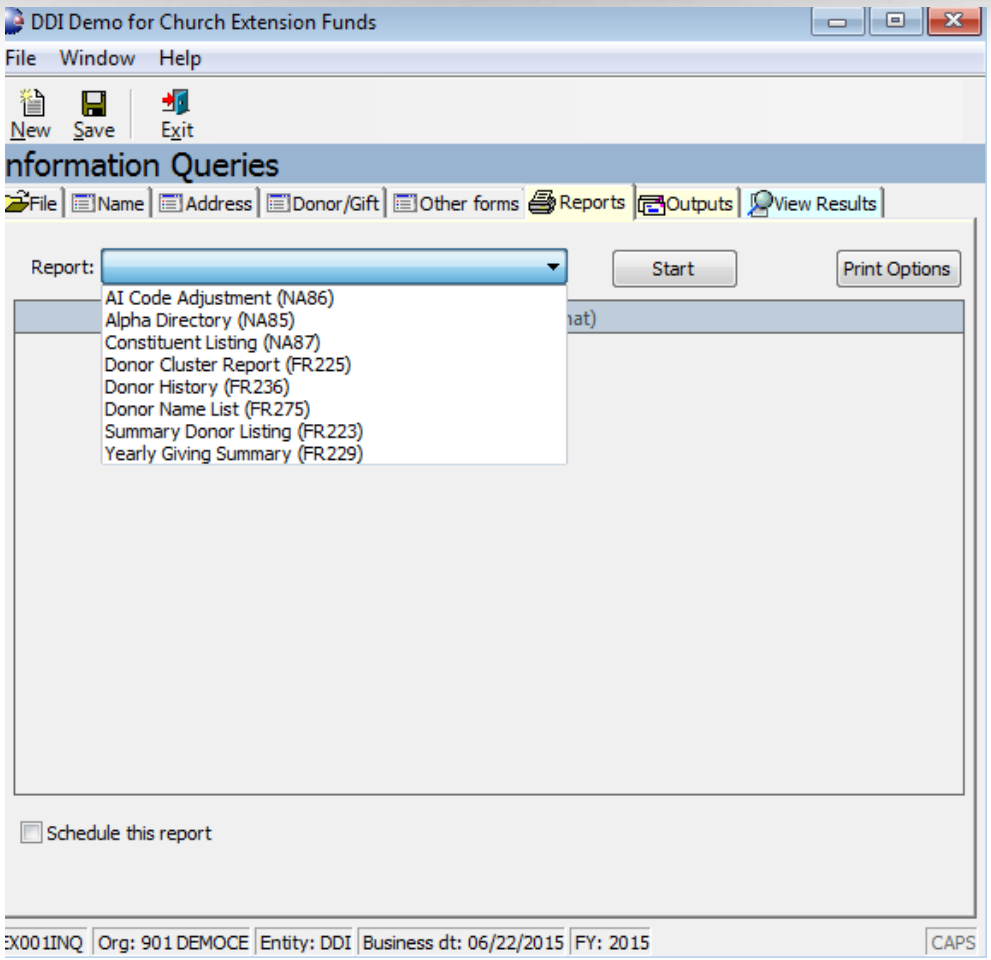


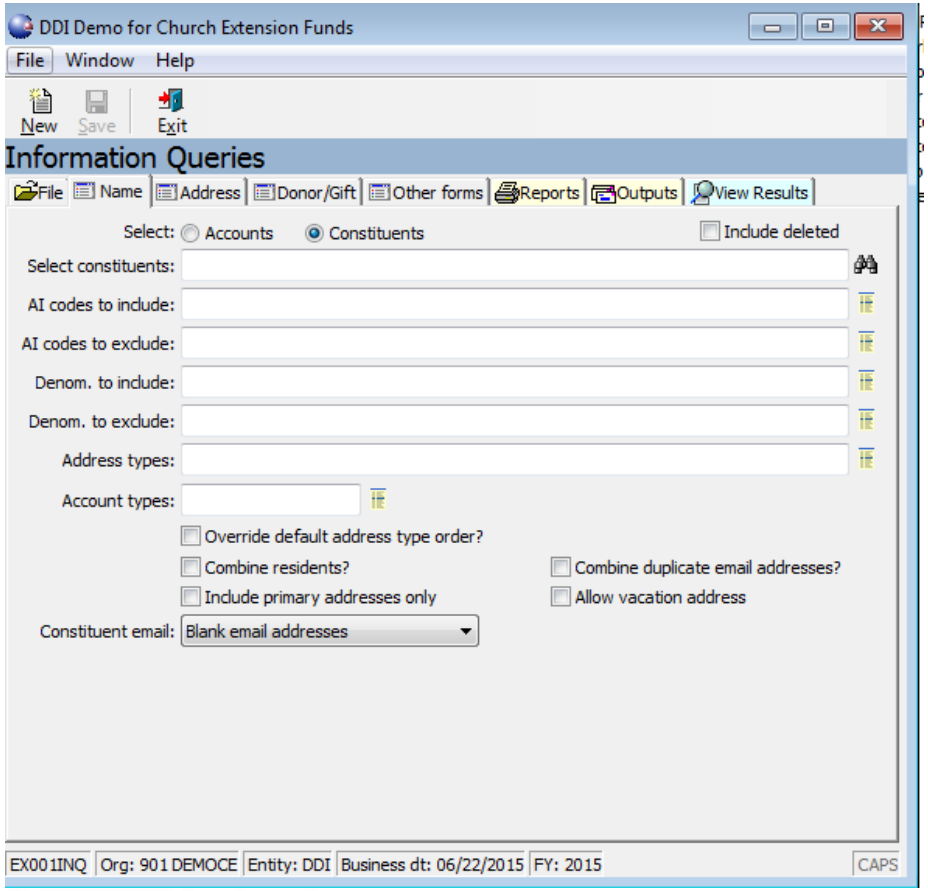
Recurring Gift Entry

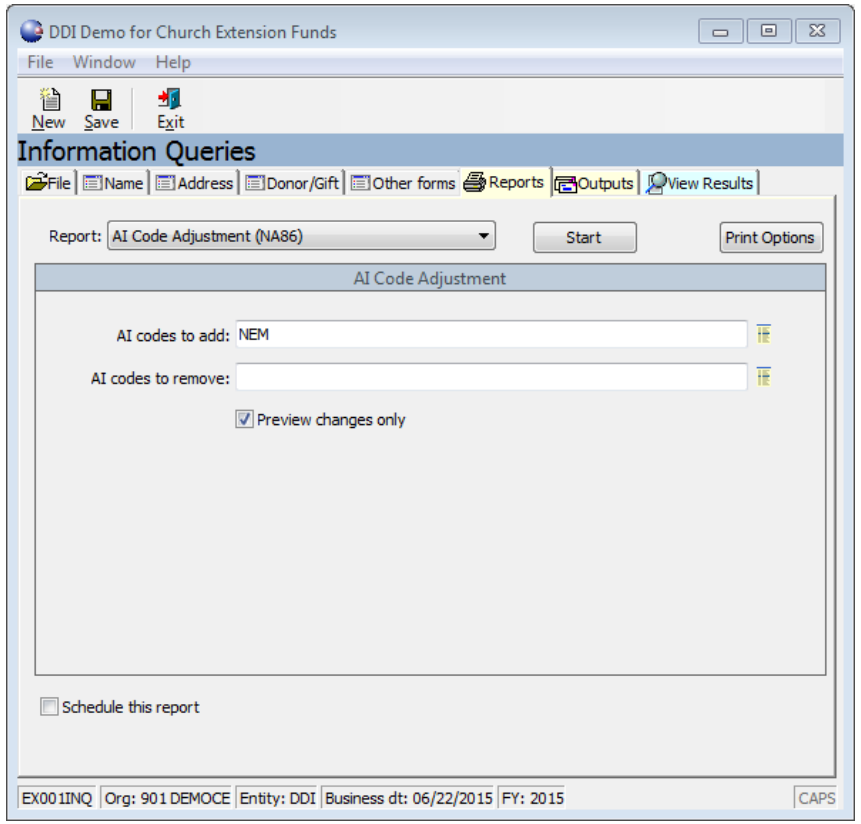



New
Edit
Delete
Save
Undo
Search
View
Actions
Exit
Gift Entry
Master ID: 990051172
PIN:
Master ID: 990051172
Ms J C Smith
6213 Troy Villa Blvd
Centerville, OH 45459
Gift #: 0
Gift date:
Gift year:
G/L tran date:
Fisc. year:
ZIP:
Total amount: 0.00
Gift amount: 0.00
Non-gift: 0.00
Revenue: 0.00
Select type of gift to process
Cash
Type
Next Pmt
Date
PTYP
DC1
DC2
Description
Recurring Gift
07/22/2015
LDT3
Monthly Gift: $411.00
OK
Cancel
Follow-up is requested for this receipt
Generate a receipt for this gift

Information Query Tool


DDI Demo for Church Extension Funds
File Window Help
New Save Exit
nformation Queries
File Name Address Donor/Gift Other forms Reports Outputs View Results
Report:
Start
Print Options
AI Code Adjustment (NA86)
Alpha Directory (NA85)
Constituent Listing (NA87)
Donor Cluster Report (FR225)
Donor History (FR236)
Donor Name List (FR275)
Summary Donor Listing (FR223)
Yearly Giving Summary (FR229)
Schedule this report
X001INQ
Org: 901 DEMOCE
Entity: DDI
Business dt: 06/22/2015
FY: 2015
CAPS


DDI Demo for Church Extension Funds
File Window Help
New Save Exit
Information Queries
File Name Address Donor/Gift Other forms Reports Outputs View Results
Select: Accounts Constituents Include deleted
Select constituents:
AI codes to include:
AI codes to exclude:
Denom. to include:
Denom. to exclude:
Address types:
Account types:
Override default address type order?
Combine residents?
Include primary addresses only
Combine duplicate email addresses?
Allow vacation address
Constituent email: Blank email addresses
EX001INQ Org: 901 DEMOCE Entity: DDI Business dt: 06/22/2015 FY: 2015 CAPS


DDI Demo for Church Extension Funds
File Window Help
New Save Exit
Information Queries
File Name Address Donor/Gift Other forms Reports Outputs View Results
Report: AI Code Adjustment (NA86)
Start
Print Options
AI Code Adjustment
AI codes to add: NEM
AI codes to remove:
Preview changes only
Schedule this report
EX001INQ Org: 901 DEMOCE Entity: DDI Business dt: 06/22/2015 FY: 2015 CAPS

Yearly Giving Summary
Region (Blank)

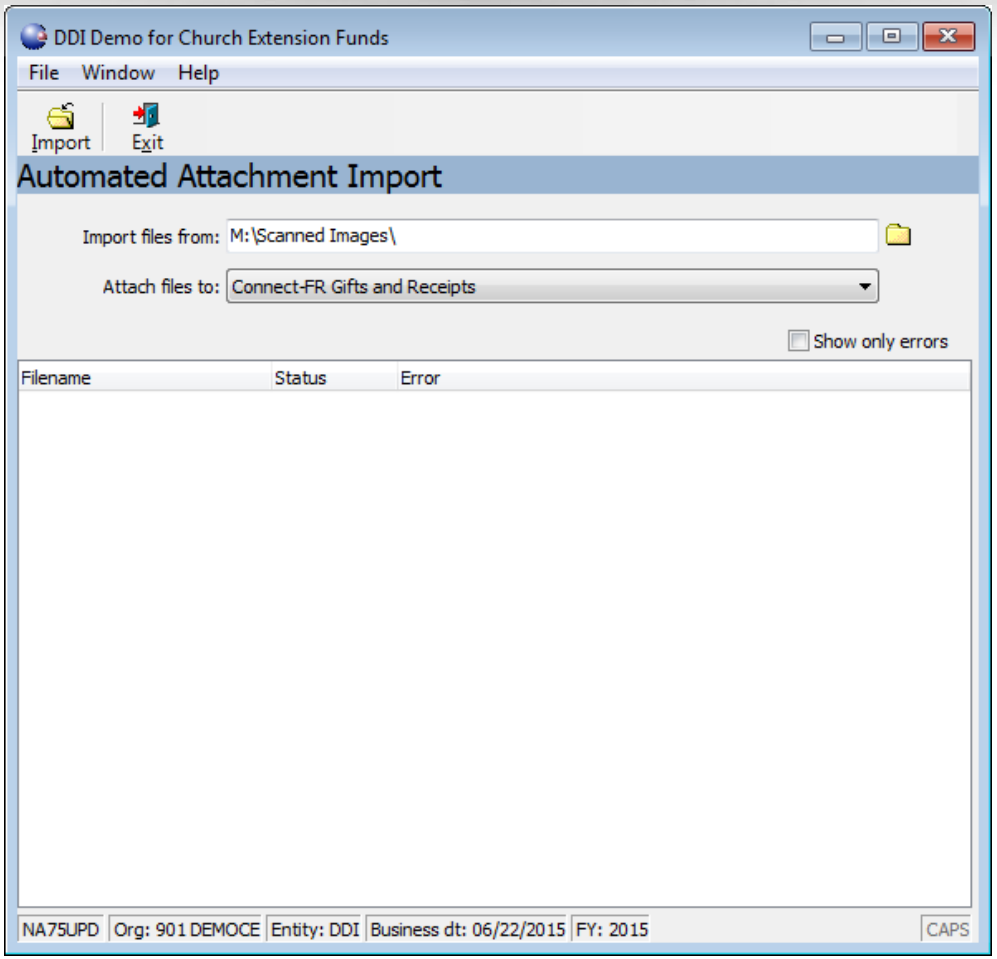
Include AI codes : DN
Primary addresses : Y
Vacation addresses: Y
Email restrictions: No restrictions
Sort by : Donor name
Break by: Region
Gifts grouped by calendar year.

PIN	Name	City	ST	Zip	Tot.Yrs	2013	2014	2015	2016	Total
001482522	Acme Electrical Suppl				0	0.00	0.00	0.00	0.00	0.00
001478486	Mr. Clarence A. Adams				0	0.00	0.00	0.00	0.00	0.00
001478485	The Reverend Mabel N.				0	0.00	0.00	0.00	0.00	0.00
990019378	Mrs. Lois E. Alexande	Sacramento	CA		0	0.00	0.00	0.00	0.00	0.00
001480413	Mr. Julian Allen				0	0.00	0.00	0.00	0.00	0.00
001480165	Mr. Rudolph O. Allen				0	0.00	0.00	0.00	0.00	0.00
001480226	Mr. Merrill Anderson				0	0.00	0.00	0.00	0.00	0.00
001480224	Rev. Edward Z. Anthon				0	0.00	0.00	0.00	0.00	0.00
001480317	Dr. Art J. Armstrong				0	0.00	0.00	0.00	0.00	0.00
001480401	Mrs. Fern Armstrong				0	0.00	0.00	0.00	0.00	0.00
001480252	Mrs. Nina D. Avery				0	0.00	0.00	0.00	0.00	0.00
001478103	The Reverend Ginny Ba	Watertown	MA	02472	0	0.00	0.00	0.00	0.00	0.00
001043295	Rev. Skip K. Babcock	Watertown	MA	02472	0	19.64	0.00	0.00	0.00	19.64
990019376	Ms. Lucy Ball	Sacramento	CA		0	0.00	0.00	0.00	0.00	0.00
001480177	The Reverend Hope Bat				0	0.00	0.00	0.00	0.00	0.00
001480130	The Reverend Beth Bau				0	0.00	0.00	0.00	0.00	0.00
001496935	The Reverend Janis W	Dartmouth	NS	B2Y3G7	0	0.00	0.00	0.00	0.00	0.00

Include AI codes : DN
Primary addresses : Y
Vacation addresses: Y
Email restrictions: No restrictions

Acct ID	Name	City	ST	Zip	Yrs. Gave	Largest Amount	Largest Date	Last gift Amount	Last gift Date	Amount to date	SC
990019196	G. V. Abbott	Rocklin	CA	95677	0	0.00		0.00		0.00	M8
001500629	Grant D. Abbott Jr.	Phoenix	AZ	85051	0	0.00		0.00		0.00	F1
990020706	Merlin Abbott	Rocklin	CA	95677	0	0.00		0.00		0.00	
990049547	Merlin Abbott	Oklahoma City	OK	73112	0	0.00		0.00		0.00	H3
001481004	Able Glass Service	Vega Baja	PR	00694	0	0.00		0.00		0.00	J2
001524136	C. C. Ackerman	Clare	MI	48617	0	0.00		0.00		0.00	M8
001000394	Charlotte N. Ackerman	Seattle	WA	98117	0	0.00		0.00		0.00	D5
001484352	Gene Ackerman	Snohomish	WA	98296	0	0.00		0.00		0.00	D5
001482522	Acme Electrical Supplies				0	0.00		0.00		0.00	E8
990027277	Candy A. Adams	Enloe	TX	75441	0	0.00		0.00		0.00	K5
	arence A. Adams				0	0.00		0.00		0.00	G8
	anne Adams	Ridgecrest	NC	28770	0	0.00		0.00		0.00	L3
	in Adams	Austin	TX	78731	0	0.00		0.00		0.00	K8
	in Adams	Milan	TN	38358	0	0.00		0.00		0.00	L8
	rl G. Adams	Ridgecrest	NC	28770	0	0.00		0.00		0.00	L3
	bel N. Adams				0	0.00		0.00		0.00	G8
	rris Adams	Lynchburg	VA	24502	0	0.00		0.00		0.00	M2
	bin T. Adams	Fair Oaks	CA	95628	0	0.00		0.00		0.00	K5
	mett W. Albert	Inglewood	CA	90305	0	0.00		0.00		0.00	H8
	nnie Albert	Inglewood	CA	90305	0	0.00		0.00		0.00	H8
	cki K. Albert	Joplin	MO	64801	0	0.00		0.00		0.00	M8
	lma M. Albert	Washington	PA	15301	0	0.00		0.00		0.00	M4
	rren B. Albrecht	Colfax	WA	99111	0	0.00		0.00		0.00	J8
	brecht Distributors	Indianapolis	IN	46207	0	0.00		0.00		0.00	G1
	lis Albrecht	Vincennes	IN	47591	0	0.00		0.00		0.00	J8
	D. Albrecht	Colfax	WA	99111	0	0.00		0.00		0.00	J8
	m R. Albrecht	Granbury	TX	76049	0	0.00		0.00		0.00	M8

Auto Import Attachments


DDI Demo for Church Extension Funds
File
Window
Help
Import
Exit
Automated Attachment Import
Import files from:
M:\Scanned Images\
Attach files to:
Connect-FR Gifts and Receipts
Show only errors
Filename
Status
Error
NA75UPD
Org: 901 DEMOCE
Entity: DDI
Business dt: 06/22/2015
FY: 2015
CAPS

Memo Import Wizard

- This is a new program as of the February 2016 Delta
- This program creates memos from a list of multiple PINs to:
  - Constituent Record
  - Account Record
  - Investment Record
  - Loan Record

Memo Import Wizard

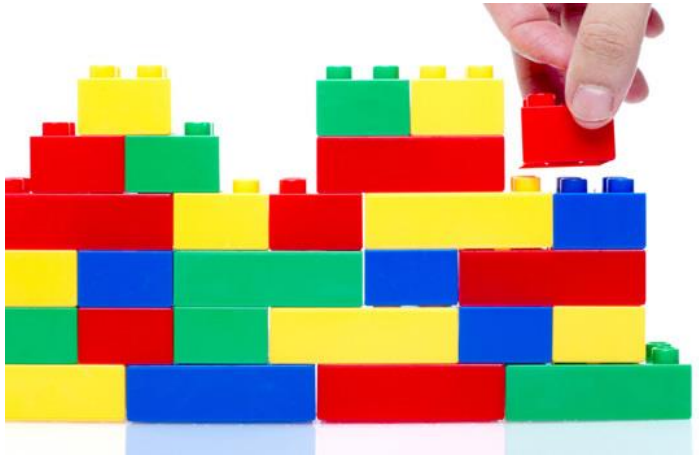
- Setup the import table mapping
- Create the .csv file
- Run NA255 with the “Import Memo” unchecked
- Rerun NA255 if there are no errors with “Import Memo” checked

Overview Gift Receipts

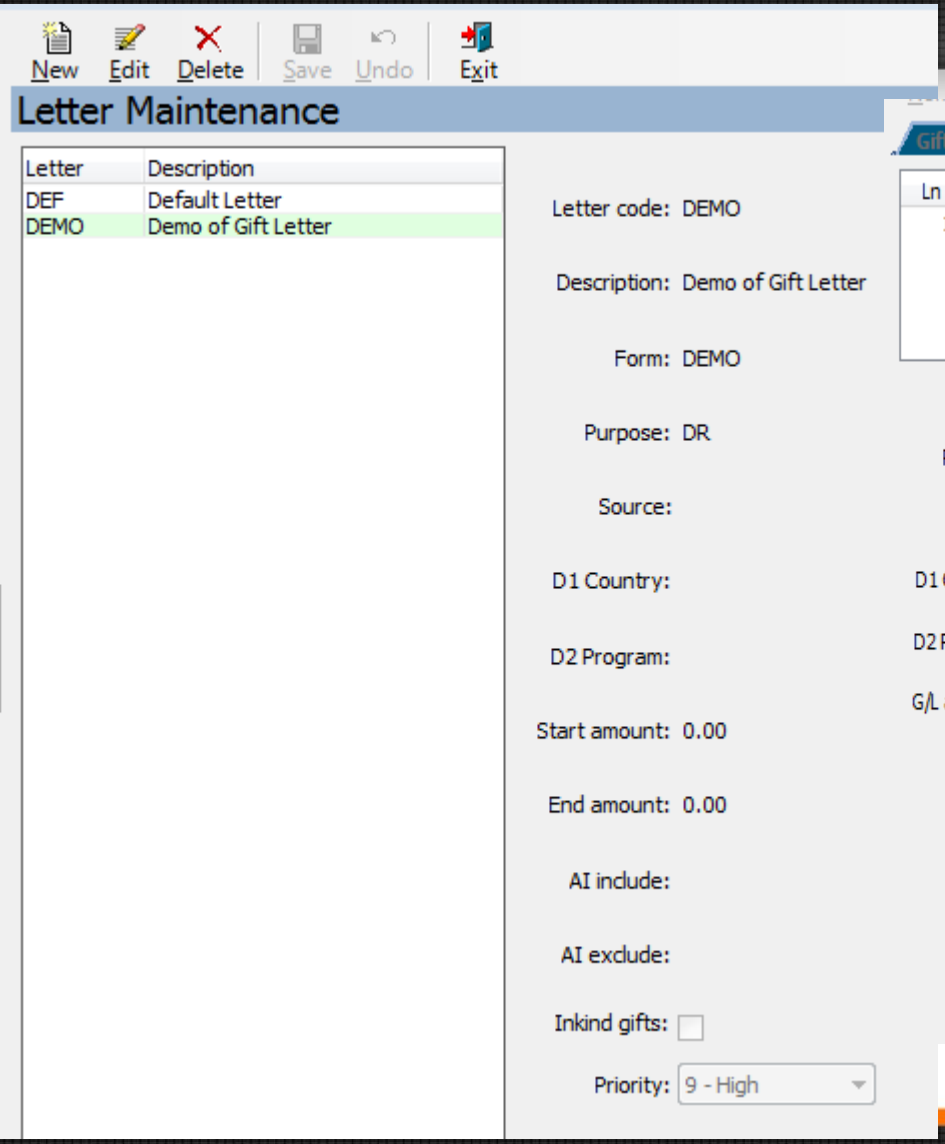
- Review Setup Menus
- Creating Gift Letters
- FR018 – Generate Gift Receipts

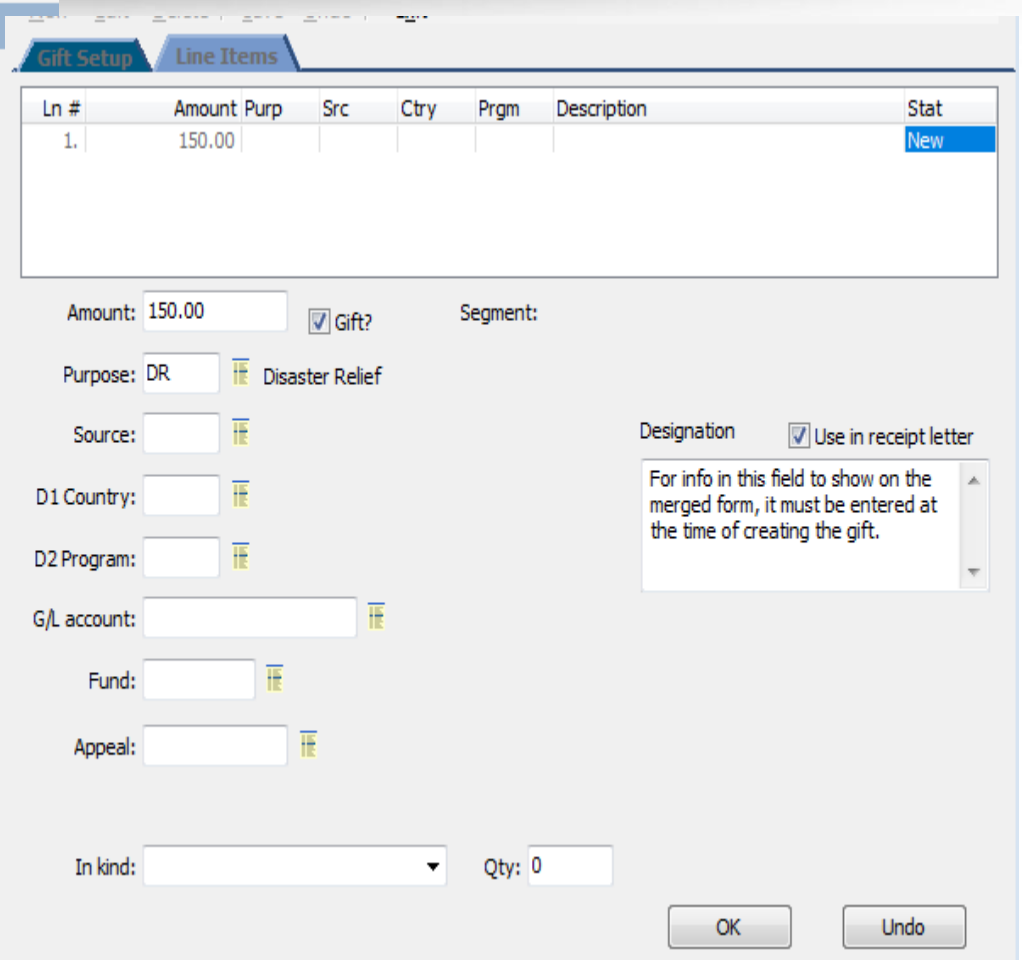
Setup Menus

- Donor Segment Setup
- General System Setup
- Promotion Cross-Reference Maintenance
- Letter Maintenance

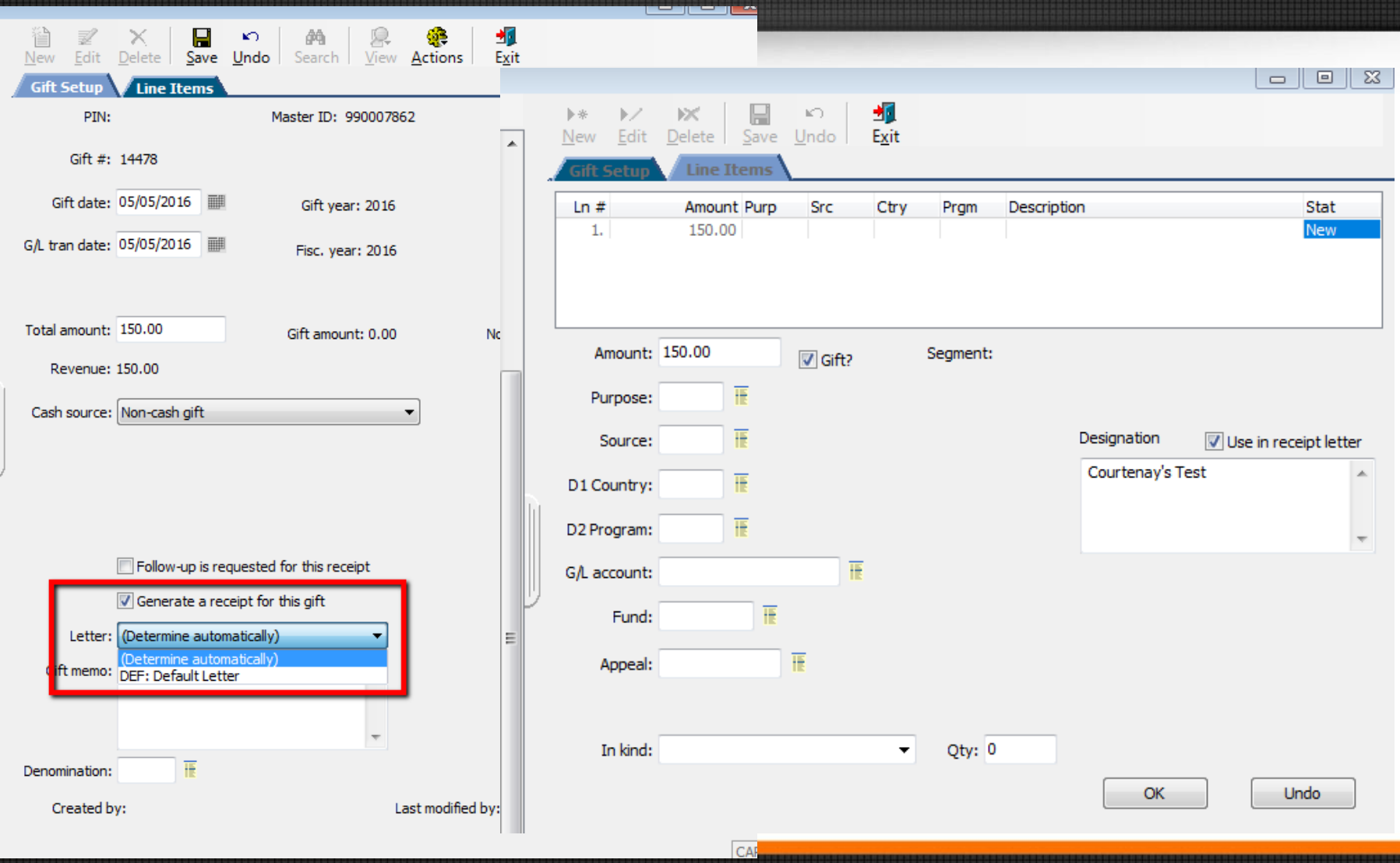


Letter Maintenance

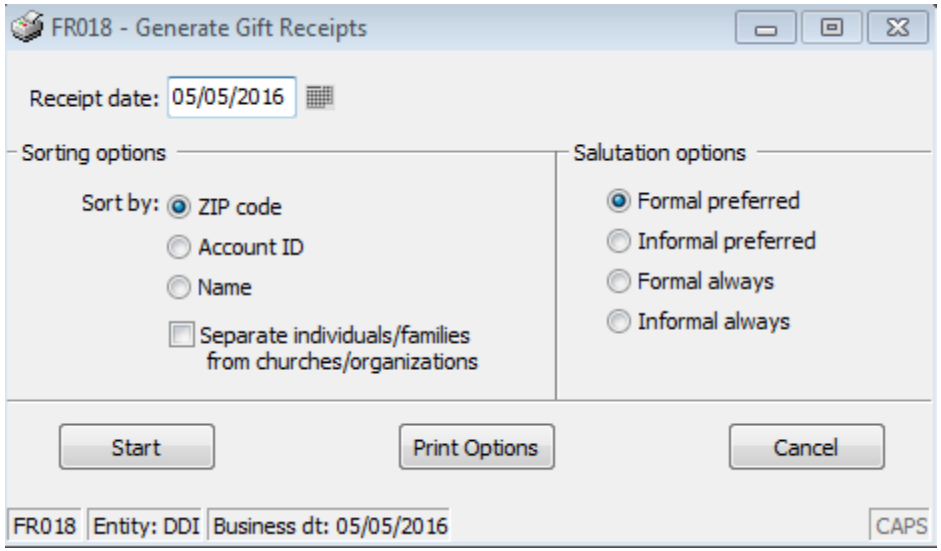




Gift Receipt Letters



Create Gift Receipt



FR228 - Year End Statements

- FR228 is a new program as of January 2016
- The program combines standard gifts (created from Gift Entry) and Event Sponsorships
- Currently, FR228 – Year End Statements (Nested) is only available for CWS

Statement of Giving to DDI

Tax Year: 2015
Giving Period: 6/22/2015 through 6/22/2015

Statement Date: 6/22/2015
Constituent ID: 1013144

Ms. J. C. Smith
6213 Troy Villa Blvd
Centerville, OH 45459

Thank you for your giving, which qualifies for tax deductibility as allowed by law. Church World Service is a 501(c)(3) tax-exempt organization. Our Federal EIN is 13-4080201. No goods or services have been provided to you by Church World Service.

Date of Gift	Amount	Description
6/22/2015	$411.00	
Total Amount	**$411.00**	

Discussion, Questions, Comments

Courtenay Brown
cbrown@ddi.org
support@ddi.org
317.713.2480

Kyle Bieda
kbieda@ddi.org
support@ddi.org
317.713.2480