

# 2017 DDI User Group

Building Community Together...

Information Query / Mailing  
Best Practice





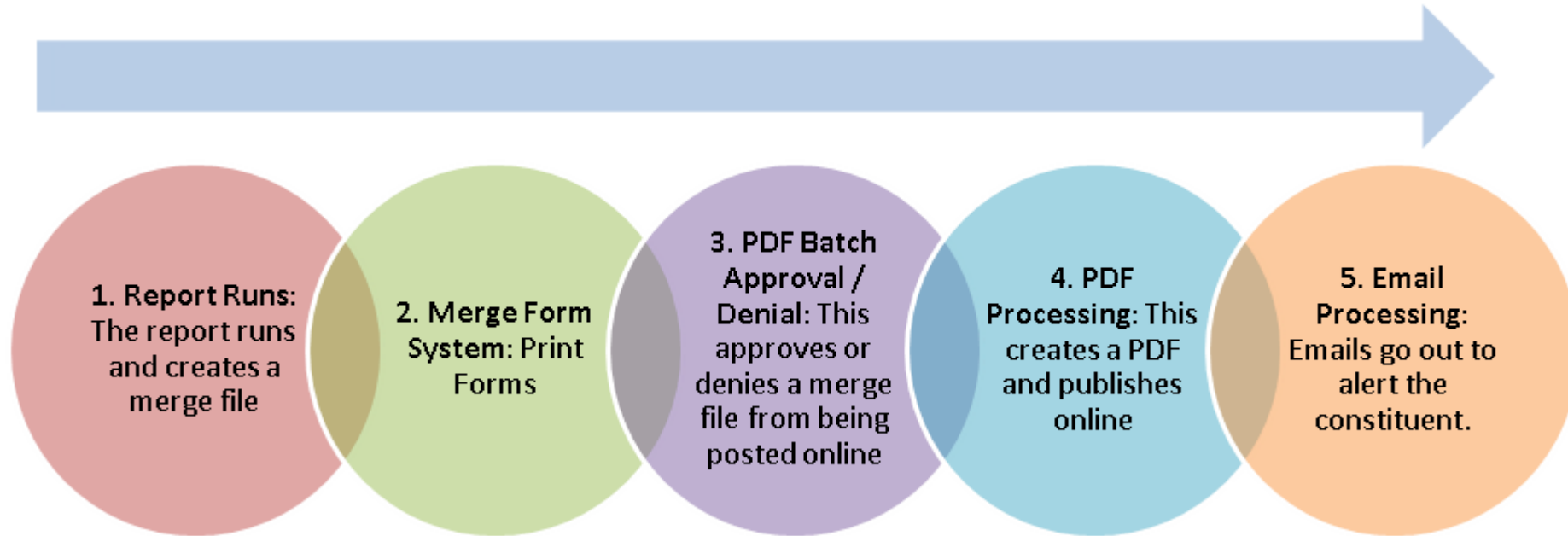
# Agenda



- Merge Form System Review + Review Online-CEF PDF Process
- Finding Mailings in CRM
- Information Query:
  - Mass Mailings
  - Mailing Labels
  - Generic Forms
- Duplicate Address (and how to fix!)
- Demo (if time permits)



# Merge Form System Review



# Merge Form System – Customize Your Message



## Customizing your email messages



DDI Demo for Church Extension Funds

File Dashboard Window

Add Edit Delete Actions Copy Save Undo Exit

Merge Form Maintenance Undo merge form edits

Email Details

From:  By: appsrv901 Sent: 08/15/2016 09:43:56 EDT

To: kbieda@ddi.org

CC:

Subject: Your Online Investment Application from Online-CEF

```
<html>
<style>
body {
background-color:#e6e6e6; text-align: center; margin: 0; font-family: Arial; font-weight:400; }
table {
border: ridge medium #0076B5; background-color:#FFF; font-size:10pt; width: 800; }
td {
border: none; color: #000; padding:10; }
</style>
<body>
<table align=center >
<tr><td style="border-bottom: ridge medium #0076B5; text-align: center;"></img></td></tr>
<tr align=left><td>
<p>Dear Mr. Rachel F. Ambler:</p>
<p>Your Online Investment Application created on 08/15/2016 is attached.</p>
<p>If you feel you have received this email in error, please contact:</p>
<p>DDI Inc.<br>
130 E. Washington St.<br>
Indianapolis, IN 46204<br>
Phone: 317.713.2480<br>
Email: <a href="mailto:support@ddi.org">support@ddi.org</a>
</p></td></tr>
```

OK



# Merge Form System – Customize Your Message



## Customizing your Letters

- Additional document/backer option

DDI Demo for Church Extension Funds

File Window Help

Add Edit Delete Actions Copy Save Undo Exit

### Merge Form Maintenance

Form Code	Language	Description	Stock Code
227	ENG	IL 227 - Investment Note	LETTER
CAPB	ENG	Capital Builder - Flex Note	NOTE7
CES1	ENG	SANN 1099 - 1 pg - single inv	LETTER
CES1T	ENG	SANN 1099 - 1 pg - single inv	LETTER
CES2	ENG	SANN 1099 - 1 pg - multi inv	LETTER
CES2T	ENG	SANN 1099 - 1 pg - multi inv	LETTER
CES3	ENG	SANN 1099 - 2 page - < 26 inv	LETTER

Form code: 227

Default language: ENG English

Description: IL 227 - Investment Note

Template file: invnote1.docx

**Additional file:**

Stock code: LETTER

# in batch: 200 Key field:

Catalog merge?

Email type: Not Setup

Purge?: Never

Logo: None

Field Description
3 Field 3
4 Field 4
5 Field 5
6 Field 6
7 Field 7
8 Field 8
9 Field 9
10 Field 10
11 Field 11
12 Field 12
13 Field 13
14 Field 14
15 Field 15
16 Field 16
17 Field 17
18 Field 18
19 Field 19
20 Field 20
21 Field 21
22 Field 22

WP03 | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS



# Merge Form System – Customize Your Message



## Customizing your letters with a new logo!

- Centralized logo maintenance

DDI Demo for Church Extension Funds

File Dashboard Window

Add Edit Delete Actions Save Undo Exit

**Logo Maintenance**

Logo	Label	Description

Label:

Description:

WP04 | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS



# Mail Record History



## INVESTMENT NOTE

DiscipleData, Inc.  
130 East Washington  
Indianapolis, Indiana 46204-3465  
(NON-NEGOTIABLE)



Master Number: 000001379  
Investment Number: 136785

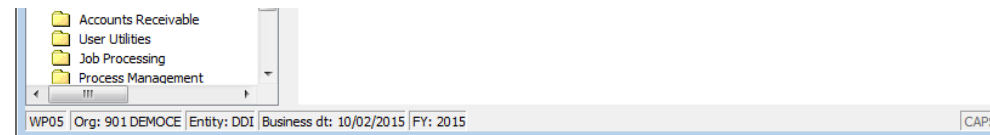
Amount: \$5,000.00

Issue Date: June 22, 2015  
Maturity Date: June 22, 2018

*DiscipleData, Inc., an Indiana corporation, hereinafter called "DDI," for value received hereby promises to pay to:*

Yellow River AMEZ Church or  
Mr Thomas E Ambler or  
Mrs Rachel L Ambler or  
Miss Grace O Ambler  
6201 Strathmore Drive  
Bremerton, WA 98337

Joint Tenancy with  
Right of Survivorship





# Mail Record History



DDI Demo for Church Extension Funds

File Dashboard Window Admin Help

Merge PDF Doc Regenerate PDF Exit

Merge Record Inquiry

Name PIN: 990057061 Ambler Thomas E

Form code: [ ]

Start date: [ ] End date: [ ]

Search Clear

Batch Date	Print?	Form Code	Form Name	Key Information
31591 06/22/2015	Yes	227	IL 227 - Investment Note	
31592 06/22/2015	Yes	IKDR	Kid Builder Deposit Receipts	inv-num: 136785
31593 06/22/2015	Yes	227	IL 227 - Investment Note	
31594 06/22/2015	Yes	IKDR	Kid Builder Deposit Receipts	inv-num: 136785
31640 10/02/2015	Yes	227	IL 227 - Investment Note	

WP05 | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/31/2015 | FY: 2015 | CAPS



# Information Query



## Information Query – What can you do?

- Mass mailings
- Generic forms
- Mailing labels for any mailings
- Offering circular
- Email list to upload to marketing sites like Constant Contact
- Update appeals
- Update AI codes



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

Main Menu

- Financial Inquiry
- Name/Address Inquiry
- Name/Address System
- Extract Module
- Information Query
- Combined Information Query
- Query / Reporting
- Setup
- Project Management
- Financial Services
- Merge Forms System
- CheckWriter
- Fixed Assets
- FundWriter
- Accounts Payable
- Connect-FR
- IRS Reporting System
- Yearbook System
- Accounts Receivable
- User Utilities
- Job Processing
- Process Management
- Web Forms
- Supervisor Menu

New Save Exit

(Untitled Query)

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:

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS

# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

(Untitled Query)

File Name Address Donor/Gift Other forms Reports Outputs View Results

Countries to include:

Countries to exclude:

Regions to include:

Regions to exclude:

Area to incl.:

Area to excl.:

State to include:   City:  Mileage radius:

Countries to include:

States to exclude:

Postal codes:

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS

# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

**Donor Criteria**

Include:  Direct giving  In-kind  Non-gift  Soft credit

Largest gift: 0.00 thru: 0.00  Use gift criteria for largest, first & total giving

Total giving: 0.00 thru: 0.00 Count: 0 thru: 0

First gift: 0.00 thru: 0.00 Date: -

Recent gift: 0.00 thru: 0.00 Date: -

Donor segment:

**Gift Criteria**

Include	Exclude
Promo type:	
Promo src:	
Desig 1:	
Desig 2:	

Gift dates: -  Calculate number of years given

Gift amount: 0.00 thru: 0.00  Output data based on gift criteria

Fund #: Fund type:  Seed gifts only

EX001INQ Org: 901 DEMOCE Entity: DDI Business dt: 10/02/2015 FY: 2015 CAPS



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Criteria form:

- Individual Information
- Appeal History
- Event Participation
- Investment Information
- Loan Information
- Yearbook Information

Main Menu

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- CheckWriter
- Fixed Assets
- FundWriter
- Accounts Payable
- Connect-FR
- IRS Reporting System
- Yearbook System
- Accounts Receivable
- User Utilities
- Job Processing
- Process Management
- Web Forms
- Supervisor Menu

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 CAPS



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Criteria form: Individual Information

**Individual Information**

Include individuals with no personal information entered (all blank)

Age range: [ ] thru: [ ] Blank ages: No restrictions

Birth date range: [ ] thru: [ ]  Search by month/day

Death date range: [ ] thru: [ ]

Include earning codes: [ ]

Exclude earning codes: [ ]

Include education levels: [ ]

Exclude education levels: [ ]

Include professions: [ ]

Exclude professions: [ ]

Include schools: [ ]

Exclude schools: [ ]

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Criteria form: Appeal History

#### Appeal History

Recipients:

Appeals to include:

Packages to include:

Appeals to exclude:

Packages to exclude:

Respondents:

Appeals to include:

Packages to include:

Appeals to exclude:

Packages to exclude:

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS





# Information Query Basics



**Special  
events!**

DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Criteria form: Event Participation

#### Event Participation

Event Region:  Area:   
State:  County:   
Event PIN:   
Event types:   
Event date:  thru:   
Event positions:   
Total walker amount: 0.00 thru: 0.00  
Total sponsor amount: 0.00 thru: 0.00  
Constituent added on:  thru:   
Staff PIN:   
Event status:  Season:

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Criteria form: Investment Information

Investment Information

Interest payment codes:

Select based on Tax Reporting Pin

Investment amount: 0.00 thru: 0.00

Investments in setup:  Must have  Can't have  Don't care

Active investments:  Must have  Can't have  Don't care

Redeemed investments:  Must have  Can't have  Don't care

Include registration types:

Exclude registration types:

Include active this year

Include registrations:

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Criteria form: Loan Information

#### Loan Information

Loan types:	<input type="text"/>	Security:	<input type="text"/>
Loan status:	<input type="text"/>	Purpose:	<input type="text"/>
Autopay?:	Either	Monitor:	<input type="text"/>
Adjust method:	<input type="text"/>		
Principal amount:	0.00	thru:	0.00
Rebate amount:	0.00	thru:	0.00
Times delinquent:	0	thru:	0
First advance date:	<input type="text"/>	thru:	<input type="text"/>
Estimated payoff date:	<input type="text"/>	thru:	<input type="text"/>
Last payment date:	<input type="text"/>	thru:	<input type="text"/>

Include only loans that:

<input type="checkbox"/> Have a remitter	<input type="checkbox"/> Are past due
<input type="checkbox"/> Have a beneficiary	<input type="checkbox"/> Are prepaid

EX001INQ Org: 901 DEMOCE Entity: DDI Business dt: 10/02/2015 FY: 2015 CAPS



# Information Query Basics



DDI Demo for Church Extension Funds

File Dashboard Window

New Save Exit

### Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Output format:  Start

- Mailing Labels
- Mail merge
- Data file
- Tape file
- Loan Data file
- Spreadsheet

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS

**Main Menu**

- Financial Inquiry
- Name/Address Inquiry
- Name/Address System
- Extract Module
- Information Query
- Combined Information Query
- Query / Reporting
- Setup
- Project Management
- Financial Services
- Merge Forms System
- CheckWriter
- Fixed Assets
- FundWriter
- Accounts Payable
- Connect-FR
- IRS Reporting System
- Yearbook System
- Accounts Receivable
- User Utilities
- Job Processing
- Process Management
- Web Forms
- Supervisor Menu



# Information Query Basics



mailing - Notepad

File Edit Format View Help

"label1"	"label2"	"label3"	"label4"	"label5"	"label6"		
"BETHLEHEM UNITED METHODIST"	"CHURCH"	"3508 DOGWOOD DR"	"CHESTERFIELD	IN 46017"	""	""	
"FIRST RUSSIAN ORTHODOX CHURCH"	"9594 SPRUCE"	"MARKLEVILLE	IN 46056"	""	""	""	
"IMMANUEL CATHOLIC CHURCH"	"1744 SHAMROCK AVE"	"SHERIDAN	IN 46069"	""	""	""	
"RED VALLEY CHURCH OF GOD"	"9239 W LATIMER PL"	"WESTFIELD	IN 46074"	""	""	""	
"SECOND AMISH CHURCH"	"700 E LOULA"	"GREENCASTLE	IN 46135"	""	""	""	
"SACRED HEART CHURCH OF GOD IN"	"CHRIST"	"429 NW 728TH ST"	"GREENFIELD	IN 46140"	""	""	
"ST. STEPHENS AMERICAN BAPTIST"	"CHURCH"	"8300 BRAZOS"	"GREENWOOD	IN 46142"	""	""	
"FIRST CONGREGATIONALIST CHURCH"	"8021 E RAINES RD"	"TRAFALGAR	IN 46181"	""	""	""	
"ST. THOMAS UNITARIAN CHURCH"	"5668 COUNTY RD 697D"	"INDIANAPOLIS	IN 46201"	""	""	""	
"WATTS MORMON CHURCH"	"7143 DUFFY RD"	"INDIANAPOLIS	IN 46201"	""	""	""	
"DEMO SYSTEM CHURCH"	"706 N DIXON"	"INDIANAPOLIS	IN 46204"	""	""	""	
"DEMO SYSTEM CHURCH"	"706 N DIXON"	"INDIANAPOLIS	IN 46204"	""	""	""	
"DEMO SYSTEM CHURCH"	"706 N DIXON"	"INDIANAPOLIS	IN 46204"	""	""	""	
"MEYER EASTERN ORTHODOX CHURCH"	"1021 GREENWOOD DR"	"INDIANAPOLIS	IN 46208"	""	""	""	
"MEYER EASTERN ORTHODOX CHURCH"	"1021 GREENWOOD DR"	"INDIANAPOLIS	IN 46208"	""	""	""	
"FIRST SOUTHERN BAPTIST CHURCH"	"728 COMMERCE"	"INDIANAPOLIS	IN 46219"	""	""	""	
"FIRST SOUTHERN BAPTIST CHURCH"	"728 COMMERCE"	"INDIANAPOLIS	IN 46219"	""	""	""	
"FIRST SOUTHERN BAPTIST CHURCH"	"728 COMMERCE"	"INDIANAPOLIS	IN 46219"	""	""	""	
"BETHEL BIBLE FELLOWSHIP"	"4050 CLEARBROOK DR"	"INDIANAPOLIS	IN 46219"	""	""	""	
"BEULAH CHRISTIAN CHURCH"	"1ST CHRISTIAN CHURCH"	"INDIANAPOLIS	IN 46219"	""	""	""	
"BLACK MEADOW UNITED CHURCH OF"	"CHRIST"	"3249 CLAYBOURNE AVE"	"INDIANAPOLIS	IN 46219"	""	""	
"BROWN CANYON MENNONITE CHURCH"	"5099 HAMLIN VALLEY DR"	"SPEEDWAY	IN 46219"	""	""	""	
"QUIET BEACH MORMON CHURCH"	"NEW GRV HALL CHRISTIAN CHURCH"	"INDIANAPO	IN 46219"	""	""	""	
"LIVING HOPE CHURCH OF GOD IN"	"CHRIST"	"904 DEPOT ST"	"INDIANAPO	IN 46219"	""	""	
"PIPER LUTHERAN CHURCH"	"4802 MOUNTAIN SHADOW DR"	"INDIANAPOLIS	IN 46219"	""	""	""	
"ST. STEPHENS PREBYTERIAN"	"CHURCH"	"770 CARVER ST"	"INDIANAPO	IN 46219"	""	""	
"ROWLAND ASSEMBLIES OF GOD"	"8055 WEXFORD RD"	"INDIANAPOLIS	IN 46219"	""	""	""	
"SALEM FREE METHODIST CHURCH"	"LITTLE BETHLEHEM OF LEAKSVILLE"	"H	IN 46219"	""	""	""	
"FIRST CHURCH OF THE NAZARENE"	"28761 ELLISON WAY"	"LA PORTE	IN 46219"	""	""	""	
"BETHEL UNITED CHURCH OF CHRIST"	"6600 S GOODMAN"	"VALPARAIS	IN 46219"	""	""	""	
"FIRST BIBLE BAPTIST CHURCH"	"6190 SW 42TH CT"	"SOUTH BEND	IN 46219"	""	""	""	
"REDEEMER MORMON CHURCH"	"C/O GEORGE M SOWERS, ATTORNEY"	"FORT WAYN	IN 46219"	""	""	""	
"BETHEL GREEK ORTHODOX CHURCH"	"710 SW IVY ST"	"MARION	IN 46952"	""	""	""	

File Home Insert Draw Design Layout References Mailings Review View

Start Mail Select Edit Highlight Address Greeting Insert Merge Merge Recipients Recipient List Merge Fields Block Line Field Write & Insert Fields

Letters  
E-mail Messages  
Envelopes...  
Labels...  
Directory  
Normal Word Document  
Step-by-Step Mail Merge Wizard...





# Information Query Basics



DDI Demo for Church Extension Funds

File Window Help

Delete Merge Exit

### Merge Print Requests

Batch	Print #	Total #	File Description	User ID	Load Date	Form Code	Stock C...
<input type="checkbox"/>	31641	40	40 Information Queries	kbieda	10/02/2015	UG17	

Select all  
 Send merge files to PC?  
 Print all (including Electronic Only)

Render as: Portable Document Format (.pdf)

WP06PRINT | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015

Outputs View Results

Start

- Letter
- Summary, 1L/1P
- Summary, 2L/1P
- Summary, 2L/2P
- Summary, 2L/3P
- Statement Note
- Short Term Note
- Merge Example
- Variable Note
- Note - Intro Off
- Int. Rate Notify
- Notification
- Var. Rate Notices
- Notices II

Cancel



# Information Query Basics



The screenshot shows the 'DDI Demo for Church Extension Funds' application. The left sidebar contains a 'Main Menu' with various options like 'Financial Inquiry', 'Name/Address Inquiry', 'Extract Module', 'Information Query', 'Combined Information Query', 'Query / Reporting', 'Setup', 'Project Management', 'Financial Services', 'Merge Forms System', 'Merge Record Inquiry', 'Merge Print Requests', 'Reprint Merge Requests', 'Nested Mailmerge', 'Administrative Tasks', 'Setup', 'CheckWriter', 'Fixed Assets', 'FundWriter', 'Accounts Payable', 'Connect-FR', 'IRS Reporting System', 'Yearbook System', 'Accounts Receivable', 'User Utilities', 'Job Processing', 'Process Management', 'Web Forms', and 'Supervisor Menu'. The 'Merge Print Requests' option is highlighted.

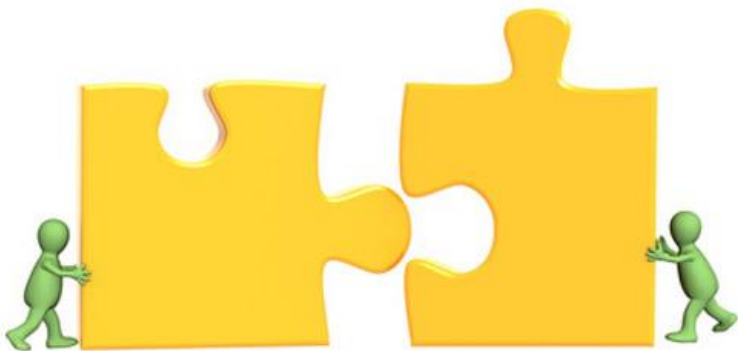
The main window displays the 'Information Queries' interface. At the top, there are 'New', 'Save', and 'Exit' buttons. Below that is a menu bar with 'File', 'Name', 'Address', 'Donor/Gift', 'Other forms', 'Reports', 'Outputs', and 'View Results'. The 'Reports' menu is active, showing a dropdown for 'Report: AI Code Adjustment (NA86)'. There are 'Start' and 'Print Options' buttons. The main area is titled 'AI Code Adjustment' and contains two text input fields: 'AI codes to add:' and 'AI codes to remove:'. A checkbox labeled 'Preview changes only' is checked. At the bottom, there is a checkbox for 'Schedule this report'.

The status bar at the bottom of the window shows: 'EX001INQ | Org: 901 DEMOCO | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 | CAPS'.





# Combined Information Query



DDI Demo for Church Extension Funds

File Dashboard Window Admin

New Edit Query Save History Exit

(Untitled Query)

Extracts Info Queries Reports Outputs View Results

Description	Owner	Type	Category
<input type="checkbox"/> Sample Output	cmilliken	A	
<input type="checkbox"/> Kyle's User Group		N	DDI
<input type="checkbox"/> Kyle's Indiana Group	kbieda	N	
<input type="checkbox"/> Kyle's Kansas Group		N	

Selected queries

Order	Description	Combine method	Special list code

Order: 0

Combine method:

Special list code:

EX001COMB | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/31/2015 | FY: 2015 | CAPS



# Information Query Scheduling



DDI Demo for Church Extension Funds

### Queue Entry Properties

Sequence:

Date codes:

Program:

Description:

**Program Type**

- Run via CHUI
- Run via GUI  Dialog box
- Standard program (no parameters)
- Standard program (infokey/infodata parameters)
- Report program (TEMP-TABLE parameter)
- Label generating program (INPUT tt, OUTPUT tt)
- AppServer program (no parameters)

Recurring entry

OK  
Cancel

Gift | Other forms | Reports | Outputs | View Results

Start Print Options

Alpha Directory

\*break by region is selected)

One time   Working days only

EX001INQ | Org: 901 DEMOCE | Entity: DDI | Business dt: 10/02/2015 | FY: 2015 CAPS



# Duplicate Address Clean Up



Cleaning Up your NA16 Report

**DUPLICATE**

PIN:  Andrew Luck

Constituent Addresses

AddrNum	AddrType	Addr1	Addr2	City	State	Zip
101	W	101 West Ohio	Suite 1650	Indianapolis	IN	46204
201	H	7001 W 56th St		Indianapolis	IN	46254

Potential Duplicate Addresses of AddrNum (201)

Merge	AddrNum	Addr1	Addr2	City	State	Zip
<input checked="" type="checkbox"/>	333	7001 West 56th St		Indianapolis	IN	46254
<input type="checkbox"/>	444	7001 W 56th St		Indianapolis	IN	46245
<input checked="" type="checkbox"/>	555	7001 W 56th Street		Indianapolis	IN	46254

Constituents linked to AddrNum (333)

PIN	Names	AddrType
674	Chuck Pagano	H
4949	Chris Ballard	H

# Questions?



DEMO



# Webinars and Touchbases



## Webinars:

- Monthly hour long sessions
- Open Q&A time at the end of the session
- Link to the webinar for future viewing
- PDF setup and checklist guide
- Cost per organization: \$75/month

## Touchbases:

- Free hour long sessions
- Monthly, Bi-Monthly, or Quarterly
- Discuss open or new requests, software needs, etc.
- Use allotted time for training on DDI-Connect™

LET'S  
WORK  
TOGETHER



# Discussion, Questions, Comments



Kyle Bieda  
[kbieda@ddi.org](mailto:kbieda@ddi.org)  
support@ddi.org  
317.713.2480

