

# DiscipleData, Inc.

Established in 1972



*Serving those who serve others*

Who Is DDI?

# Non-Profit Cooperative



We Focus on Faith Based Organizations



Ministry & Mission-minded

Stewardship of Resources



Partnership



# Client Support Services

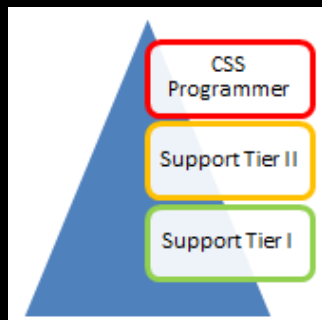
✓ 3-Tier Support Structure

✓ Requests can be submitted via phone, email or Web



✓ Onsite Training

✓ Remote Web Training





✓ Full Wiki Knowledge Database

✓ Custom Solutions



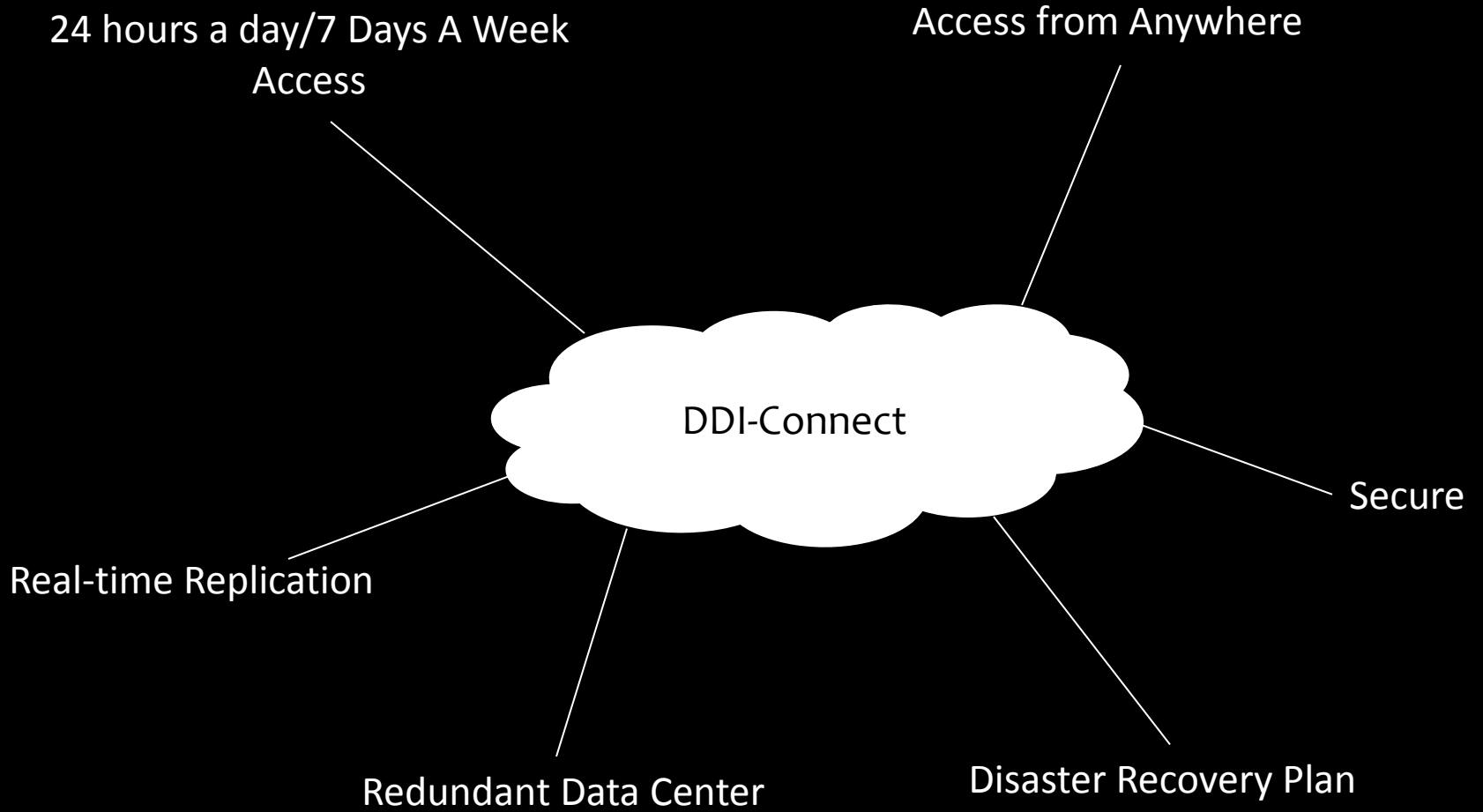
✓ Consulting



✓ Data Mapping & Full Implementation Plan



DDI-Connect





Connect from anywhere with Internet connectivity from almost any device using our Citrix Platform.



And Much more...

Fully Integrated

CRM

General  
Ledger

Investments

DDI-Connect

Unlimited  
Document  
Storage

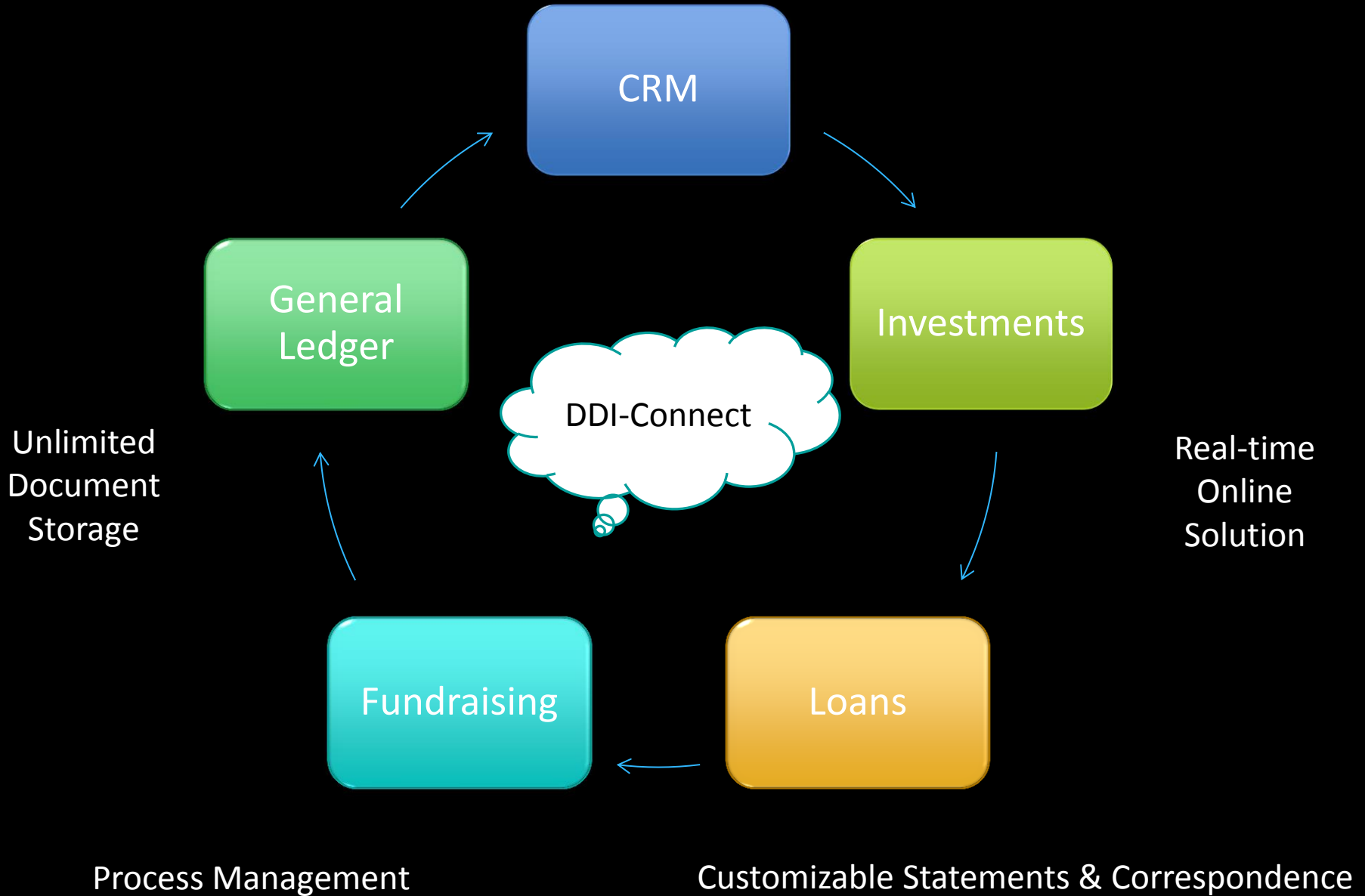
Real-time  
Online  
Solution

Fundraising

Loans

Process Management

Customizable Statements & Correspondence



# CRM (Customer Relationship Management)

- ✓ Store all contacts, churches and organizations in one location
- ✓ Powerful Search Tool
- ✓ Classify Records with Custom Account Information Codes
- ✓ Create Mailing Labels or Email Listings with a Click of a Button

The screenshot shows a CRM software interface with a search and data table. A blue box labeled 'CRM' is positioned at the top center. A green box labeled 'General Ledger' is on the left side, and another green box labeled 'Investments' is on the right side. A cyan box labeled 'Fundraising' is at the bottom left, and an orange box labeled 'Loans' is at the bottom right. Blue arrows point from these boxes to specific fields in the interface: 'CRM' points to the 'Name/Address' header, 'General Ledger' points to the 'AI codes' field, 'Investments' points to the 'Phone' field, 'Fundraising' points to the 'Acct type' dropdown, and 'Loans' points to the 'City' field. The data table below has columns for 'PIN Name' and 'Address'.

PIN	Name	Address	Phone
00172	First AME Church	5492 Cedar Ridge St N	
00035	First AME Church	5030 Firestone Blvd, B	
00071	First AME Church	1421 N Walnut, Pettus	
00012	First AME Church	1426 Centerline Rd, Alb	
390029	First AME Church	PO Box 96057, Charleroi, PA 15022	(724)735-4013
160200	First AME Church	406 SW 65, Cedar Rapids, IA 52408	(319)225-4063
360203	First AME Church	5826 E 18st St Apt 832, 2208 Ward Pkwy, Tiffin, OH 44883	(419)926-2731
50157	First AME Church	1 Peters Canyon Road, Ontario, CA 91762	
480068	First AME Church	6111 Winterset Circle, Spokane, WA 99223	(509)535-1711
100034	First AME Church	3219 E Roosevelt, 700 NE Tudor Rd, Jacksonville, FL 32210	(904)831-8091
370119	First AME Church	7820 Swope Pkwy, Newkirk, OK 74647	
150068	First AME Church	50007 Hazelhurst, Crawfordsvill, IN 47933	
	ch	HC 7	(573)741-8591
	ch	968	(410)231-2475
	ch	100	
	ch	424	(270)397-6324

# CRM (Customer Relationship Management)

The screenshot displays a CRM application window with a menu bar (New, Edit, Delete, Save, Undo, Processes, Accounts, View, Actions, Options, Exit) and tabs for Name/Address, Status, Relationships, and Memos. The main area shows contact information for 'DiscipleData, Inc.' with fields for Name, Organization, Alt ID, DBA, Tax ID (35-1234567), Source, Name 2, DBA, Salutation (Dear Friends), AI codes (INVA,OR), and a creation date of 09/06/2013. A 'Contact' tab is active, showing a 'Contact Information' sidebar with expandable sections for Addresses (Home: 130 East Washington St, Indianapolis, IN 46204), E-Mail (Contact: support@ddi.org), Phone (Home: (317) 713-2480), Web (Home page: www.ddi.org), and People (Contact: Tom Ambler (System Operations Manager)). A 'Constituent Window' table lists 'DiscipleData, Inc.' and 'Droeger Rebecca' with a relationship of 'TR'. Below this is a 'Contact Details' section with a 'Type' field and a 'Preferred' checkbox. A 'Comment' field is at the bottom. The status bar indicates 'Correspondence preference: Paper only'.

DiscipleData, Inc. Active

Name: DiscipleData, Inc. Tax ID: 35-1234567 Source:

Name 2:

DBA: Salutation: Dear Friends:

AI codes: INVA,OR

Created 09/06/2013

Contact Home

**Contact Information**

- Addresses: Home: 130 East Washington St, Indianapolis, IN 46204
- E-Mail: Contact: support@ddi.org
- Phone: Home: (317) 713-2480
- Web: Home page: www.ddi.org
- People: Contact: Tom Ambler (System Operations Manager)

**Constituent Window**

Name	Rel.
DiscipleData, Inc.	
Droeger Rebecca	TR

**Contact Details**

Type:  Preferred

Comment

Correspondence preference: Paper only

See Your Contact's  
Information All In One  
Place:

- ✓ Personal Information
- ✓ Addresses
- ✓ Email
- ✓ Phone
- ✓ Web
- ✓ Contacts
- ✓ Relationships
- ✓ Accounts
- ✓ Mailing History
- ✓ And More...

# CRM (Customer Relationship Management)

**Name/Address** | **Status** | **Relationships** | **Memos**

**Subsystem Status for PIN: 100000 Name: DiscipleData, Inc.**

**Donor Status**

Direct Giving 2,000.00 **Donor account**

Donor since 04/30/2013

**Investor Status**

Investor since 07/27/1981 **Investments**

Status Active investor

Active investments (non-primary) 3

Investment balance (non-primary) 208,384.49

**Loan Status**

Borrower since 09/13/1995 **Loans**

Status Existing loans outstanding

Total loans 2

Total advances 910,000.00

Current loans 1

Current loan balance 496,606.34

At a glance see the status of a contacts:

- ✓ Donations
- ✓ Investments
- ✓ Loans

Summary		Gifts			
	Lifetime Total amount	Largest gift Amount	First gift Date	Recent gift Amount	Recent gift Date
Gifts	2,000.00	2,000.00	04/30/2013	2,000.00	04/30/2013
Planned giving					
Event sponsorship					
In-hand					
Soft credit					
<b>Total Giving</b>	<b>2,000.00</b>		<b>04/30/2013</b>		

**Loans for DiscipleData, Inc.**

Name PIN: 100000 Account: 001401293  
Tax ID: 35-1234567 Tax ID: 89-3936437

DiscipleData, Inc.  
130 East Washington St.  
Indianapolis, IN 46204-4605

Black Field Church of God in Christ  
DiscipleData, Inc  
848 Congress Ave  
Collierville, TN 38017

Borrower	Account	Loan	Rate	Status	Commitment	Balance
Black Field Church of God in	1401293	10887	7.7500	03	400,000.00	0.00
Black Field Church of God in	1401293	12564	6.2500	02	1,188,000.00	583,844.29
DiscipleData, Inc.	990006879	11524	5.7500	02	800,000.00	496,606.34
DiscipleData, Inc.	990006879	11948	7.0000	13	110,000.00	0.00
Peters Congregationalist	990009483	12244	4.9900	02	37,500.00	6,540.64
Peters Congregationalist	990009483	12246	7.0000	13	37,500.00	0.00

**Investments for DiscipleData, Inc.**

Name PIN: 100000 Tax ID: 35-1234567 Account: 000005948

DiscipleData, Inc.  
130 East Washington St.  
Indianapolis, IN 46204-4605

Duncan Assemblies of God  
DiscipleData, Inc  
50808 Anza #643  
Altadena, CA 91001

Mode: Active Investments

Invest #	Rate	Type	Purchased	Maturity	Accr. Int.	Original Bal	Current Bal	CUSIP
110517	01.6250	3016	07/28/1997	02/02/2015	345.30	85,000.00	85,000.00	
<b>Account SubTotal</b>					<b>345.30</b>	<b>85,000.00</b>	<b>85,000.00</b>	
129902	05.0000	5540	09/08/2008	09/09/2013	328.50	21,238.22	26,279.30	
131196	00.5000	0095	06/03/2009		143.61	129,930.49	97,105.19	
<b>Account SubTotal</b>					<b>472.11</b>	<b>151,168.71</b>	<b>123,384.49</b>	
<b>SubTotal Active Investments</b>					<b>817.41</b>	<b>236,168.71</b>	<b>208,384.49</b>	

# Investments

View Account Processes Exit

## Investment Inquiry

Inv #: 112416 Account: 000006851 Lighthouse Pentecostal Church  
968 Beth Dr  
7289 E County Rd 200 S  
Washburn, IL 61570

Status: 01 Active Ownership: Sole Ownership

Summary Interest Dates Settings Penalty Maturity/Other Deposit Premium

Category: 0300 30 Month Notes  
Type: 3016  
Rate: 1.5000 CUSIP:

Current Principal Balance: \$ 1,018.89  
Actual Accrued Interest: 8.49  
Posted Accrued Interest: 7.22  
Days of Posted Interest: 30  
Last Interest Post Date: 03/31/2013

Last Statement Balance: 0.00

Purchase Date: 03/17/1998 State of Purchase: IL  
Current Maturity Date: 09/21/2015  
Original Maturity Date: 09/17/2000

Original Principal Balance: 1,018.89 Total Deposits: 1,018.89  
Principal Balance Change TD: 0.00 Total Withdrawals: 0.00  
Principal Balance Change YTD: 0.00

Step-Up Date:  Step-Up Eligible

## Investment Inquiry:

- ✓ Investment #
- ✓ Ownership Information
- ✓ Description
- ✓ Current Balance
- ✓ Accrued Interest
- ✓ Investment Dates
- ✓ ACH Information for Withdrawals & Deposits
- ✓ Penalty Info
- ✓ And More...

# Investments

- ✓ Transaction History
- ✓ Major Change History at a Glance
- ✓ Investment Transaction Inquiry
- ✓ Memos & Attachments

### Investment Estimator

Beginning balance: 1,000.00

Annual Return on Investment: 1.50%

Accrued Interest: 45.00

Last Accrued Interest: 03/31/2013

As of: 09/12/2013

Ending Balance: 1,018.89

### Memo Editor

Memos for Invest# 112416 - Lighthouse Pentecostal Church

Memos | Attachments

Entered on	Category	Code	Memo
09/12/2013		MEMO	Sent Circular Offering on 9/12/2013

Pop-up from: Sent Circular Offering on 9/12/2013

thru:

Memo code: MEMO

Value:

Category:

Created by: pmchugh on 09/12/2013 at 09:05 EDT Modified by: pmchugh on 09/12/2013 at 09:05 EDT

File Name	File Description	Attached By	Added On	Priv	Size(KB)
-----------	------------------	-------------	----------	------	----------

Method	Frequency	Via	Beg Bal	Rate	End Bal	Start Dt	End Dt
30/360	Semi-An...	Check	1,018.89	1.5000	1,018.89	03/31/2013	09/21/2015

Investment extended at maturity. The type after extension.

# Loans

CRM

General Ledger

Investments

Fundraising

Loans

View Account Processes Exit

### Detailed Loan Inquiry

Loan #: 11524 Account: 990006879

ATONEMENT CATHOLIC CHURCH  
DISCIPLEDATA, INC  
2109 N. ROSEWOOD AVE.  
BROOKLYN, NY 11221

Summary	Payments	Adjustments	Remitter
Loan type:	Secured Loan		
Interest rate:	5.75%		
Commitment date:	09/13/1998		
Commitment amount:	800,000.00		
Commitment expiration:	04/01/1997		
Principal balance:	496,606.34		
Principal paid YTD:	18,307.79		
-Prepaid / +past due:	-8,161.00		
Maturity date:	08/01/2021		
First payment due:	04/01/1998		
Estimated payoff:	07/01/2021		
Amortization term:	15		
Monitor/Processor:	ER/B5		
Adjustment date:	04/01/2014		

Regular payment amount:	
Last payment amount:	
Last payment date:	
Payment due date:	
Current investment support:	0.00
Close date:	02/13/1998
Actual interest due:	1,173.49
Last interest post date:	04/15/2013
Interest now posted:	0.00
Interest paid YTD:	9,228.21
Loan status of 02:	

- ✓ Loan Type
- ✓ Current Balance
- ✓ Interest Rate
- ✓ Loan Dates
- ✓ Payment Amount
- ✓ Loan Adjustment Information
- ✓ Loan Support
- ✓ EFT Payment Information
- ✓ Remitter Information
- ✓ And Much More...



# Loans

- ✓ Transaction History
- ✓ Loan Document Tracking
- ✓ Loan Memos & Attachments
- ✓ Loan Calculator
- ✓ Payoff Calculations
- ✓ Loan Risk Analysis
- ✓ Loan Process
- ✓ And More...

Pr P

Step

1  
2  
3  
4  
5  
6

Estimate

View

Clear

Exit

Loan Calculator for Loan #11

Payment fre

Loan Risk Field Data

Loan number

Number of pe

Last paym

Principal	Payment	Interest
496,606.34	6,359.00	5.75

Start date:

Projected start:

Finish date:

Projected finish:

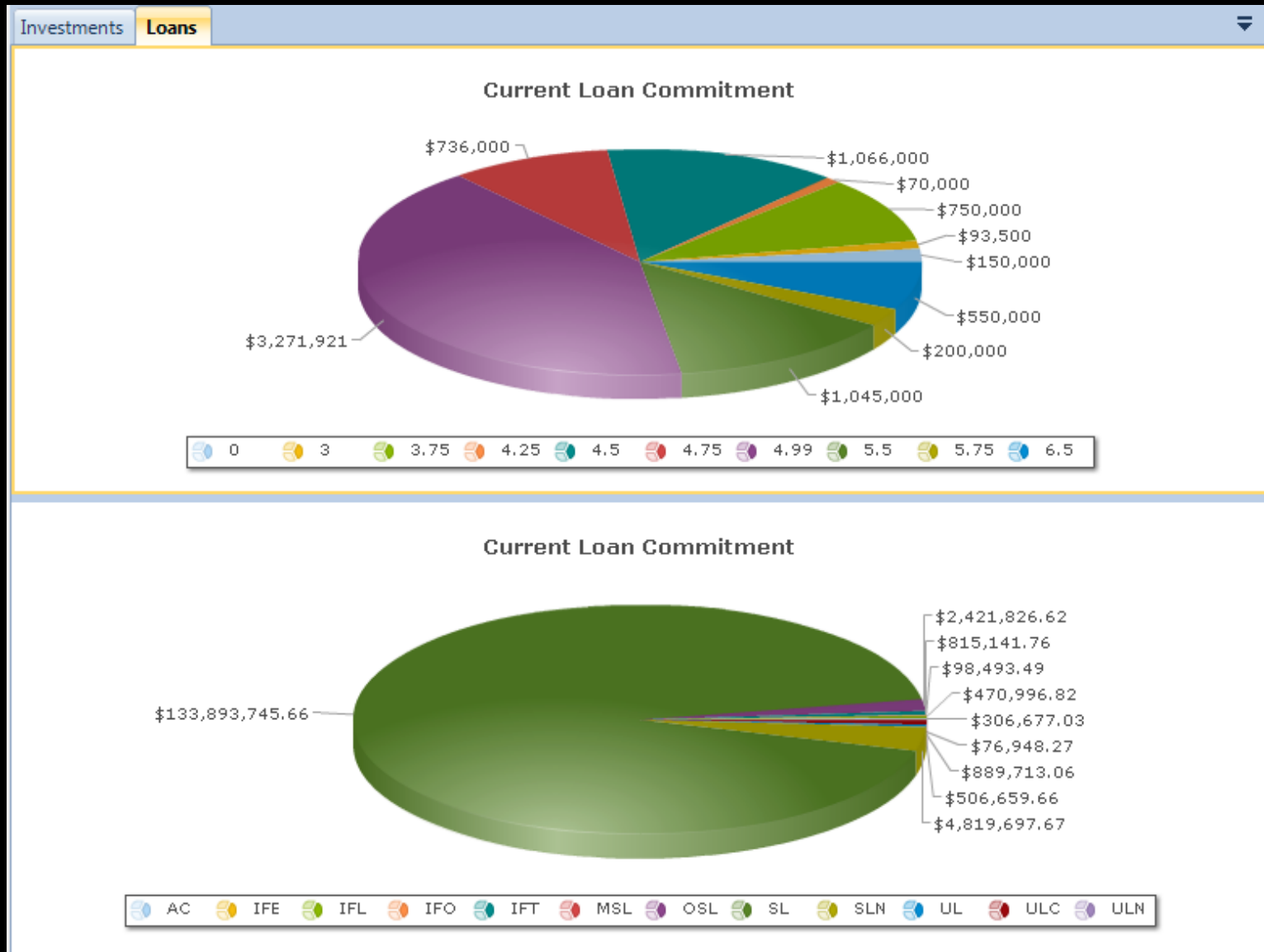
Estimate

days/year





# Executive Dashboards



# Online Banking

Easy Access

View Investments, Loans, & Donations Online



Welcome . . . Tom Testing

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US



Welcome . . . Tom Testing

MY PROFILE LOGOUT

WELCOME ACCOUNTS STATEMENTS CONTACT US

**Account Statements for** 2013 ▾

- 2013
- 2012
- 2011
- 2010
- 2009
- 2008

Document Number

No records to display.

Date	Description	Account Number	For
No records to display.			

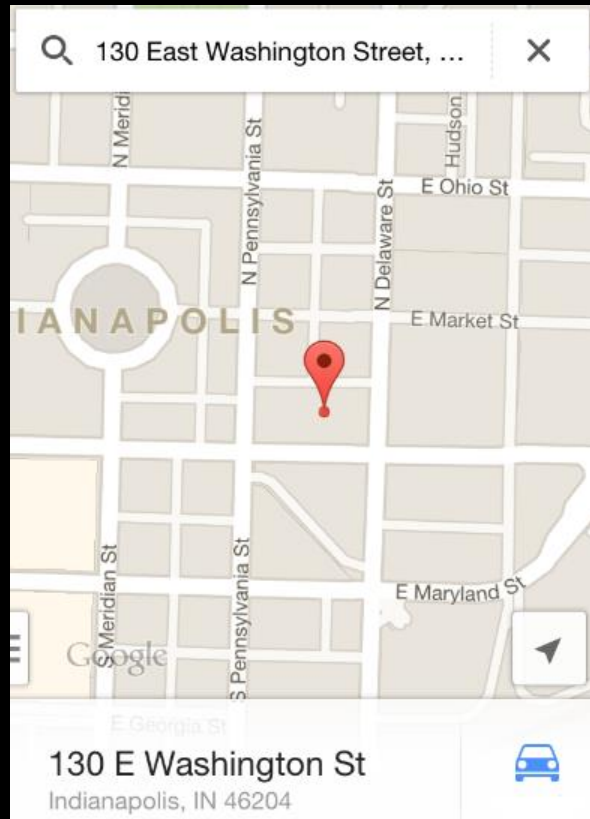
**Loans**

Account Number	Borrower	Balance
No records to display.		
<b>Total:</b>		<b>\$0.00</b>

Purchase New Investments, Make Additional Deposits, Make Loan Payments..... All Online!

Electronic Statements & Correspondence

## Contact Us



Bob McLaughlin, President/CEO

Phone: 317.713.2413

Email: [support@ddi.org](mailto:support@ddi.org)

Website: [www.ddi.org](http://www.ddi.org)

*\*\*Please Take a Business Card and Setup an Appointment to Learn More Information on the DDI-Connect System\*\**