Setting Up For Success

2015 DDI USER GROUP MEETING

MAY 19TH-20TH

Name/Address (CRM) Settings

Location: Name/Address System → Setup

Contact Information Type Setup

- Customize based on your organizational needs
- Add Screen Label
- **Idea:** Add Social Media as a contact type

Contact Information Type Setup

Filter by category: All ▼

Category	Screen Label /	Description	Prompt?	Active?
Other	Address	Mailing address	no	yes
Phone	Alternate	Alternate phone	no	yes
Phone	Church	Church phone	no	yes
Email	Contact	Contact email	no	yes
Phone	Contact	Contact phone	no	yes
Person	Contact	Contact person	no	yes
Web	Facebook	Facebook	no	yes
Phone	Fax	Fax	no	yes
Email	Home	Home email	no	yes
Phone	Home	Home phone	no	yes
Web	Home page	Home page	no	yes
Person	Leader	Church leader	no	yes
Phone	Mobile	Mobile phone	no	yes
Phone	Vacation	Vacation phone	no	yes
Email	Work	Work email	no	yes
Phone	Work	Work phone	no	yes

| Name | Church | Alt ID | DBA |

Name: First Church of God   Tax ID: 01-7005

Name 2:

DBA: Salutation: Dear Friends:

AI codes: INVP,CH,HMA,YB,HIAM,SPAR,TAXN,USML,P/D,GSTEMP

Created 07/07/1995   Updated 05/15/2015

| Contact | Yearbook | Mailing | Home | Mailing (2) |

Contact Information

- Addresses
  - **Yearbook: Box 52053, Indianapolis, IN 46236**
  - Mailing: Moore Multicultural Center, Indianapolis, IN 46...
  - **Home: PO Box 6999, Indianapolis, IN 46236**
  - Mailing: 9070 - 7th St, Indianapolis, IN 46236
- E-Mail
  - **Contact: cgstephenson95@gmail.com**
- Phone
  - **Home: (317) 344-4131**
  - Home: (317) 976-3191
- Web
  - **Facebook: http://www.facebook.com/FirstChur...**

Correspondence preference: Paper only

Constituent Window   Menu ▼

Name	Rel.
First Church of God	

Contact Details

Type: Facebook   ☑ Preferred

URL

http://www.facebook.com/FirstChurchofGod

Comment

AI Code Setup

AI Codes are used by the system to categorize your constituents in ways that are meaningful to you and your organization.

- Adding a New AI Code Group:

  - **Radio Button Groups** only allows users to select one option from within the group.

  - **Checkbox Groups** allow for multiple choices within the group.

AI Code Setup

AI Code: Constituent vs Account level
- Constituent AI codes are your primary list of codes
  - Applies to constituent (individual, church, organization)
  - Most commonly used

- Account level AI codes are specific to the account
  - Applies only to the account selected
  - Used by a few organizations

AI Codes Assigned By The System

Code	Description
DN	Donor
INVA	Active Investor
INVD	Dormant Investor
INVI	Extended Investor
INVR	Former Investor
LOAN	Active Borrower
LCMT	Pending Borrower
LNPD	Former Borrower
PORT	Active Portfolio
PTNP	Tentative Portfolio
PTPD	Former Portfolio

Tax Exempt AI Code

- Update your churches and organizations with the Tax Exempt AI Code

Code	Description
TAXN	Tax Exempt

- Update via the Extract Module

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Address Option – Country Format Maintenance

Address Options – Region Maintenance

Region Code	Region Descr	Unit #	Unit Abbrev	Unit Descr
98	Puerto Rico			
01	Alabama-Northwest Florida			
03	Arizona			
04	Arkansas			
05	California, Northern - Nevada			
06	Central Rocky Mountain			
09	Capital Area			
10	Florida			
11	Georgia			
13	Idaho-South			
14	Illinois & Wisconsin			
15	Indiana			
16	Upper Midwest			
17	Kansas			
18	Kentucky			
19	Louisiana			
23	Michigan			
25	Mississippi			
26	Mid-America			
27	Montana			
28	Nebraska			
33	Northeastern			
34	North Carolina			
36	Ohio			
37	Oklahoma			

New   Edit   Delete   Save   Undo   Exit

Region Maintenance

Region code: 01   Region description: Alabama-Northwest Florida

Unit #:

Address Options – Postal Code Maintenance

- Automatically Assign Regions & Area's by Postal Codes

System Settings - Base Settings tab

- Assign deceased AI code & deletion code
- Assign AI logic for deceased date
- Customize your region and community label

Connect-CRM System Settings

| Base Settings | Address Types | Salutations | Attachments | Yearbook Setup |

AI code: DEAD   ☑ Apply AI code when entering a deceased date

Deletion code: DE   ☐ Apply deletion code when entering a deceased date

Name format: PFM.LS

Default country code: USA

"Region" label: Region   Abbreviation: Reg

"Community" label: Area   Abbreviation: Area
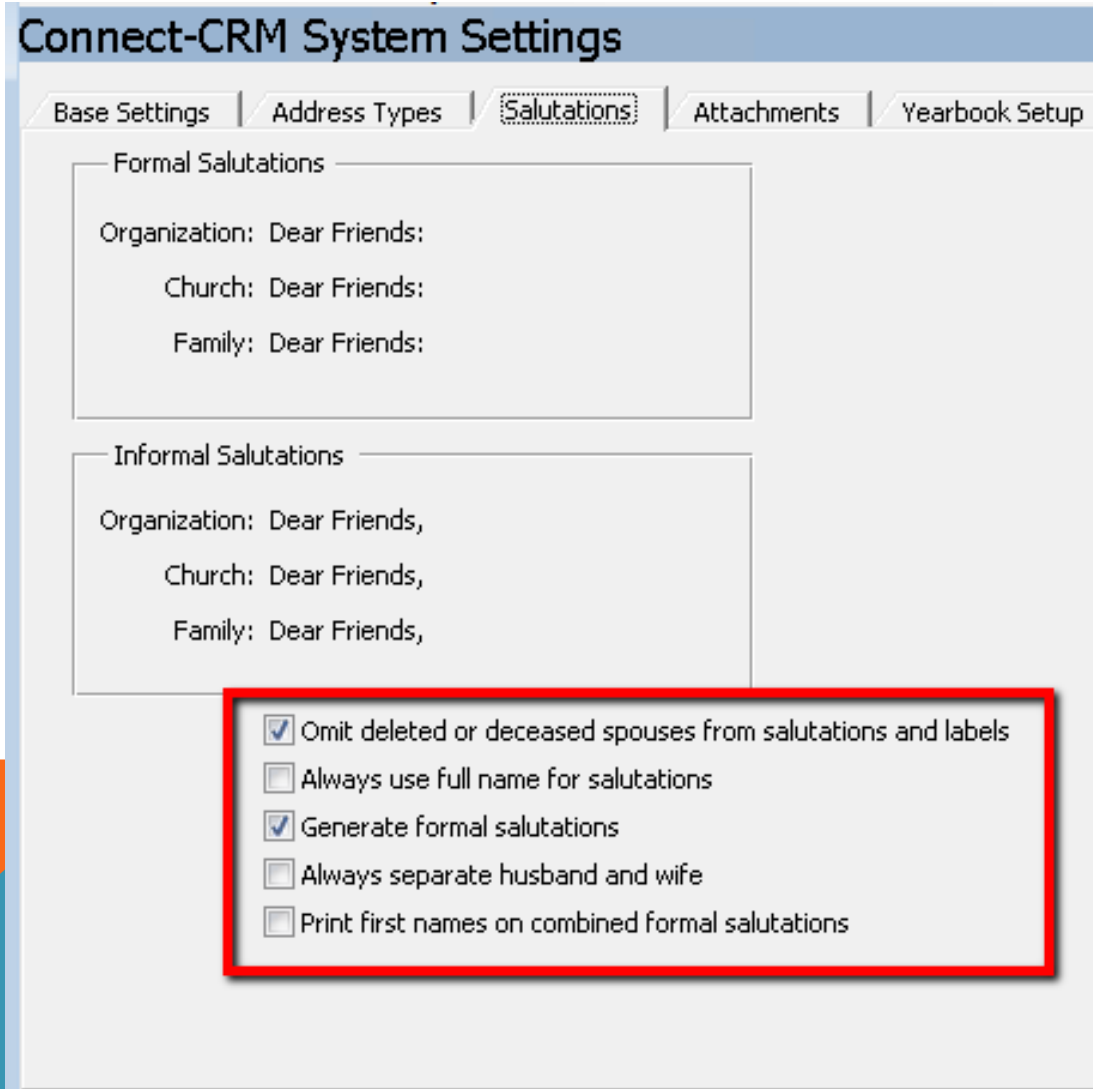
☑ Region is required

Relationship codes for spouse: SPOU,DP

System Settings – Salutations Settings

- Setup default salutations

Email Correspondence

Email Correspondence (continued)

- Once your email correspondence is setup, attach that correspondence to a particular merge form that gets generated out of the system.
- Location: Merge Forms System → Setup → Merge Form Maintenance

Merge Form Maintenance

Form Code	Language	Description	Stock Code
INNOTE1	ENG	IL227 - New Investment Note - CH ORG	LETTER
INNOTE2	ENG	IL227 - New Investment Note - IND	LETTER
INNOTE3	ENG	IL227 - New Investment Note - RR_RT	LETTER
INNOTE4	ENG	IL227 - New Investment Note - CUS	LETTER
INRT	ENG	IL248 - Investment Deposit Receipt	LETTER
INRT2	ENG	IL248 - Investment IRA Deposit Receipt	LETTER
INV	ENG	IL289 - Investment Statement Transactional	LETTER
INVS	ENG	IL289 - Investment Statement Summary Version	LETTER

Form code: INNOTE1

Default launguage: ENG ⊫ English

Description: IL227 - New Investment Note - CH_ORG

Template file: Investment_Note_CH_ORG_IL227.docx 📁

Additional file: 📁

Stock code: LETTER

in batch: 250   Key field:

☐ Catalog merge?

Email type: Statement ▼

Purge?: Never ▼

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
23	Field 23
24	Field 24

Cash Receipt Settings

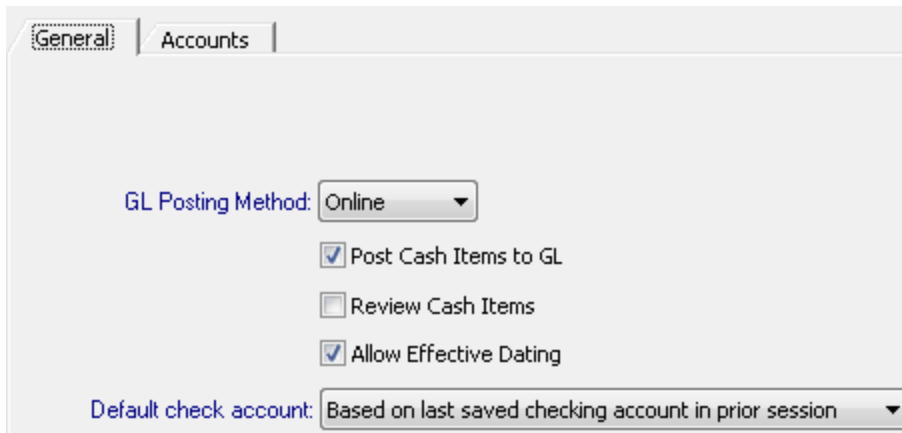**Location: Financial Services → Data Processing → Financial Services Administration**

Financial System Settings

- GL Posting Method
- Effective Dating
- Transaction Bank Defaults

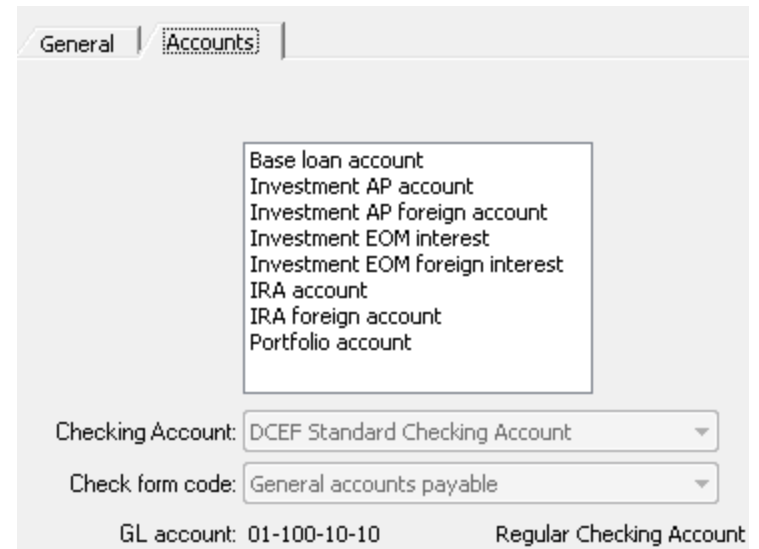© DISCIPLEDATA, INC.   2015 USER GROUP MEETING

Cash Receipts Setup

- Remote Capture Options: X9 Files, CSV Files

Investment Settings
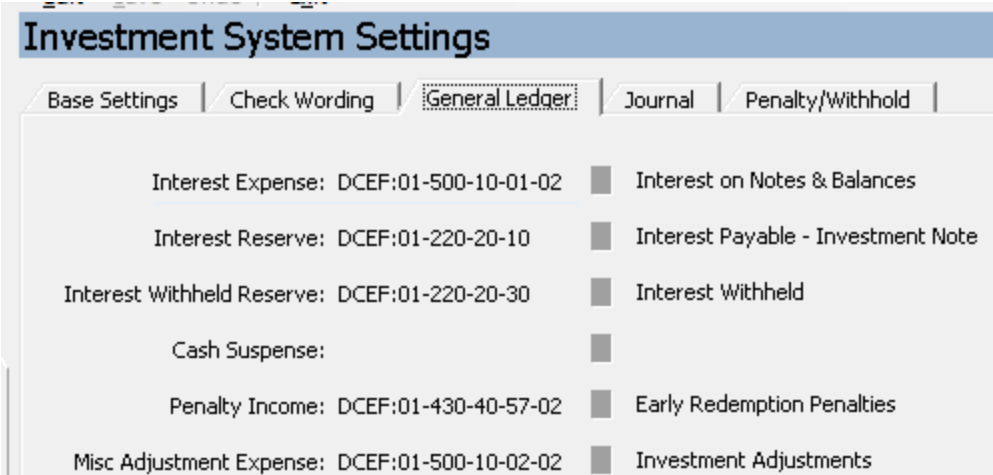
Location: Financial Services →
Investments → Setup

Investment System Settings
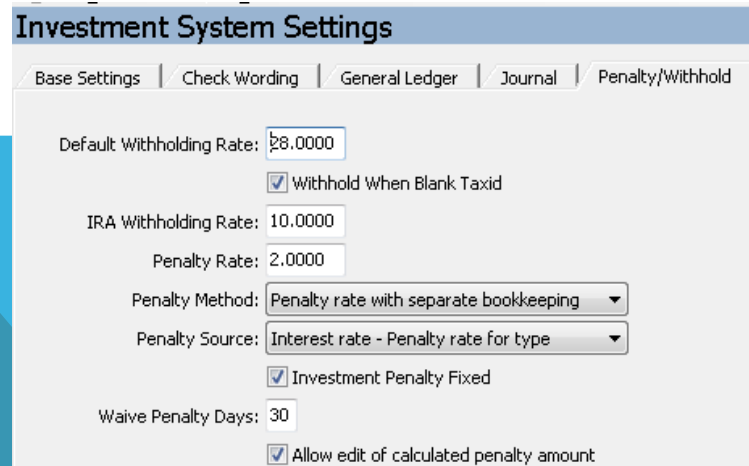
- General Ledger Tab
  - GL Hierarchy
    - Investment Categories first → System Setting defaults

- Penalty/Withhold

State Sales Maintenance

- Tracks Sales Limits
- Tracks Registration Dates (should be setup every year)
- Facilitates Information Gathering for Registering in Each State
- Reporting on Registrations:
  - IL224, IL226, IL241, IL243 are some of the reports that will pull State Sales information
- Online Offering Circular

Loans Settings

Location: Financial Services → Loans → Setup

Loan System Settings

- Balance payoff/refund of overpayment
- Late Fees – setup and for many, this is a "new" concept
  - Flat amount
  - Percent of Regular Payment Amount
  - IL639 – Loans w/o Payment in Desired Month

Loan Type Maintenance

- Set up loan types and G/L accounts here
  - G/L settings override Loan System Settings selections

- 30/360 Loan calculation
  - Collect 30 days checkbox forces 30 days of interest at the time of payment
  - Does not reflect accruals

Loan Type Maintenance

Loan Type	Description
AC	Accessibility Loan
BSL	Building Sale Loan
CL	Clergy Loans
GL	Green Loan
IFE	Interest Free Emergency
IFL	Interest Free Loans

[Settings] | General Ledger 1 | General Ledger 2 | General Ledger 3 | Reserve

Loan Type: AC

Description: Accessibility Loan

Loan Numbers: 0   thru: 0

Interest Rate: 0.0000   Minimum Rate: 0.0000   Maximum Rate: 0.0000

Amortization Term: 0

Inquiry Security:

Maintenance Security:

☐ Collect 30 days of interest (assuming 30/360 basis) with every payment

Loan Documentation Tracking

- Track the key documents needed for loan processing!
- Setup forms based on your needs
- Automatically apply needed forms to new loans using IL405 report

Name/Address System → Setup → Codes Maintenance – Code 0600

Loan Document Codes

Code	Description
1STMAT	1STMAT - Restoring deleted [INACTIVE]
ADJFORM	ADJFORM - Restoring deleted [INACTIVE]
AFIN	Copy of Auditied Financials
APPL	Application
ASSRENTS	Assignment of Rents and Leases
AUTO	Automatic Funds Transfer Authorization Form
BINS	Builder's Risk Insurance
BPO	Broker's Price Opinion
BRINS	Builders Risk Insurance
BYLAW	By-Laws
CASS	CASS - Restoring deleted [INACTIVE]
CFIN	Copy of Current Financials
COLLASS	Collateral Assignment
CONT	Contract

Amortized Loan Fee Type Maintenance

- Render method (display on transaction screen):
  - Inactive
  - Active
  - Active with default fees (applies if not already on loan)

- Default fee method:
  - Amount
  - Percentage

- Fees applied thru loan transaction IL467

Loan type: Green Loan

Fee Code	Description

Fee code: RECORD

Description: Default RECORD fee for loan type GL

Credit GL:

Render method: Active with default fees

Default fee method: Amount

Fee amount: 150.00

Financial Setups

Location: CheckWriter → Setup → Checking Account Setup

Checking Account Setup

- Checking Account Setup

  - New Bank Info

    - Never delete a checking account, mark Inactive

    - Never reuse a checking account number, always make a new one

Checking Account Setup

Special Note:

If you get a new checking account, other system settings will need to be updated to get transactions to post to that new account. Mainly, the settings located under Financial Services → Data Processing → Financial Services Administration → Financial System Settings

Accounts Payable Setup

- AP Setup

  - Memo Type:

    - This information is seen on the G/L Activity Spreadsheet depending on which selection from the drop down is chosen

    - Voucher approval determined at organization level

  - Email ACH payment notices

Cannot be changed after initial setup.

Connect-FR Setup

Location: Connect-FR → Setup

Connect-FR Setup

- Customizable field labels
  - Gift purpose, source & designations
  - Can be changed at any time

- Automatic generation of designation descriptions in letters

CONNECT-FR

General System Setup – Financial

- GL Tran Memo Formats (3 formats to help Accounting staff)

Promotion Cross-Reference Maintenance

Promotion Cross-Reference Maintenance

- Automatically determine default G/L account to post gift line item

- Allows for unlimited selections based on gift purpose & designations

- Able to be overridden at the gift entry screen

Cross reference:

Promo type	Country	Program	Segment List
AABD			43250,80,2,465
AAL8			43000,80,2,412
ABBD			43250,80,2,465
ACBD			43250,80,2,465
ADBD			43250,80,2,465
AGAN			43000,80,2,420
AGBY			43000,80,2,420
AGC9			43000,80,2,420
AGCA			43000,80,2,420
AGCB			42000,80,2,420
AGCD			43000,80,2,420
AGCG			43000,80,2,420
AGGI			43000,80,2,420
AGHM			43000,80,2,420
AGMA			43000,80,2,235
AGMR			43000,80,2,420
AGOO			43000,80,2,420
AGRE			43000,80,2,420
AGWE			43000,80,2,420
AHA0			43000,80,2,405
AHA1			43000,80,2,405
AHA2			43000,80,2,405
AHA3			43000,80,2,405
AHA4			43000,80,2,405
AHA5			43000,80,2,405
AHA8			43000,80,2,405
AHA9			43000,80,2,405
AHB1			43000,80,2,405
AHB2			43000,80,2,405
AHB3			43000,80,2,405

Promo type:

Country:

Program:
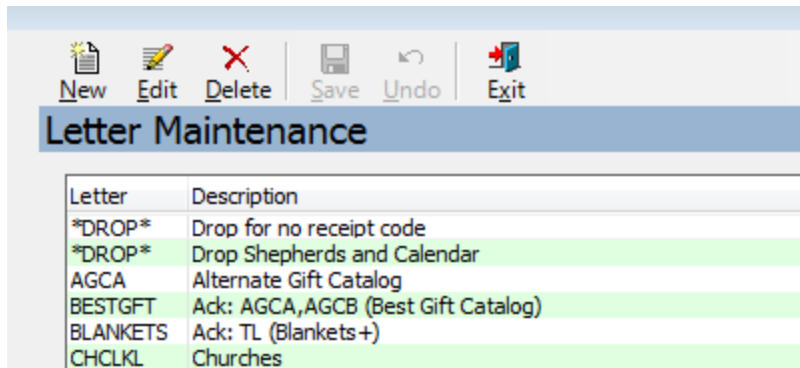
Segment format: GL,Office,Restriction,Funding source

Segment values:

CONNECT-FR

Send specialized letters based on each gift!

- Allows for custom selection of letters based on gift line items
- Runs with standard gift letter processing (FR018)

Letter	Description
DROP	Drop for no receipt code
DROP	Drop Shepherds and Calendar
AGCA	Alternate Gift Catalog
BESTGFT	Ack: AGCA,AGCB (Best Gift Catalog)
BLANKETS	Ack: TL (Blankets+)
CHCLKL	Churches

Letter code: *DROP*

Description: Drop Shepherds and Calendar

Form:

Promo type: MOSH,SCSK,DGWL

Promo sour:

Country:

Program:

Start amount: 0.00

End amount: 0.00

AI include:

AI exclude:

Inkind gifts: ☐

Priority: 9 - High

Donor Segment Setup

- Configure to meet your organization's needs

- Set custom values for each portion of the segment code

- Utilize in generating your mass mailings and appeals

- Automatically updates the segment code on the donor record with each gift!

Donor Segment Code Setup

Select a position of the segment code to edit its values:

- ◉ Amount of largest single gift (position 1)
- ○ Number of years within which last gift was given (position 2)
- ○ Total number of lifetime gifts (position 3)
- ○ Amount of most recent gift (position 4)

Code Value	Large Amt From	Large Amt To
M	0	24.99
L	25	49.99
K	50	99.99
J	100	249.99
I	250	499.99
H	500	999.99
G	1,000	2,499.99
F	2,500	4,999.99
E	5,000	9,999.99
D	10,000	24,999.99
C	25,000	49,000.99
B	50,000	99,999.99
A	100,000	Up

Code value: M

Amount of largest gift to date:

From: 0   To: 24
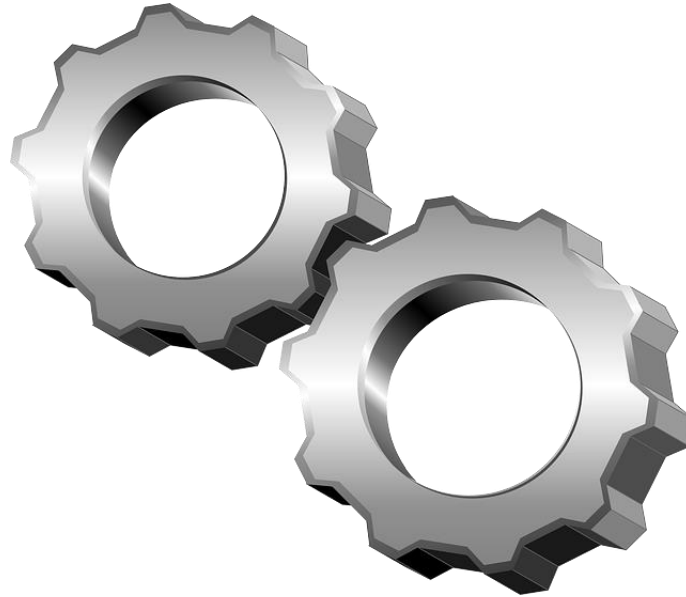
System Administration

System Administration

DDI-Connect allows for many customizable settings in the background that you may not even be able to see.

Error messages, wording on forms, online system settings, email processing, etc. have background settings that can be maintained by the qualified staff at DDI.

Ask a support representative if specific wording can be changed.

Discussion, Questions, Comments

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