



Setting Up For Success

2015 DDI USER GROUP MEETING
MAY 19TH-20TH

Name/Address (CRM) Settings

Location: Name/Address System → Setup



May 19-20, 2015

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: 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...>

Constituent Window

Name	Rel.
First Church of God	

Contact Details

Type: Facebook Preferred

URL

<http://www.facebook.com/FirstChurchofGod>

Comment

Correspondence preference: Paper only

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

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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

The screenshot displays the 'Information Queries' application interface. On the left, a sidebar contains various filters and options for selecting constituents, including fields for 'AI codes to include/exclude', 'Denom. to include/exclude', 'Address types', 'Account types', and checkboxes for 'Override default address type', 'Combine residents?', and 'Include primary addresses only'. The main window shows the 'Reports' menu selected, with the 'AI Code Adjustment (NA86)' report chosen. A red box highlights the 'Start' button in the top right corner. An orange arrow points from the 'Reports' menu in the top-left window to the 'Start' button in the bottom-right window. The 'AI codes to add' field contains 'TAXN', and the 'AI codes to remove' field is empty. The 'Preview changes only' checkbox is checked.

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Address Option – Country Format Maintenance

Country Format Maintenance

Country Code	Description
BENI	Benin
BERM	Bermuda
BHUT	Bhutan
BOLI	Bolivia
BOSN	Bosnia and Herzegovina
BOTS	Botswana
BRAZ	Brazil
BRUN	Brunei
BULG	Bulgaria
BURK	Burkina Faso
BURU	Burundi
BVI	British Virgin Islands
BWI	British West Indies
CAMB	Cambodia
CAME	Cameroon
CANA	Canada
CAR	Central African Republic
CARI	Caribbean
CAYM	Caymen Islands
CEAM	Central America
CHAD	Chad
CHAN	Channel Islands

Country code: CANA

Description: Canada

Postal cd format: A9A 9A9

Address format: \$CITY, \$ST \$ZIP
!COUNTRY

State label:







State abbrev.:

Postal Website: <http://www.canadapost.ca/business/tools/p>

Address format can contain the following macros:

- \$CITY City name (capitalized if !CITY)
- \$ST State abbreviation
- \$STATE Full state name (capitalized if !STATE)
- \$ZIP Zip code, or equivalent
- \$COUNTRY Country name (capitalized if !COUNTRY)

Address Options – Region Maintenance

 New
  Edit
  Delete
  Save
  Undo
  Exit

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			


Region code: 01 Region description: Alabama-Northwest Florida
 Unit #:

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Address Options – Postal Code Maintenance

- Automatically Assign Regions & Area's by Postal Codes

Postal Code Maintenance

Country: United States 

Zip	City	State
00210	Portsmouth	NH
00211	Portsmouth	NH
00212	Portsmouth	NH
00213	Portsmouth	NH
00214	Portsmouth	NH
00215	Portsmouth	NH
00401	Pleasantville	NY
00501	Holtsville	NY
00544	Holtsville	NY
00601	Adjuntas	PR
00602	Aguada	PR
00603	Aguadilla	PR
00604	Aguadilla	PR
00605	Aguadilla	PR
00606	Maricao	PR
00607	Aguas Buenas	PR
00608	Aguirre	PR
00609	Aibonito	PR
00610	Anasco	PR
00611	Angeles	PR
00612	Arecibo	PR
00613	Arecibo	PR
00614	Arecibo	PR
00615	Arroyo	PR
00616	Bajadero	PR
00617	Barceloneta	PR
00618	Barranquitas	PR
00619	San Juan	PR

Postal Code: 00210

City: Portsmouth

State: NH

County: RKHM

Region: 33

Area:

Coord NS: 43.067038 Coord EW: -70.772830

Branches:

Save Cancel

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

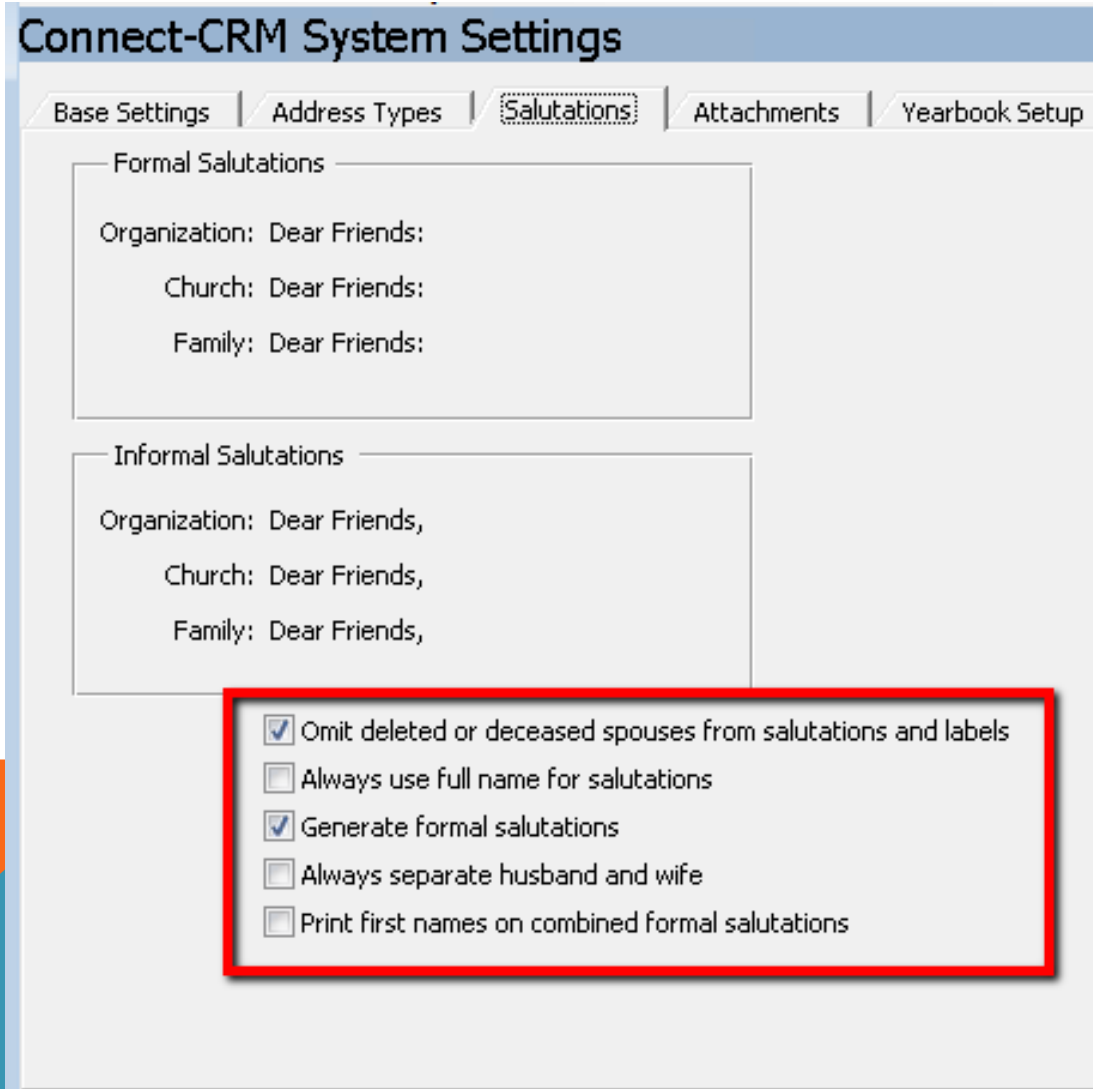
Abbreviation: Area

Region is required

Relationship codes for spouse: SPOU,DP

System Settings – Salutations Settings

- Setup default salutations



The screenshot shows the 'Connect-CRM System Settings' interface with the 'Salutations' tab selected. The interface is divided into two main sections: 'Formal Salutations' and 'Informal Salutations'. Each section contains three rows for 'Organization', 'Church', and 'Family', each with a text input field. Below these sections is a list of five checkboxes. A red rectangular box highlights this list of checkboxes.

Connect-CRM System Settings

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

Formal Salutations

Organization: Dear Friends:
Church: Dear Friends:
Family: Dear Friends:

Informal Salutations

Organization: Dear Friends,
Church: Dear Friends,
Family: Dear Friends,

- Omit deleted or deceased spouses from salutations and labels
- Always use full name for salutations
- Generate formal salutations
- Always separate husband and wife
- Print first names on combined formal salutations

Email Correspondence

Basic Setup | Email Text

Email type (unique): Statement

Return email address: support@ddi.org

Login URL: https://ddi-online.org/default.aspx?mod=cef&org=ddi

Unsubscribe message:
(maintained by DDI)

You are receiving this notification because you are a DDI Account. This customer notification is for the DDI Account Maintenance on 0820.

Basic Setup | Email Text

For the subject & body, you can use the following special words. When the email is generated, these words will be replaced with data. Options: \$NAME \$DATE \$MONTH \$YEAR \$URL \$ACCTID

Subject: Your electronic document is now available online

Body: Dear \$name,
Your electronic document is now available for viewing online. Please visit \$URL to login to your account. Click on the Login button to view your statement.
If you have not contacted us for your access code, you will need to request this code before going to the website.
If you have any questions or concerns, please feel free to contact our office at 555.219.0820.

Signature: DDI

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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
INV5	ENG	IL289 - Investment Statement Summary Version	LETTER

Form code: INNOTE1

Default language: English

Description:

Template file:

Additional file:

Stock code:

in batch: Key field:

Catalog merge?

Email type:

Purge?:

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
25	Field 25

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Cash Receipt Settings

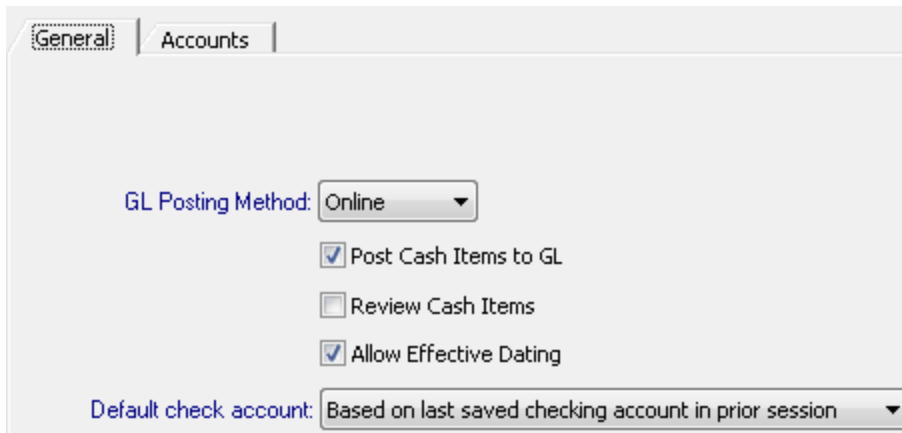
Location: Financial Services → Data Processing → Financial Services Administration



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Financial System Settings

- GL Posting Method
- Effective Dating
- Transaction Bank Defaults



General Accounts

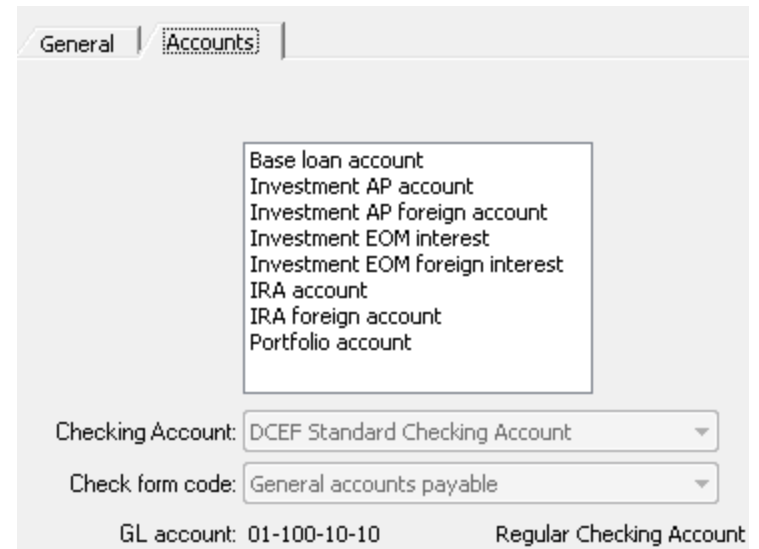
GL Posting Method: Online

Post Cash Items to GL

Review Cash Items

Allow Effective Dating

Default check account: Based on last saved checking account in prior session



General Accounts

Base loan account
Investment AP account
Investment AP foreign account
Investment EOM interest
Investment EOM foreign interest
IRA account
IRA foreign account
Portfolio account

Checking Account: DCEF Standard Checking Account

Check form code: General accounts payable

GL account: 01-100-10-10 Regular Checking Account

Cash Receipts Setup

- Remote Capture Options: X9 Files, CSV Files

Edit | Save | Undo | Exit

Cash Receipt System Setup

Stage 1 | Work groups | Credit memos | Remote capture | Processing fees

Remote capture method: X9 file

Pending file location:

Completed file location:

Investment Settings

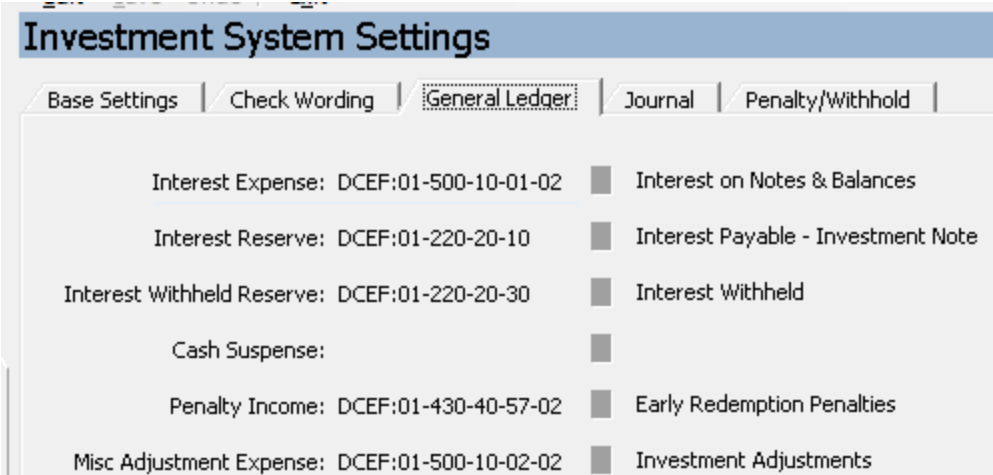
Location: Financial Services →
Investments → Setup



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Investment System Settings

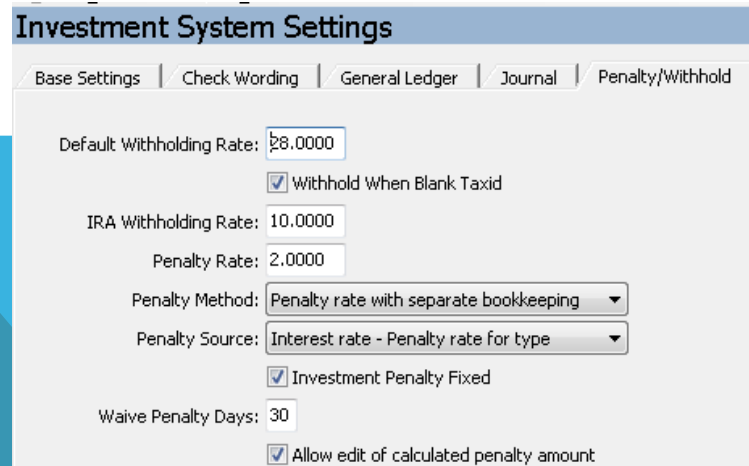
- General Ledger Tab
 - GL Hierarchy
 - Investment Categories first → System Setting defaults



The screenshot shows the 'Investment System Settings' window with the 'General Ledger' tab selected. The window has a title bar and a tabbed interface with tabs for 'Base Settings', 'Check Wording', 'General Ledger', 'Journal', and 'Penalty/Withhold'. The 'General Ledger' tab is active, displaying a list of settings with their corresponding account codes and checkboxes:

Account Code	Setting Name	Checked
DCEF:01-500-10-01-02	Interest Expense	<input type="checkbox"/>
DCEF:01-220-20-10	Interest Reserve	<input type="checkbox"/>
DCEF:01-220-20-30	Interest Withheld Reserve	<input type="checkbox"/>
	Cash Suspense	<input type="checkbox"/>
DCEF:01-430-40-57-02	Penalty Income	<input type="checkbox"/>
DCEF:01-500-10-02-02	Misc Adjustment Expense	<input type="checkbox"/>
	Interest on Notes & Balances	<input type="checkbox"/>
	Interest Payable - Investment Note	<input type="checkbox"/>
	Interest Withheld	<input type="checkbox"/>
	Early Redemption Penalties	<input type="checkbox"/>
	Investment Adjustments	<input type="checkbox"/>

- Penalty/Withhold



The screenshot shows the 'Investment System Settings' window with the 'Penalty/Withhold' tab selected. The window has a title bar and a tabbed interface with tabs for 'Base Settings', 'Check Wording', 'General Ledger', 'Journal', and 'Penalty/Withhold'. The 'Penalty/Withhold' tab is active, displaying various settings:

Default Withholding Rate:	<input type="text" value="28.0000"/>
	<input checked="" type="checkbox"/> Withhold When Blank Taxid
IRA Withholding Rate:	<input type="text" value="10.0000"/>
Penalty Rate:	<input type="text" value="2.0000"/>
Penalty Method:	<input type="text" value="Penalty rate with separate bookkeeping"/>
Penalty Source:	<input type="text" value="Interest rate - Penalty rate for type"/>
	<input checked="" type="checkbox"/> Investment Penalty Fixed
Waive Penalty Days:	<input type="text" value="30"/>
	<input checked="" type="checkbox"/> Allow edit of calculated penalty amount

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

State Sales Maintenance

Registration		Category			Type		
State	Registration	Term	Sales Limit	SEC Total	Type	Current	SEC Total
AK	AK-13	0005	100,000.00	0.00	0005	no	0.00
AL	AL-13	0010	100,000.00	0.00			
AR	AR-09	0020	100,000.00	0.00			
AZ	AZ-13	0021	100,000.00	0.00			
CA	CA-13	0022	100,000.00	0.00			
CO	CO-13	0051	100,000.00	0.00			

Registration Detail

State: AK Registration: AK-13 Sales limit: 100,000.00

Start Date: 05/01/2013 End Date: 04/30/2014 Hidden

Maturity notification: 1 Transfer Restricted Extend at maturity


SEC sales: 0.00 Count: 0 Is shown online

SEC extensions: 14,271.97 Count: 4

SEC transfers: 0.00 Count: 0

SEC total: 14,271.97 Count: 4

Non SEC sales: 0.00 Count: 0

Offering circular: 2013 Offering Circular 

Loans Settings

Location: Financial Services → Loans → Setup



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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 System Settings

Settings | General Ledger | General Ledger 2 | Journal

Application fee method: \$500

Closing fee method: % of Advances

LSP margin: 2% Margin

LSP frequency: 1 Month Frequency

Balance where loan is automatically paid off: 2.00

Minimum overpayment to be refunded at payoff: 2.00

Grace period between first/final advance and accrual: 4

Default due day: 1

Use adjustment logic

Late fee method: Flat Fee Late fee amount: 0.00

Max # of future payments due date can be advanced: 2

Use risk rating in calculation of new rates

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:

Description:

Loan Numbers: thru:

Interest Rate: Minimum Rate: Maximum Rate:

Amortization Term:

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 Audited 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

The screenshot shows a software interface with a menu bar (Add, Edit, Delete, Save, Undo, Exit) and a data table. Below the table is a configuration form with several dropdown menus and input fields.

Document Code	Action Code	Select Option	Select Data	Loan Status	Date Basis	Months	Add Date	Operator
MREL	Required	ALL	ALL	03,13		0	12/15/95	rhonda

Form fields:

- Document code: Assignment of Rents and Leases
- Action code: Received
- Select option: All Loans
- Date basis: Last Pmt Dt
- Loan status: ALL
- Months before(-) or after(+): 2

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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

The screenshot shows a web form for maintaining an amortized loan fee type. At the top, there is a dropdown menu for "Loan type" with "Green Loan" selected. Below this is a table with two columns: "Fee Code" and "Description". The table is currently empty. Under the table, there are several input fields and dropdown menus: "Fee code:" with the value "RECORD"; "Description:" with the value "Default RECORD fee for loan type GL"; "Credit GL:" which is empty; "Render method:" with a dropdown menu showing "Active with default fees"; "Default fee method:" with a dropdown menu showing "Amount"; and "Fee amount:" with the value "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

A#	Description	Bank Name	Bank Account #	ABA Number
01	CE Standard Checking Account	PNC Bank	3340525027	183388814
02	CE Alternate checking account	National City Bank	465682	016262047
03	CE Month End Interest Checks	PNC Bank	4130716158	166040661
04	CE IRA Checking Account (old)			000000000
05	CE IRA Checking Account		8698814422	152641993
06	CE IRA Checking Account Key Ba		875527072969	153256358
09	CE Portfolio Custodial Account			000000000

Checking acct #: 1 Description: CE Standard Checking Account Inactive

G/L account: CE:01-100-10-10 (Unknown account)

Suspense account:

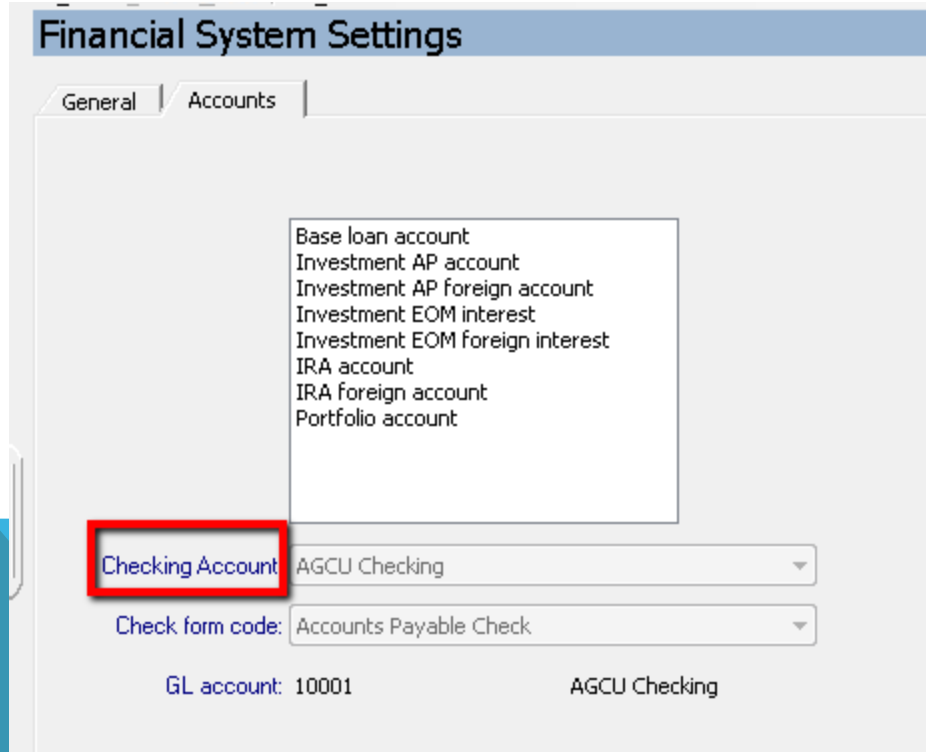
Bank/EFT Information	Formatting
Company name: BDCHURCHEXTEN	Form code: AP
Company tax ID: 54-7000665	Next check #: 201373
Bank name: PNC Bank	Check # digits: 6
Bank routing #: 183388814	Post to G/L?: yes
Account #: 3340525027	
EFT company ID: 3509534251	

Use with	Consolidate When Posting?
<input checked="" type="checkbox"/> Checks	<input type="radio"/> No Consolidation
<input checked="" type="checkbox"/> ACH	<input checked="" type="radio"/> Cash
<input checked="" type="checkbox"/> SWIFT	<input type="radio"/> Accounts Payable
<input type="checkbox"/> Wire	<input type="radio"/> Both

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



The screenshot shows the 'Financial System Settings' window with the 'Accounts' tab selected. A dropdown menu is open, listing various account types: Base loan account, Investment AP account, Investment AP foreign account, Investment EOM interest, Investment EOM foreign interest, IRA account, IRA foreign account, and Portfolio account. Below the dropdown, the 'Checking Account' field is highlighted with a red box and contains 'AGCU Checking'. The 'Check form code' field contains 'Accounts Payable Check'. At the bottom, the 'GL account' is '10001' and the account name is 'AGCU Checking'.

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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

The screenshot shows the Accounts Payable Setup interface. A red callout box with a red arrow pointing to the 'Memo type' dropdown menu contains the text: "Cannot be changed after initial setup." The interface includes a menu bar with 'Edit', 'Save', 'Undo', and 'Exit'. Below the menu bar, there are several settings sections:

- Use Name/Address system to maintain vendors
- Omit name prefix
- Vendor address types: [Text Field]
- Transaction posting method: Batch
- Posting consolidation method: A/P
- Memo type: Payee name
- Maintain voucher batches
- Reset voucher numbers to 1 at the start of each year
- Include discount/credit details on check stubs
- Show vendor contact on vendor checks
- Load account number for vendor into voucher memo field
- Allow manual voucher number entry
- Include payment type with voucher # on posting report
- Apply general ledger date for approval

Below these settings are tabs for 'Default', 'CE', 'DCEF', 'HOPE', and 'PAR'. The 'Default' tab is active, showing:

- Discount G/L account: [Text Field]
- Default checking account: 53
- Default A/P account: (40) - DCEF Accounts Payable
- Voucher approval required
- Top approval level: 1
- Email payment notices automatically for ACH payments
- Default terms: Upon receipt

Connect-FR Setup

Location: Connect-FR → Setup



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Connect-FR Setup

- Customizable field labels
 - Gift purpose, source & designations
 - Can be changed at any time
- Automatic generation of designation descriptions in letters

The screenshot displays the 'Basic & Display' tab of the Connect-FR Setup interface. The 'Connect-FR modules' field is set to 'DN,NF'. Below this, there are four rows of configuration options, each with a label field and an abbreviation field:

Field Label	Value	Abbreviation	Value
Gift purpose label:	Promo type	Abbreviation:	PTYP
Gift source label:	Promo src	Abbreviation:	PSRC
First designation label:	Desig 1	Abbreviation:	DC1
Second designation label:	Desig 2	Abbreviation:	DC2

Below these fields are four checkboxes:

- Display PIN field before Master ID field on entry screens
- Gift postal codes checked for validity
- Automatically generate designation descriptions (highlighted with a red box)
- Warn if a user changes the fiscal year when editing or deleting

At the bottom, there are three more fields:

- Default tribute notification: M
- Default region for invalid or blank zip codes: [empty field]
- Default county for invalid or blank zip codes: [empty field]

CONNECT-FR

General System Setup – Financial

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

Basic & Display | **Financial** | Analysis | Receipt Options

Require G/L number for gifts

Post gifts to General Ledger

Source of gift date:

Source of G/L tran date:

Named fund type changes:

G/L tran memo format:

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:

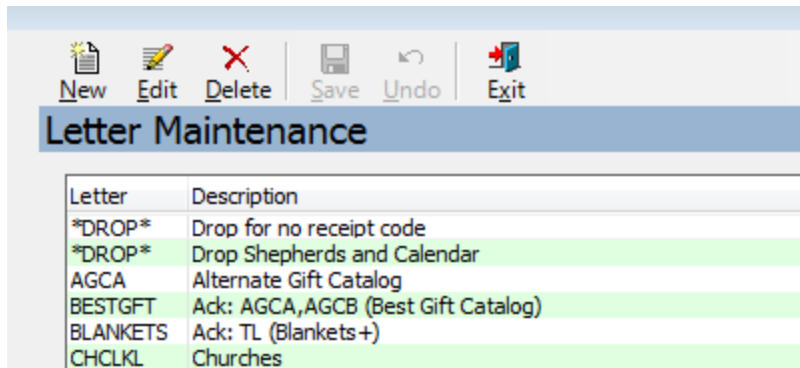
Segment format: GL,Office,Restriction,Funding source

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

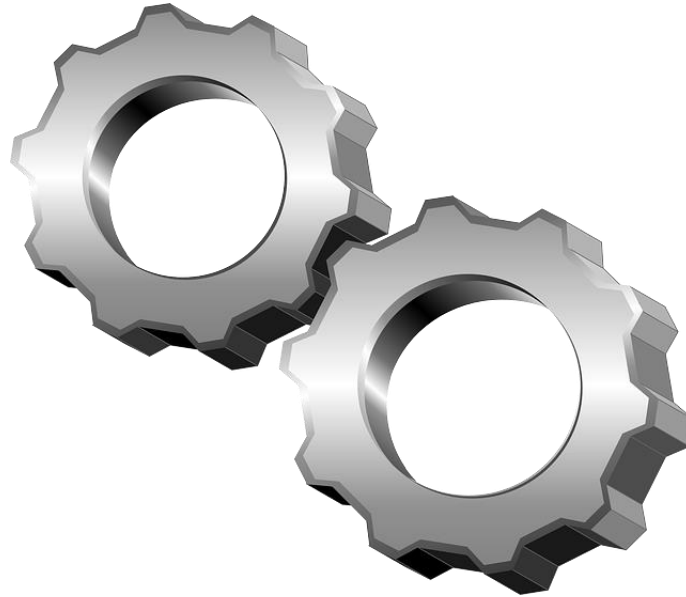
Amount of largest gift to date:

From: 0

To: 24

May 19-20, 2015

System Administration



May 19-20, 2015

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2015 USER GROUP MEETING

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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May 19-20, 2015