



# Improving Relationships By Working Outside The Box

2015 DDI USER GROUP MEETING  
MAY 19<sup>TH</sup>-20<sup>TH</sup>

# OVERVIEW

- ➔ Tools for Contact Management
- ➔ Contact Management Inside DDI-Connect
- ➔ Memo Setup
- ➔ Memo Follow-up
- ➔ Email & Correspondence Storage Inside DDI-Connect
- ➔ Process Management
- ➔ Relationship Management
- ➔ Loading Name/Address Data





**What products do you  
use to keep track of your  
daily tasks?**

May 19-20, 2015



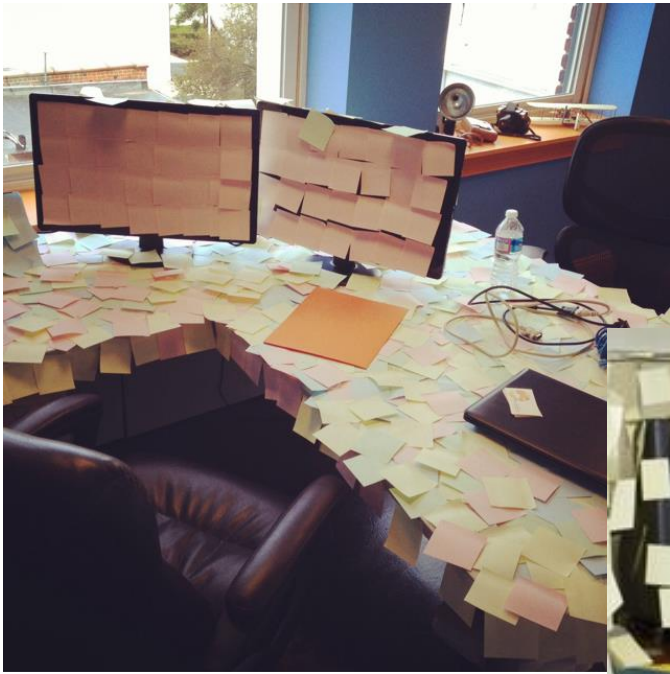
Microsoft®  
Outlook®



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**What products do you use to track and document your client interactions and follow-up's?**

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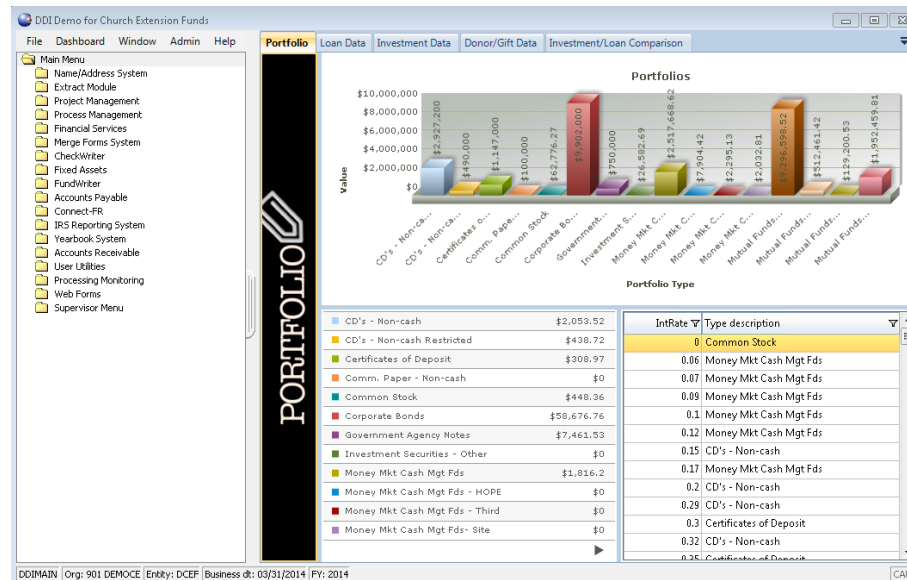
*Look  
Familiar?*

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# How about using DDI-Connect for Contact Management?



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# Benefits of Using DDI-Connect

- All Constituent Information in One System
- Alert Features for Other Users
- Better Client Relationships
- Save Time
- Cost Savings
- Less Training for New Employees



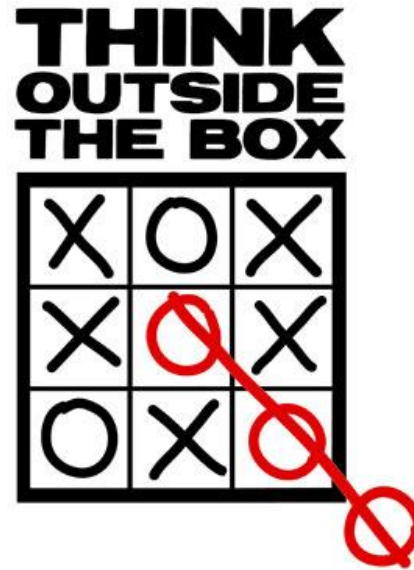
Consolidate.

Client Relations





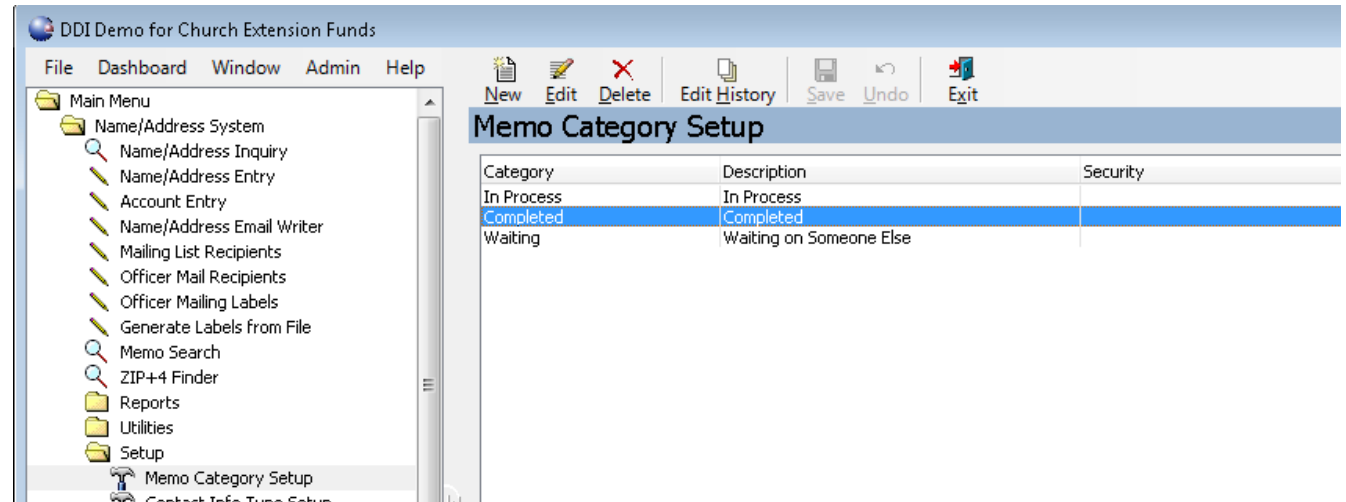
# How Does It Work?



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# Setup

- Go to Name/Address System → Setup → Memo Category. Setup the following categories:
  - In Progress
  - Completed
  - Waiting



# Setup

- Go to Name/Address System → Setup → Codes Maintenance → 0017.  
Update/Add codes that you will need and want to track by. Then put a “D” in the Type field so you can track the code by date.

The screenshot displays the Rocky Mountain United Methodist Foundation, Inc. software interface. The main window is titled "Codes Maintenance" and shows a list of "Memo codes". The "Code List Properties" dialog box is open, showing the configuration for record code 17, "Memo codes".

**Codes Maintenance Memo codes Table:**

Code #	Description
AN	Anniversary [INACTIVE]
BD	Birthday [INACTIVE]
CHLNA	Children's names [INACT
COMMT	Comments
CONTACT	Contact Person [INACTIV
DEATH	Date of death [INACTIVE]
EMAIL	Email
LETTER	Letter
MEETING	Meeting
OTHER	Other
PHONE	Phone
WILL-A	Amount of will [INACTIVE]

**Code List Properties Dialog Box:**

- Record code: 17
- Code: PHONE
- Description: Phone
- Security: [Empty]
- Numeric value 1: 0
- Numeric value 2: 0
- Type (T/D/A): D
- Text value 2: [Empty]

# Add Contact Memo To The Constituent Record

**Memos for PIN: 1001515 Name: Manning Peyton R**

Memos Attachments

Entered on	Category	Code	Memo
04/07/2015	In Process	PHONE	Follow-up with Peyton Manning on or after 6/01/21015 to see if he wants to reinvest after his contract renewal with the Broncos.

Pop-up from: Follow-up with Peyton Manning on or after 6/01/21015 to see if he wants to reinvest after his contract renewal with the Broncos.

thru:

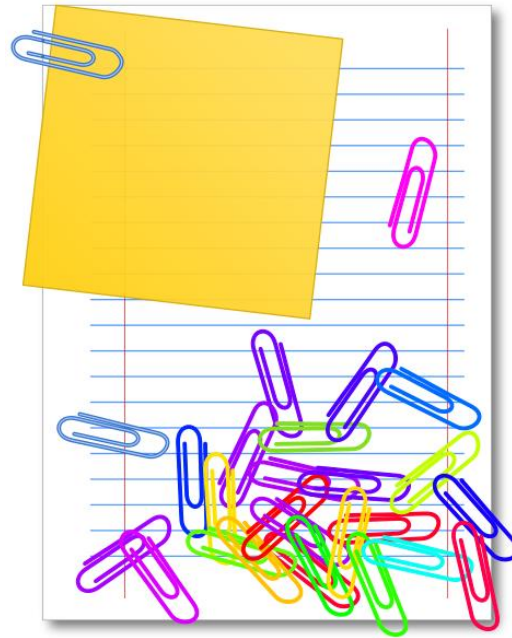
Memo code: PHONE

Value: 06/01/2015

Category: In Process

Created by: pmchugh on 04/07/2015 at 14:38 EDT Modified by: pmchugh on 04/07/2015 at 14:38 EDT

# Memo Search





View



Exit

## Memo Search

Entry dt:  to:  Memo codes:

Origination:  Amt value:  to:

Category:  Date value:  to:

Entered by:  Memo text:

Include deleted memos File name:

File description:

Record Description	Entry Dt	Memo Code	Category	# Attach	Entered By
PIN: 1001515 Name: Manning Peyton R	04/07/2015	Phone	In Process	0	pmchugh
PIN: 990057064 Name: Luck Andrew	04/07/2015	Phone	In Process	0	pmchugh

Follow-up with Peyton Manning on or after 6/01/21015 to see if he wants to reinvest after his contract renewal with the Broncos.



## Memo Editor

Memos for PIN: 1001515 Name: Manning Peyton R

Memos Attachments

Entered on	Category	Code	Memo
04/07/2015	Completed	PHONE	Follow-up with Peyton Manning on or after 6/01/21015 to see if he wants to reinvest after his contract renewal with the Broncos.

Pop-up from:

thru:

Memo code: PHONE

Value: 06/01/2015

Category:

Follow-up with Peyton Manning on or after 6/01/21015 to see if he wants to reinvest after his contract renewal with the Broncos.

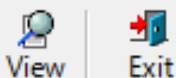
6/3/2015 - Called Peyton, he is sending us \$500,000 to open a 5 Year Note.

Created by: pmchugh on 04/07/2015 at 14:38 EDT

Modified by: pmchugh on 04/07/2015 at 14:49 EDT

File Name	File Description	Attached By	Added On	Priv	Size(KB)
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## Memo Search

Entry dt:  to:  Memo codes:

Origination:  Amt value:  to:

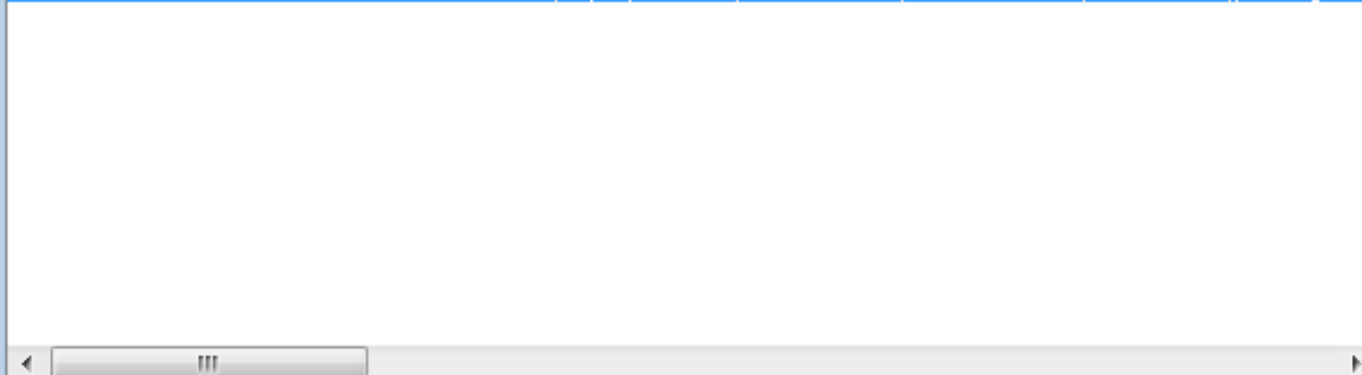
Category:  Date value:  to:

Entered by:  Memo text:

Include deleted memos File name:

File description:

Record Description	Entry Dt	Memo Code	Category	# Attach	Entered By
PIN: 990057064 Name: Luck Andrew	04/07/2015	Phone	In Process	0	pmchugh



Call Andrew Luck in May to see if he wants to Donate to our Scholarship for Inner City Kids Program.



# Memo Report

You can have a report email you all your outstanding , “In Progress”, items via your Job Processing.

NA69 - Memo Report

Date ranges:

Starting display date: [ ] thru: [ ]

Ending display date: [ ] thru: [ ]

Entry date: [ ] thru: [ ]

PIN: [ ]

Master ID: [ ]

Memo code: [ ]

Origination: [ ]

Category: [ ] **\*\* 1 Selection made \*\***

Sort order:

Available Fields: Category, Constituent ID, Entry date, Memo code

Sort Fields: [ ]

Buttons: Add Ascend ->, Add Descend ->, <- Remove

Create data file

Buttons: Start, Print Options, Cancel

NA69 Business dt: 03/31/2014 CAPS ER GROUP MEETING

04/14/2015 2:08 PM EDT  
NA69

DDI Demo for Church Extension Funds  
Memo Report  
Categories: In Process; Filename: No export

Page 1

Name Pin	Master ID	Name / Address
990057064		Andrew Luck 123 Colts Way Noblesville, IN 46062

04/07/2015 Call Andrew Luck in May to see if he wants to Donate to our Scholarship for Inner City Kids Program.

Memo category: In Process

Memo code: Phone

Memo code val: 05/15/2015

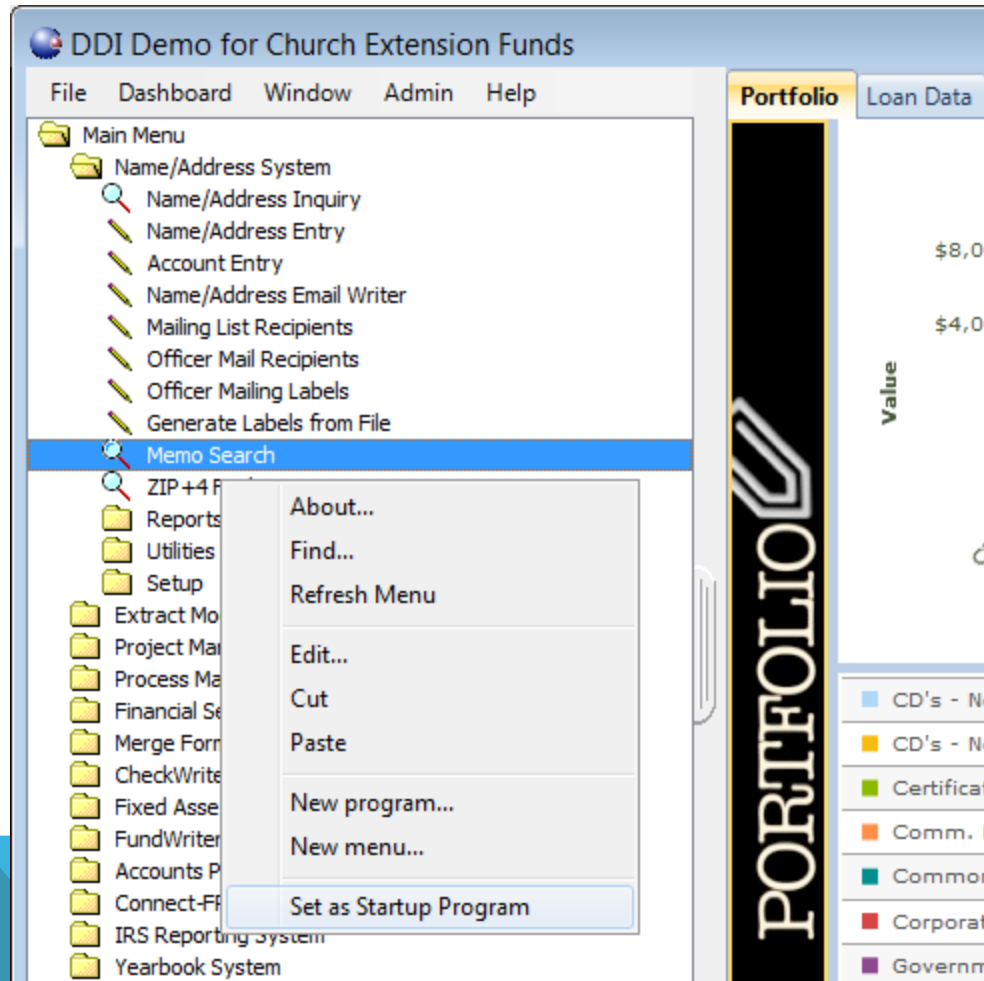
Created by pmchugh on 04/07/2015 at 14:43 EDT

Last modified by pmchugh on 04/07/2015 at 14:43 EDT

PIN: 990057064 Name: Luck Andrew

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# Set Memo Search as your Startup Program



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# Saving Email Correspondence Inside DDI-Connect



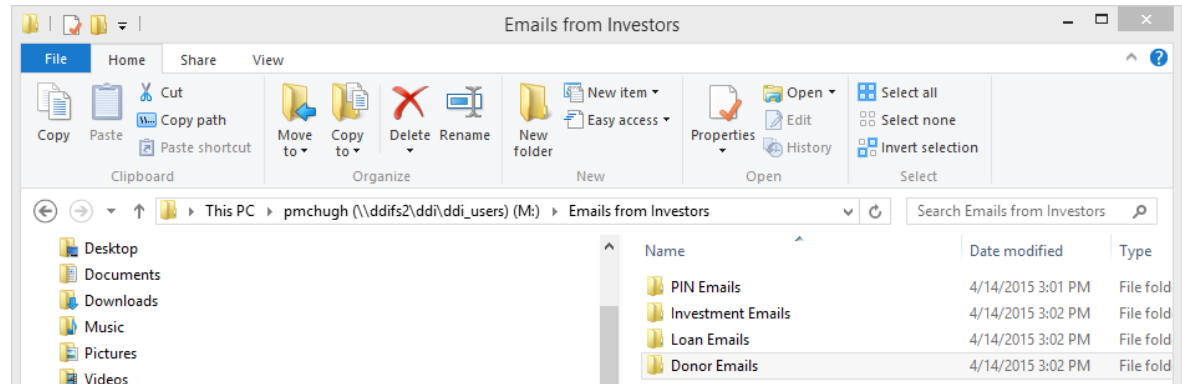
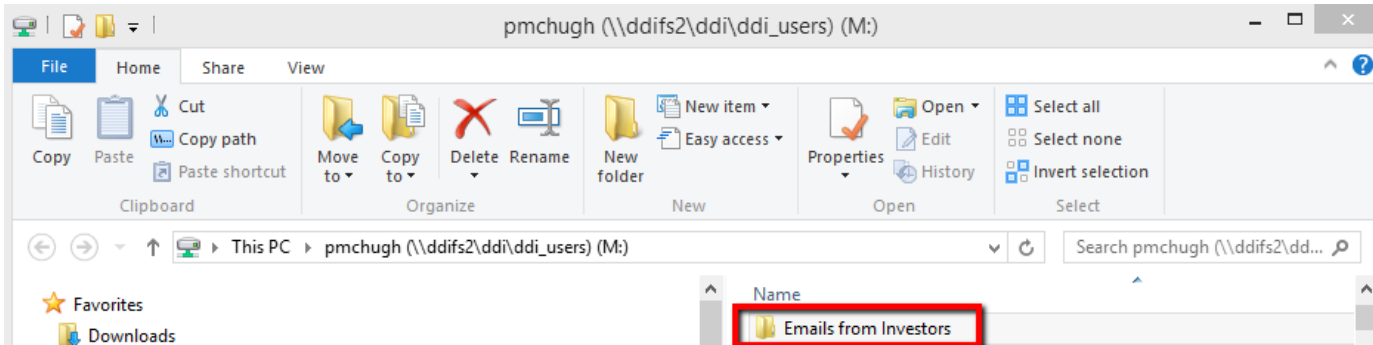
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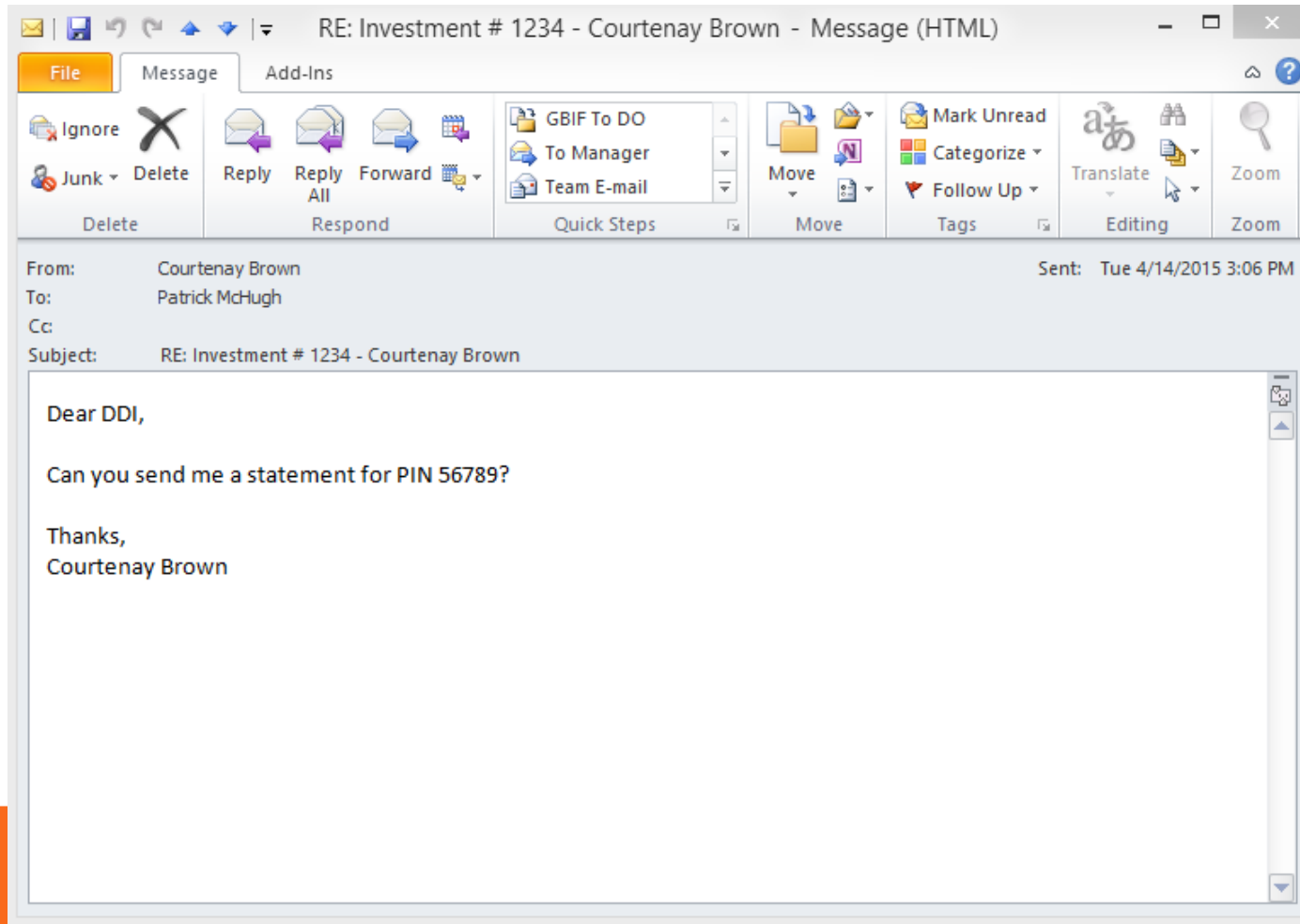
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# Setup

- Setup a New Folder on your network.

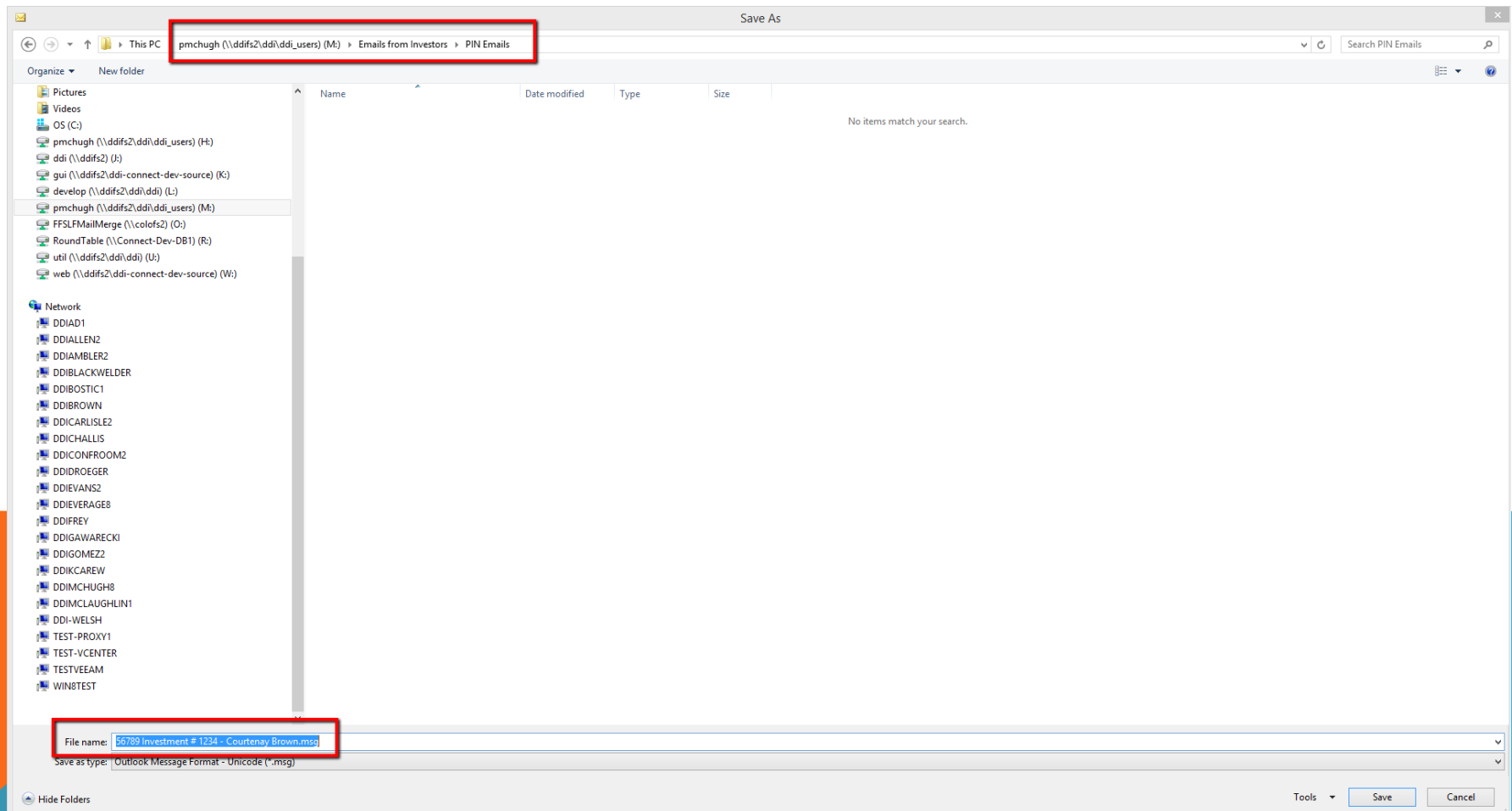


# Emails



# Save The Email In The Folder

- Choose Save As the file rename the file to PIN #\_file name. Example: PIN #56789, you will want to save the file as 56789 Investment # 1234 - Courtenay Brown.msg (*\*.msg extension is available as of 5/17/2015*)
- Save it in the network location you created.



# Auto Attachment Import

- Save emails throughout the week in the network folder.
- Then once a week or how often you choose, perform the Auto Attachment Import.
- Once Imported, clear the folder on your network folder.



# Auto Attachment Setup

- Setup the Auto Attachment Setup. Go to Name/Address System → Setup → System Settings. Click the Attachments tab and update the memo information.

The screenshot shows a software window titled "DDI Demo for Church Extension Funds". The window has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for "Edit", "Save", "Undo", "History", and "Exit". The main content area is titled "Connect-CRM System Settings" and has several tabs: "Base Settings", "Address Types", "Salutations", "Attachments", and "Yearbook Setup". The "Attachments" tab is selected. The text below the tabs reads: "The following settings are used for the automatic attachment of documents:". The settings are as follows:

- Base directory: M:\
- Memo code: E-MAIL
- Category: Completed
- Memo text: Email Correspondence
- Number of errors allowed before automatic attachment process is terminated: 10

At the bottom of the window, there is a status bar with the following information: NA001SET | Org: 901 DEMOCE | Entity: DCEF | Business dt: 03/31/2014 | FY: 2014 | CAPS

# Process Management



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# Is Anyone Currently Using Process Management Inside DDI-Connect?



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# Process Examples:

- New Loan Procedures
- New Investor Setup
- Donor Development
- Loan Development
- Church Consulting
- Internal Procedures
  - Month End
  - Year End
- And More...



# Process Management Setup

The screenshot displays the 'Process Management Setup' application. The left sidebar contains a tree view of modules, with 'Process Management' highlighted in a red box. The main window is divided into two tabs: 'Process Setup' and 'Steps'. The 'Process Setup' tab is active, showing a table of processes and a detailed configuration form for the selected process, 'Other Secured Loan'.

Process Title /	Created	Use With	Class	Category	Opp Amt
Other Secured Loan	11/15/2013	Loan	Other Secure...	New Loan Ap...	\$0.00
Secured Loan	11/14/2013	Loan	Secured Loan	New Loan Ap...	\$0.00
Unsecured Loan	11/15/2013	Loan	Unsecured Loan	New Loan Ap...	\$0.00

**Title:** Other Secured Loan  
**Category:** New Loan Application  
**Class:** Other Secured Loan  
**Use with:** Loan

Process active from: 11/14/2013 thru:  Allow users to reorder steps  
 Auto assign steps to process owner

**Expected results:** Complete the following steps to complete the loan process.  
**Description:** New Loan Application for a Other Secured Loan

**Opportunity amt:** \$0.00  
**Attachment:**

Created By: pmchugh on 11/15/2013 Modified By: pmchugh on 11/15/2013

# Process Management Setup

Title: Other Secured Loan

Category: New Loan Application

Class: Other Secured Loan

Use with: Loan

Allow users to reorder steps

Auto assign steps to process owner

Process active from: 11/14/2013 thru:

Expected results: Complete the following steps to complete the loan process.

Description: New Loan Application for a Other Secured Loan

Opportunity amt: \$0.00

Attachment:

Created By: pmchugh on 11/15/2013 Modified By: pmchugh on 11/15/2013

Name/Address  
System → Setup →  
Code Maintenance







New Edit Delete Codes Export Exit

**Master Code List**

Code /	Description
0090	User-defined process category type codes
0091	User-defined process class codes
0092	User-defined process step actions
0093	User-defined process status codes
0094	Tables where User-defined processes can be attached
0095	User-defined process step status codes
0096	User-defined process STEP category type codes
0097	User-defined process STEP class codes
0098	Process Event Codes
----	----

- Define the Process
- Assign a Category & Class
- Expected Results
- Process Description
- Use With
- Reorder Steps/Auto Assign Flags
- Opportunity Amount

# Process Management Setup

New Edit Delete Save Undo Exit

Process Setup Steps

**Other Secured Loan**

Step# /	Step Title	Duration	Class	Category	Action
1	Enter Church/Constituents i...	1	Mandatory	Pre-Approval	Email
2	Mail Application to the Borro...	1	Mandatory	Pre-Approval	Email
3	Setup Folders for Loan Doc...	0	Mandatory	Pre-Approval	Setup
4	Add Loan to Board Report S...	0	Mandatory	Pre-Approval	Setup
5	Follow-up on Application	5	Mandatory	Pre-Approval	Follow-Up
6	Scan Completed Application ...	5	Mandatory	Pre-Approval	Scan & Upload
7	Determine Collateral	0	Mandatory	Pre-Approval	Setup
8	Provide Documents to Assig...	1	Mandatory	Pre-Approval	Deliver
9	Prepare Risk Rating	2	Mandatory	Pre-Approval	Setup
10	Advisor Provides Terms of L...	3	Mandatory	Pre-Approval	Deliver

Title: Enter Church/Constituents into DDI-Connect & Setup a Loan Process

Category: Pre-Approval ▼
Probability: 0.00%

Class: Mandatory ▼
Expected duration: 1 days

Action: Email ▼
 Optional

Removable




Role assignment:

Expected results: Enter preliminary data into DDI-Connect for tracking

Description:

1. Enter Church &/or Constituents into DDI-Connect.
2. Add a Account for the Borrower
3. Add a Loan to the Account of Borrower
4. Add Process to the Loan Record

Attachment:

Created By: pmchugh on 11/14/2013
 Modified By: pmchugh on 11/15/2013

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# Process Management Setup

Title: Enter Church/Constituents into DDI-Connect & Setup a Loan Process

Category: Pre-Approval  
 Class: Mandatory  
 Action: Email

Probability: 0.00%

Expected duration: 1 days

Optional  
 Removable

Role assignment:

Expected results: Enter preliminary data into DDI-Connect for tracking

Description:

1. Enter Church &/or Constituents into DDI-Connect.
2. Add a Account for the Borrower
3. Add a Loan to the Account of Borrower
4. Add Process to the Loan Record

Attachment:

Created By: pmchugh on 11/14/2013 Modified By: pmchugh on 11/15/2013

Name/Address System → Setup → Code Maintenance

- Define the Step
- Assign Duration
- Enter Category, Class, Action
- Assign the Task to a User
- Enter Expected Results
- Enter Additional Directions
- Add Attachments/Support Documents












New Edit Delete Codes Export Exit

**Master Code List**

Code	Description
0090	User-defined process category type codes
0091	User-defined process class codes
0092	User-defined process step actions
0093	User-defined process status codes
0094	Tables where User-defined processes can be attached
0095	User-defined process step status codes
0096	User-defined process STEP category type codes
0097	User-defined process STEP class codes
0098	Process Event Codes



# Add a New Process

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

PIN: 001001515 | **Mr. Peyton R. Manning** Act

Name	Personal	Professional	Clergy	Education	Alt ID	DBA
Prefix	First name	Middle name	Last name	Suffix	Sex	
Mr	Peyton	R.	Manning		M	

AI codes: IN, XMNP +

Name 2: Tax ID: Source:

Created 04/29/1982 Updated 03/31/2014 Salutation: Dear Mr. Manning:

---

Contact | Home

**Home address** Menu

Address: 123 Denver St

Country: United States  
 ZIP: 43235  
 City: Denver ST: CO  
 County: GARF: Garfield  
 Region: 06: Central Rocky Mountain  
 Area:  
 Phone: (614) 268-7985

Updated by pmchugh on 03/31/2014 at 10:46 EDT

**Constituent Window** Menu

Name	Rel.
Manning Peyton R	
Atonement Full Gospel Church	MEMB

**Address Options**

Primary address

Residency: Primary resident

Comment:

Dates: 03/31/2014 -

CAPS

# Add a New Process

View New Exit

Process History Completed Step History

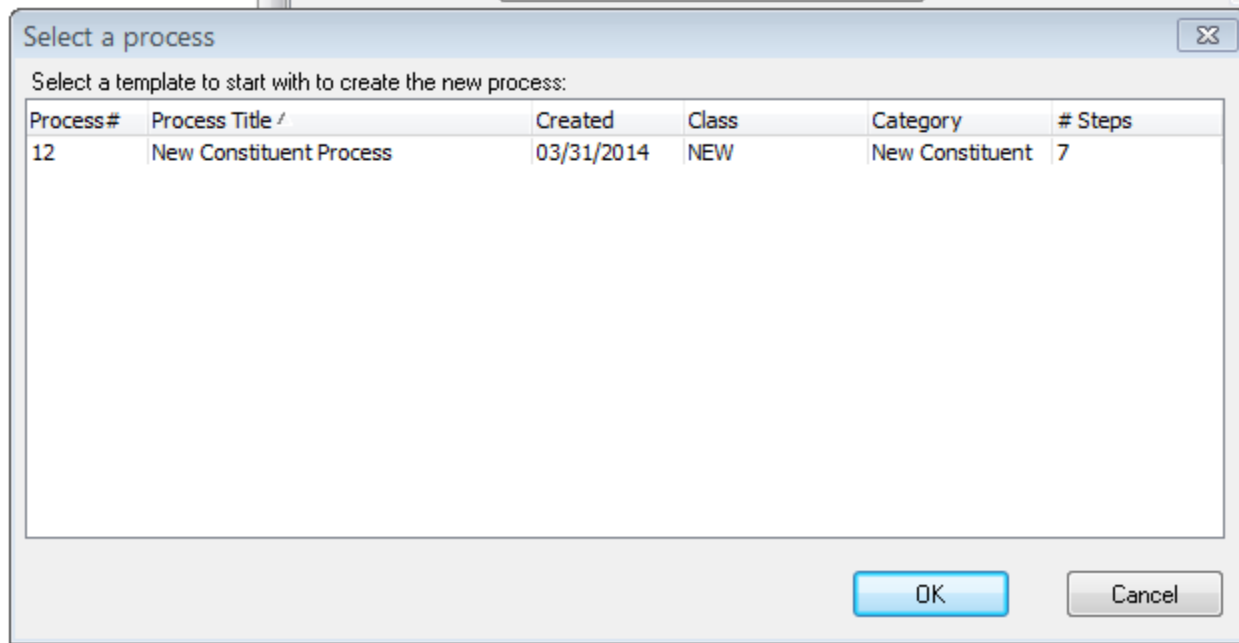
Linked to Constituent 1001515  
Peyton R. Manning

Process Title	Status	Class	Category	Start Date	End Date
---------------	--------	-------	----------	------------	----------

Seq# /	Step Title	Status	Start Date	End Date	Finished By
--------	------------	--------	------------	----------	-------------

CAPS

# Add a New Process



# Add a New Process

New Edit Delete Delete Process Save Undo Actions Exit

Process title: New Constituent Process Linked to Constituent 1001515  
Peyton R. Manning

Filter:

Step# /	Step Title	Assign To	Start	End	Status	Action
1	Enter Information into DDI-...	pmchugh				Deliver
2	Enter Tax ID	pmchugh				Deliver
3	Enter Relationships	pmchugh				Deliver
4	Enter AI Code Classification	pmchugh				Deliver
5	Tell Our Story	pmchugh				Meeting
6	Provide them their Investm...	pmchugh				Meeting
7	Enter Memo	pmchugh				Deliver

Step Info | Process Info | Step Attachments

Step title: Enter Information into DDI-Connect  
 Expected results: Enter Constituent Information into DDI-Connect  
 Expected action: Deliver  
 Description:

Start date:       Finish date:       By:   
 Projected start: 03/31/2014      Projected finish: 04/01/2014

Notes:

Assigned to: pmchugh      Assigned to role:   
 Created by: pmchugh on 03/31/2014      Modified by:

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# User Activities

The screenshot shows a software application window with a menu bar (File, Dashboard, Window) and a toolbar (Search, View Process, Actions, Exit). The left-hand navigation pane lists various system modules, with 'User Activities' highlighted in a red box. The main content area features search filters: 'See my list OR See activities assigned to:' with dropdowns for 'Source' (set to 'All'), 'Action', 'Category', and 'Class'. There is also an 'Include completed steps' checkbox. Below the filters is a 'Filter the results further after searching:' section with 'Projected date' (set to 'All'), 'Start from', and 'thru' fields, and an 'Apply' button. At the bottom, a table displays activity data.

Source Type	Source ID	Source Name	Process Title	Step Title	Status	Assigned	Action	Step X
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter Tax ID	Started	pmchugh	Deliver	24
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter Relationships		pmchugh	Deliver	34
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter AI Code Class...		pmchugh	Deliver	44
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Tell Our Story		pmchugh	Meeting	54
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Provide them their I...		pmchugh	Meeting	64
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter Memo		pmchugh	Deliver	74

# Where Used Inquiry

The screenshot shows a software application window with a menu on the left and a main workspace. The menu includes 'File', 'Dashboard', and 'Window'. Under 'Window', there is a 'Where Used Inquiry' option highlighted with a red arrow. The main workspace has a toolbar with 'Search', 'Clear', 'View Process', and 'Exit'. Below the toolbar, there are search filters: 'Select process(es):' with a magnifying glass icon, 'OR Search by process name: \*\* Processes selected from pop-up \*\*', an 'Include completed processes' checkbox, 'Processes started from:' and 'thru:' date pickers, and 'Source:', 'Class:', and 'Category:' dropdown menus. A table below shows the results of the inquiry.

Process Title	Source Type	Source ID	Source Name	Status	Class	Category	Finished On	Last Step Completed	La: Co
New Constituent Pr...	Constituent	1001515	Peyton R. Manning	Started	NEW	New Cons...		1 of 7	03

# Process Report

The screenshot shows a dialog box titled "NA78 - Process Management Report". It contains several input fields and a checkbox:

- Assigned to: [Text input field]
- Source: [Dropdown menu with "All" selected]
- Action: [Text input field]
- Category: [Text input field]
- Class: [Text input field]
- Start date: [Text input field] [Calendar icon] thru: [Text input field] [Calendar icon]
- Include completed steps

At the bottom, there are three buttons: "Start", "Print Options", and "Cancel".

At the bottom left, there is a status bar with "NA78" and "Business dt: 03/17/2014". At the bottom right, there is a "CAPS" button.

# Relationship Management



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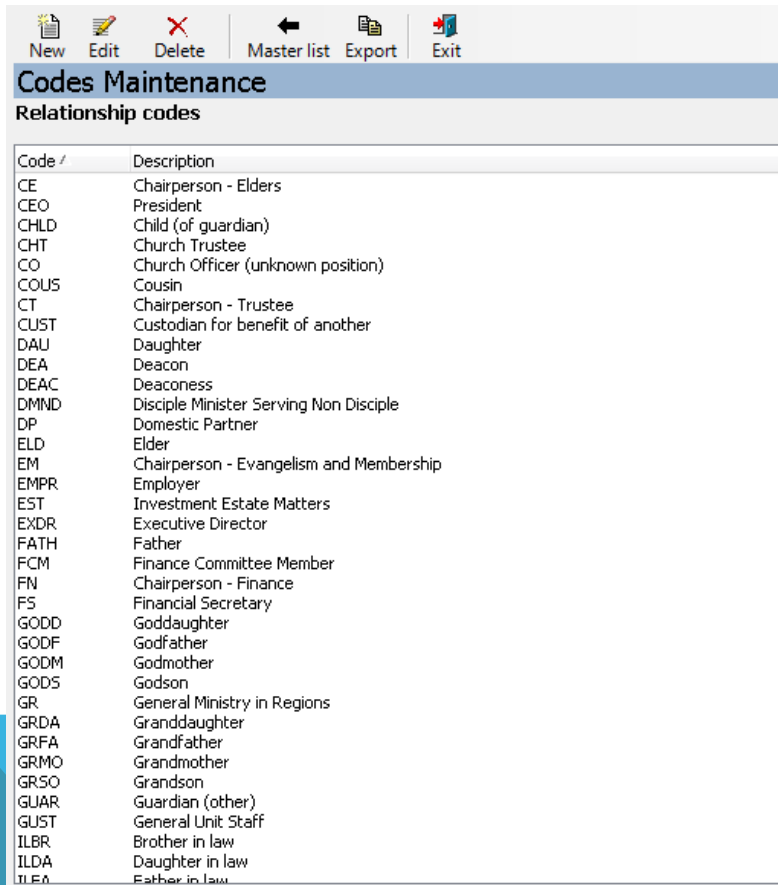
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# Relationship Setup

- Go to Name/Address System → Setup → Codes Maintenance → 0012 Relationship Codes. Create relationship codes your organization wants to track.



The screenshot shows a software window titled "Codes Maintenance" with a subtitle "Relationship codes". The window has a menu bar with "New", "Edit", "Delete", "Master list", "Export", and "Exit". Below the menu bar is a table with two columns: "Code #" and "Description".

Code #	Description
CE	Chairperson - Elders
CEO	President
CHLD	Child (of guardian)
CHT	Church Trustee
CO	Church Officer (unknown position)
COUS	Cousin
CT	Chairperson - Trustee
CUST	Custodian for benefit of another
DAU	Daughter
DEA	Deacon
DEAC	Deaconess
DMND	Disciple Minister Serving Non Disciple
DP	Domestic Partner
ELD	Elder
EM	Chairperson - Evangelism and Membership
EMPR	Employer
EST	Investment Estate Matters
EXDR	Executive Director
FATH	Father
FCM	Finance Committee Member
FN	Chairperson - Finance
FS	Financial Secretary
GODD	Goddaughter
GODF	Godfather
GODM	Godmother
GODS	Godson
GR	General Ministry in Regions
GRDA	Granddaughter
GRFA	Grandfather
GRMO	Grandmother
GRSO	Grandson
GUAR	Guardian (other)
GUST	General Unit Staff
ILBR	Brother in law
ILDA	Daughter in law
ILEA	Father in law

# Relationship Setup

- Automatic Mirrored Relationships

Code List Properties

Record code: 12      **Relationship codes**

Code:        Active

Description:

Security:

Numeric value 1:

Numeric value 2:

Recip. code (M):

Recip. code (F):

OK

Cancel

Code List Properties

Record code: 12      **Relationship codes**

Code:        Active

Description:

Security:

Numeric value 1:

Numeric value 2:

Recip. code (M):

Recip. code (F):

OK

Cancel

# Relationships in Name/Address

The screenshot displays the DDI Demo for Church Extension Funds software. The main window shows a contact record for Andrew Luck (PIN: 990057064). The Relationships tab is active, and a 'New Relationship' dialog box is open. The dialog box contains the following information:

- Constituent: 000150277 (First Church of God)
- Relationship: MEMB: church member
- of: Andrew Luck (PIN 990057064)

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# Load Name and Address Information (Import)



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# NA37 – Load Name and Address Information

- Update Existing Records from a Database File or add a New PIN
- If Church PIN is supplied, it will automatically Build a MEMB relationship
- Auto AI Code Update
- Auto Memo Build



# NA37 – Why it is Used?

- Many use it to upload church membership data to their DDI-Connect system.
- Upload Church Records to the DDI-Connect System



# NA37 File Format

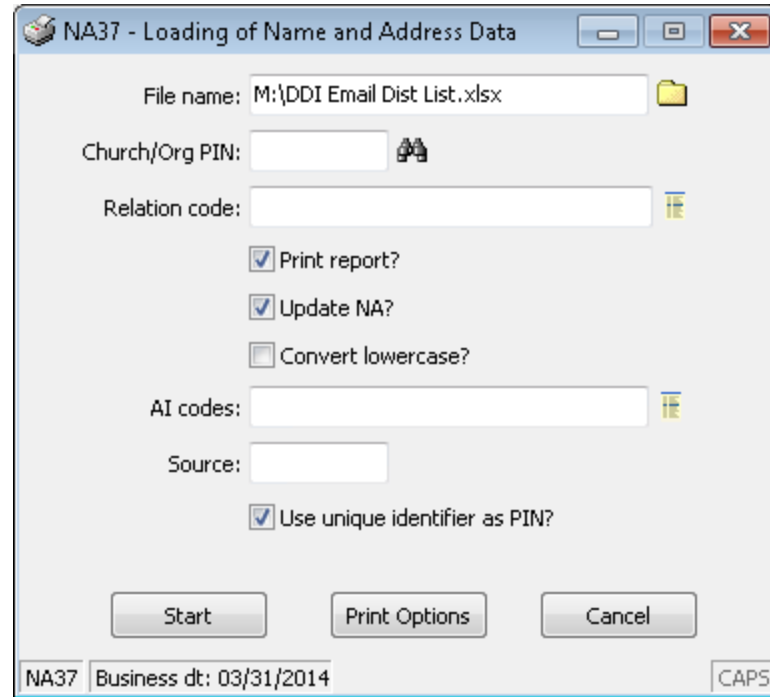
- The file you use can be text, csv, or excel, but MUST be properly formatted in order for the system to update records. The file format is:



Field	Name
1	Unique Identifier Number
2	First Name or First Initial
3	Middle Initial or Middle Name
4	Last Name
5	Prefix
6	Suffix
7	Gender, M or m or F or f
8	Social Security Number
9	Address 1
10	Address 2
11	City
12	State
13	Zip Code
14	Country
15	Phone #
16	Alternate ID
17	Account Type (I, F, O, or C – blank assumes Individual)
18	Name 2
19	Address Type (if blank, assume Home)
20	Clergy Status
21	Clergy Type
22	Ethnicity
23	Home Email
24	Work Email
25	Church PIN
26	Individual AI Codes (combined with AI Codes criteria)
27	Nickname
28	Date of Birth
29	Phone 2
30	Fax
31	Position
32	Memo line 1
33	Memo line 2
34	Memo line 3
35	Salutation number

# NA37 Import

- This is located in Name/Address System → Utilities.





# Discussion, Questions, Comments



Patrick McHugh  
pmchugh@ddi.org  
support@ddi.org  
317.713.2480

May 19-20, 2015