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How To Use This Guidebook

Welcome to the 2025 Annual CDM+ Users Conference! This guidebook is designed to help you navigate the event with ease so you can make the most of your training experience. Inside you'll find everything you need to plan your days, choose the right sessions, and locate classrooms.

What's Inside

- **Class Schedule** - An overview of sessions, times, and dates
- **Suggested Tracks** - Tailored paths designed for specific roles in your organization
- **One on One Support** - Instructions for how to book a one-on-on session in person with a CDM+ support technician
- **Table of Contents** - Quickly locate sections of this guide
- **Class Pages** - Each class has it's own page with outline, time, and location
- **Notes Pages** - Following each class section there is space provided for jotting down key takeaways, reminders, etc
- **Hotel Map** - At the back of the book, a map to help you navigate to meeting spaces and key conference areas

Tips For Success

We recommend beginning with the table of contents to see the structure of the guide, then using the class schedule to get a daily overview of what's happening. Be sure and review the map and schedule ahead and time and mark classes that are of interest to you.

We also encourage you to explore classes beyond your regular interests and discover all that CDM+ has to offer.

If you are interested in a one-on-one support session, book your slot early! If you book a session and end up not needing it, please cancel your appointment to free up the time for another attendee. You can cancel a session using the confirmation email or just stop by the help desk and we'll be happy to assist.

Keep this guidebook handy during the day for quick reference.

Online Guide

All of the material in this guidebook is also available on the dedicated 2025 CDM+ Annual Users Conference website. Simply scan the QR code on the cover of this book or visit auc2025.cdmplus.com/auc from your phone, tablet, or computer. Each class page in this book also has a QR code linking directly to the page for that class.

The online guide includes the same class content as this book and adds clickable links that take you directly to the CDM+ Help Center. There you'll find step-by-step instructions and related resources.

You are NOT required to use the online resources with each class. Just come to the class and follow the presenter to start learning!

We're so glad you're here and look forward to an engaging conference experience!

1-on-1 Scheduled Support

Tech support is always available on a first-come, first-served basis in the Computer Lab. But sometimes you need a little extra focus and that's where our 1-on-1 scheduled appointments come in.

Booking an Appointment

You can book an appointment by scanning the QR or visiting https://suransystemsinc.setmore.com/ and completing the form. (please note spaces are limited).

Support appointments are blocked for 30 minutes and are a great alternative to taking a class as they occur during regular class time.

Here's How it Works

- Book your appointment
- Arrive at the computer lab a few minutes before your appointment
- Let a Suran staff member know you have are there for an appointment and they'll connect you with a support specialist

Tips for Success

- Have your laptop connected to CDM+ and ready to log in, or have your credentials handy if you need to use a lab computer
- Please be respectful of other attendee's appointments
- If you need additional time beyond the appointment, the support specialist can book a follow-up time with you (including after you return home from the conference)

Need to Cancel or Re-schedule?

No problem! Just follow the instructions in the confirmation email or stop by the Help Desk and we'll be happy to help!

Getting Started Membership

Mon 9:45 - 11:00 | Bluegrass B
Tue 1:45 - 3:00 | Bluegrass B

Don Howell
Hannah Roethle

Class Description

We begin with an in-depth review of the Address and Individual Records, including the membership records screens and fields, their features, and toolbars. The relationship between Address Records, Individual Records, and Giving Unit records is explained. This class is an effective introduction to Membership, providing the beginning user everything needed to get started.

Class Topics

How To Use An Address Record

- Family Records - Family Information
  - Photos
- Assigning Families for Care
- Giving Unit Assignment
- Pastoral Care
- Connected Records
- Adding a New Record
  - How to Enter Couples with Different Last Names

How To Use Individual Records

- Personal/Membership Information
- Groups
- Visitation Information
- Attendance Information
- When an Individual Moves
- Adding a New Individual

Notes

Membership Data Management

Mon 11:15 - 12:30 | Bluegrass B
Tue 3:15 - 4:30 | Bluegrass B

Don Howell
Hannah Roethle

Class Description

Learn to customize CDM+ Membership with an in- depth look at the Master Coding System and how to best set up Membership to support the ministries of your church. Learn how to use List Maintenance, Field Maintenance, and list transfer to manage groups and personal data.

Discover the expansive possibilities the User Fields offer you to track a wide variety of family and personal information. This class will focus on cleaning up Membership records and maintaining them on an ongoing basis.

Class Topics

Master Coding System

- Codes
- Groups
  - Detailed Tracking
  - Attendance
  - Ranked
- User Fields

Membership Maintenance

- Address/Individual Field Maintenance
- Address/Individual List Maintenance

Address Utilities

- Update Grades

Membership and Attendance Preferences

- Fields
- Default
- Notices

User Specific Preferences

- Visitation
- Pastoral

Notes

Membership Reports

Mon 1:45 - 3:00 | Bluegrass B
Wed 8:15 - 9:30 | Bluegrass B

Don Howell
Hannah Roethle

Class Description

Discover the many membership reports you can create using CDM+ and its multiple configurations. Learn how to create Yearbook Directories and Name Badges for your members or staff to use. Discover the strengths of the Custom Listing reports and how they enhance your capacity to view your data. We will review how to export data from CDM+ to other programs and how to manage simple and complex queries. Join us as we look at how CDM+ Membership Reports can enrich your effectiveness and your productivity.

Class Topics

Directories

- Address
- Individual
- Address Yearbook
- Individual Yearbook

Labels/Envelopes

- Address
- Individual

Notices

- Letters
- Cards
- Saving Sent Notices in Preferences
- Emails

Custom Listing and Exports

- Address
- Individual

Name Badges

- Address
- Individual

Summaries

- Address
- Individual

Notes

Getting Started Attendance

Tue 1:45 - 3:00 | Barrel Room

Don Howell

Class Description

Learn how to enter event, class, and list attendance for worship services, Sunday School, small groups, and even board meetings! Putting individuals in classes or groups, as well as preparing attendance worksheets (barcoded and not), is taught. See how easy it is to take live attendance with the CDM+ Mobile app, easily accomplish Class promotion, and create Attendance Histories.

In order to begin tracking attendance in CDM+, you must have the following items in place:

- Individual Records must be entered.
- Master Codes for Services/Events, Church (Sunday) School Classes, and other groups or lists must be identified and entered.
- Membership Status codes should be set up for control of Attendance Lists.

Class Topics

Setting up Class and Group Lists

Assign Individuals to Classes

Attendance Preferences

Taking Attendance

- Attendance Worksheet By Date
- Attendance Worksheet
- Barcode Worksheet
- Entering Attendance for a Service or Event
- Entering Attendance for a Class
  - Using a Barcode Reader to Enter Attendance

Setting Up Attendance Taking on a Tablet or Phone

- Set Up Attendance Taking - tablet app
- Set Up Attendance Taking - phone app
- Using CDM+ Mobile to Enter Attendance
- Barcode Attendance App

Update Attendance History and View

Attendance Promotion

- Individual List Maintenance

Notes

Attendance Analysis & Reports

Tue 3:15 - 4:30 | Barrel Room

Don Howell

Class Description

Attendance tracking accomplishes little without attendance analysis! Vital individual and group analysis is demonstrated by using the Missing Analysis report and the Attendance by Date report. Learn how to view a full year's attendance summary for an individual. Exporting attendance records and event statistics are examined. Master accessing and analyzing the significant individual and group attendance data tracked in CDM+.

Class Topics

Attendance Reports

- Attendance Directory
- Attendance By Date
- Attendance By Individual
- Attendance Summary
- Missing Analysis

Notices

- Letter Notices
- Card Notices
- Email Notices

Attendance Export

Event Statistics

Notes

Visitor Tracking

Wed 8:15 - 9:30 | Barrel Room **Don Howell**

Class Description

Growing churches know who's visiting and follow a process to minister to and assimilate visitors into their fellowship. This class demonstrates a process and presents you with the tools through the Membership/Attendance and Contributions programs to implement an effective procedure for ministering to visitors and prospects.

Class Topics

Visitor Records

- User Defined Groups
- Follow-Up Ministry/Outreach Actions
- Additional Phones/E-mails
- Individual Attendance
- Comments

Attendance Tracking of Visitors

- Entering Attendance for a Service or Event
- Entering Attendance for a Class

Visitor Letters

- Create Visitor Letters
- Print Visitor Letters

Demographic Information and Follow-up of Visitors

Connections

Reports and Analysis of Effective Evangelism

- Visitor Master Listing
- Measuring Effectiveness of Visitor Follow-Ups
- Analysis of Effective Evangelism
- Tracking Where Your Visitors Are Coming From

Using Membership Records for Visitors

Notes

Contact Management

Tue 11:15 - 12:30 | Bluegrass B

Dean Phelps

Class Description

Faith-based and other non-profit organizations are in the people business. Building trust through regular contact and timely follow-up remains a high priority. Visitation and Pastoral records in the CDM+ Membership program provides an effective means of tracking contact with people connected to your organization.

In this class, we will learn how to use the CDM+ Mobile app and the CDM+ desktop program to record contacts, create reminders, and push reminders to CDM+ Mobile devices. We'll also learn how to secure visitation and pastoral information to ensure that confidential information remains confidential.

Class Topics

Visitation and Pastoral Records

- Data Privacy
- Granting Record Access to Users
- Connecting Mobile Devices to Visitation Records

Setting Up Notifications to Mobile Devices

Setting Default Access to Visitation and Pastoral Records

Creating Visitation Records and Reminders in the Desktop

Creating Visitation Records and Reminders in CDM+ Mobile

Create Pastoral Records in CDM+ Mobile

Notes

Getting Started Contributions

Mon 9:45 - 11:00 | Rockbridge Reserve
Tue 3:15 - 4:30 | Barn

Roslyn Brittain

Class Description

Here, we cover everything you need to begin entering contributions, including setting up Giving Codes and Giving Funds, viewing individual Giving History (both in CDM+ Contributions and CDM+ Mobile), and the Groups field on Giving Unit records. Basic Batch Contributions setup and entry is explained. Everything you need to know about linking to Accounting and Posting to Accounting is explained. Learn to verify your contributions entry through the use of Daily reports.

Class Topics

Giving Unit Records

- Creating Giving Unit Records
  - Creating a new Address Record, and adding a Giving Unit Record initially
  - Adding a Giving Unit Record to an existing Address Record
- Path to Giving Unit Records
  - GO buttons
- Display Information Tabs

Contribution Setup

- Link to Accounting
- Link to Memorial Gifts

Giving Funds

- Importance of Sort Order
- Inactive
- Non Tax-Deductible
- Sets

Contribution Entry

- Batch Contribution Entry
  - Preferences
  - Batch Setup
  - Entering Contributions
    - Loose Offerings
    - Non Tax-Deductible Contributions
  - Contribution Records
    - Gifts In-Kind
      - Do Not Post to Ledger

Class Topics Cont.

Post Contributions

Contribution Reports

- Daily Contribution Report
- Check Deposit Report
- Daily Contribution Breakdown
- Contribution Worksheet

Notes

Notes

Contribution Procedures

Mon 11:15 - 12:30 | Rockbridge Reserve
Wed 8:15 - 9:30 | Barn

Roslyn Brittain

Class Description

Go beyond the basic Contributions Entry and the Daily Report of Giving . Maintaining the integrity of the Contributions History file is covered, as well as demonstrating its printing capabilities . The use and set up of "Special" and "Visitor" giving codes to track loose cash and visitor gifts are explained . If you receive regular checks or electronic fund transfers that are generated by givers' banks, you'll also learn how to streamline entering those in your contributions records . Information about handling special offerings, gifts-in-kind, and non-deductible gifts is given . Tracking and reporting of Memorial Gifts is also covered.

Class Topics

Linking Contributions to Accounting

Giving Funds

- Creating Giving Funds
- Creating Giving Sets
- Non Tax-Deductable Gifts

Giving Unit Codes

- Loose Offering Giving Code
- Visitor Giving Code
- Updating Giving Unit

Recording Contributions

- Batch Contribution Entry
  - Special Offerings
  - Gifts-in-Kind
  - Mass Contribution Edit
- Contribution Records
  - Used for other payment processors besides Engage Giving
  - Used for returned deposit items

Memorial Gifts

- Activating Memorial Gifts/Contribution Link
  - Recording Memorial Gifts as contributions
  - Recording Memorial Gifts not as contributions
  - Using Memorial Gifts
  - Memorial Gift Reports
    - Reporting Gifts to the Designee's Family
    - Memorial Gifts Given Report
    - Memorial Gifts Used Report
    - Memorial Gift Labels

Class Topics Cont.

Contribution Procedures

- Transferring Contributions between Giving Units
  - Transferring vs. Merging Giving Unit Records
  - Transferring Contributions from a Visitor Giving Unit Record
- Giving Unit Email Maintenance

Contribution History

- Creating/Updating Contribution History

Notes

Notes

Contribution Statements

Mon 1:45 - 3:00 | Rockbridge Reserve
Wed 9:45 - 11:00 | Barn

Roslyn Brittain

Class Description

Accurate and timely Giving Statements promote good stewardship by members and donors. This class reviews the Contribution Statement report options built into CDM+ so you can decide which is best for your church . This one class covers the creation of, paper, emailed, and online Giving Statement reports. Using contribution Receipts is also covered.

If you have the responsibility to prepare Giving Statements, don't miss this class!

Class Topics

Contribution Statement Options

- Contribution Statements
- Contribution Statements Email
- Contribution Statements Line
- Contribution Statements Line Email
- Online Giving Statements
- Contribution Receipts

Configuring Contribution Statements

Formatting Options

- Close look at Configuring Ranges
- Email Statement Setup
    - Giving Unit Email Maintenance
    - Notices (Training on Notices will be offered in a separate class)

Online Statements

- Preparation
- Generate a Batch
- Reviewing the Statements
- Publishing the Statements
- Email Published Statements
- Retracting Statements
- Viewing and Downloading Statements
    - How to see if a Donor has Viewed their Statement

Notes

Contributions Pledging

Tue 9:45 - 11:00 | Barn

Roslyn Brittain

Class Description

Churches often use the pledging process as a financial forecasting tool. Learn how to enter annual pledges and use the Multi-Year Pledge function. Learn what “projected” pledges are and how they are integrated into the reporting process. Pledge comparison reports are reviewed and the process of creating a Letter Notice with a member's actual Pledge Amount included is demonstrated in this class.

Class Topics

Pledge Preferences

- Terms

Giving Funds

- Importance of separate Giving Fund for each Pledge Year

Pledges

- Establishing Pledge Funds/Pledge Setup
- Entering Pledges
  - Actual vs. Projected
  - Initial Amount
  - Frequency
- Pledge Changes/Cancellations

Pledge Reports

- Pledge Listing
- Pledge Letter Notice
- Pledge Comparison
  - Actual vs. Pledge
  - Pledge by Month

Notes

Contribution Comparison Reports

Wed 11:15 - 12:30 | Barn

Roslyn Brittain

Class Description

In this session, we review many of the reports within Contributions. Comparative reports and exports are investigated. Learn how to create Contributions letters to givers that include their Year-to-Date giving totals right in the text of the letter! Listing reports, including Giving Detail by fund(s) and Giving by Date, are effective evaluation tools for stewardship committees. Analysis of giving by dollar ranges and increase/decrease in giving by individuals or giving to specific Giving Funds is taught.

Class Topics

Contribution Reports

- Labels/Envelopes
- Notices
- Statements
- Receipts

Daily Reports

- Daily Report of Contributions
- Daily Contribution Breakdown
- Check Deposit Reports

Listing and Exports

- Giving Unit Listing
- Contribution Worksheet
- Detail Contributions
- Contribution Totals by Date
- Contribution Custom Listings and Export
- Pledge Summary Custom Listing and Export

Notices

- Contribution Letters

Comparative

- Composite by Giver vs Composite by Date
- Totals By Month
- Contribution Range
- History Comparison

Engage

- Transaction Custom Listing and Export

Notes

Engage Online Giving and Online Payment Processing

Tue 11:15 - 12:30 | Rockbridge Reserve
Tue 3:15 - 4:30 | Rockbridge Reserve

Julianne Manning

Class Description

Online giving and payment options are plentiful, but only one solution – Engage Giving with Payment Processing – automatically enters donations and payments into CDM+ Contributions and CDM+ Fund Accounting! Learn how to set up Engage Giving to allow easy, secure one-time and recurring online giving via debit card, credit card, or ACH bank account transactions. Find out how to organize funds using giving sets, and how to handle gift notifications, confirmation emails, processing fees, and more. Plus, we will discuss how to track these online gifts, event registrations, and payments from receipt to positing to the ledger.

Our unique Deposit Processing tool automatically reconciles electronic deposits made into your bank account and creates ledger entries that track the income and fees associated with these transactions. Learn how to track the status of payments, including failures and returns, and how to issue refunds.

Class Topics

Engage Giving

- Engage URL
- Memo
- Staff Notifications
- Fee Assist
- Guest Gifts

How to Create a Giving Set

- Naming the Set
- Customizing your URL
- Ways to Publish your Link
- Adding Funds
- Enabling Recurring Payments
- Allowed Payment Methods
- Customizing the Look and Feel of your Link

How to Give through Engage

- New Members
- Give as a Guest
- Make a Donation
    - Give Anonymously
- How To Give By Signing In
    - Manage Recurring Donations
    - See Online Statements
    - Update Payment Method

Class Topics Cont.

Administering CDM+ Engage Giving (Giving Unit Records)

- Scheduled Gifts
- New Gifts
- Payment Methods
- Recent Gifts

Online Payment Processing

Permissions

Setting Up Accounts For Income and Fees

- Contributions
- Event Records
- Engage Billing

Process Pending Contributions

Event Registration Payments

Deposit Processing

- Mark For Processing
- Red Dots
- Post
- Toggle Already Marked For Processing Button
- History
    - Print
    - Show Records
    - Unprocessed
- Online Deposits

Payment Administration

- Search Transactions
    - Details
    - Scheduled Gift
    - Issuing a Refund

How To See Expiring Cards

One-Time Charge

Bonus Materials

- Transaction Custom Listing Report
- Text to Give

Notes

Notes

Grow Your Giving

Wed 8:15 - 9:30 | Rockbridge Reserve

Julianne Manning

Class Description

CDM+ allows you to turn your data from your database into a powerful fundraising tool. Whether you're raising money for a capital campaign, mission trip, or just want to find ways to increase your weekly Tithes and Offerings, CDM+ provides specific tools to increase your giving. In this class, we'll focus on ways you can pull different reports to see live data on your givers, customize your giving links, and provide marketing tips and tricks on how you can publish your links. We'll also hear from other users on ways they successfully use their giving links.

Class Topics

Defining Your Donor

- Recurring Givers
- Major Givers
- Special Interest Givers
- Lapsed Donors

Customizing Your Giving Sets

- Determine how many funds to add to a set and when to use them
- How to continue your branding for your purpose

Marketing Tips and Tricks

- Ways to Publish Your Links
- Where to Put Your Link On Your Website
- How to Encourage Members to Use Online Giving
- Contribution Notices
- Current Giving Trends

User Experience

- Hear from each other on specific ways you have used your giving links

Notes

Getting Started Accounting

Mon 9:45 - 11:00 | Bluegrass A
Tue 11:15 - 12:30 | Bluegrass A

Jennifer Nelson

Class Description

In this class, we cover the basics of CDM+ Accounting beginning with the Accounting Setup Window and moving through the Chart of Accounts to the General Ledger. Participants receive a solid "how-to" introduction to Accounting Beginning Balances and Ledger entries. Deposits and Journal entries are also explained.

This class also covers an introduction to double-entry accounting including Account Types, Debits and Credits, Funds, Fund Accounting, and the relationship of Ledger Entries to Income/Expense and the Balance Sheet reports.

Class Topics

Accounting Basics

- Balance Sheet
- What is Fund Accounting
- Account Types
- Fund Balance Accounts
- Double Entry

Setting Up Your Chart of Accounts

- Think with the end in mind
- Categories/Sub-Categories
- Balance Sheet Accounts
- Income/Expense Accounts

Accounting Setup

- Beginning Balance Window
  - Purpose of it
  - Keeping it in balance
- Formatting Checks
- Check Numbers

Notes

General Ledger A & B

Mon 11:15 - 12:30 | Gen Ledger A | Bluegrass A
Mon 1:45 - 3:00 | Gen Ledger B | Bluegrass A
Tue 1:45 - 3:00 | Gen Ledger A | Bluegrass A
Tue 3:15 - 4:30 | Gen Ledger B | Bluegrass A

Jennifer Nelson

Class Description

This class takes the next step in CDM+ Accounting and delves deeper into ledger entries, budget, bank reconciliation, period closing procedures, and Advance Fund Accounting. Learn how to save time by using Ledger recurring transactions for month-end transactions and check-writing. Emphasis is also given to troubleshooting issues such as finding and correcting ledger mistakes, and understanding the relationship between Contributions, Accounts Payable, and Payroll.

The General Ledger class is one class spread over two class periods repeated two times. Participants should plan to take the same Part A & Part B together.

Class Topics

Ledger Entry Records Window

- What is the Ledger Entry Records window and what is it’s function
- How to Navigate the Window
- Entering different types of Transactions into the Ledger
  - Check
  - Entry
  - Deposit

Recurring Ledger Entries

- Set Up Entries
- Creating Recurring Entries from Setup

Voiding and Deleting Ledger Entries

- Offsetting Entry
- Zeroing Out Entry

How To Search In The Ledger Entry Record Window

- Find
- Advanced Find
- Searches On the Side

Budget

- Creating a New Blank One
- Copying From a Prior Budget
- Adding Accounts
- Budget Inspector
- Budget Window Features

Class Topics Cont.

Helpful Ledger and Budget Reports

Bank Reconciliation
- Adding a New Month
- Clearing Entries
- Showing and Clearing Voids

Close/Open Periods
- Closing a Month
- What Happens When You Close
- Opening a Month

Closing A Year

Notes

Notes

Accounts Payable

Tue 9:45 - 11:00 | Bluegrass A
Wed 9:45 - 11:00 | Bluegrass A

Jennifer Nelson

Class Description

This session covers the Accounts Payable process. Vendor setup and reports, including 1099 vendors will be presented. Creating recurring and non-recurring invoices, the use of Mobile Receipts and the use of invoice reports is demonstrated.

We help you understand the purpose and function of accrual accounting and how easy it is in CDM+. This class also covers how to select invoices for printing, check printing, and re-printing, if necessary. The Post to Ledger option and posting reports is detailed.

Class Topics

Creating a Vendor

- How to Inactivate a Vendor
- Miscellaneous Vendors
- Creating 1099 Vendor and Marking Payments as 1099 Items
- Creating Credit Card Vendor

Entering Purchase Orders

Entering Invoices

- Entering Credit Card Purchases

Marking Invoices to Be Paid

- Check
- Auto-Draw
- Credit Card

Printing Checks and Posting Payables to the Ledger

Create Recurring Transaction Invoices

Ledger by Vendor Report

- 1099 Vendors Only
- How to Select Specific Vendors

Mobile Receipts

Notes

Accounting Reports

Mon 3:15 - 4:30 | Bluegrass A
Wed 11:15 - 12:30 | Bluegrass A

Jennifer Nelson

Class Description

This class will go over all the Accounting reports in CDM+, the different features found in ledger daily/week work reports, budget reports, and month-end reports. This class covers an in-depth review of ledger reports, including Monthly Comparison, Monthly Summary, Range Summary, Ledger by Accounts, Accounting Balances-Balance Sheet, Trial Balance, and Fund Activity. Using reports as troubleshooting tools is also demonstrated.

Class Topics

How to Generate Reports and Use Reports for Troubleshooting

Creating Account Sets

Using the Account Browser to Select Reports

Activity Reports

Balance Reports

Comparison Reports

Notes

Accounts Receivable

Wed 8:15 - 9:30 | Bluegrass A **Jennifer Nelson**

Class Description

The Accounts Receivable area of CDM+ Accounting is a valuable tool for any type of invoice/billing needs; i.e., churches with a school or day care center. This class reviews all aspects of Accounts Receivable. See how easy it is to keep track of money owed to your organization and to present professional invoices/statements. We will also cover Engage Billing which allows customers to see their balance and make online payments.

Class Topics

Setting Up Account Numbers in Accounting

Customers

- Creating New Customers
- Setting up Recurring Invoices
- Linking Individuals for Online Engage Payments

Accounts Receivable Invoices

- Creating New Invoices
- Creating Recurring Invoices
- Accruing Invoices

Payments

- Creating New Payments
- Posting Payments

Engage Billing

- Seeing Invoices
- Payments

Statements

- Generating a Statement
- Printing Statements

Accounts Receivable Reports

Notes

Getting Started Payroll

Tue 9:45 - 11:00 | Barrel Room
Wed 9:45 - 11:00 | Barrel Room

Don Howell

Class Description

Proper payroll setup and payroll procedures are the goals of this class. You will learn time saving steps to assist with adding new employees. Participants also receive an in-depth understanding of exactly how CDM+ calculates payroll, writes checks, posts to the ledger, and can be viewed in Engage Payroll. The relationship of CDM+ Payroll with Accounts Payable and the General Ledger is presented. This class is for both the new or experienced user of CDM+ Payroll.

Class Topics

Setting Up Payroll

- Chart of Accounts
- Payroll Defaults
- Deductions
- Payer Records

Employee Information

- W-4
- Pay Items
- Time Off
- Liabilities
- Engage Payroll

Calculating Payroll

- Salary
- Hourly
- Time Off

Writing Payroll Checks/Direct Deposit/ACH

- Writing A Payroll Check
- Direct Deposit Payroll
  - Set Up Employee Account Information
  - Employee Selection
  - Processing Payroll for Direct Deposit Payroll
- ACH Payroll Deposit
  - ACH Setup
  - General Section
  - Immediate Destination/Immediate Origin
  - Export File Defaults
  - Set Up Employee Information
  - Employee Selection
  - Processing Payroll for ACH Deposit
  - Create ACH File

Notes

Payroll Procedures & Reports

Tue 11:15 - 12:30 | Barrel Room
Wed 11:15 - 12:30 | Barrel Room

Don Howell

Class Description

The focus of this class is to understand the inner workings of CDM+ Payroll to help deal with situations that you may encounter. We will look at the process of voiding a payroll, reissuing a payroll check, correcting payroll not set up correctly, validating 941 and W-2 information, and verifying balance sheet payroll liabilities. An overview of the optional ACH direct payroll deposit payroll process will be presented. If time permits we will take an in-depth look at using the features in payroll to track employee sick, vacation, and comp time.

Class Topics

Voiding a Payroll

- Reissuing a Payroll Check

Correcting Taxable or W-2 Information Not Set Up Correctly

Validating 941 and W-2 Information

Verifying Balance Sheet Payroll Liabilities

- User Deductions

Aatrix and Payroll Tax Forms

- Tax Forms Payer Information
- Using Aatrix Tax Forms
- Continuous Updates
- 941 Form
- W-2/W-3 Forms
- State Forms

Sick, Vacation, and Comp Time

- Calculating Time Off

Payroll Reports

Notes

Aatrix Tax Reporting

Tue 1:45 - 3:00 | Barn

Roslyn Brittain

Class Description

CDM+ partners with a third party provider, Aatrix, to produce all State and Federal Forms. Information from CDM+ payroll is passed onto the Aatrix Form Viewer. Corrections to tax forms can be done through the Aatrix Form Viewer, but it is highly recommended that all corrections be made in CDM+. This class will prepare you to produce an accurate 941, W-2 and 1099 forms.

Class Topics

Aatrix Forms Viewer

- Printing Tax Forms
- Both Federal and State Reports are available
- How to Select the Reports
- Aatrix Form Viewer Installation & Setup
- Validate Information in Wizard

941 Reporting

- Use the Taxable Income Summary Report, with the Date Paid Option, to validate Information on the 941 are correct
- How to Produce the Form
- Best Practice on How to Make Changes if Necessary
- Print Form or File Electronically

W-2 Reporting

- Validate the information on the Payer record
- Use the Taxable Income Summary Report, with the Date Paid Option, to validate Information on the W-2 forms
- How to Produce the Form
- Best Practice on How to Make Changes if Necessary
- Print Form or File Electronically

1099 Reporting

- Use the Ledger by Vendor Report to determine what Vendors needs to receive a 1099
- How to mark missing payments to be Included on the 1099
- How to Produce the Form
- Best Practice on How to Make Changes if Necessary
- Print Form or File Electronically

History

- How to Find Previously Filed Reports
- View Historical Reports
- Reports are saved on the computer where the report was generated

Notes

Roommate Facilities Manager

Mon 9:45 - 11:00 | Barn

Julianne Manning

Class Description

Roommate is your solution for facilities scheduling. Here we present in detail how to use CDM+ Roommate to track your events, rooms equipment, whether on campus or off.

Discover other uses of this powerful tool in scheduling staff, categorizing events by Department, and keeping an up-to date inventory of your organization's assets. We will also cover how to use Web Ministry Tool to publish your calendars online.

Class Topics

What Is Roommate?

CDM+ Roommate combines an event calendar, resource and contact manager into one easy-to-use, powerful program.

Uses For Roommate

- Event Calendar
- Staff Schedules
- Volunteer Schedules
- Resource/Inventory Management
- Facility Management

Roommate Master Coding System Options

- Room Configurations
- Departments
- Resource Types
- Roommate User fields

The Different Records of Roommate

- Room records
  - Room Details
  - Configurations
  - Resources
  - Connections

Class Topics Cont.

The Different Records of Roommate (cont.)

- Resource Records
  - Resource Details
  - Default Locations
  - User Fields
  - Connections
- Contact Records
  - Contact Details
  - Connections

System Preferences

- Managing Conflicts

User Preferences

- Sch. Formats
- Room Sort
- Schedule
- Monthly Cal.
- Event Sort

Events Schedule

- Monthly, Weekly, and Daily Views
- Filtering by Department
- Filtering by Room
- Navigating Options
- Saving Views
- Event Inspector

Creating An Event

- Event Details
- Rooms
- Billing
- Notes
- Resources
- Recur Event
  - Standard and Advanced Options
  - Adding or Skipping a Date
  - Deleting a Recurring Event
- Conflicts

Class Topics Cont.

Publishing Your Calendar Online

- How to Login to Web Ministry Tools
- How to tie Web Ministry Tools to Roommate
- How to Publish the Department and Rooms that you want
- How to Publish Your Calendar to your Website

Roommate Reports

- Monthly Calendar
- Event Custom Listing and Export Report Options
- Resource Reports

Notes

Event Registration A & B

(A) Mon 11:15 - 12:30 | Barn
(B) Mon 1:45 - 3:00 | Barn

Julianne Manning

Class Description

This is a two-part class that will cover both the setup of an Event and how to utilize tools to manage your event. In Part A we will walk through the steps to create an event record, structure custom activities, setup confirmation emails, create an online registration option through Web Ministry Tools, and record manual registrations. We will also highlight how to tie event payments and fees to CDM+ Fund Accounting and how you can see historical event registrations for members in CDM+ Membership. In Part B we will explore the tools to help make your event a success. In this class we will focus on what to do with all of your online and manually entered registrations. From our robust reporting system to creating name badges to sending out follow-up emails and letters we will walk through these features that will help you manage your event like a pro!

Class Topics

Creating An Event Record

- Adding Event Details
- How to Add Activities
- Adding Connections

Event Notices

- How to Navigate to Event Notices
- Ways to use Event Notices
- How to Set up a Search to Send Notices

Connecting an Event Record to Web Ministry Tools

- How to Login to Web Ministry Tools
- Creating and Connecting an Event
- Previewing and Publishing your Event Link

Registration Entry

- Engage Registrations
- Manual Registrations
  - Registrants
  - Contacts
  - User Fields
  - Activities
  - Payments
  - Sent Notices
  - Post Payments to Ledger
- Adding New Payments for an Event
  - Through Engage
  - Through CDM+

Class Topics Cont.

Viewing Historical Event Registration for Members

- Individual Records
  - Connections

Event Reports

- Master List
- Master List Detail
- Payments
- Activity
- Custom Listing

Names Badges

Labels/Envelopes

Notes

Notes

Check-In/Check-Out

Wed 11:15 - 12:30 | Rockbridge Reserve **Julianne Manning**

Class Description

CDM+ Check-In/Check-Out is a versatile addition to the CDM+ suite that tracks everything from childcare to youth groups, adult classes, and more. This class covers every main window in the Check-In/Check-Out program including setup, performing check-ins and check-outs, and running reports. We also discuss how to configure Check-In/Check-Out for a broad range of events, from security-conscience childcare to automatic attendance entry using self-check-in, including using the CDM+ Mobile app.

Class Topics

Check-In/Check-Out Event Record

- Event Tab
- Check-In Reports
- Validation Fields
- Notes
- Connections

Check-In/Check-Out Event Sets

- How to add Events to an Event Set
- When to use an Event Set

Self (Manual) Check-In

- Self Check-In Process
- Check-In Reports

Staff Check-In

- Staff Check-In Process
- Check-In Reports
- Viewing an Individual Record
- Troubleshooting
    - Re-printing name badges

Barcode Check-In

Mobile Check-In

- Tablets
- Phones
- Check-In Process
- Printing Name Badges

Mobile Check-Out

- Different Check-Out Scenarios

Class Topics Cont.

Check-In/ Check-Out Child Care Options

- Pre-Authorization
- Check-In Name Badges and Receipts
- Adding Notes
- Manual Check-Out
- Check-Out Using a Barcode
- Checking Pre-Authorization

Reports

- Utilizing Membership Reports
- Check-In/Check-Out Report Options

Notes

Notes

Administering CDM+

Mon 3:15 - 4:30 | Barn

Don Howell

Class Description

Get familiar with the essential CDM+ administrative features. We'll discuss best practices for managing user's permission and review systems and user preferences to get the most of CDM+. Using the Audit log to review detailed record changes will also be covered.

Class Topics

CDM+ Structure

- CDM+ Desktop
  - Primary platform for managing CDM+ data
  - Download from Suran Help Center
  - Contains windows, reports, and program logic
- CDM+ Engage and Web Ministry Tools
  - Web-based access to your data
  - Member's portal
  - Online Giving
  - Registrations
- CDM+ Mobile
  - Data access from a mobile device
  - Download from the App Store/Google Play/Amazon
- CDM+ Hosting
  - Service managed and provided by Suran
  - Hosted in data centers around the US and internationally
  - Manages backups, including separate off-site backups
  - Communicates between CDM+ Desktop, Engage, WMT, Mobile, and your data
  - Also contains certain server-based functions for CDM+
- Database
  - Main Database or Archive
  - Contains all your information
  - Service managed and provided by Suran
  - Hosted in data centers around the US and internationally
  - Manages backups, including separate off-site backups
  - Communicates between CDM+ Desktop, Engage, WMT, Mobile, and your data
  - Also contains certain server-based functions for CDM+

Maintenance

- Consistent data entry (see Archiving & Data Cleanup Manual)
- Security

Class Topics Cont.

Installing CDM+

- Installing on a Mac
- Installing on a Windows machine

Connecting to Your Account

Logging in to CDM+

- Alternate Login Method
- User Login
- Passwords

Administration

- Access / Audit Log
- Permissions
- Mobile Profiles
- Updates
- Payroll
- Sets
- Searches
- Notices
- Encryption

Preferences

- User Preferences
  - Toolbars
  - Defaults
  - User Email
  - Enter Key Function
- System Preferences
  - Name
  - Terms
  - System Email

Suran Support

- Opening a Support Ticket
- Opening a Training Ticket
- Opening a Customer Service Ticket

Notes

Notes

Engage Administration

Tue 9:45 - 11:00 | Rockbridge Reserve
Tue 1:45 - 3:00 | Rockbridge Reserve

Julianne Manning

Class Description

Bring fresh, enriching content to your organization's website and know that any information you publish there is updated whenever you make changes in CDM+. This class walks you through setting up CDM+ Engage, managing Engage user accounts, and publishing Engage to your members, supporters, and visitors. How to work with Web Ministry Tools is included, as is granting access to staff to manage just the right areas of Engage. If you administer Online Giving, Directories, Payroll, or Events, this class is strongly recommended for you!

Class Topics

What Is Engage?

What Can You Do With Engage?

Getting Started

- No Additional Cost with Any SAAS or Cloud Plan
- Merchant Account If Using Engage Giving
- Assigned a Unique URL You Can Use

Used Permission

- How to Create Engage Administrators

Engage Settings

- Organization
- Member Changes
- Publish Engage

Organization Directory

Logging Into Engage

- Creating An Account
- Matching Email Address
- Email Address Not Found

Class Topics Cont.

Engage Privacy Settings

- Profile Settings
- Profile Preview

Managing Engage Credentials (Individual Record)

- Change, Clear, and Transfer an Individual's Engage settings
- Engage Roles
  - Standard
  - Administrator

Processing New Accounts

Merging Accounts

Accessing Engage on a User's Behalf

Web Ministry Tools

- Creating a Tool
- Options
- Publish
- Church Profile
- Users

Notes

Notes

CDM+ Mobile

Tue 9:45 - 11:00 | Bluegrass B
Wed 11:15 - 12:30 | Bluegrass B

Dean Phelps

Class Description

People serving in faith-based or other non-profit organizations are not stationary. They need data that is on the move with them. In this class, we will learn how the CDM+ Mobile app keeps you connected to CDM+ from your iOS or Android mobile device. We will learn how to use CDM+ Mobile to work with people, attendance, visitation contacts, and charge receipts.

Class Topics

Connecting a Device to Your Database

- Setting up a Device
- Transferring Settings to a New Device
- Disabling a Device

CDM+ Mobile Applications

- Applications for most CDM+ programs
- Setting up Access to Applications

Staying in Touch with People by Email and Text

- Setting up Mobile Uses for Email and Text Messages
- Contacting Individuals
- Contacting Groups

Getting Reminders

- Using the Reminders app

Recording Attendance

- Record Attendance Manually
- Setting up Barcode Attendance

Notes

Searches/Custom Listings

Mon 3:15 - 4:30 | Bluegrass B
Wed 9:45 - 11:00 | Bluegrass B

Dean Phelps

Class Description

At its core, CDM+ is both a database of people and an accounting database. People relate to your organization in a variety of ways. For example, people are related to one another in households. They donate to your organization. They register for and attend events. Likewise, an accounting database is more than journal entries for income and expenses, Journal entries relate to donations as well as to customers and vendors. Those database relationships make CDM+ a robust and powerful database. In this class, we will explore how to harness that power by learning how to search the data so that we can produce reports or export data.

Class Topics

Custom Listings and Exports: Rows and Columns of Data

Begin with the End in Mind

- Desired Columns Point to the Primary Record Type
- Desired Rows Dictate the Search Criteria

Using the Record Window to Search

- Simple Finds with a Single Criteria
- Advanced Finds with Multiple Criteria

Advanced Searches Using Related Records

Building Your Custom Listing and Export

- Using Reports from the Sidebar Button
- Using Reports from the Menu Bar

Saving Your Searches

Notes

Notices

Mon 3:15 - 4:30 | Barrel Room
Wed 9:45 - 11:00 | Rockbridge Reserve

Julianne Manning

Class Description

Want to save yourself the extra steps of exporting email addresses or creating merged letters? This class covers how to use the word-processor-like features of Notices in CDM+. You can create eye-catching, personalized cards, letters, and emails from within CDM+. We also cover organizing notices by category and set access to saved notices. Put the power of CDM+ to work in your communications!

Class Topics

Professional Communications

Notices For Different Parts Of The Program

Features of Notices

- Letters
- Cards
- Email
- Pull in Database fields
- Continuation of your branding

Organizing Notices

- Navigation
- Select/Add
- Add/Edit/Duplicate/Delete
- Adding and Duplicating you're prompted to provide a name

Setting Access

- View
- Modify

Categories

- Optional
- On-the-Fly and MCS
- Assigning a Category to New and Old Notices

Formatting/Editing Notices

- Formatting Palette
- Insert Options
- Find and Replace
- Custom Dictionary

Class Topics Cont.

Delivering, Tracking, and Resending Notices

- How to Print or Send a Notice
- How to View the last time a Notice was Sent
- How to see Sent Notices from Address/Individual/Giving Unit Notice tab
- Individual Sent Notice Record window
- Re-send a Notice

Notes

Notes

Archiving & Data Cleanup

Mon 3:15 - 4:30 | Rockbridge Reserve
Tue 11:15 - 12:30 | Barn

Roslyn Brittain

Class Description

Confused about archiving? Learn the purpose and benefits of archiving and tips and techniques for cleaning up your data. This class teaches not only how to archive CDM+ data, but when and what data to archive. Tools to make bulk updates and corrections are also covered, as are best practices for standardizing your data to improve reporting and data analysis.

Class Topics

What Is Archiving and Why Do it?

- Archiving moves some information out of your main database into a separate database
- It is used to section off historical information while keeping it readily available
- It is part of a control process for your database, much like closing an accounting year or filing giving history
- Three Options of Archiving Ranked
  - Standard Archive
  - Copy Only
  - Delete Only (we recommend to have Support assist you with this option)

Program Organization

- Understanding the Parent/Child relationship when archiving

Archiving Considerations

- One Archive database should be used to Archive all of your CDM+ data
- Timing
  - Most often done at the end of the year
- Leave the most recent 3 -5 years of data in the main database

Preparation Steps

Special Considerations Before Archiving

- Attendance - Run the Update Attendance History Function
- Contributions - Processing Pending Contribution records, prior to running the Update Contribution History Function

Address Records

- Use Mailing Codes: Pending Archive, Ready to Arching

Class Topics Cont.

Individual Records

- Individual marked as Inactive
- Membership Status: Deceased
- Death Date

Ledger Entry Records

We strongly encourage to have a Support Specialist assist you in preparing your data, prior to archiving.

- Process Online Deposits
- Close all months and years
- Be certain that all ledger items have been cleared on bank reconciliation statements for the period to be archived
- If there are any offsetting voided entries, check that both sides of the voided entries are in the records to be archived

Archive Process

- Back up your active CDM+ database
- Decide whether to create a New Archive or to Archive to Existing file
    - New Archive - Put “Archive” in Name
- Select which records to archive
    - Archive records selected by an Advanced Find
- Check the archive preview and settings
- Proceed to Archive records

Accessing Archive

- How to login to the Archive database
- User Management and Login

Restoring Data from an Archive Database

- Select records to restore through the Advanced Find
- Check the archive preview and settings
- Proceed to restore records

Notes

Notes

Regional

Mon 1:45 - 3:00 | Barrel Room

Dean Phelps

Class Description

The CDM+ Regional program tracks data for multi-level organizations that manage data for multiple entities, such as a state or regional office that oversees a group of local churches. We will explore Church Records in the CDM+ desktop as well as additional data for individuals, households, and giving units. We will also look at additions to CDM+ Mobile and Engage with CDM+ Regional.

Class Topics

Church Records

- The Church Records Window
- Church Giving Units
- Church Photos

Connecting Addresses and Individuals

- Church Positions

Churches in CDM+ Mobile

- Set Up

Church Information in Engage

Reports and Notices

- Church Position Directory
- Church Position Notices

Denominational Customizations

- Christian Church (Disciples of Christ)
- Church of God - Cleveland
- United Church of Christ

Notes

DOC Search and Call

Mon 9:45 - 11:00 | Barrel Room   Dean Phelps

Class Description

The CDM+ Search and Call program allows regional offices of the Christian Church (Disciples of Christ) to retrieve and share minister profiles, manage congregational profiles, and maintain a history of activity with ministers and search committees. We will explore Ministry Position Records and Minister Records. We will also describe how to publish and share minister and congregational profiles.

Class Topics

On the Church Side

- Creating a New Ministry Position
- Setting Up the Search Committee
- Using the Online Congregational Profile Tool
- Sharing the Congregational Profile

On the Minister Side

- Searching for Minister Profiles
- Flagging and Sending Minister Profiles
- Sharing the Minister Profile

Notices, Reports, and Exports

Notes

DOC Minister Reporting

Mon 11:15 - 12:30 | Barrel Room   Dean Phelps

Class Description

The master list of ministers is maintained in the minister database at Disciples Home Missions. The Design stipulates that regions hold responsibility for timely reporting of minister data, especially regarding standing and the credentialing region. The CDM+ Regional program for the Christian Church (Disciples of Christ) is customized so that regions can both manage minister information and report that information to the wider church through Disciples Home Missions.

Class Topics

General and Regional CDM+ Databases

- Differences
- Codes from General CDM+ Database

Individual Records for Ministers

- Minister checkbox
- DOC Minister tab
- Standing Information on the DOC Minister tab
- Church Positions on the Church tab
- Reporting Minister Changes to DHM
- Change History

When a Minister Dies or Leaves the Region

Minister Information in ALEX

Notes

Church of God State Office Training

Mon 9:45 - 4:30 | Carriage Room
Tue 9:45 - 4:30 | Carriage Room
Wed 8:15 - 12:30 | Carriage Room

Sherry Snedden
Kim Gill

Class Description

This class is specific to staff of the State offices of the Church of God (Cleveland, TN). We will examine importing and processing Treasurer and Minister reports, along with specific items related to church tracking, minister tracking, and all special reports that the state office receives from local congregations. You will also be walked through many of the programs of CDM+ and show their application to State offices.

Class Topics

Day 1

Membership

- Address
- Individual
- Giving Unit Records
- Church Records
  - ACH Setup

Reporting

- Treasurer Reports
  - Import Reports
  - Online Reports
  - Manual Reports
- Membership Update
- Minister Reports
  - Import Reports
  - Online Reports
  - Manual Reports
- Other Reports

Contributions

- Procedures
- Pledging
- Email Statements

Engage Giving

- Settings
- Giving
  - Receiving
  - Processing
  - Reporting
  - Failed
- Search Transactions

Class Topics Cont.

Notices

- Overview
- What's Possible
- Creating Notices
- Notice Editor
- Sending Notices

Day 2

General Ledger

- Accounting Basics
- Chart of Accounts
- Creating and Finding Ledger Entries
- Recurring Ledger Entries
- Voiding and Deleting Ledger Entries
- Bank Reconciliation
- Budget
- Close/Open Periods

Accounts Payable

- Vendor Records
  - Creating
  - Inactive
  - 1099
- Creating and Managing Invoices
  - Creating
  - Marking to be Paid
  - Printing and Posting
  - Create Recurring
- Reprinting Checks
- Mobile Receipts
- Reports

Payroll

- Employee Setup
  - Clergy Setup
- Deductions Setup
- Calculating Payroll
- Voiding Payroll
- Reprinting a Payroll Check
- Adjustments to Payroll
- Liabilities
- Payroll Reports
- Payroll Tax Forms - Aatrix
- 941 Report
- W-2/W-3
- 1099

Class Topics Cont.

Day 3

Reporting

- Custom Listings and Export
- Report Sets
- Account Browser
- Activity Reports
- Balance Reports
- Comparison Report
- Trial Balance
- Audit Trail

Event Registration

- Event Records
  - Activities
- Entering Registrations
- Registration Notices
- Sent Notices
- Web Ministry Tools
- Reports
  - Master List for Event
  - Activity Report

Mobile

- Overview/Availability
- Provisioning
- Creating
- Disabling
- Mobile Apps
- Church Information
- Pastor Information
- Reminders

Notes

Notes

Notes