Getting Started with CDM Plus

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Getting Started with CDM Plus

What is CDM Plus?

CDM Plus™ (Church Data Master Plus™) is a very powerful and useful tool for the ministry of your congregation. It allows you to manage and access vital information which will enhance the ministry of your church. **The key to any good data management program is giving prior thought to how you will want to access the information you want to manage.** This manual will assist in that process and help you get started quickly with CDM Plus taking advantage of its many powerful features.

CDM Plus comes in four modules:

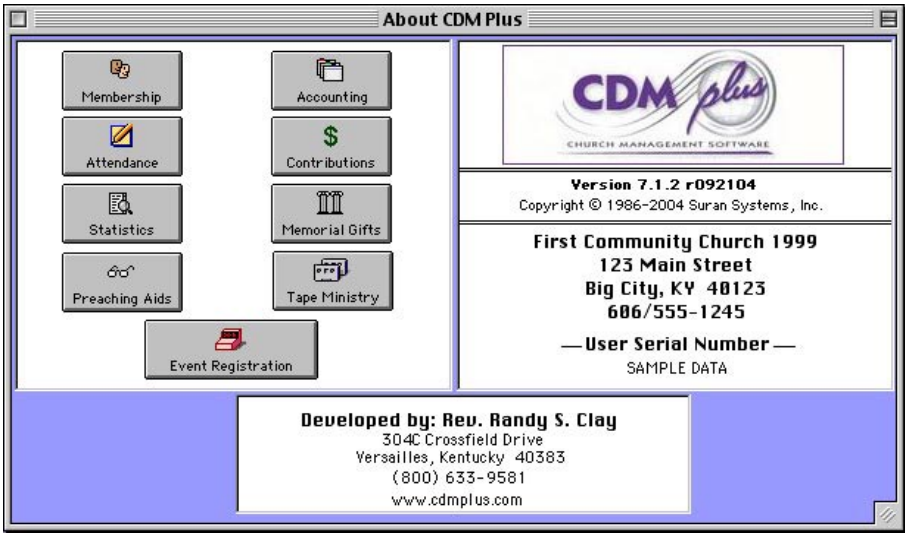
Module 1 - **Membership/Attendance** which maintains family and individual membership records as well as tracking attendance at any number of services, classes and activities. Also included in this module are the Statistics, Preaching Aids, and Tape Ministry program areas.

Module 2 - **Contributions** which tracks an unlimited number of different types of offerings to the church. Detailed reports and individual giving statements can be produced. Also included in this module is the Memorial Gifts program area.

Module 3 - **Accounting** which includes Accounts Payable, Accounts Receivable, General Ledger, and Payroll.

Module 4 - **Event Registration** can record details and registrations for a wide range of events. The program tracks monies received and due and prints name badges and many other reports.

The nine program areas of CDM Plus can be accessed by clicking on the toolbar icons, or from the **CDM+** menu. Keyboard shortcuts are also shown on the menu. The program areas are also available by clicking on the buttons on the **About CDM Plus** window which appears at start-up of the program. **About CDM Plus** can also be opened at any time from the menu (Macintosh) or **File** menu (Windows).



About this Manual –

This manual gives an introduction to the many powerful features of CDM Plus followed by easy to follow step-by-step instructions which will help you achieve the highest level of success and productivity possible. **Appendices** are included to offer suggestions, examples, and special procedures which help make CDM Plus what it is intended to be—a tool for ministry.

For tips in using the electronic Help, please see the **Using CDM Plus Help** section of the manual.

Things to Remember as You Begin –

Membership Information

In order to take advantage of the **Family Address Records** and **Individual Records,** you will need to compile up-to-date information on all persons affiliated with your church. A **sample membership questionnaire form** to help you with this task is found at the end of this document (page 9). You do not, however, have to have all of this information gathered before using CDM Plus. Many churches enter their address records first, then enter an individual record with only a first name and possibly some basic information, as described below in Inserting Individual Records. This way they can begin to generate mailing labels for newsletters, post contributions, and record attendance. In CDM Plus it is easy to go back and **add information** as it becomes available.

Consistency of Data Entry

It is always advisable to maintain some consistency in entering data—such as all upper case or all mixed case. Generally speaking, mixed case data entry is easier to read and presents better looking reports.

NOTE 1.1: CDM Plus can print your mailing labels in all caps even though the information is not entered in all caps. In the **Preferences/Settings** window, located under the **File** menu under **Setup,** you can have CDM Plus default your labels to all caps as necessary by clicking on the **Membership** icon and selecting that preference.

Some fields, such as those requiring a code, will only allow you to enter upper case and will automatically display information typed in lower case as upper case letters.

Common Buttons and Functions Found Throughout CDM Plus

First - Displays first **Record**.

Next - Displays the next **Record** in sequence based on the **Find** (see below).

Previous - Displays the previous **Record** in sequence based on **Find**.

Last - Displays the last **Record** entered into the file.

Find - Finds a record based on one of the indexed fields. After clicking on **Find,** the **Find dialog box** appears. Using the drop-down list, choose the field in which you wish to find. Type the information to be found in the Criteria field, choose the appropriate option, and click **OK** or press **Return**.

Add - Adds a new **Record** into the database file.

Change - Allows changes to be made in an existing **Record**.

Delete - Removes displayed **Record**.

Cancel - Cancels current **Add** or **Change** without saving changes. Does not delete displayed **Record**.

Save - Saves current **Record** with added or changed data.

Print - Prints information from displayed **Record** to various user-selected destinations.

There are keyboard equivalents for the above button functions under **Cmds** on the menu bar.

Tool Bar

An **Icon Tool Bar** appears across the top of the CDM Plus screen allowing for easy navigation throughout the program. Placing the cursor on an icon displays its name, and clicking on the icon will take you to that program area.

Program Areas **Related Functions**
(changes with program area)

The Tool Bar is divided into two sections – **Program Areas** and **Related Functions**. The icons in the Related Functions portion of the Tool Bar will change depending on which Program Area is selected.

Program areas are also available under **CDM+** on the menu bar or by clicking on the buttons on the **About CDM Plus** screen.

NOTE 1.2: If you have not purchased the module containing a program area or if your password does not allow acces to a program area, it will be grayed out and unavailable.

Moving Through Fields

There are three ways to move from one field to the next. Pressing the **Tab** key will move you to the next field. Pressing **Shift-Tab** will move back to the previous data entry field. **Clicking the mouse inside a field** will activate that field for data entry. The standard **Cut**, **Copy** and **Paste** functions can be used throughout CDM Plus.

NOTE 1.3: You can only move through fields when in **Add** or **Change** mode.

Renaming Field Titles

If the preset field names in CDM Plus do not suit the terminology of your church or denomination, you have the flexibility to change them. The following instructions show, for example, how to change Dedication Date and Dedication Place to Confirmation Date and Confirmation Place. The same procedure applies to other fields in **Individual Records**, as well as **Family Address Records**. The **Individual Records** also contain six **User-Defined fields** that do not have names yet. You may name these whatever you wish.

1- Under **File** on the menu bar, select **Setup** and then **Preferences/Settings**.

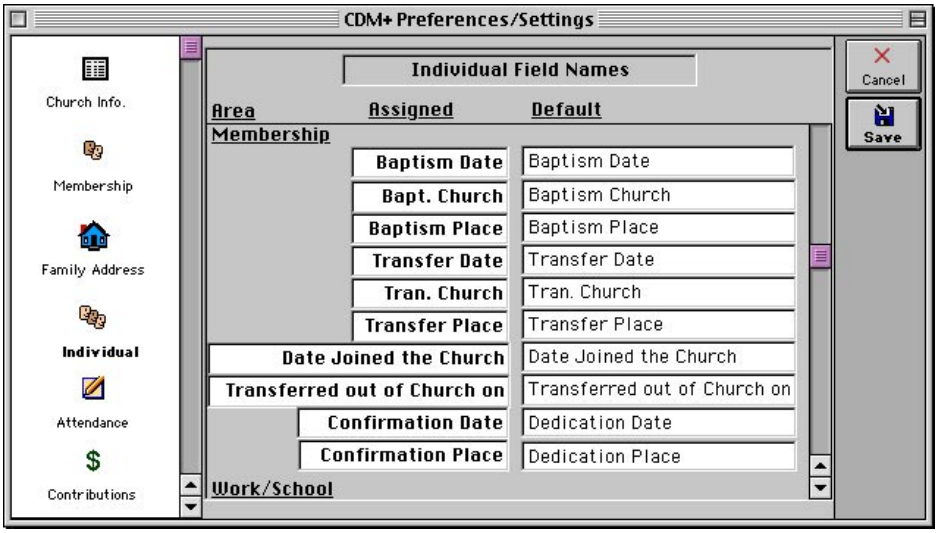
2- Click on **Individual**

in the left column.

3- **Tab** to and highlight, or use the mouse to select, the **Assigned** field name you wish to change (e.g.—**Dedication Date**).

4- Type the new field title you wish to use (e.g.—**Confirmation Date**).

5- In our example, you would then **tab to** and **highlight**, or use the mouse to select, **Dedication Place** and type **Confirmation Place** instead.



6- Once the desired field titles have been changed, click the **Save** button.

Use this same procedure to change any field titles in **Individual Records**, or use **Family Maintenance/Field Maintenance** to change field titles in the **Family Address Records**.

NOTE 1.4: These changes are stored in your data file so that even when you receive an updated copy of the CDM Plus program, your changed field titles will remain changed.

Screen Report Printing Options

In CDM Plus, when a report is sent to the screen, the **Print Icon** P appears in the upper right corner of the report. Clicking on this icon provides 4 printing options: **Show Paged Report**, **Open Page Preview**, **Print Page**, or **Print Report**. Also, the black bar at the top of the vertical scroll bar and at the left of the horizontal scroll bar provides the opportunity to split the screen top to bottom or right to left. Just click and drag the small black bar to the location of your choice.

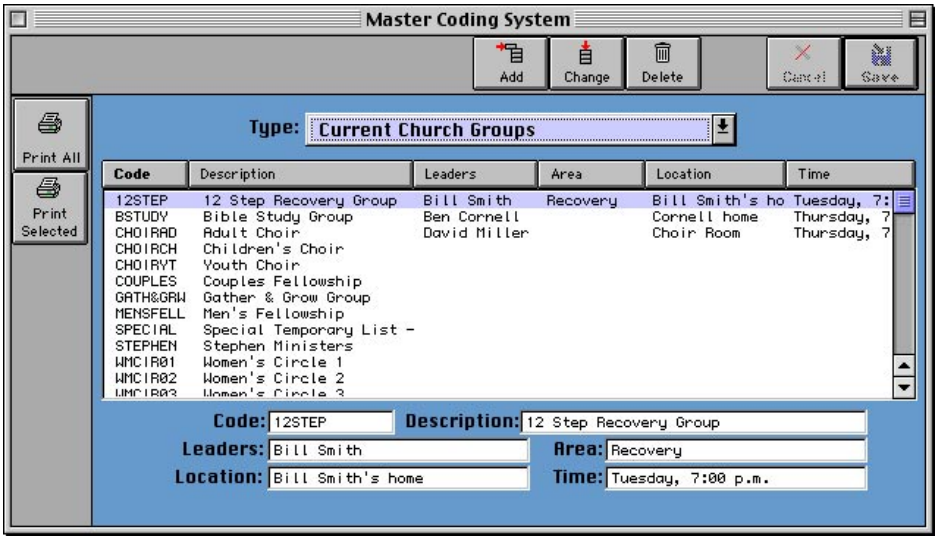
Screen Report Exporting Option

In CDM Plus, when a report is sent to the screen, a **tab-delimited export option** is available. **Click the mouse** near the upper left corner of the data you wish to export. **Click and drag** across the desired data, enclosing it within a dotted-line rectangle. Then choose **Copy** from **Edit** on the menu bar. Open a word processing or spreadsheet program and, from within that program, choose **Paste** from **Edit** on the menu bar. The data will be pasted in using a tab-delimited format. The information may then be manipulated or merged as desired.

Master Coding System

The **Master Coding System,** found under **Setup** on the **File** menu**,** allows you to create, define and manage many of the codes used within CDM Plus. Being able to establish your own coding system allows flexibility

and control over the information. All of the fields in CDM Plus which use a user-defined code accessed by the Master Coding system are listed on the **Master Coding System** window. See **Appendix A** for how to create codes in the Master Coding System and examples of the most commonly used codes.



It is helpful to insert codes and their descriptions prior to data entry. At any time you may modify and add new codes into the system. A printout of the coding system can be produced by selecting **Master Coding System** (on the **File** menu under **Setup**) and then clicking on either the **Print All** or the **Print Selected** button. When in **Individual** or **Family Address Records,** a pop-up list of possible code choices are also available whenever you are entering data by clicking on the **Arrow** button beside the field.

NOTE 1.5: Lists which have a corresponding code pop-up window are designated with an **Arrow** button beside the field. Only codes related to this field are displayed. Adding to a list can be done by double-clicking on the code in the pop-up list.

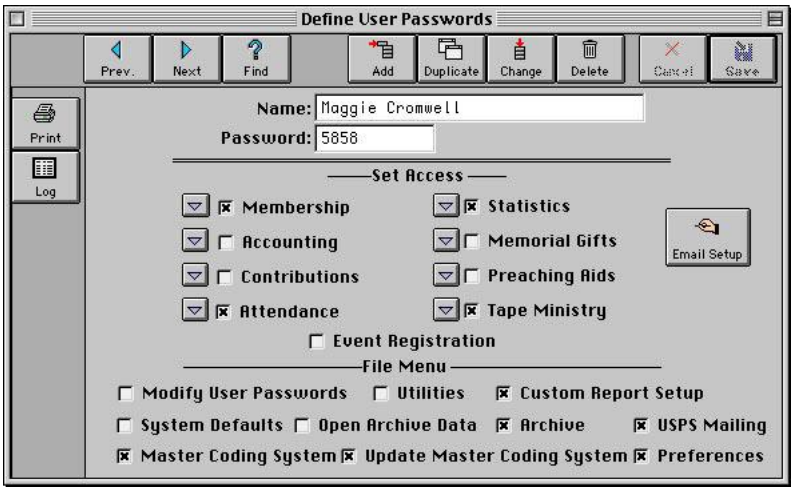
Passwords

Passwords help users maintain control over access to the important information that is kept in CDM Plus. Passwords can be established which allow users to access only certain areas of the program and/or only view information and not make any changes. CDM Plus will record who accesses the program. This **Log** can be viewed by the **Program Administrator** from the **Password Maintenance** window. Users can change their individual password at any time, but only program administrators should be able to add or change the **Access Level** of users.

To set up or change password access levels:

1- Select **Change User Password/Preferences** from the **file** menu.

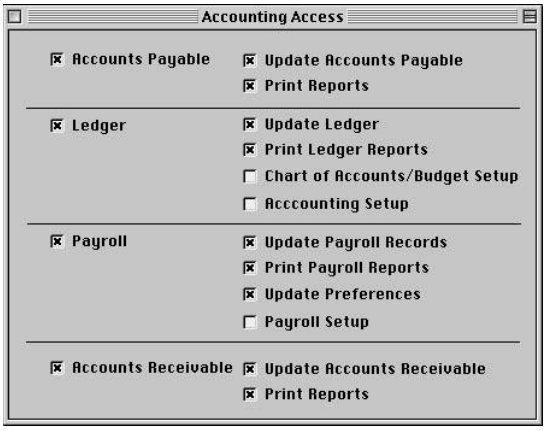
2- Click on **Password Maintenance** (if you do not have access to this level, then this button will not appear).



3- Click on **Add** or **Duplicate** to create new passwords or find an existing password to change its access levels.

4- Click on the **Checkbox** next to any item to give access or remove access to any item. An **X** in the box indicates the user has access to that item or area of the program.

5- Click on any **Down Arrow** to view additional options for any specific area of the program.

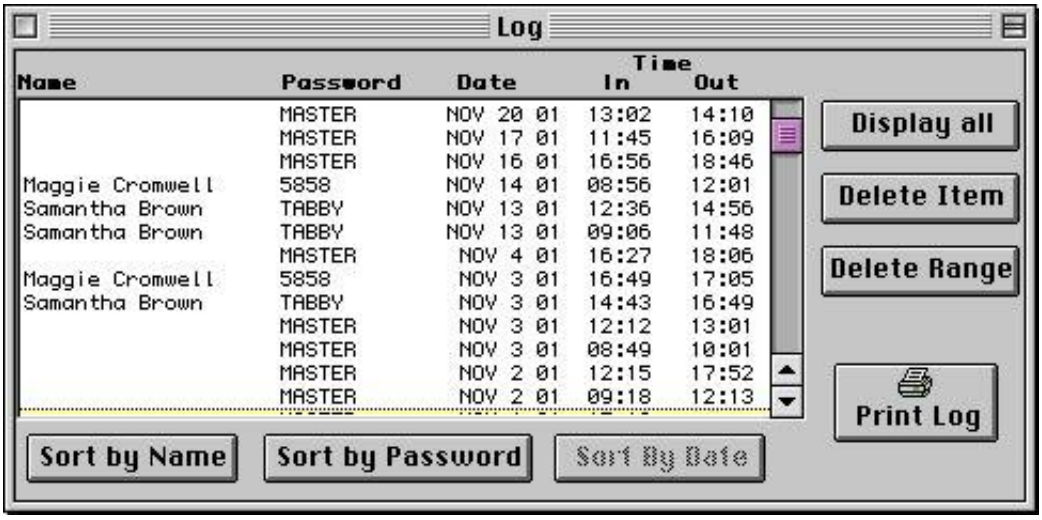


6- Click on the **Print** button to view all of the access options and rights for a specific user. (Note that if you click on this button when no password is in view, a blank worksheet will be printed.)

To view the log of access:

1- Click on the Log button from the Password Maintenance window.

2- A log of the current password will be displayed.



3- Click on **Display All** to see all information in the password log.

4- Click on **Print Log** to print the current list which is in view.

NOTE 1.5: It is a good idea to periodically delete the log information. This is done from the Log window by clicking on the Delete Range button. Enter a date range to delete the log for a specific period.

To return to CDM Plus after updating passwords, select **Return To CDM+** from the **File** menu or close the window. The current password in view will become the active password at that time.

To change program access while in CDM Plus:

1- Select **Change User Password/Preferences** from the **file** menu.

2- Enter a new password and click **OK** or press **Return/Enter**.

To change the password, but not the access level:

1- Select **Change User Password/Preferences** from the **File** menu.

2- Click on **Change Password**.

3- Enter your **New Password** and reenter it under **Verify Password**.

4- Click on **OK** or press **Return/Enter** to **Save** the new password.

Membership Questionnaire

Please note: The **Family Address Information** section (page 1) is basic contact information for the household. A separate **Individual Information** section (pages 2 & 3) should be completed for each person living here (even if for only part of the year). Please be as accurate as possible, but don't worry if you don't know all the information requested. Thank you!

Family Address Information

Mailing Label Name
(How you would like a letter sent to the entire household to be addressed—for example: Bob Jones & Mary Smith, Bob and Mary Jones, Mr. & Mrs. Robert E. Jones, or The Jones-Smith Family.)

_____

Primary Address

Street _____

City _____ State _____ Zip _____

Primary Phone Number _____ ❑ Unlisted ❑ Do Not Publish

Household Fax Number _____ ❑ Do Not Publish

Household E-mail Address _____ ❑ Do Not Publish

Optional Alternate Address (such as winter/summer or college)

Street _____

City _____ State _____ Zip _____

Primary Phone Number _____ ❑ Unlisted ❑ Do Not Publish

Household Fax Number _____ ❑ Do Not Publish

Household E-mail Address _____ ❑ Do Not Publish

Dates this address is effective _____ to _____

May we publish the above information in our church directory (unless checked "Do Not Publish")? ❑ Yes ❑ No

Please list all individuals living at this address

Name Birth date

_____

_____

_____

_____

_____

_____

Individual Information

Please complete a copy of this form for each person living at this address. If widowed, please include your deceased spouse.

Title First Name Middle Name Last Name Suffix

Preferred Name _____

Family Status ❑ Head of Household ❑ Spouse ❑ Child ❑ Other _____

Alternate Address *(If different from what is listed on* ***Address Information*** *form)*

Street _____

City _____ State _____ Zip _____

Dates this address is effective _____ to _____

Phone(s)/E-Mail

Cellular _____ ❑ Do Not Publish

Work/School _____ ❑ Do Not Publish

Other _____ Description _____ ❑ Do Not Publish

E-mail _____ ❑ Do Not Publish

May we publish the above information in our church directory (unless checked "Do Not Publish")? ❑ Yes ❑ No

Personal Information

Gender _____ Blood Type _____ ❑ Blood Donor ❑ Organ Donor _____

Birth date_____ Birthplace _____

Father _____ Mother _____

Occupation _____ ❑ Retired

Work Place _____

School _____ Grade _____

Current Marital Status ❑ Never Married ❑ Married ❑ Separated ❑ Divorced ❑ Widowed

Married Date _____ Married Place _____

Spouse's Name _____ Birth date_____

Previous Marriage _____ Dates _____

Death Date _____ Death Place _____

Cemetery _____ Cemetery Place _____

(Continued)

Membership Information

Membership Type ❑ Member ❑ Non-Member ❑ Child, Not Yet a Member ❑ Prospective

Membership Status ❑ Active ❑ Inactive ❑ Shut-in or Housebound ❑ Deceased

Church School Class _____

Date joined this church _____ ❑ Baptism ❑ Confirmation ❑ Transfer

Baptism Date _____ Baptism Church _____

Transfer In Date _____ Transfer from Church _____

Confirmation Date _____ Confirmation Place _____

Please list all church groups in which you currently participate. _____

All church offices held or committees served on:

Office/Committee	Dates

Other Information

Please list your skills, talents and ministry interests. _____

Please list your community involvement (organizations, volunteer service, etc.). _____

Military Experience _____

Funeral or Internment Instructions *(Any special requests or arrangements.)* _____