CDM Plus Membership

Family Address Records 2
- Special Fields 4
- Special Buttons 4

Individual Records 5
- Special Buttons 10
- Couples with Different Last Names 10

Pastoral Records 12
- Adding comments 12
- Special Buttons 12

Visitation Records 13
- Adding visitation records and follow-up reminders 13
- Special Buttons 14

Membership Reports 15
- Mailing Labels 15
- Church Directories 15
- Group, Committee, Officer, etc.
  - Labels or Envelopes 16
  - Cards 17
  - Letters 17
  - Directories 18

Family/Individual Maintenance 19
- Adding mailing codes 19
- Adding individual membership and status codes 19
- Adding individuals to groups, offices, and committees, etc. 20
- Adding individuals to Church School Classes 21

CDM plus

CHURCH MANAGEMENT SOFTWARE

The power to help you connect your church's **ministry** to its **mission**

Membership

Adding Family Address Records

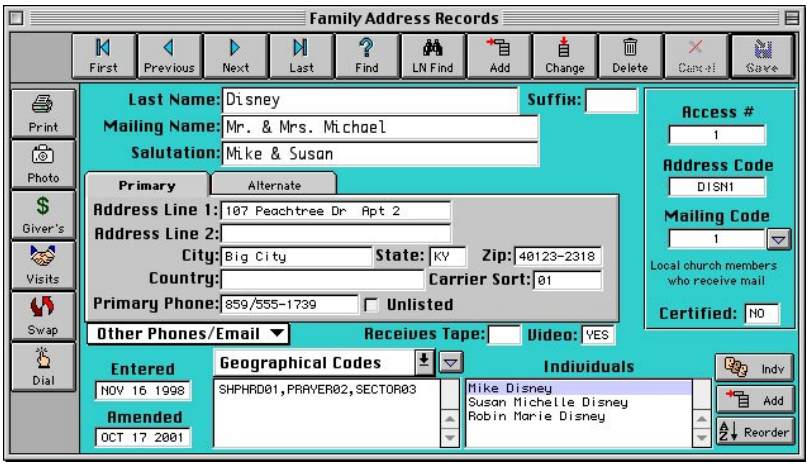
NOTE 2.1: If most of the families to be recorded in CDM Plus for your church live in the same town with the same zip code, CDM Plus can automatically load that information for you. Choose **Preferences/Settings** under **Setup** on the **File** menu and select **Membership**. Fill in the County, City, State, Zip, and Default Mailing Code which will most often be used. Click **Save**. Now when a Family Address Record is added, this City, State, Zip, and Mailing Code will automatically load in those fields. For those not living there, the fields can be changed during data entry.

NOTE 2.2: You may also want to create a standardized phone display at this time. For information on doing so (also called creating a **Phone Mask**), see item 17 below.

1- Under **CDM+,** select **Membership** or click the **Membership** icon on the tool bar..

2- Under **Membership** select **Family Address Records** or click the **Family Address Records** icon on the menu bar.

3- Click the **Add** button. The cursor will appear automatically in the **Last Name** field. Type the family last name. Title Case is suggested (e.g. - Smith). Do not use only UPPERCASE. Labels can be generated in UPPERCASE when necessary since the Post Office prefers UPPERCASE.



4- **Tab** through the **Suffix**, **Mailing Name** and **Salutation** fields, entering information into each field as described in steps 5, 6 and 7 below.

5- If applicable, type a suffix (e.g., Jr., Sr. or III) in the suffix field. Leave this field blank if there is no suffix.

6- Type the family mailing name (e.g., Mr. & Mrs. William or Mr. and Mrs. William). Do not type the last name again here. Use the *&* or *and* but use the same one every time. Consistency of data entry is **EXTREMELY** important.

7- Type the family salutation (e.g. - Bill & Mary).

NOTE 2.3: The Mailing name or the Salutation will be combined with the Last Name for mailing labels, so the two choices will typically be *Mr. & Mrs. William Smith* or *Bill & Mary Smith.*

8- Make sure the **Primary** tab is selected. Press the **Tab** key to move the cursor to the **Address Line 1** field.

9- Type the street address of the family.

10- **Tab** through the **Address Line 2**, **City**, **State**, **Zip**, **Country**, **Carrier Sort** and **Primary Phone** fields, entering information into each field as described in items 11 through 17.

11- Type the second line of the street address, if applicable. Leave this field blank if there is no second address line.

NOTE 2.4: It is important to use only **Address Line 1** if you want your mailing list to be C.A.S.S. certified later for the sake of postal discounts. In the case of a street address and a Post Office box, put the Post Office box in **Address Line 2.**

12- Type the name of the city.

NOTE 2.5: If you followed the instructions in **NOTE 2.1** above, the City, State, and/or Zip will have been inserted for you. If they are correct, tab past them and go to step 15, or you may replace them with other information if this family does not live in the default city, state, and zip.

13- Type the **two-letter abbreviation** for the State or Province.

14- Type the zip code. The zip + 4 may be typed in if that information is available.

15- Type the country, if applicable (use only if country is not your own).

16- Type the carrier sort number if you know it. This is used by those who qualify for carrier route presort mailings. Contact your Post Office for information. The carrier sort prefix is defined under **Preferences/ Settings** along with the default address. (See **Note 2.1** above.)

17- Type the primary phone number, including the area code if you wish. Under **Setup** on the **File** menu, choose **Preferences/Settings**, then click on **Date/Phone Disp.** This is where you auto-format phone numbers in CDM Plus [e.g.—choose (###) ###-#### *or* ###/###-#### *or* ###-###-####, the # sign indicating where numbers will be stored]. Auto-formatting—also called creating a **Phone Mask**—allows you to type only the digits to display a consistent phone number format. CDM Plus will automatically add parentheses and dashes or slash marks as indicated by the phone mask. If you choose not to create a phone mask, remember to use the same format every time. Consistency of data entry is **EXTREMELY** important.

Unlisted: Check this box if the phone number is unlisted. How unlisted numbers are printed is handled through the Membership Preferences/Settings (reached by choosing **Setup** on the **File** menu, then choosing **Preferences/Settings**, then clicking on **Membership**).

18- Click the **Arrow** button beside the **Mailing Code** field to bring up a list of available mailing codes. You may double-click the code you wish to assign or click once on the code and press **Return/Enter** or click **Done**.

If you have not established **Mailing Codes** yet through the **Master Coding System** (See **Appendix A**), take no action here. CDM Plus will assign a mailing code of 1. When creating Mailing Codes, see **Master Coding System Tip 1** in **Appendix A**. You may also create a new Mailing Code from the Mailing Codes window using the **Create Code** button.

NOTE 2.6: Mailing codes can be created later and families can be assigned different codes very easily through the **Family Maintenance** feature of CDM Plus Membership. (See *Using Family/Individual Maintenance* at the end of this chapter.)

19- Press the **Tab** key to move the cursor to the **Receives Tape** field. Leave blank or type **Y** or **N** for YES or NO. Mailing labels can be generated for all records with YES in this field. This is helpful for sending tapes to shut-ins.

20- **Tab** to the **Receives Video** field. As with the **Receives Tape** field, type **Y** or **N** (for YES or NO) or leave blank. Mailing labels can also be genreated for all records with YES in this field.

21- Click the *outside* **Arrow** button beside the **Geographical Codes** field. The Geographical Codes window appears. Double-click all Geographical Codes applicable to this family and then click **Done**. If you have not established **Geographical Codes** yet through the **Master Coding System** (See **Appendix A**), leave this field blank. Codes can be added later if necessary. Geographical codes are used to group families by geographical areas, prayer chains, shepherding groups, or other groupings of families needed beyond the mailing code breakdown. You may also create a new Geographical Code from the Geographical Codes window using the **Create Code** button.

NOTE 2.7: Missing reports generated from attendance can be sorted by **Geographical Code** for shepherding groups. To take advantage of this feature the shepherding group code should be 8 characters in length and placed at the beginning of the geographical code field. See **Master Coding System Tip 2** in **Appendix A**.

22- A handy field for entering miscellaneous **Notes** can be accessed through the Geographical Codes field. Click the *first* **Arrow** button beside the Geographical Codes field. A drop-down menu appears. Select **Notes** from the drop-down menu, place the cursor in the **Notes** field and type any text desired.

23- Review the information in the Family Address Record to make sure it is correct. Then press **Return/Enter** or click **Save**.

24- A dialog box appears asking, **Insert Giving Unit Record for this address?** If you plan to use the contributions module of CDM Plus now or at any time in the future, click **YES**. CDM Plus will then create a **Giving Unit Record** for this family that can be used later to enter contributions. If you do not ever plan to use Contributions, or if you want to add **Giving Units** later, click **NO.** If someone else handles the **Contributions** module, then you may want to check with him/her on how to handle creating new Giving Units. To create Giving Units after an address has been entered, click on the **Giver's** button on the left.

25- If you answer **YES** to the question about creating a **Giving Unit Record**, information about the **Giving Unit Record** will be displayed. The address code (See **Address Code** description below) will be used as the **Giver's Code**, but it can be replaced with an envelope number if your church uses envelopes. If envelope numbers are used, type the number at this time and select the **Giver's Name** you prefer to use. Be sure to use leading 0's for one and two-digit numbers (e.g., 001, 002, 010, 011, etc.).

26- Press **Return/Enter** or click **OK**.

The **Family Address Record** entry for this family is now complete.

Special Fields in the Family Address Record.

Access #: Number assigned by CDM Plus to each family in the order they are entered. Used in creation of the address code. Numbers will not be reused even if records are deleted.

Address Code: Made up of first four letters of last name plus the access number. Used to connect other records in the system to the address.

Entered: Date automatically updated by CDM Plus when a record is inserted.

Amended: Date automatically updated by CDM Plus when a record is changed.

Certified: Indicates whether or not address is C.A.S.S. certified for additional postal discount.

Other Phone: Select **Family** or **Individual** from drop down to display additional phone numbers. Additional family phone numbers may be added here. Additional individual phone numbers must be added by clicking the **Other Individual Phones** button in **Individual Records**.

Special Buttons on Family Address Record

LN Find - Finds all the Family Address Records with the same last name. You have three search options: **Exact**, for when the spelling is certain, and **Begins With** and **Contains** to help when the exact spelling is unknown. Once the list is displayed, double-click on the Family Address Record desired and it will be displayed.

Print - Provides opportunity to print Master List of all family information or print address information to a label, envelope, or to the clipboard.

Photo - Brings up a window where a picture of the family can be inserted.

Giver's - Displays list of giver's codes assigned to this household. Additional giver's codes may be created from this screen using the Add button.

Visits - Displays a list of all visits made to this household as recorded in **Visitation Records**.

Swap - Use this button to replace the primary address information with the alternate address and vice a versa.

Dial - Dials phone number if proper modem installation is provided.

Indv - Goes to the **Individual Record** for the currently-selected individual.

Add (beside "Individuals" field) - To add another individual to this particular address.

Reorder - Allows for the reordering and reassigning of family status codes to individuals.

Alternate tab: Alternate address (e.g.—Florida address during the winter) can be recorded here.

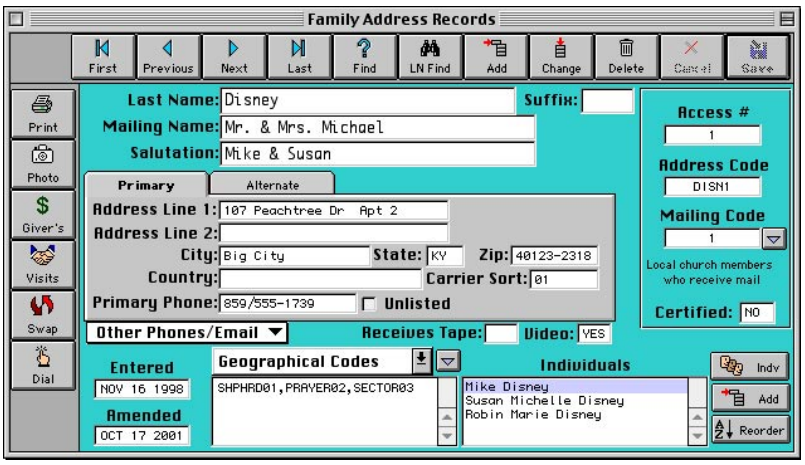
Adding Individual Records

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar..

2- Under **Membership** select **Family Address Records** or click the **Family Address Records** icon on the menu bar.

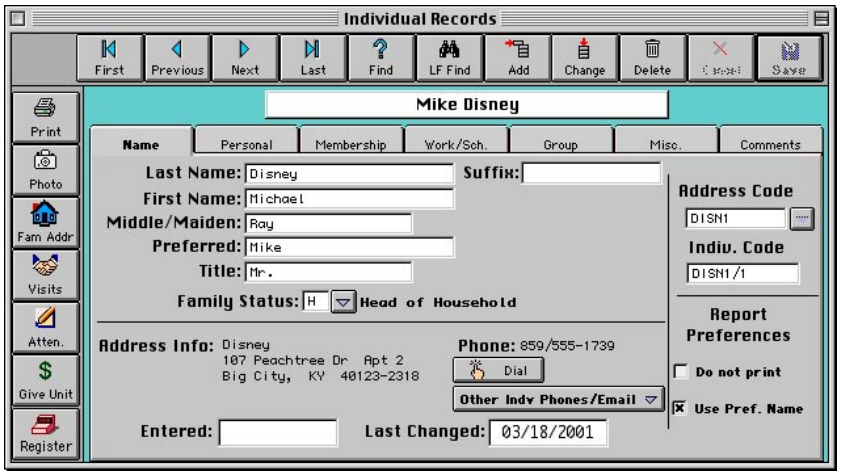
3- Locate the family using either the **Find** or **LN Find** options.

4- If no individuals have been entered for this address, no individual names will appear in the **Individuals** field in the lower right of the window. To add names, click the long **Add** button below the **Indv** button.



Note 2.8: It is recommended that individual family members be added in the following order: Head of Household, Spouse (if applicable), Children (if applicable) from oldest to youngest. This helps in the establishment of the Individual Record # (described later) and in future searches.

5- The **Name** window of **Individual Records** will appear. Address Code, Phone, and Address Info will be visible and the **Address Code** will be highlighted.



6- Press the **Tab** key to move the cursor to the **Last Name** field.

7- The family last name will appear automatically in the **Last Name** field and will be highlighted. If the individual being added has a different last name, that name may be typed in now. If the individual's last name is the same as the family last name, **Tab** to the **Suffix** field.

8- Type a suffix, if applicable (e.g., Jr., Sr., III). Leave this field blank if there is no suffix.

9- **Tab** through the **First Name**, **Middle/Maiden**, **Preferred** and **Title** fields, entering information as instructed in steps 10 through 13.

10- Type the first name (e.g. - William) in the **First Name** field.

11- Type a middle or maiden name in that field, if the information is available.

12- Type the preferred name if it is different from the first name (e.g. - Bill for first name William). If a preferred name is to be used on reports, labels, cards, and letters, use the mouse to put an X in the check box beside **Use Pref. Name** under **Report Preferences**.

13- Type the individual's title (e.g. - Mr., Mrs., Ms., Miss, Rev., Dr., Pastor, Bishop, etc.).

14- Click the **Arrow** button beside the **Family Status** field. The choices are **H** for Head of Household, **S** for spouse, **C** for child, **O** for other family member such as cousin, mother-in-law, etc. Double-click on one of the choices, placing that code in the **Family Status** field, or click the code once and press **Return/Enter** or click **Done**. Additional codes may be created through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Family Status Codes** window using the **Create Code** button.

NOTE 2.9: The **Other Individual Phones/Email** button allows for the input of other phone numbers (cellular, pager, etc.) or other information such as an e-mail address for each individual.

15- Press the **Tab** key to bring up the **Personal** window and move the cursor to the **Sex** field. Type **F** for female or **M** for male in this field.

16- Click the **Arrow** button beside the **Marital Status** field. The choices are **M** for married, **S** for single, **D** for divorced, **W** for widowed. Double-click on one of the choices, placing that code in the **Marital Status** field, or click the code once and press the **Return/Enter** or click **Done.** Additional codes may be created

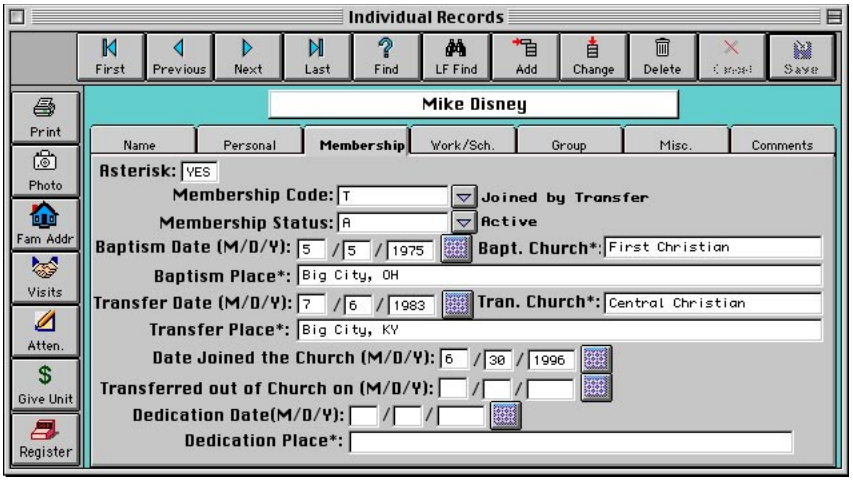
through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Marital Status Codes** window using the **Create Code** button.

17- **Tab** through the remaining fields on the **Personal Information** window, typing in any information available at the time. When a field has a **Calendar** button, click on the button to bring up a calendar. Navigate to the correct year and month on the calendar, and double click on the desired date. The calendar will disappear and the correctly-formatted date will appear in the field. Alternately, you may enter dates manually.

NOTE 2.10: Many of the fields in the Individual records can be left blank initially and then filled in later after a membership questionnaire or survey has been distributed and returned. This information can be input at any time in the future as it becomes available. Using the **Field Maintenance** function will allow for quick data entry.

18- After completing this window, with the cursor in the **Donor** field, press the **Tab** key to bring up the **Membership** window and move the cursor to the **Asterisk** field.

19- Type **Y** or **N** in the asterisk field. How you use the asterisk function is up to you, but one of its most common uses is to distinguish between members and non-members in the church directory. Yearbook directories will place an asterisk beside the name of everyone who has a **YES** in this field. The asterisks may also be left out.



20- Click the **Arrow** button beside the **Membership Code** field and double-click your choice. If you have not created any Membership codes yet, you may do so through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Membership Codes** window using the **Create Code** button. When creating Membership Codes, see **Master Coding System Tip 3** in Appendix A.

NOTE 2.11: Membership Codes can be created later and individuals can be assigned different codes very easily through the **Individual List Maintenance** feature of CDM Plus Membership. (See *Adding individual membership and status codes through Individual List Maintenance* at the end of this chapter.)

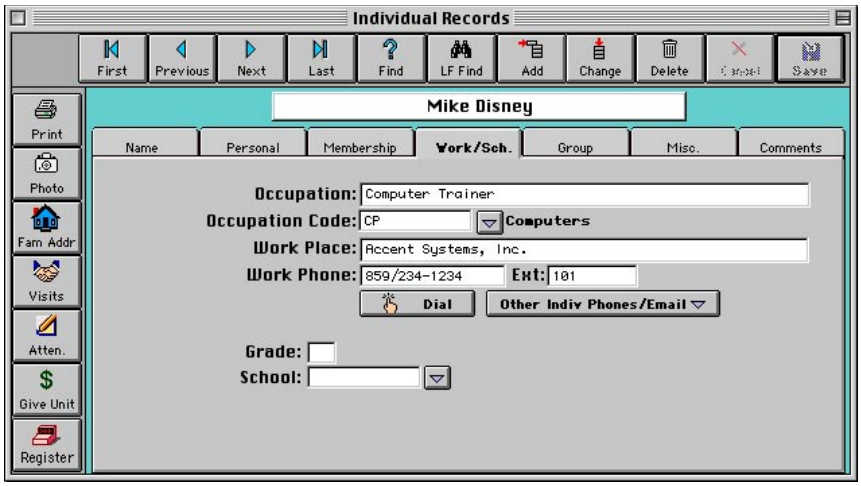
21- Click the **Arrow** button beside the **Membership Status** field and double-click your choice. If you have not created any Membership Status codes yet, you may do so through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Status Codes** window using the **Create Code** button. When creating Membership Status codes see **Master Coding System Tip 3** in Appendix A.

NOTE 2.12: Membership Status Codes can be created later and individuals can be assigned different codes very easily through the **Individual List Maintenance** feature of CDM Plus Membership. (See *Adding individual membership and status codes through Individual List Maintenance* at the end of this chapter.)

22- **Tab** through the remaining fields on the **Membership** Information window, typing in any information available at the time. After completing this window, with the cursor in the **Dedication Place** field, press the **Tab** key, which will bring up the **Work/Sch.** window and move the cursor to the **Occupation** field.

23- Type the individual's occupation.

24- Click the **Arrow** button beside the **Occupation Code** field and double-click your choice. If you have not created any Occupation codes yet, you may do so through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Occupation Codes** window using the **Create Code** button.

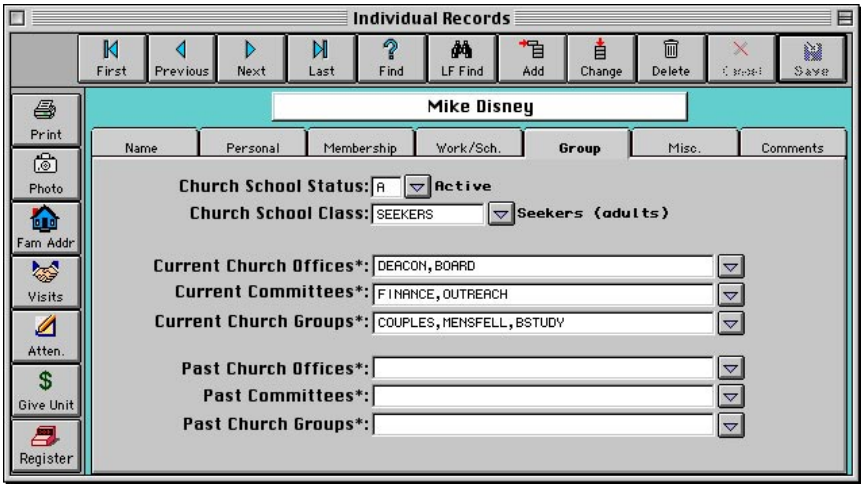


25- **Tab** through the remaining fields on the **Work/School** window, typing in any information available at the time. At the **School** field, click the **Arrow** button beside the **School** field and double-click your choice. If you have not created any School codes yet, you may do so through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **School Codes** window using the **Create Code** button.

NOTE 2.13: The **Other Individual Phones/Email** button allows for the input of other phone numbers (cellular, pager, etc.) or other information such as an e-mail address for each individual. This button is also on the **Name** tab.

26- Press the **Tab** key which will bring up the **Group** window and move the cursor to the **Church School Status** field. This window is for recording participation in church school classes, offices, committees, and groups.

27- Click the **Arrow** button beside the **Church School Status** field and double-click your choice. If you have not created any **Church School Status** codes yet, you may do so through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Church School Status Codes** window using the **Create Code** button.



28- Click the **Arrow** button beside the **Church School Class** field and double-click your choice. If you have not created any **Church School Class** codes yet, you may do so through the **Master Coding System** (See **Appendix A**). You may also create a new code from the **Church School Codes** window using the **Create Code** button.

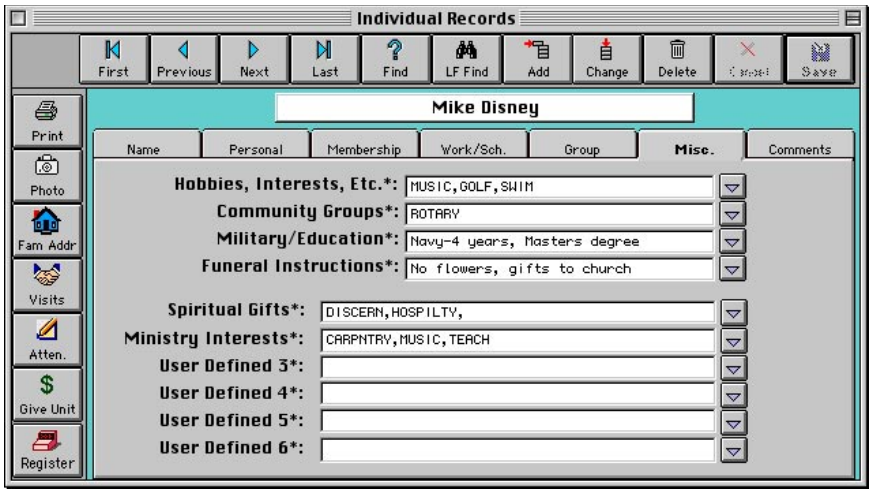
NOTE 2.14: Church School Status is for indicating if one is active or inactive in Church School, and **Church School Class** indicates what class one is in. Class codes are established by the user through the **Master Coding System** (See **Appendix A**).

29- To fill in the rest of the fields on the **Group Information** window, use the **Arrow** buttons to enter codes created through the **Master Coding System** (see **Appendix A**). You may also create new codes from the pop-up windows using the **Create Code** button.

NOTE 2.15: Church School, Office, Committee, and Group codes can be created later, and individuals can be assigned different codes very easily through the **Individual List Maintenance** feature of CDM Plus Membership. (See *Adding individuals to groups, offices, and committees, etc. through Individual List Maintenance* at the end of this chapter.)

30- Click on the **Misc.** tab.

31- To fill in the information in the **Misc.** window, click on the **Arrow** buttons to enter codes created through the **Master Coding System** (see **Appendix A**). You may also create new codes from the pop-up windows using the **Create Code** button.



NOTE 2.16: In this window, there are 6 **user-defined fields** which the user can name as needed, and codes for them can be created through the **Master Coding System** (see **Appendix A**). Other field titles can also be renamed to customize the program for your particular church (see *Renaming Field Titles* in **Getting Started**).

NOTE 2.17: An **Arrow** button beside a field indicates there is a pop-up list of codes available for this field. These codes are defined by the user in the **Master Coding System** (See **Appendix A**). In addition, an asterisk at the end of a field title means the field will scroll from right to left and will hold more information than can appear in the window.

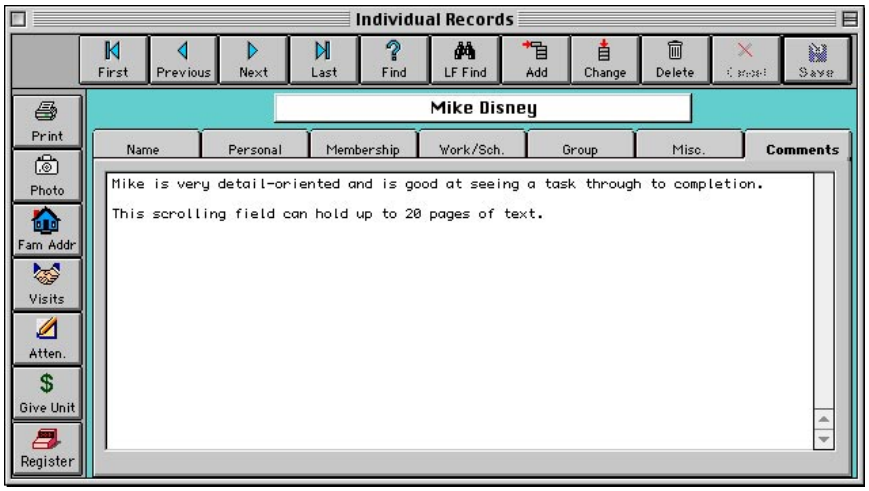
32- Click on the **Comments** tab. The **Comments** field, which has a scroll bar to the right, will hold up to 20 pages of text. Type any appropriate information in the **Comments** field.

33- Press the **Tab** key which brings up the **Name** window and highlights the **Address Code.**

34- Press **Return/Enter** or click **Save**.

Individual Record input is now complete for this person.

Now click the **Add** button and return to step 6 of ***How to insert Individual Records*** and start the process over with the next person in the family. Do this until all family members are in for this particular household.



Special Buttons on Individual Record

LF Find - Finds individual by last name and first name for quick retrieval of a specific person.

Print - Provides opportunity to print Master List of all individual information or print address information to a label, envelope, or to the clipboard.

Photo - Clicking on this button brings up a window where a picture may be inserted. Click on the **Import** button on the **Photo** window, then click **Paste From File** under the **Edit** menu. Navigate to where you have the picture stored. Select it and click open. Windows users need to use a picture in **BMP**, **WMF** or **EMF** format. Macintosh users need a **PICT**.

Fam Addr - Returns to **Family Address Record** to which this individual is connected.

Visits - Displays a history of the visits made to this person as recorded in **Visitation Records** under **Membership**.

Atten. - Displays attendance history for the individual.

Give Unit - Displays the **Giving Unit Code** assigned to this individual in the **Contributions** module of CDM Plus. If you have not purchased the **Contributions** module, this button will not be available (will be grayed out).

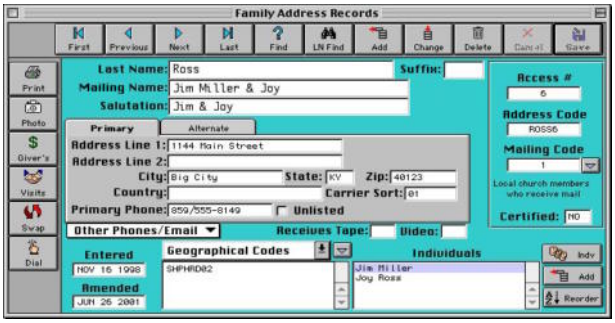
Register - Clicking on this button allows you to register this individual for an event or camp through the **Event Registration** module of CDM Plus. If you have not purchased the **Event Registration** module, this button will not ba available (will be grayed out).

Dial - Dials phone number if proper modem installation is provided.

How to Enter Couples with Different Last Names

Wives sometimes retain their maiden names and do not take the last name of their husband. Following is the procedure for entering this into the **Family Address Record** in CDM Plus so that it appears appropriately in the directory and on address labels.

For example, you wish to enter a record for Jim Miller and Joy Ross.



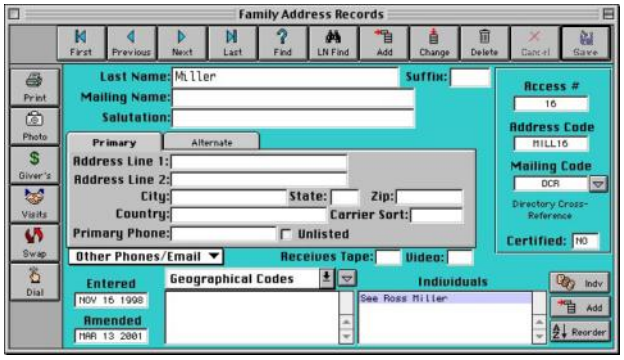
1- Type *Ross* in the **Last Name** field and *Jim Miller and Joy* in the **Mailing Name** field. This way, when the address label prints for the newsletter, for instance, the label will read, *Jim Miller and Joy Ross*.

This takes care of the mailing label, but what about the church directory? If someone wishes to find Jim Miller, he would be printed with the R's under Ross. To remedy this situation:

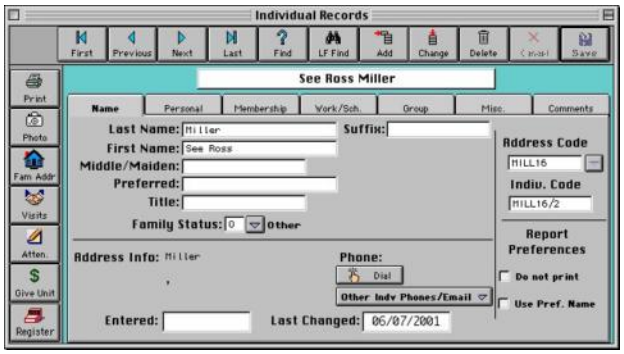
2- Insert another **Family Address Record** so this family can be cross-referenced under Miller. To do this, first create a **Mailing Code** for this purpose. **DCR** may be used as the code (for **D**irectory **C**ross **R**eference).

NOTE 2.18: Include the DCR Code when printing a church directory. **Never** include the DCR code when doing a mailing.

The additional **Family Address Record** would look like the one at right. Miller appears in the **Last Name** field and **DCR** in the Mailing Code field.



3- Insert an **Individual Record** for this Family Address Record. Type *Miller* in the **Last Name** field and *See Ross* in the **First Name** field (since the family actually appears under Ross in the Family Address Record). The new Individual Record will look like the screen at right.



When entered in this way, the two Yearbook Directory entries print out as follows:

Family entry

Jim Miller & Joy Ross

1144 Main Street Big City, KY 40123 859/555-8149

Jim Miller* Joy Ross*

Cross-reference entry

Miller

See Ross

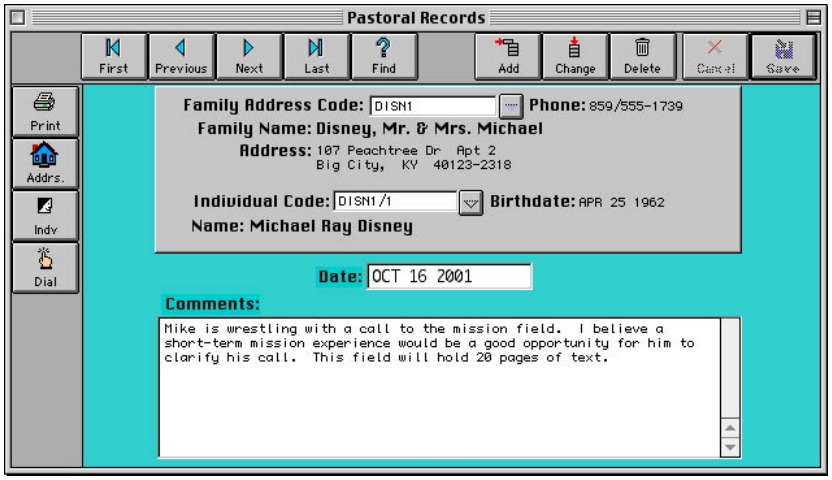
In this way, when looking up **Miller** in the directory, one is referred to **Ross**, where the family appears with complete information.

Of course, if you wish, you may place the husband's name last on the first **Family Address** record so it reads *Joy Ross and Jim Miller*. Ross would then be cross-referenced and referred back to Miller.

Pastoral Records

NOTE 2.19: Privacy of **Pastoral Records** in CDM Plus is password protected. Access is set in the **Membership** area of **Password Maintenance**, which is located under **Change User Password/Preferences** on the **File** menu. Passwords and preferences should be set up when CDM Plus is first installed. For complete instructions, refer to the **Change User Password/Preferences** in **Getting Started**.

Adding comments in CDM Plus Pastoral Records



1- Under **CDM+** on the menu bar, select **Membership** or click the **Membership Icon** on the Tool Bar.

2- Under **Membership** on the menu bar, select **Pastoral Records** or click the **Pastoral Records Icon** on the Tool Bar.

3- Click the **Add** button.

4- Click the **Arrow** button next to the **Family Address Code** field, and select the appropriate code from the pop-up list. Family information, including family name, address and phone number, appears automatically.

5- Click the **Arrow** button next to the **Individual Code** field, and select the code for the correct individual from the pop-up list. The individual's name and birth date is automatically entered.

6- **Tab** to place the cursor in the **Date** field. Enter the date.

7- **Tab** to place the cursor in the **Comments** field. Enter comments in free text.

8- Click the **Save** button. Options are now available to **Print** the comments, return to the linked **Family Address Record** or **Individual Record**, or **Dial** the phone (if proper modem installation is provided).

NOTE 2.20: The link from a **Pastoral Record** to its associated **Family Address Record** or **Individual Record** only works in one direction. For privacy reasons, there is no link *to* a Pastoral Record *from* either the **Family Address Record** window or the **Individual Record** window.

Special Buttons on Pastoral Record

Print - Provides opportunity to print Pastoral Record information or print address information to a label, envelope, or to the clipboard.

Addrs. - Returns to **Family Address Record** to which this individual is connected.

Indv - Returns to **Individual Record** for this individual.

Dial - **Dials** the phone (if proper modem installation is provided).

Visitation Records

NOTE 2.21: Visitation Records under Membership in CDM Plus allows the user to track visits made to people in the church and also reminds of follow-up visits and contacts that should be made. Before using Visitation, **Staff Codes** and **Visit Types** should be created in the **Master Coding System** (See **Appendix A**). Also see **Master Coding System Tip 6** in **Appendix A** for recommended Staff and Visit Type codes.

Adding visitation records and follow-up reminders in CDM Plus visitation.

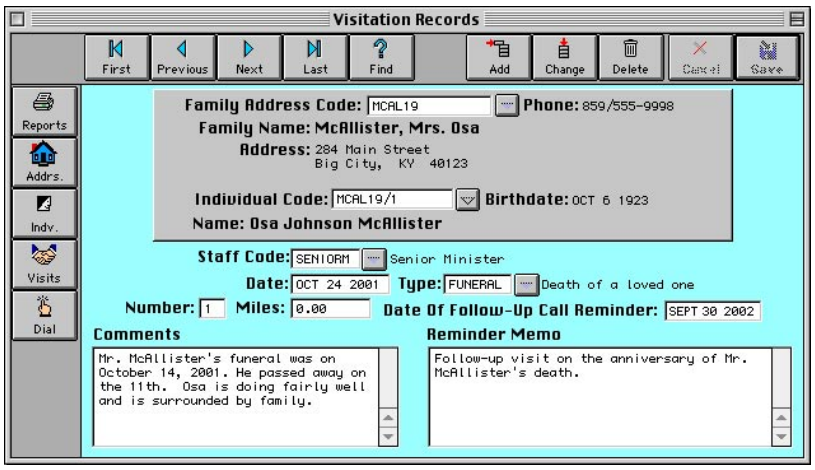
1- Under **CDM+** on the menu bar, select **Membership** or click the Membership icon on the Tool Bar.

2- Under **Membership** on the menu bar, select **Visitation** or click the Visitation icon on the Tool Bar.

3- Click the **Add** button.

4- Click on the **Arrow** button beside the **Family Address Code** field and choose the code of the family visited from the pop-up list.

5- If only one person was visited (e.g.—hospital visit), click on the **Arrow** button beside the **Individual Code** field and make your selection from the pop-up list. If more than one member of this family was visited, leave this field blank.



6- Click on the **Arrow** button beside the **Staff Code** field and make your selection from the pop-up list. This may be ministers, staff members or laypersons who make calls (See **Master Coding System Tip 6** in **Appendix A** for recommended Staff codes).

7- Press the **Tab** key to place the cursor in the **Date** field, and enter the date the visit was made.

8- Click on the **Arrow** button beside the **Type** field and make your selection from the pop-up list (See **Master Coding System Tip 6** in **Appendix A** for recommended Type codes).

9- Press the **Tab** key to place the cursor in the **Number** field, and type the number of persons visited during this call.

10- Press the **Tab** key to place the cursor in the **Miles** field, and type the number of miles traveled in making this call (optional).

11- Press the **Tab** key to place the cursor in the **Comments** field, and type any comments about this visit you wish to record (i.e.— Mr. McAllister's funeral was on October 14, 2001. He passed away on the 11th. Osa is doing fairly well and is surrounded by family).

12- Press the **Tab** key to place the cursor in the **Date of Follow-up Call Reminder** field, and enter the date on which you wish to make a follow-up call, contact, or visit.

NOTE 2.22: Go under **File** on the menu bar to **Setup** and then to **Preferences/Settings.** Click on **Membership** and set the number of **Tickler File Reminder Days**. This tells CDM Plus how many days before the **Date of Follow-up Call Reminder** you wish to be notified that a follow-up is pending.

13- Press **Tab** to place the cursor in the **Reminder Memo** field, and enter information about what type of follow-up is needed (e.g.—call, letter, visit, etc.)

14- Press **Return/Enter** or click the **Save** button. The record is saved and you will be reminded to make the follow-up call based on the number of **Tickler File Reminder Days** entered under **Preferences/Settings**.

NOTE 2.23: When the date falls within the range prescribed by the **Tickler File Reminder Days**, the following message will appear as CDM Plus is launched:

Click **Yes** to print the tickler records and distribute them to the appropriate people who need to make the follow-up call(s). Click **No** if you do not wish to print them now. The system will continue to remind you each time CDM Plus is launched.

If you print the records, you will be asked if you want the records marked as printed. Say **Yes** if you do not wish to be reminded again; click **No** if you do wish to be reminded again.

Special Buttons on the Visitation Records screen.

Reports - Provides multiple format options for reporting visitation acitvity.

Addrs. - Returns user to Address Record screen for family displayed on visitation record.

Indv. - Returns user to Individual Record screen for individual displayed on visiation record.

Visits - Pops up a list of all currently recorded visits to this family.

Dial - Dials phone number of displayed record with proper modem hookup.

The **Visitation Records** feature of CDM Plus allows the church to keep up with the visitation needs of the congregation and prevents the staff from overlooking the pastoral care needs of members of the church.

It is especially helpful to record the anniversary dates of deaths in the church. In that case, the computer begins to remind the user of the follow-up call which needs to be made to Mrs. Smith on the anniversary of her husband's death. It will begin reminding you 5 days before the anniversary, or as many days ahead as you indicate in the **Tickler file Reminder Days** under **Preferences/Settings**.

Appendix E includes a sample **CDM Plus Visitation Records Report Form**. The person making calls may use this to record their visits. Then the information can be input into the computer by someone else, if necessary. You may photo-copy this form or use it as a guideline to set up your own, considering that your visit types may be different.

Membership Reports

Following are instructions for printing some of the most commonly used reports generated out of CDM Plus Membership.

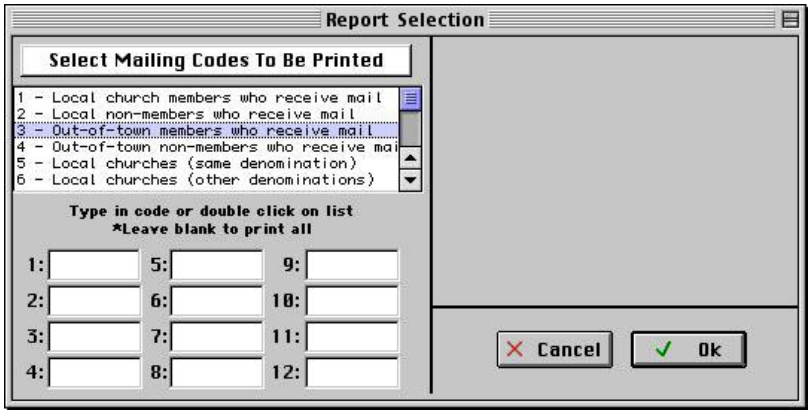
Mailing Labels

1- Under **CDM+,** select **Membership** or click the **Membership** icon on the tool bar.

2- Under **Reports**, select **Address Labels** and then **Mailing Labels-Family**.

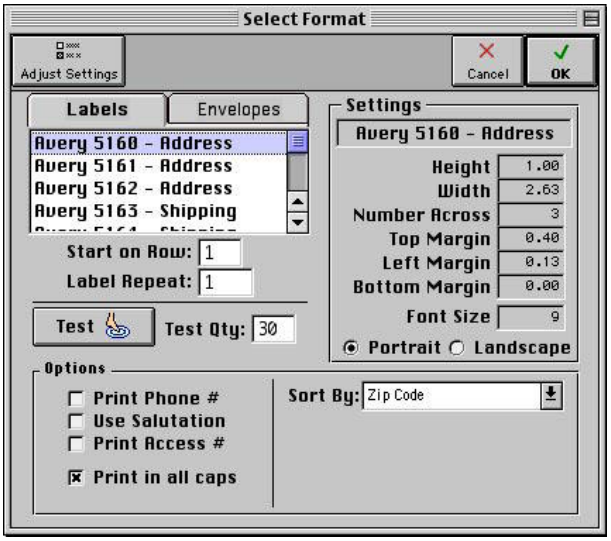
3- Select Mailing codes to be printed. Type or double-click up to 12 mailing codes to be included in this mailing, placing them in the 12 selection boxes. Or leave the selection boxes blank to print all codes.

6- Press **Return/Enter** or click **OK**.



7- Select the type of label from the **Avery** list or click on the **Envelope Tab** to print directly onto envelopes. You can adjust any settings for a line item or change the name of a line by clicking on the **Adjust Settings** button in the upper left-hand corner. Use the Options **check-boxes** to choose which additional information to include on the label or envelope, such as phone #, access #, whether to use the Salutation instead of the Mailing Name, and whether to print the labels in all caps. You may also choose to do an alignment test at this point.

NOTE 2.24: Make sure the proper type of labels are in the printer before running an alignment test or printing the labels.



8- If you are printing laser labels and want to begin printing on a specific line of the sheet of labels, then enter that line in the **Start on Row** field. Note that this only affects the first page of labels to be printed.

9- Choose the proper **Sort** order by selecting from the pull-down menu on the lower right-hand corner of the window. The **USPS** option will print the labels in the proper order for bulk mailings as required by the post office. It will also generate the proper documentation for preparation of your postage statement.

10- Select **Printer** on the **Set Report Destination** screen.

11- Press **Return/Enter** or click **OK** and labels or envelopes will be printed.

Church Directories

The most commonly-used format for a church directory is the Yearbook Directory. To print a yearbook directory, do the following:

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **Reports**, select **Yearbook Directory**.

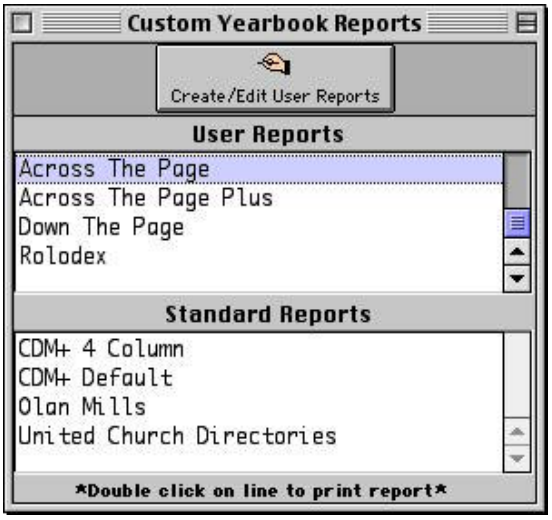
3- Select Mailing codes to be printed. Type or double-click up to 12 mailing codes to be included in this directory, placing them in the 12 selection boxes.

4- Press **Return/Enter** or click **OK**.

5- Double-click on the **Custom Yearbook Reports** format to be used (e.g.—**Across the Page**).

6- Select **Printer** on the **Set Report Destination** screen.

7- Press **Return/Enter** or click **OK** and a directory will be printed.



Group, Committee, Officer, etc. Labels or Envelopes

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **List Repts**, select **Labels**.

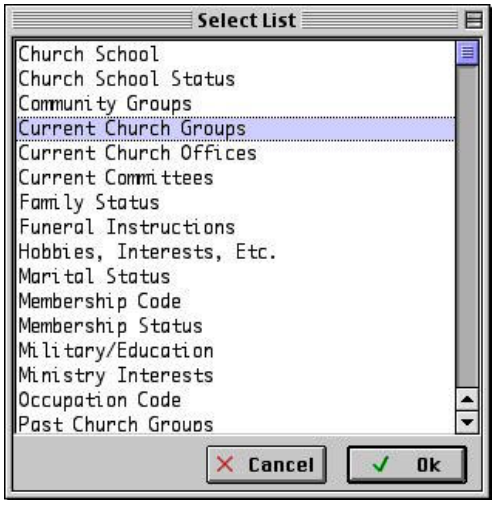
3- Double-click your choice from **Select List** (e.g.—**Current Church Groups**)

4- The **Select Codes for Print Out** window appears.

5- Double-click the Church Group(s) you want labels for from the **Currrent Church Groups Codes** window on the right, moving them to the **Print List** window on the left.

6- Click **OK**.

7- Select type of label from the **Avery** list or click on the **Envelope Tab** to print directly onto envelopes. You may choose to do an alignment test at this point.



NOTE 2.25: Make sure proper type of labels are in the printer before running an alignment test or printing the labels.

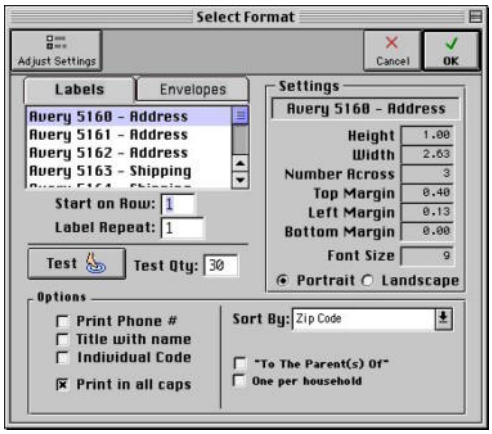
8- **Select Label Addressee And Sort** window now appears.

9- Select desired options by turning on radio buttons and/or checkboxes with the mouse.

10- Press **Return/Enter** or click **OK**.

11- Select **Printer** on the **Set Report Destination** screen.

12- Press **Return/Enter** or click **OK** and labels will be printed.



Group, Committee, Officer, etc. Cards

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **List Repts** select **Card Notice**.

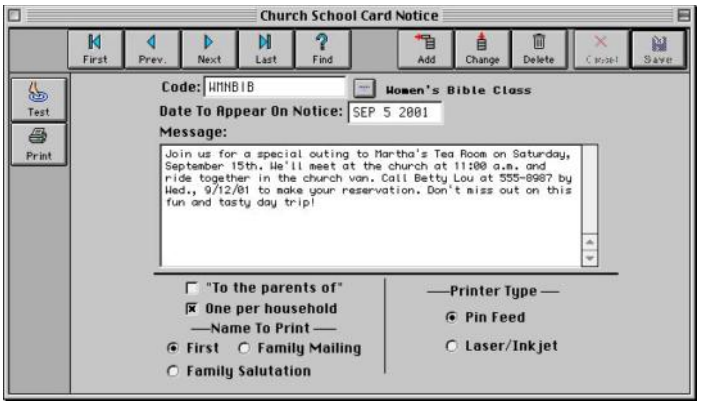
3- Double-click your choice from **Select List** (e.g.—**Church School**)

4- The **Card Notice** window appears.

5- Click **Add** or click on the **Arrow** button beside the **Code** field to see a pop-up list of the choices. From this list, double-click your choice.

7- Press the **Tab** key, and enter the date to appear on the card notice.

8- Press the **Tab** key, and type the message you wish to appear on the card notice. Include only the text, not the salutation. CDM Plus will create the salutation for you, placing the first or preferred name after the word "Dear."



9- Select desired options at the bottom of this screen, including **Printer Type**.

NOTE 2.26: Once several cards have been entered in CDM Plus, you may use the **Find** button to locate previously-saved cards and just change the date to be printed on the card and the date and time of the meeting and use the card again without typing in a completely new card.

10- Click **Save**.

11- Click the **Print** button.

12- Select **Sort Order**: **Alphabetical Order**, **Zip Code Order**, or **Carrier Sort Order**.

13- Press **Return/Enter** or click **OK** and personalized cards will be printed.

Group, Committee, Officer, etc. Letters

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **List Rpts** select **Letter Notice**.

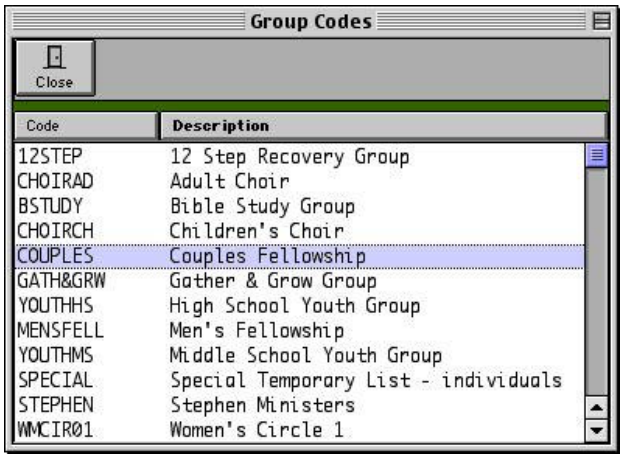
3- Double-click your choice from **Select List** (e.g.—**Currrent Church Groups**)

4- The **Letter Notice** window appears.

5- Click **Add** or click on the **Arrow** button beside the **Code** field to see a pop-up list of available Group Codes. From this list, double-click your choice.

6- Press the **Tab** key, and enter the date to appear on the letter notice.

7- Press the **Tab** key, and type the message you wish to appear on the letter notice. Include only the text, not the salutation. CDM Plus will create the salutation for you, placing the first or preferred name after the word "Dear."



Please note that this field is not "WYSIWYG" (what you see is what you get). For example, changing the font size or margins will not be reflected in what you see on this window, only in what you print.

8- Select desired options, including **Font Size** and **Margins** so the letter will fit on your letterhead. Also, turn on the checkbox beside **Print address info.** if you want the inside address to be printed on the letter.

9- Select **Sort Order: Alphabetical Order**, **Zip Code Order**, or **Carrier Sort Order**.

10- Click **Save**.

NOTE 2.27: Once several letters have been entered in CDM Plus, you may use the **Find** button to locate previously saved letters and just change the date to be printed on the letter and the date and time of the meeting and use the letter again without typing in a completely new letter.

11- Click the **Print** button.

12- Select **Printer** on the **Set Report Destination** screen.

13- Press **Return/Enter** or click **OK** and personalized letters will be printed.

NOTE 2.28: At this point you may return to the instructions for doing **Group, Committee, Officer, etc. Labels or Envelopes** on page 18 and print envelopes to go with the personalized letters just printed.

Group, Committee, Officer, etc. Directories

1- Under **CDM+,** select **Membership** or click the **Membership** icon on the tool bar.

2- Under **List Repts,** select **List Directory**.

3- Double-click your choice from **Select List** e.g.—**Current Church Groups**)

4- The **Select codes for print out** window appears.

5- From the **Current Church Groups Codes** window on the right, double-click the Church Group(s) for which you want to print a directory, moving them to the **Print List** window on the left.

6- Click **OK**.

7- Select **Sort Order: Alphabetical Order**, **Zip Code Order**, or **Carrier Sort Order**.

8- Press **Return/Enter** or click **OK**.

9- The **Report Preference Defaults** window now appears. Select desired options by turning on radio buttons and/or the checkbox with the mouse.

10- Press **Return/Enter** or click **OK**.

11- Select **Printer** on the **Set Report Destination** screen.

12- Press **Return/Enter** or click **OK** and the directory will be printed.

Using Family/Individual Maintenance

Adding mailing codes to Family Address Records through Family Maintenance

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **Membership**, select **Family Maintenance** and under **Family Maintenance**, select **List Maintenance**.

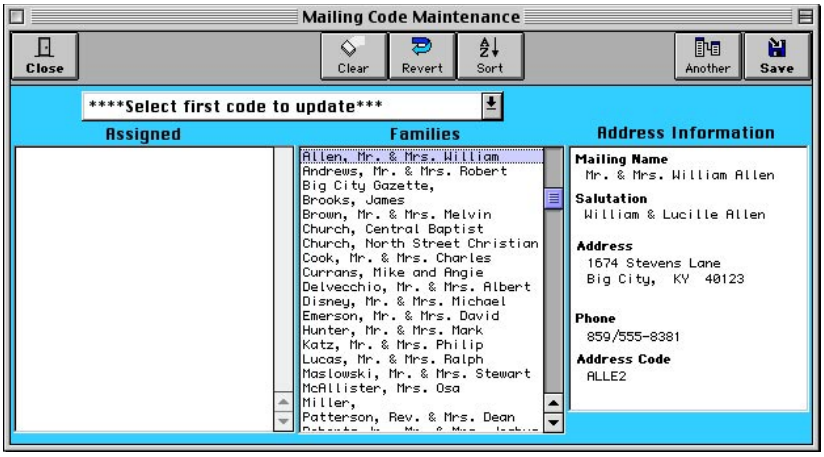
3- Turn on radio button beside **Mailing Code** and press **Return/Enter** or click **OK**.

4- The **Mailing Code Maintenance** window appears and all family names will load in the **Families** window.

5- Use the drop-down list to select the Mailing Code you wish to assign. Any families already assigned this mailing code appear in the **Assigned** window to the left.

6- The selected code will be highlighted in the field above the lists.

7- Double-click the family names you wish to assign this mailing code in the **Families** window on the right, moving them to the **Assigned** window on the left.



8- Click the **Save** button.

9- The selected Family records will be updated. You may update another list by clicking the **Another** button and returning to step 3 above.

NOTE 2.29: It is wise to do one code after another at one sitting. This way you only have to wait for the families to load one time.

Adding individual membership and status codes through Individual Maintenance

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **Membership**, select **Individual Maintenance** and under **Individual Maintenance**, select **List Maintenance.**

3- Double-click **Membership Code**.

4- All individual names will then load into the **Individuals** window.

5- Use the drop-down list to select the Membership Code you wish to assign. Any individuals already assigned this Membership code will appear in the **Assigned** window to the left.

6- The selected code will be highlighted in the field above the lists.

7- Double-click the individual names you wish to assign this membership code to in the **Individuals** window on the right, moving them to the **Assigned** window on the left. You may also click and drag across multiple names selecting them all at once. A click of the mouse on the selection, followed by a slight pause, will turn the pointer into a hand which you can use to drag the entire selection to the other list.

8- Click the **Save** button.

9- The selected individual records will be updated. You may update another list by clicking the **Another** button and returning to step 3 above.

NOTE 2.30: It is wise to do one code after another at one sitting. This way you only have to wait for the individuals to load one time.

Follow this same procedure to assign **Membership Status** codes to individual records.

Adding individuals to groups, offices, and committees, etc. through Individual Maintenance

1- Under CDM+, select Membership or click the Membership icon on the tool bar.

2- Under **Membership**, select **Individual Maintenance** and under **Individual Maintenance**, select **List Maintenance**.

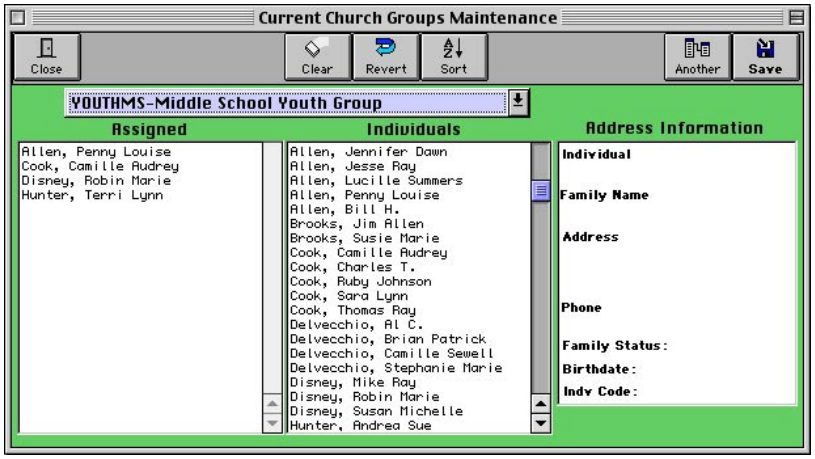
3- Double-click **Current Church Groups**.

4- All individual names will then load into the **Individuals** window.

5- Use the drop-down list to select the Current Church Group Code you wish to assign. Any individuals already assigned this Group code will appear in the **Assigned** window to the left.

6- The selected code will be highlighted in the field above the lists.

7- Double-click the individual names you wish to assign this Current Church Group code in the **Individuals** window on the right, moving them to the **Assigned** window on the left. You may also double-click names in the **Assigned** list if they are to be removed from the group. You may also click and drag across multiple names, selecting them all at once. A click of the mouse on the selection, followed by a slight pause, will turn the pointer into a hand which you can use to drag the entire selection to the other list.



8- Click the **Save** button.

9- The selected individual records will be updated. You may update another list by clicking the **Another** button and returning to step 3 above.

NOTE 2.31: It is wise to do one code after another at one sitting. This way you only have to wait for the individuals to load one time.

Follow this same procedure to assign **Committees, Offices,** and other codes to individual records.

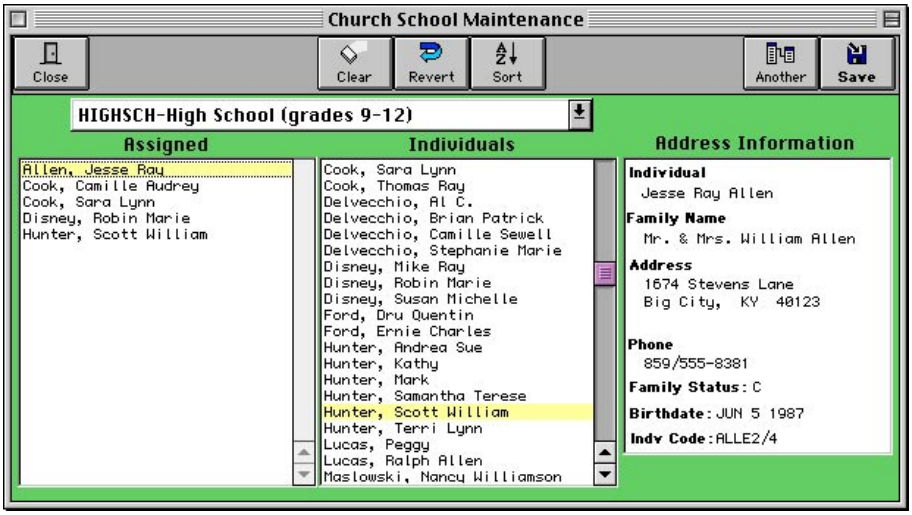
Adding individuals to Church School Classes through Individual Maintenance

1- Under **CDM+**, select **Membership** or click the **Membership** icon on the tool bar.

2- Under **Membership**, select **Individual Maintenance** and under **Individual Maintenance**, select **List Maintenance**.

3- Double-click **Church School**.

4- All individual names will then load into the **Individuals** window.



5- Use the drop-down list to select the Church School Class Code you wish to assign. Any individuals already assigned this Church School Class code will appear in the **Assigned** window to the left.

6- The selected code will be highlighted in the field above the lists.

7- Double-click the individual names you wish to assign this Church School Class code in the **Individuals** window on the right, moving them to the **Assigned** window on the left. You may also double-click names in the **Assigned** list if they are to be removed from the class. You may also click and drag across multiple names, selecting them all at once. A click of the mouse on the selection, followed by a slight pause, will turn the pointer into a hand which you can use to drag the entire selection to the other list.

8- Click the **Save** button.

9- The selected individual records will be updated. You may update another list by clicking the **Another** button and returning to step 3 above.

NOTE 2.32: It is wise to do one code after another at one sitting. This way you only have to wait for the individuals to load one time.