

# CDM+ 8.1 Upgrade

## (from CDM+7.1.2 or earlier)

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The logo for CDM+ features the letters 'CDM' in a large, bold, red sans-serif font, followed by a '+' sign of the same style. A horizontal red line is positioned below the 'CDM+' text, extending from the left edge of the 'C' to the right edge of the '+' sign.

CHURCH MANAGEMENT SOFTWARE



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# Welcome to CDM+ 8.1

Congratulations! Your church’s computer software is about to take a giant step forward. Here are the steps involved in moving to CDM+ 8.1 from an earlier version of CDM+. **NOTE: Although we refer to CDM+ 7.1.2 in this document, it is not necessary to update to 7.1.2 before you upgrade to CDM+.** The CDM+ conversion routine can convert a datafile as old as CDM+ 4.0.

If you run into any difficulties during the installation/conversion process, call CDM+ Tech Support at 800-633-9581 Monday-Thursday 8:30 AM–7:00 PM, Friday 8:30 AM–5:00 PM Eastern Time. Or, you may e-mail us at support@cdmplus.com at any time.

This document will help you install CDM+ and convert your data from a previous version. After you have upgraded to CDM+, be sure to read the “Getting Started” and “Common Features” documents found in the Manuals folder on the program CD or, once CDM+ is up and running, by selecting **Browse Manuals** under the **Support** menu. To view the CDM+ Manuals you will need Adobe® Reader® (6.0 or later) or another program capable of rendering PDF files. If you cannot view the CDM+ Manuals, first check that you have Adobe Reader 6.0 or later installed on your computer. Earlier versions of Adobe Reader cannot open the manuals. An installer for Adobe Reader may be downloaded free from [www.adobe.com](http://www.adobe.com) (click on “Get Adobe Reader”).

## System Requirements

**Please Note!** If you are running CDM+ 8.1 on a stand-alone Macintosh or Windows computer, it is considered the database server. System requirements are as follows:

Macintosh (Server & Client Computers)	Windows (Server & Client Computers)
Mac OS X 10.4 or later (servers may also run Linux—kernel 2.6 or later recommended)	Windows 2000/XP/2003/Vista (XP or Vista recommended)
512 MB of RAM	512 MB of RAM
200 MB of disk space + free space for data	200 MB of disk space + free space for data
TCP/IP network connection (static TCP/IP if server)	TCP/IP network connection (static TCP/IP if server)
Color monitor running 800x600 or larger (not necessary for server not used as workstation)	Color monitor running 800x600 or larger (not necessary for server not used as workstation)

**NOTE:** On Intel-based Macintoshes, CDM+ 8.1.2 runs under the Rosetta compatibility environment. The Rosetta feature of Mac OS X is automatic and does not require you to make any change to run software under Rosetta. On computers running Windows Vista®, CDM+ 8.1.2 must run in XP compatibility mode. Special instructions for this are included with your program CD and are also found on page 5 of this document.

**NOTE:** The conversion routine relies on a component that must run under the Classic compatibility environment. If you have an Intel-based Macintosh, are running Mac OS X 10.5 Leopard or do not have Classic installed, please contact CDM+ Support to schedule conversion of your data at no charge.

CDM+ will operate natively on a cross-platform network with no additional software required (except the purchase of both Windows and Macintosh licenses for CDM+ is necessary). A file sharing connection to the server or between workstations is not required.

# General Installation Info

**NOTE:** These instructions are written for a multi-user, networked environment. If you only use CDM+ on one computer, that computer is considered both the client and the server. Ignore any instructions regarding additional client computers.

## Important note for those running CDM+ over a network:

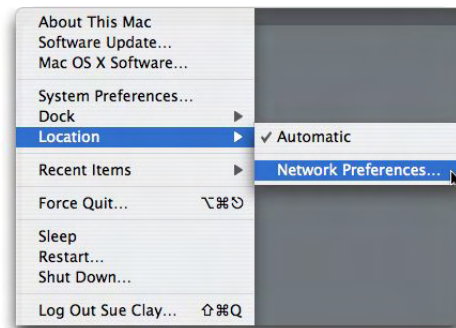
The first computer on which you install and run CDM+ 8.1 **MUST** be your database server. You may install CDM+ on other clients while the server completes installation, but do not launch CDM+ on any client until the server displays the Login window.

## Firewalls

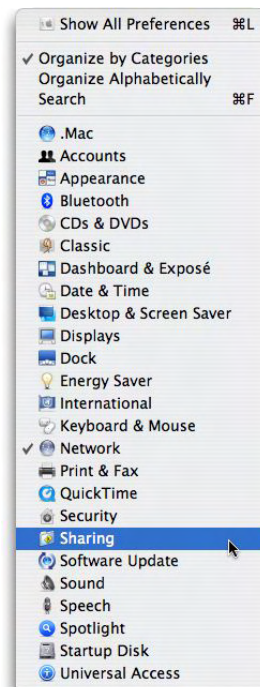
If you run a firewall on your server, you need to add some exceptions to allow other users to access your CDM+ database. **DO THIS BEFORE RUNNING CDM+ FOR THE FIRST TIME.** The following instructions show you how to do this with Mac OS X's built-in firewall and Windows. For other firewalls, make sure to allow access on ports 20221-20300 or to the programs listed below for the Windows firewall. If you do not run a firewall, you can skip these steps.

### Mac OS X

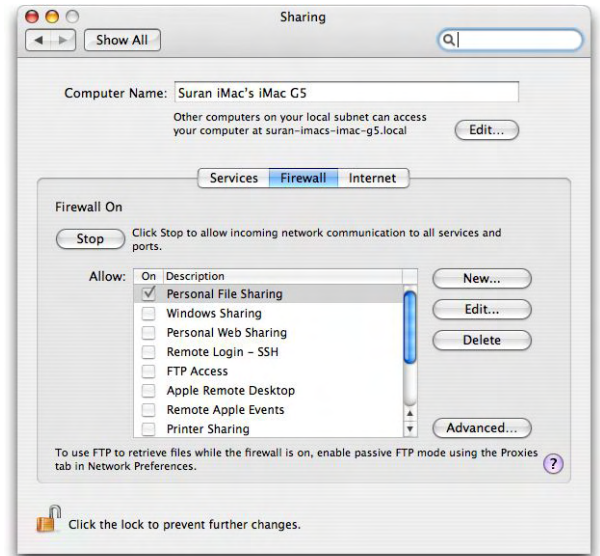
- 1) From the Apple Menu, select Location, then Network Preferences....



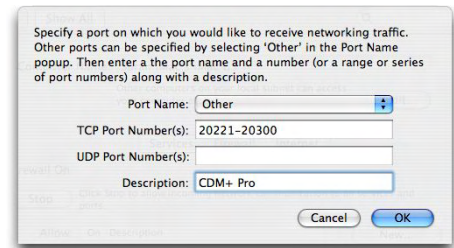
- 2) From the View menu in System Preferences, select Sharing.



- 3) Click the Firewall tab. If your firewall is turned on, you will see the text "Firewall On". If you see "Firewall Off", you can skip these instructions. If your firewall is running, click New....



- 4) Next to Port Name, select Other. For the Port Number, Range or Series, enter 20221-20300 (TCP only for Mac OS X 10.4). For Description, enter CDM+. Click OK, and quit System Preferences.



### Windows (or other 3rd party firewalls, such as Norton or Zone Alarm)

If you run a firewall on this computer, you will need to make one of these two changes:

- 1) Open ports 20221-20300
- 2) Allow access to these programs (Note: these programs can alternatively be on the D, E, F, G or H drive):
  - C:\OpenBase\bin\openinfo.exe
  - C:\OpenBase\bin\openexec.exe
  - C:\OpenBase\bin\OpenBase.exe

If you choose option 2, you will need to temporarily disable your firewall, install CDM+, and once the program begins the update of your database (see below), add access to the three programs listed above and start the firewall.

Consult the documentation on your firewall for how to open ports or allow access for specific programs. For the standard Windows Firewall in Windows XP Service Pack 2, visit this web page: <http://support.microsoft.com/kb/875357#7>

# Upgrading from CDM+ 4.x – 7.1.2 (CDM Plus)

## System Requirements

**Please Note!** System requirements have changed for CDM+ 8.1 and there are a different set of system requirements for the server and client computers (use the server requirements if running 8.1 on a stand-alone Macintosh or Windows computer). Please compare your system with the chart on page 1 BEFORE installing the upgrade.

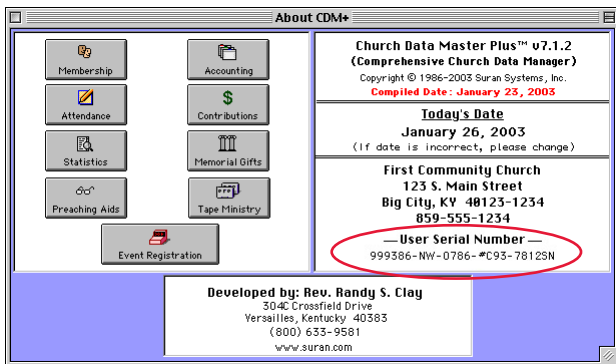
# FIRST - Determine your current CDM+ serial number.

Users of ANY version of CDM+ (or CDM Plus) prior to CDM+ 8.1 must call CDM+ at 877-891-4236 and give us their current serial number before beginning the updating process. This serial number must be obtained from within the CDM+ program. Please do not read it off a box or label.

If you have already received a CDM+ 8.1.2 Activation Code, skip to the SECOND section on determining the location of your CDM+ datafile.

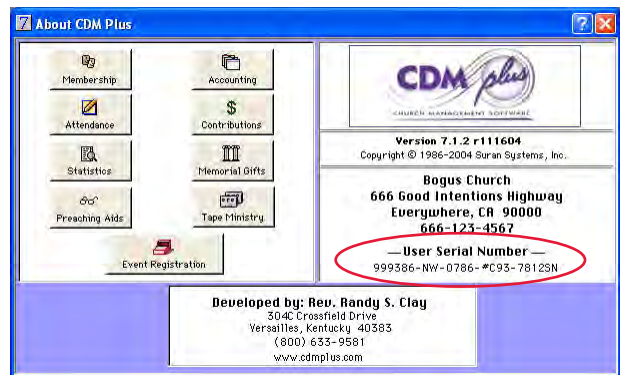
## Users of CDM+ 7.x or earlier:

Go to **File > About CDM+** (Windows users) or **CDM+ > About CDM+** (Macintosh users). The "About CDM+" window appears.



## Users of CDM Plus (your program icon has a purple "plus" across it):

Go to **File > About CDM Plus** (Windows users) or **CDM Plus > About CDM Plus** (Macintosh users). The "About CDM Plus" window appears.



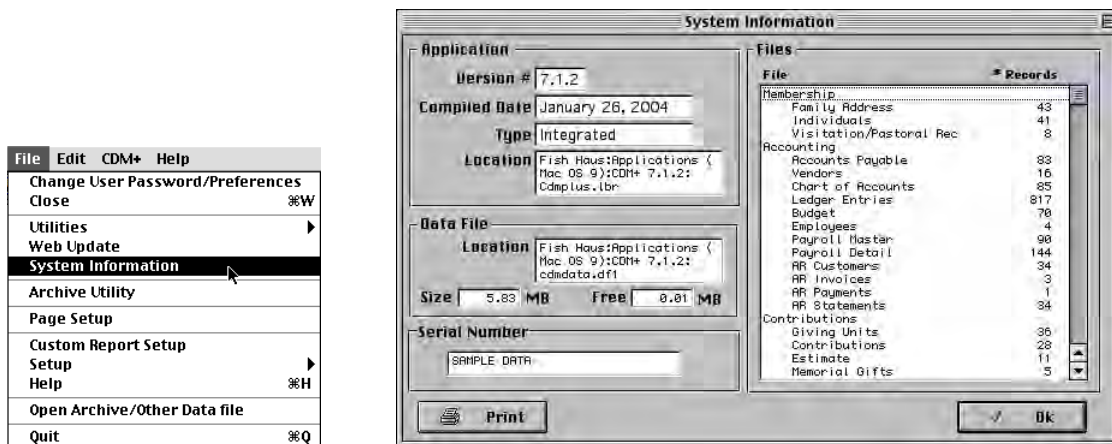
Carefully record the serial number (including any dashes) you see on the window.

Call 877-891-4236 to report your *current* CDM+ serial number. You will be asked for an e-mail address to which we can send your CDM+ 8.1.2 activation code and instructions. Creating a new activation code is not an instantaneous process, so you can expect to receive the e-mail within 2 business days (often sooner).

Once you receive your CDM+ 8.1.2 Activation Code you may proceed to the section on installation below.

# SECOND - Determine the location of your current CDM+ datafile

You will need to know this during the conversion process. The path to this datafile can be found in CDM+ 7.1.2 (or CDM Plus) by going to **File>System Information**, and checking the datafile location.



If you own the Event Registration program, you will need to know the location of that datafile also. This file (regdata.df1) is normally in the same location as the regular CDM+ datafile, and you can verify its location in CDM+ 7.1.2 by going to **Event Registration**, and going to **Registration>About Registration** and clicking **Info**.



Make a note of the location of your datafile(s).

**IMPORTANT:** Before quitting your current version of CDM+, you should check to see that Passwords are set up for each user as you desire under **Password Maintenance (File menu->Change User Password/Preferences)** and make note of those usernames and passwords. The conversion process will carry them forward to CDM+. For information on maintaining passwords in CDM+, see the User Management section of the **Administrative Tools** manual.

## Quit your current version of CDM+ before starting the CDM+ 8.1 installation/conversion process.

**Firewalls** – If you run a firewall on your server, please read the section regarding firewalls on page 2 BEFORE installing the CDM+ 8.1 upgrade on your server.

## THIRD - Install CDM+ 8.1.2 on EVERY computer than runs CDM+

- 1) If you did not choose to order the CDM+ 8.1.2 update on CD, you will need to download the installer. Follow the instructions you received via e-mail.
- 2) Following the instructions e-mailed to you or included with your CD, **INSTALL BUT DO NOT OPEN** CDM+ 8.1.2 on EACH computer that needs to use it.

### Important note for those running CDM+ over a network:

The first computer on which you install and run CDM+ 8.1 **MUST** be your server. Also, you **MUST** let the initial conversion to 8.1 complete before launching CDM+ on any additional client computers. You may install CDM+ on other clients while the server updates your data, but do not launch 8.1 on any client until the server displays the Login window.

### Macintosh

- 1) Insert the CDM+ program CD in the CD/DVD drive of the computer where you wish to store your data (the CDM+ server). *This may be the only computer on which you are installing CDM+.* But if you are installing CDM+ on more than one computer on your network, you **MUST** begin with the server.
- 2) Locate the **CDM+** CD icon on your desktop and double-click it.
- 3) Double-click the **CDM+ Installer** icon.
- 4) Follow the on-screen instructions.

After the installation process finishes, you can launch CDM+ by double-clicking the CDM+ application located in the CDM+ Folder that was installed. The default installation location is Applications/CDM+.

## Windows

- 1) Insert the CDM+ program CD in the CD/DVD drive of the computer where you wish to store your data (the CDM+ server). *This may be the only computer on which you are installing CDM+.* But if you are installing CDM+ on more than one computer on your network, you **MUST** begin with the server.

Once you insert the CDM+ program CD in your drive, the installer should automatically open. Follow the on-screen instructions to install CDM+. If the installer does not open, follow the steps below.

- 2) On your desktop, double-click **My Computer**. If you do not see **My Computer** on your desktop, click **Start** and then **My Computer**.
- 3) Double-click the **CDM+** CD icon.
- 4) If the installer doesn't begin, double-click the **CDM+ Installer.exe** icon (this may appear as **CDM+ Installer**).
- 5) Follow the on-screen instructions.

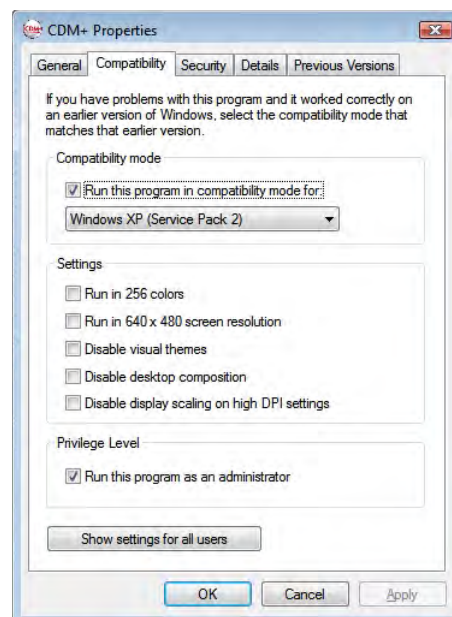
## VISTA USERS ONLY:

- 6) Before opening CDM+, right-click the CDM+ shortcut on your desktop and choose **Properties**.
- 7) Select the **Compatibility** tab.
- 8) Check "Run this program in compatibility mode for:" and select "Windows XP (Service Pack 2)".
- 9) Check "Run this program as an administrator".

**NOTE:** If this option is grayed-out and you cannot check it, you need to enable User Access Control (UAC). Consult the Vista Help for steps on enabling UAC or contact CDM+ technical support (800-633-9581). Once you check "Run this program as an administrator", you can disable UAC again.

- 10) Click OK.
- 11) Right-click the CDM+ shortcut on your desktop and choose "Open File Location".
- 12) Open the folder "conversion".
- 13) Right-click "Conversion.exe" and choose properties. Follow steps 7-9 above and click OK.
- 14) CDM+ and the 7.1.2 conversion process will now function properly under Windows Vista. After the installation process finishes, you can launch CDM+ by double-clicking the CDM+ shortcut on the desktop or the CDM+ application located in the CDM+ Folder that was installed. The default installation location is:

C:\Program Files\CDM+  
(or Start->Programs->CDM+->CDM+)



If you experience difficulties while installing CDM+, call the **CDM+ Technical Support** staff at **800-633-9581** Monday-Thursday, 8:30 AM-7:00 PM, Friday 8:30 AM-5:00 PM Eastern Time for assistance.

# Server Setup

**Follow these instructions even if you are installing CDM+ 8.1 on only one computer.**

If you only use CDM+ on one computer, that computer is considered both the server (the computer that has your data on it) and the client. You can ignore any instructions regarding additional client computers.

**Macintosh** – CDM+ 8.1 operates under Mac OS X 10.4 or later. You may also install it on a server running Linux (kernel 2.6 or later recommended), however, clients computers may not be running Linux.

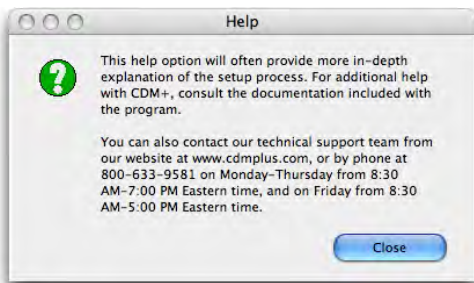
**Windows** – CDM+ 8.1 operates under Windows 2000, 2003, XP and Vista. We recommend Windows XP or Vista for all Windows users. CDM+ will run in XP compatibility mode under Vista. If you are running Vista be certain to note the special instructions regarding Vista above.

These instructions will document setting up CDM+ 8.1 under Windows XP and Mac OS X 10.4, so you may see some slight differences between the screenshots and your operating system.

## For either Windows or Macintosh:

- 1) Begin by installing and launching CDM+ 8.1 on your server. See the **Installation Instructions** available for download from the CDM+ website or on the CDM+ upgrade CD for more information.
- 2) The welcome screen will appear. Click **Continue**.

NOTE: For help during the setup process, click on the **Help** button on any window to open a pop-up window:



- 3) CDM+ will ask how you'd like to configure CDM+. Choose the 3rd option (that you are updating from an older version of CDM+ prior to 8.1) and click **Continue**.



- 4) Next choose a **Database Server Option**. You may click each of the radio button to see more information about each option.

### Local Database Server

If you will be using CDM+ on this computer ONLY, choose the first option "Install a local database server". Click **Continue**.

### Network Database Server

If you will be using CDM+ on more than one computer on your network, first be certain that this computer is where you want to install the database server. If you are not certain, **STOP**. CDM+ must be installed FIRST on the database server. If this is not the correct computer, click **Quit CDM+** and first install CDM+ on the database server computer before installing on this computer.

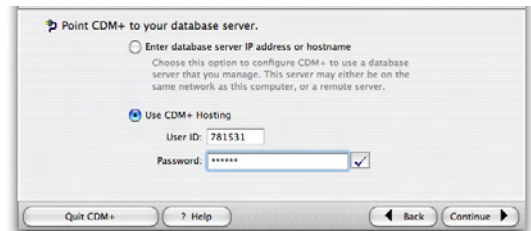
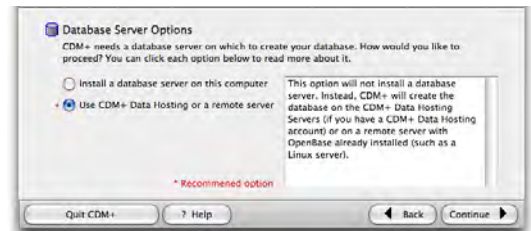
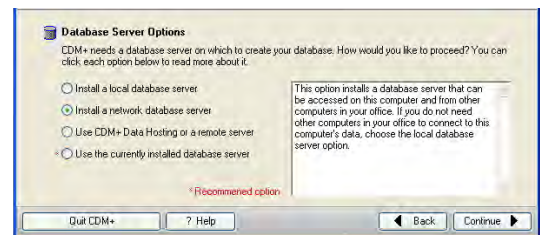
If this is the computer that will be your CDM+ database server, choose the second option "Install a network database server". Click **Continue**.

### CDM+ Data Hosting Service

If you purchased the CDM+ Data Hosting Service, choose the third option "Use CDM+ Data Hosting or a remote server". Click **Continue**.

Enter the User ID and Data Hosting Password given to you by CDM+ and click **Continue**. Your CDM+ database will be installed on a CDM+ Hosting Server.

If you are not sure of which Database Server Option to choose, contact CDM+ Technical Support for help. Call 800-633-9581 Monday-Thursday 8:30 AM-7:00 PM, Friday 8:30 AM-5:00 PM Eastern time.

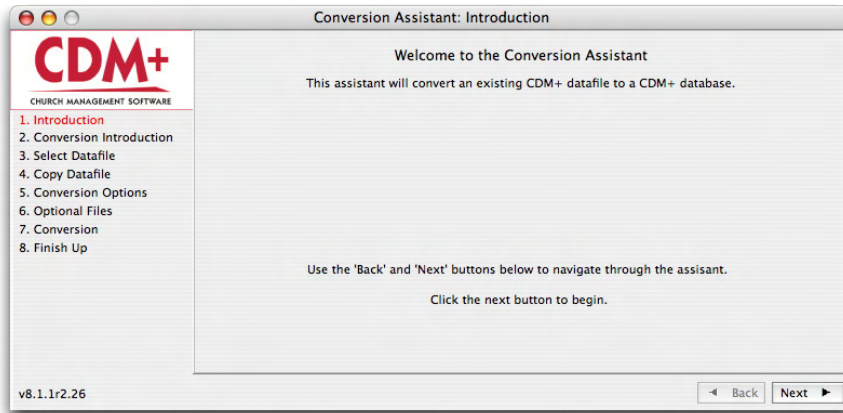


- 5) Select the radio button next to "Version 7.1.2 or earlier" and click **Continue**.

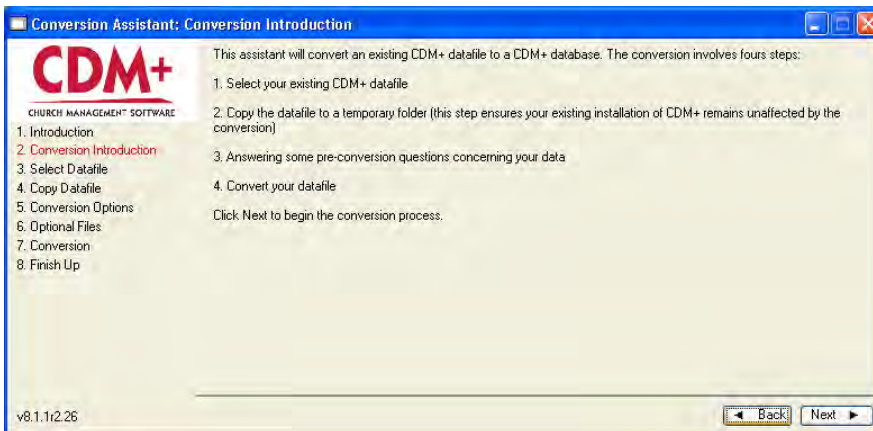


# Set up the Conversion from CDM+ 4.x – 7.1.2 (CDM Plus)

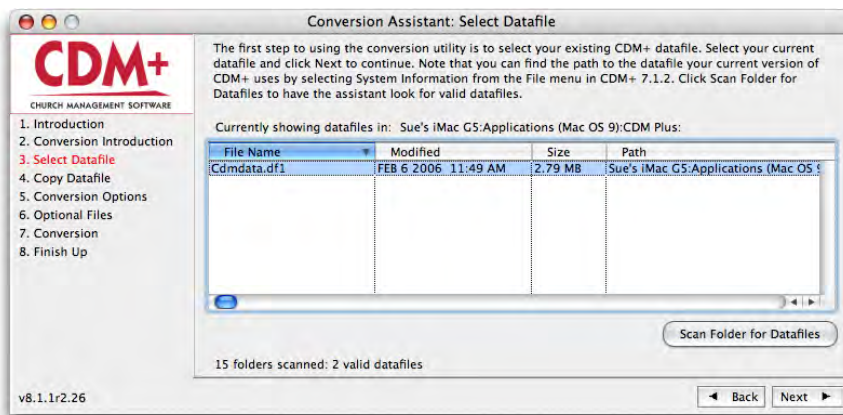
- 1) This opens the first of the Conversion Assistant screens.



- 2) Click **Next**.



The **Conversion Introduction** window explains the steps of the conversion process. After reading them, click **Next**.



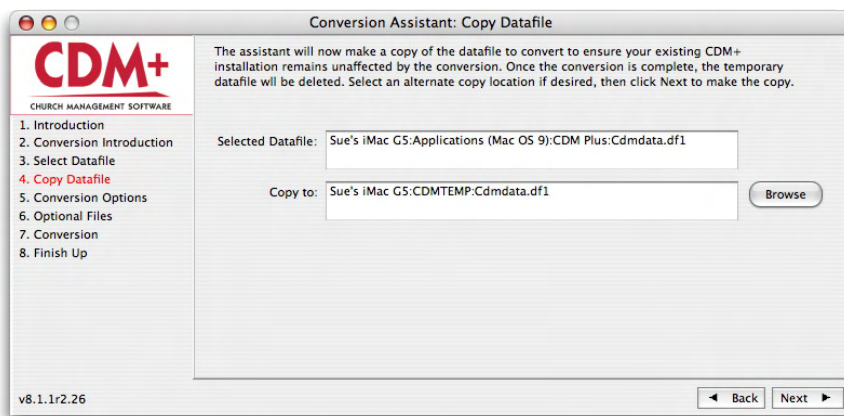
- 3) **Select Datafile** – Next, you are prompted to select your existing CDM+ datafile. CDM+ will ask if you want to scan your entire hard drive for valid CDM+ datafiles.

If you click **YES**, this could take a long time. Since you already took note of the location of your CDM+ datafile, you can click **NO** and click on the **Scan Folder for Datafiles** button. This will allow you to browse your computer for the folder holding your CDM+ datafile, select the folder, and click **Open**. CDM+ will list all valid datafiles it finds in the window.

Once you have the correct datafile highlighted, click **Next**.

- 4) **Copy Datafile** – Next, the Conversion Assistant will copy your datafile to your local hard drive (or any location you specify) and work off this copy.

**NOTE:** This cannot happen if you have your current of CDM+ open on your computer.

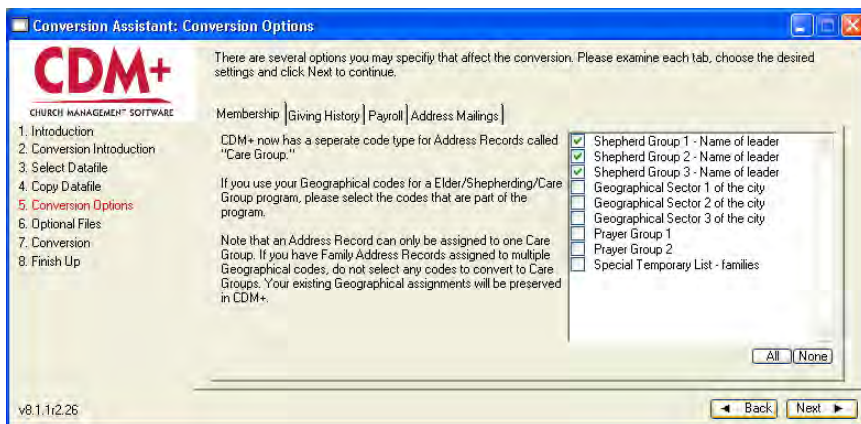


The conversion assistant works on a copy of your current CDM+ datafile to avoid disrupting your current CDM+ setup. This means is that if the conversion does not complete, your current copy of CDM+ will be untouched. Also, you can continue to work with the current copy of CDM+ while the conversion runs (after it's copied in this step), though any changes you make to your current copy of CDM+ will not be in the converted data.

Confirm that the **Copy to:** location is correct. If you wish to select a different location, click on the **Browse** button. Click **Next**.

## Conversion Options

- 5) Next you will be asked to set several settings, which are organized into tabs under Step 5 of the Conversion Assistant. Depending on the CDM+ programs (modules) you own, you may not see them all. Click on each tab of this window, making selections as prompted.

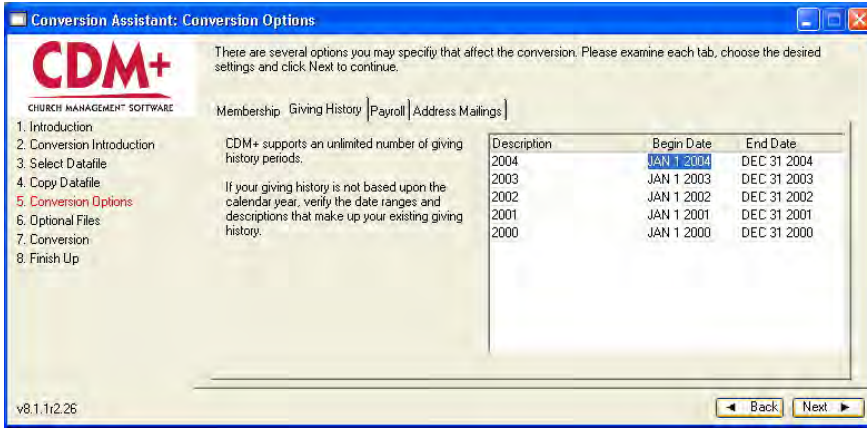


### Membership tab

CDM+ contains a new field on the Address Records window called Care Group. You have the option to rename this field in CDM+, but it is designed to allow you classify addresses/families into care groups, elder groups, shepherd-ing groups, etc. During the conversion process you have the option to choose Geographic Codes to convert to Care Groups. Geographic Codes that are not converted to Care Groups will remain listed as Geographic Codes in CDM+.

**NOTE:** If you choose to not select any Geographical Codes to be converted to Care Group codes during the conversion, you can later use **Address List Maintenance** to move existing groups on the **Groups** tab of Address Records to **Care Groups**.

Click on the **Giving History** tab of the Conversion Options window.



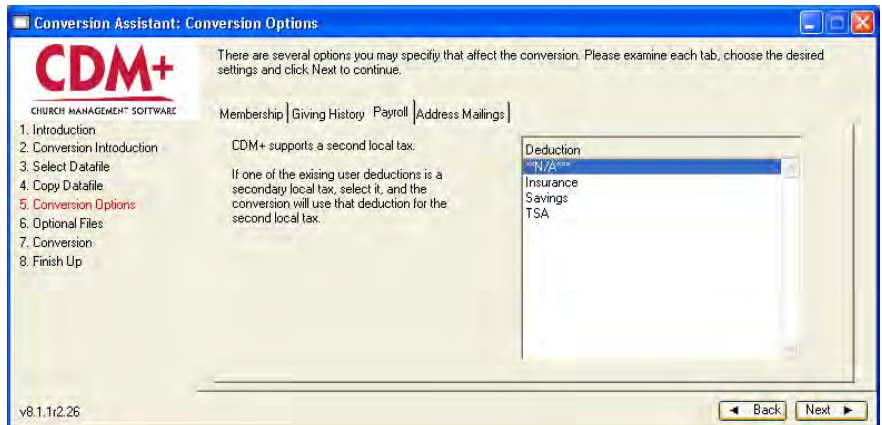
## Giving History tab

While previous versions of CDM+ support up to five years of giving or contributions history, CDM+ supports an unlimited number of periods. In order to correctly convert your existing history, the conversion assistant need to know the date ranges of your existing history. This is particularly relevant if your history operates on a fiscal year, rather than a calendar year. If you still have the detailed contribution records in your datafile, you can redo the history in CDM+ after the conversion completes.

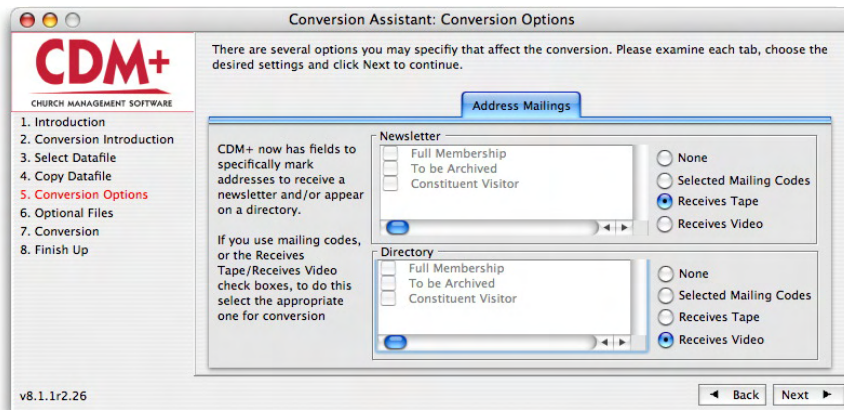
Click on the **Payroll** tab of the Conversion Options window.

## Payroll

Payroll in CDM+ supports two local tax codes, for example a county and city. Under the Payroll tab of the conversion options, you can select a User Deduction from your current version of CDM+ to convert to a secondary local tax.



Click on the **Address Mailings** tab of the Conversion Options window.



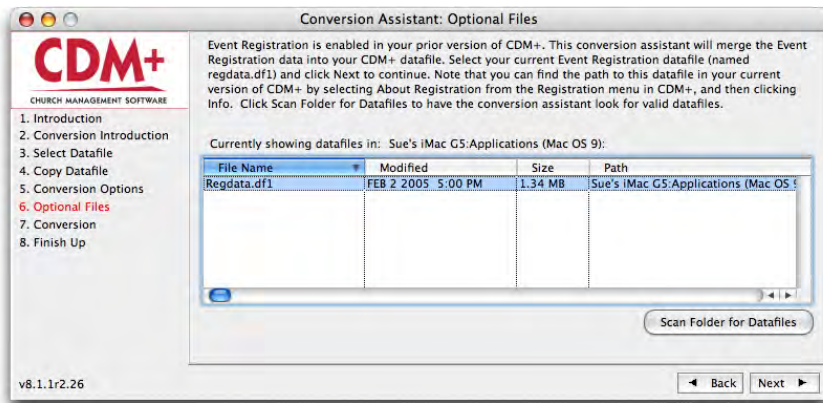
## Address Mailings

To simplify mailing newsletters and directories, CDM+ contains Newsletter and Directory checkboxes on the Address Records window. You can have these boxes checked during the conversion process by specifying certain mailing codes or using the Receives Tape and Receives Video checkboxes settings in your current version of CDM+.

Once this is done, you may quickly print labels or envelopes for this group of addresses just by making a selection on the report setup window, rather than specifying several mailing codes.

**NOTE:** Selecting Address Records with certain Mailing Codes to be marked with a Newsletter or Directory checkbox for quick printing of labels or envelopes does not affect the existing mailing codes assignments at all.

Click **Next**.



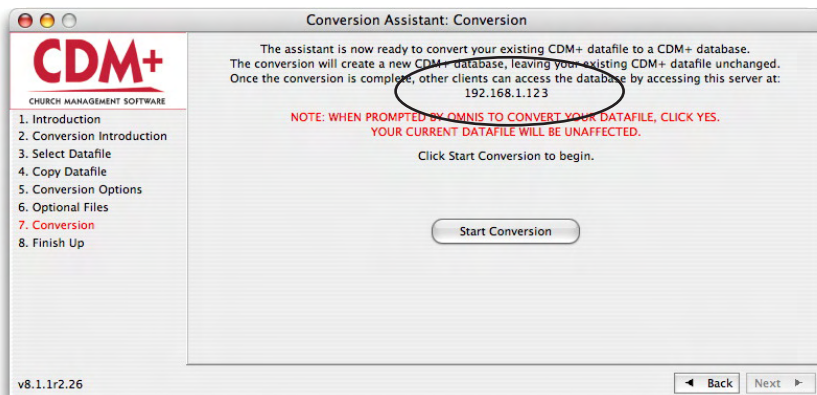
## Optional Files

If you own CDM+ Event Registration, you will be prompted to select your Event Registration datafile, named "regdata.df1". This file is normally in the same location as the regular CDM+ datafile. If you do not see it listed on the window, click on the **Scan Folder for Datafiles** button. This prompts you to select a folder to scan for valid CDM+ datafiles and lists them in the window. Since you took note of the location of your CDM+ Event Registration datafile before starting the installation/conversion process, you should have no trouble selecting it here. Once you have the correct datafile highlighted, click **Next**.

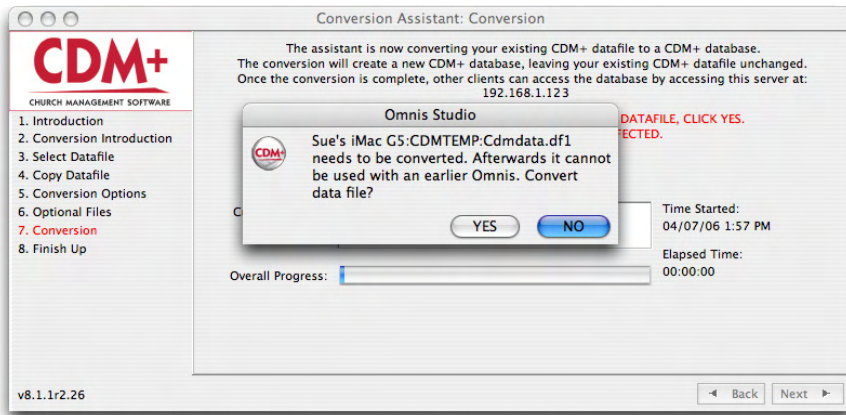
## Allow CDM+ to convert your data

At this point, the conversion process will begin. First, the conversion assistant will bring your previous datafile up-to-date with the most current version of CDM+ 7.1.2 .

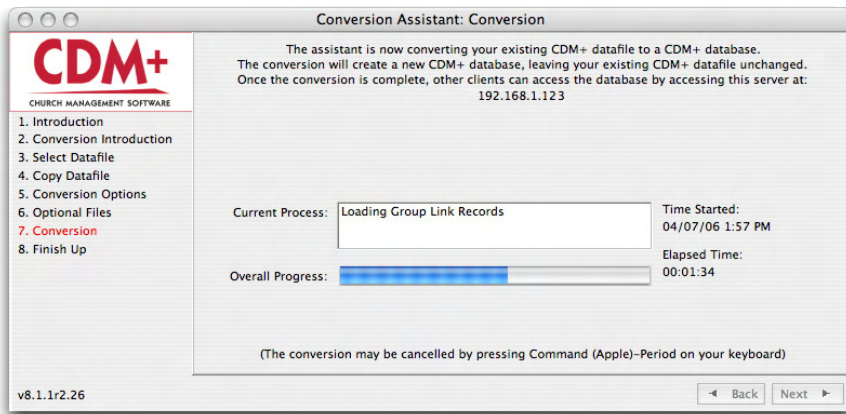
**NOTE:** Before clicking **Start Conversion**, write down the IP address (192.168.1.123 in the example below) on this window. You will need it later.



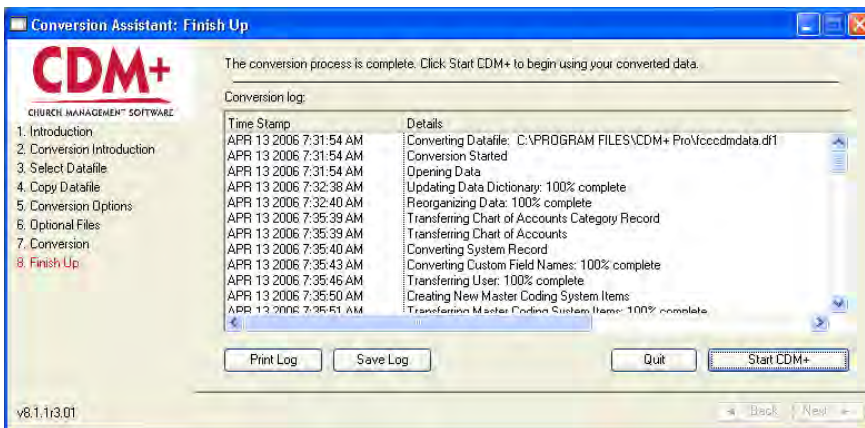
You will be asked (twice, if you own Event Registration) if you want to convert the copy of your datafile—click **Yes** to each message. (Remember—this conversion is being done on a copy of your current datafile. You will still be able to access the original with your current version of CDM+.)



The conversion will now run unattended until it is complete.



During the conversion process, a log file is written in the CDM+ program folder detailing the conversion's progress. Once the conversion is complete, you can view this log file in the conversion assistant window. You may also Save or Print the conversion log by clicking on the appropriate button on this window.



**NOTE:** Providing you don't delete your previous datafile, everything in your old version of CDM+ will still be available. In fact, you could even reconvert your old data if you wanted. You may wish to run duplicate programs for a short period while learning the new features of CDM+. When you are confident in using only the new program, you would then re-convert the datafile.

## Launch and Activate CDM+ 8.1

Click on the **Start CDM+** button at the bottom of the final Conversion Assistant window. The Login window opens.

Carefully type (or copy and paste if supplied in an e-mail) the **Activation Code** given to you when you upgraded to CDM+ 8.1 and click **Continue**.



**NOTE:** CDM+ will keep its version synchronized with the latest available version on your network. This means that adding an additional computer at a later date can be done easily from the original CD—the first time you connect the new machine to your database, the latest version of the program will be installed.

## Client Setup - Upgrading from CDM+ 4.x - 7.1.2 (CDM Plus)

- 1) Begin by installing and launching CDM+ 8.1 on the client computer. See the **Installation Instructions** available for download from the CDM+ website or on the CDM+ upgrade CD for more information.
- 2) The welcome screen for 8.1 will appear. Click **Continue**.



- 3) CDM+ will ask how you'd like to configure CDM+. Choose the 2nd option (that CDM+ 8.1 is already installed on your server) and click **Continue**.



- 4) CDM+ will ask for the address of the server. Enter the address you noted in step 4 above and click **Continue**.



- 5) Select your user (or enter your username), enter your password and click **Log In**.



# Changing Your Password

If you wish to change your password, click **Change Password** on the **Login** window. Enter your current password, the new password you wish to use (confirming that password by re-entering), and click **OK**.



If you have lost your password, ask your system administrator to give you a new one. If you are the system administrator and have lost your password, contact CDM+ Technical Support for help resetting your password. See the **Support** section below for information on contacting Tech Support.

# Welcome to CDM+ Window

After setting up CDM+ and logging into it, you will be presented with the **Welcome to CDM+** window. There is a button for each program and sub-program of CDM+ here.

You may check the box at the bottom next to **Don't Show This Window at Startup** to avoid seeing it again. To re-enable this window at any time, choose **Open the application Welcome window** from the Startup options of the General Preferences window. See the **Preferences** section in the **Administrative Tools** chapter of the CDM+ manual for more information on setting and changing preferences.



To view this window at any time, select **Welcome to CDM+ Window** from the **Support** menu.

Click on one of the buttons to see a list of steps to begin using that program or sub-program.

Click on the Windows tab to open a new pane. Clicking on one of the buttons found here will open that record window.

Click on the Reports tab to open another pane, listing the reports within this particular program or sub-program. Double-click on the desired report name to open the report setup window.



See the **Getting Started with CDM+** and **Common Features** manuals for more information about navigating CDM+. See below for how to access the CDM+ electronic manuals.

# Accessing the CDM+ Manual

The CDM+ Manual is available electronically in Adobe PDF format either from within CDM+ or directly from the CDM+ program CD. This enables us to easily update the manuals as changes are made to the software. You will be notified by e-mail if a major update to the manual is released.

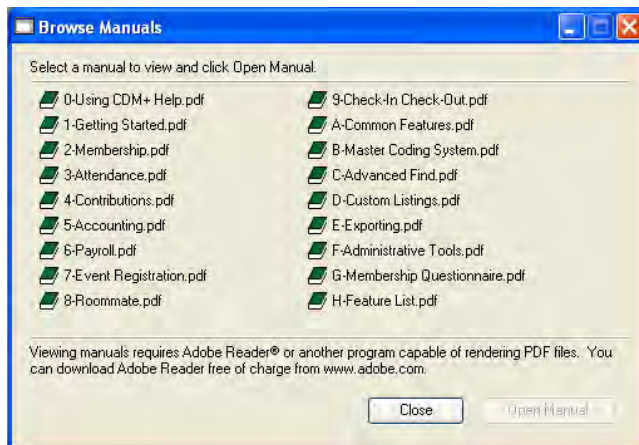
To view (and print, if desired) the CDM+ manual from the program CD, open the **Manuals** folder and double-click on the desired topic.

**Note:** Windows users will need to right-click the CDM+ CD icon, choose **Explore**, and click on the **Manuals** folder. Double-clicking the CDM+ CD icon will launch the program setup.

To view (and print, if desired) the CDM+ manual from within the program, select **Browse Manuals** from the **Support** menu. Double-click on the desired topic to open it.

We suggest you first read **1-Getting Started** and **A-Common Features** which will introduce you to the fundamentals of CDM+. The **0-Using CDM+ Help** document has instructions in using CDM+ manuals.

**NOTE:** You need to have Adobe Reader® or another program that can render PDF files installed. If you are having problems opening the CDM+ manuals, first try installing the latest version of Adobe Reader for your operating system. You can download the free Reader software from [www.adobe.com](http://www.adobe.com) (click on "Get Adobe Reader").



If you are unfamiliar with Reader, we suggest you spend a few minutes with **Reader Help** (found under the **Help** menu when viewing a manual) to learn how to view, navigate and print PDF documents.

You may print as many copies of the CDM+ Manual sections as you'd like and put them in a binder, if you desire.

## Getting Help with CDM+

### Phoning CDM+ Tech Support

Help from CDM+ Technical Support staff is available by calling 800-633-9581 Monday-Thursday, 8:30 AM–7:00 PM, Friday, 8:30 AM–5:00 PM Eastern Time for assistance. (Note: Kentucky does observe Daylight Saving Time.) 60 days of free access to our toll-free phone support, beginning on the purchase date, is included in the upgrade price of CDM+. Please do not hesitate to call; we are happy to help.

If no tech support personnel are available when you call, you will be placed on a callback list. Tech support calls are returned in the order in which they are received. Our commitment is to return all support calls within four hours of the time we receive them, but we usually respond in half that time or less. Certain times are busier, such as January or when we release a new version of CDM+ , and we appreciate your patience when the call load is heavy.

If you call outside the above hours, or if all operators are busy when you call, please leave a voice mail message with your name, your church or organization name, location and phone number. It is not necessary to explain your support issue in detail. If CDM+ Tech Support is not open when you call, you will be called when we are next open. If you reach the Tech Support voice mail during regular support hours, you will be placed on the list for a return call.

If we do need to call you back and you know you will be unavailable at a certain time, it is helpful to give that information to the operator when you phone to avoid missing our return call. For example, if you tell us you'll be out to lunch between Noon and 1 PM CST, we won't call you back during that time period.

### Support Menu

The **Support** menu provides access to user support for CDM+, including the electronic manual, links to the Tech Support e-mail address and CDM+ website, and a form for providing feedback on the program.

### Browse Help Manuals

Select this menu item open the **Browse Manuals** window. See the Accessing the CDM+ Manual section above.

### E-Mail Tech Support

If you need CDM+ technical support, you can call toll-free 800-633-9581 (Mon.-Thurs. 8:30 AM–7:00 PM, Fri. 8:30 AM–5:00 PM Eastern Time).

You can also e-mail us your question. Select **E-Mail Tech Support** under the Support menu to open a new e-mail to support@cdmplus.com with your e-mail application.

Be sure to include your name and the church name and location (you'd be surprised how many churches have the same name!) in the body of the e-mail. We cannot respond to your questions if we cannot find you in our database of churches and organizations using CDM+. Also, please add **support@cdmplus.com** to your e-mail application's address book or "allowed" list to avoid missing e-mails from CDM+ support staff due to spam-blocking software.

Tech Support phone calls generally take precedence over Tech Support e-mails. Therefore, during busy support times, such as when a new version of CDM+ is released or in January, you may experience a slower response time to e-mails.

## Welcome to CDM+ Window

Select this menu item to open the **Welcome to CDM+** window (described above).

## Provide CDM+ Feedback

If you need to report a bug, want to make a suggestion or provide any other type of feedback, you can select **Provide CDM+ Feedback** under the Support menu to access the feedback form.

To use the Provide CDM+ Feedback feature, just fill out the form, making sure to include a detailed description of your feedback, and click **Send**. You may also include pertinent screenshots of open windows by checking them in the Include screenshots list.

**Please note:** The Provide CDM+ Feedback function does not take the place of contacting CDM+ Tech Support. You will not get a response from the CDM+ software developer working on the issue unless he or she has a question. For timely help with a problem, please call or e-mail CDM+ Tech Support.

The screenshot shows a window titled "Provide CDM+ Feedback". At the top, there is a disclaimer: "Please note that there may be a delay between the time you send a feedback and when our developers begin to address it. If you need a more immediate response, please contact our Support team at 800-633-9581 Monday-Thursday 8:30 AM-7:00 PM ET, Friday 8:30-5:00 ET or by e-mail at support@cdmplus.com (you can also e-mail Support by selecting E-Mail Tech Support from the Support menu)." Below this, the form contains several input fields: "Name" (filled with "Ruth Stokes"), "Church/Organization's Name" (filled with "First Community Church, Big City KY"), "Your E-Mail Address" (filled with "ruths@fc-bigcity.org"), "Operating System" (filled with "Windows NT/2000/XP") and "Version" (filled with "5.1"), "Printer Vendor and Model" (empty), "Feedback Type" (filled with "Positive feedback"), "Related program location: (such as the window containing the bug)" (filled with "Membership"), and "Feedback Details" (filled with "Thanks for the nifty skip labels feature!"). At the bottom, there is a section for "Include screenshots: (note that only currently open windows will be shown, and that open SQL Errors are automatically included)" with a list of open windows. At the very bottom, there are five buttons: "Clear Form", "SMTP Options", "Print", "Copy to Clipboard", and "Send".

## CDM+ Training Opportunities

A variety of training venues are available to CDM+ users. For more information on CDM+ Training, visit our website ([www.cdmplus.com](http://www.cdmplus.com)).

### On-Site Training

For the ultimate in personalized individual training, we offer on-site training. You can arrange to have a CDM+ trainer come to your office at a mutually agreeable time to work with you and your CDM+ database. Contact us by phone (800-633-9581) or by e-mail ([training@cdmplus.com](mailto:training@cdmplus.com)) to discuss an on-site visit.

### Annual CDM+ Users Conference

The annual users conference is our premier group training experience. Over 3 days you can choose from over 30 classes covering all aspects of CDM+. Classes are offered for both the novice user and experienced users who want to explore how CDM+ can further impact their ministry. Plus, the CDM+ Tech Support staff and program developers are available on-site in labs to answer your questions. The conference is a great chance to network with other CDM+ users from all over the country. Visit our website, [www.cdmplus.com](http://www.cdmplus.com), for more information.

### Regional Training Events

Periodically, we offer lecture-style, classroom training events around the country. During these two-day seminars, our trainer follows a set course of basic instruction in the use of CDM+. One day is devoted to Membership, Attendance, Visitor Records

and Event Registration training and the second day we cover Contributions, Memorial Gifts, and Accounting (General Ledger, Accounts Payable, Account Receivable, and Payroll). Regional Training Events are publicized on our website and in our newsletter. You will be notified by e-mail when an event is coming to your area.

## Online Training Options

Using a high-speed Internet connection on your own computer and a phone, you will be able to see and hear as a CDM+ trainer illustrates working in CDM+.

### Online Group Training

A small group (10-12 clients) training class hosted online by an experienced trainer, Online Group Training focuses on the daily and weekly ministry tasks that you perform in your ministry roles. Each one-hour class features both lecture and Q & A teaching styles. A variety of classes are available for each CDM+ program in both basic and advanced levels. A FREE **Fundamentals of CDM+** class is offered periodically and all CDM+ users are encouraged to take it.

### Online Individual Training

This training is also hosted online but caters to the training needs of one client. The content and length of the session will be agreed upon in advance by the client and the trainer after assessing the client's needs. Sessions feature consultation, lecture and/or Q & A teaching styles and are available for each CDM+ program or a combination of programs, or as an opportunity to consult about using CDM+ to support the unique ministry of your organization. This individualized training approach allows the client to get precisely the training/consultation needed.

## CDM+ Premier Support Program

Most CDM+ users find it worthwhile to enroll in the optional annual CDM+ Premier Support Program. Although you may get a good start with CDM+ during the free 60 days of support after purchasing the upgrade to CDM+ 8.1, it is good to know that the friendly, helpful CDM+ Tech Support staff is there to help out anytime as you delve into the possibilities CDM+ brings to your ministry.

### Benefits of the CDM+ Premier Support Program include:

- **UNLIMITED** toll-free phone support
- E-mail support (with preferential response)
- **FREE** CDM+ updates and minor upgrades (downloaded)
- Discounts on training, including the annual CDM+ Users Conference
- Discounts on 3rd-party products, such as check readers, barcode scanners, specialty printers and PhoneTree®
- Discounts on CASS certification for automation rate mailing
- **FREE** federal and state payroll tax table updates as needed (downloaded)
- **TRAINING CREDITS** – For each CDM+ program owned, Premier Support members earn **one** training credit each year. Credits may be combined and applied to any type of training listed above.

**Please note:** If you choose not to enroll in the CDM+ Premier Support program, and you call for CDM+ technical support after your initial 60 days (from date of upgrade purchase) of free support, you will be charged \$55/instance. If the problem exists due to a program error, there will be no charge.

## CDM+ Annual CD Maintenance Program

All updates and minor upgrades to CDM+ are free to members of the CDM+ Premier Support program as a download from our website. If you choose to get an update mailed to you on a CD, there is a \$10 charge.

As a convenience for our users who are unable to download updates, we offer the CDM+ Annual CD Maintenance Program. For \$36/year, you will automatically receive in the mail all published update releases of CDM+ (including tax tables). You must be enrolled in the Premier Support Program to participate in the Annual CD Maintenance Program.

**To enroll in the CDM+ Premier Support and Annual CD Maintenance Programs, please call the CDM+ Sales Department at 877-981-4236 Monday–Friday 8:30 AM–5:00 PM Eastern Time.**