

2009 Annual Users Conference Classes

Categories of classes during the 2009 Annual Users Conference are color-coded on the conference schedule and below. Please note that some classes fall into more than one category, as shown by multi-colored blocks on the schedule. Classes are a mix of lecture and Q&A, with attendees viewing the program projected on a large screen.

CDM+ Classes

General Sessions

General sessions apply to all conference participants.

Basic

Basic classes are structured to provide an introduction into all areas of the program. The classes assume that the user has little or no experience with the most current version of CDM+. The goal of each of these classes is to provide detailed instructions on how to enter, find, change and delete data. Shortcuts to aid in the use of each area of CDM+ are provided. A review of basic reports is also discussed.

Advanced

Advanced classes assume that the user has a basic familiarity of each area through use or attending a basic class. The focus of these seminars is to explain in detail the function of each area and how it relates to other areas of CDM+. More time spent on reporting features and how to access special functions within CDM+.

Administrative

Administrative classes deal with a wide range of topics. These sessions are for those involved in overseeing the use of CDM+ with other staff members. Some classes are designed to introduce certain elements of the program that may not be used on a regular basis. Other classes are designed to help you utilize all the functions offered by CDM+.

Ministry

Ministry classes assume basic knowledge of CDM+ then apply that knowledge to specific ministry situations . Each class takes a specific ministry need and presents how to unlock the full power of CDM+ to meet the data management needs of that ministry area.

Computer Lab

A computer lab, located in Mezzanine Salon B, is open throughout each day of the conference. The lab has computers set up for CDM+ users to practice what they have learned in class, using a sample CDM+ database.

If you want to bring your data and work with it during the conference, you may bring it on a thumb drive or CD for transfer to a lab computer. Please take your data to the lab early on Monday so we may get it loaded on a lab computer. You are also welcome to bring your laptop computer.

The computer lab is staffed with Suran Systems personnel to answer your specific CDM+ questions. If you have an issue that will require working with a CDM+ tech at length, please go to the lab early on Monday to schedule that time with the lab staff in advance.

A limited number of computers are also available for you to check your e-mail.

CDM+ Classes

Fund Accounting Introduction

Are you new to CDM+ Accounting? Do you have little or no accounting experience? Desire to learn the basics of fund accounting? Maybe you'd just like a better understanding of the church's financial reports. We designed this class just for you. It covers an introduction to double-entry accounting including Account Types, Debits and Credits, Funds and Fund Accounting, and the relationship of Ledger Entries to Income/Expense and the Balance Sheet reports. This class is great place to start your CDM+ Accounting training!

Getting Started – Accounting

In just one session, we cover the basics of all three components of CDM+ Accounting. Beginning with the Accounting setup window and moving through the Chart of Accounts to the General Ledger and on to Accounts Payable, participants receive a solid "how to" introduction to Accounting. Beginning Balances and Ledger entries, including Deposits and Journal entries, are explained. (Payroll is covered in separate classes.)

Accounting Procedures

This class takes the next step in CDM+ Accounting and looks in depth at budgeting, bank reconciliation, and period closing procedures. Learn how to use recurring transactions for month-end transactions and check writing to save time. Understand the power of accrual accounting and how easy it is in CDM+. Emphasis is given to finding and correcting mistakes and understanding the relationship between contributions, accounts payable and payroll.

Accounting Ledger Reports

This session reviews the Accounting Reports often used in the daily/weekly work in CDM+ Accounting. The use of Selected Accounts, Account Sets and the Account Browser is demonstrated. Some of the reports reviewed are: Daily Reports, Deposit Listing, Budget, Budget Comparison, Ledger by Accounts, Ledger to Budget, Income and Expense, Current Balance Sheet, Account Balances-Check Register and Fund Activity.

Accounting Comparison Reports

A review of YTD Ledger reports including: Monthly Comparison, Monthly Summary, Range Summary, Ledger by Accounts, Accounting Balances-Balance Sheet, Trial Balance, and Fund Activity. Using reports as trouble-shooting tools will be demonstrated. Prior participation in the Accounting Ledger Reports class is not required, but is helpful.

Accounts Receivable

The Accounts Receivable area of CDM+ Accounting Pro is ideal for churches running a school or day care center. It can also be a valuable tool for any type of invoice/billing needs of your organization. This class reviews all aspects of Accounts Receivable. See how easy it is to keep track of money owed and present professional invoices to those using your services.

Advanced Fund Accounting

Advanced Fund Accounting is an optional feature of CDM+. This session is not for those who are just starting out in accounting; a good understanding of fund accounting and balance sheets is needed. A thorough review of the advanced fund accounting structure in CDM+ is presented. Suggested standards for accounting for nonprofit organizations can be met with the CDM+ advanced fund accounting feature. Balance sheets by funds are as easy as a click of the mouse in CDM+. If you need to produce a balance sheet for each of your funds, or you are concerned about fulfilling all the regulations—this is the class for you.

Administering CDM+

Bring into focus the essential CDM+ administrative features of User Management, System Information, Preferences, and CDM+ Updates. Learn the underpinnings of CDM+ to protect your data and keep CDM+ running smoothly. Remote access to CDM+ via the Internet and Suran Systems' data hosting service is also covered. Save time for this class!

Advanced Finds/Searches

The skills taught in this class take your use of CDM+ beyond the limitations of a simple search! Here you will learn how to construct basic advanced finds, how to mix comparisons (and/or) within a single advanced find, how to pull together finds from multiple programs into a single find, how to use saved searches, and how to master the advanced find window. After taking this class, you'll know how to extract just the information you're looking for!

Archive and Back-Up

Nervous about archiving? Learn not only how to archive CDM+ data, but when and what data to archive to keep your CDM+ database running lean. We'll also cover the all-important backing up of CDM+ data, including the auto-backup feature in CDM+ 8.1.2. If you've ever suffered the pain of a computer crash, you know the value of this class.

Getting Started – Attendance

Learn how to input event, class, and list attendance for worship services, Sunday School classes, small groups, and even board meetings! Entering individuals in classes and groups, as well as the preparation of attendance worksheets for classes and groups is taught. Use of an optional barcoded attendance worksheet will be demonstrated.

Attendance Analysis & Reports

Class promotions and attendance analysis are made easy in this course. Missing Analysis reports, the Attendance by Date report, and even how to view a full year's attendance summary for an individual are all covered; as is tracking overall attendance averages and trends. Exporting attendance records and event statistics are examined. This class will highlight accessing and analyzing the significant attendance information tracked in CDM+.

CASS Certification & NCOA Processing

Does your church or organization do bulk (permit) mailing? Then you may have heard about the USPS requirement to regularly update your addresses. Come to this class to learn how CDM+ can help. We'll cover using NCOA processing and other ways to get folks' new addresses when they move. You'll also learn how to export/import your CDM+ addresses for CASS certification to qualify for low postage rates on Standard Automation (barcoded) mailings.

CDM+ Discount Mailing

Do you have a permit for USPS discount (Standard) mail? Concerned about ever-increasing postage costs? Come to this class to see how the CDM+ Discount Mailing feature will sort and process your addresses according to U.S. Postal Service guidelines to get the best rates and services. Labels or envelopes printed in proper order, supporting documentation, tray and sack tags can all be generated from the CDM+ mailing program.

Getting Started – Check In/Check Out (CICO)

CDM+ Check-In/Check-Out is a versatile addition to the CDM+ suite that tracks everything from childcare, to youth groups, to adult classes and more. This class covers every main window in the Check-In/Check-Out program including setup, performing check-ins and check-outs, and running reports.

Experience Check-In/Check-Out (CICO)

Check-In/Check-Out stations for several types of events will be setup so you can experience CDM+ Check-In/Check-Out yourself. We will also discuss how to configure Check-In/Check-Out for a broad range of events, from security-conscience childcare to automatic attendance entry using self-check-in. Finally we will demonstrate how to setup and use various hardware add-ons including touch-screen displays, barcode scanners and label printers.

COG Treasurer Report

This class is specific to Church of God (Cleveland, TN) users. It focuses on how to configure CDM+ to automate the creation of the Treasurer Report and submit it to State/Regional and International Offices. A must-have class for all Treasurers of COG churches and State Office staff who receive the reports!

Getting Started – Contributions

Here we cover everything you need to begin entering contributions, including setting up Giving Codes and Giving Funds, viewing individual Giving History, and the Groups field on Giving Unit records. Basic Batch Contributions setup and entry is explained, as well as how to use a Check Reader or Image Scanner for contributions entry. Everything you need to know about linking to Accounting and Posting to Accounting is explained. Learn to verify your contributions entry through the use of Daily reports.

Contributions Procedures

Go beyond the basic Contributions Entry and the Daily Report of Giving. Maintaining the integrity of the Contributions History file is covered, as well demonstrating its printing and graphing capabilities. Setup "Special" and "Visitor" giving codes to track loose cash and visitor gifts. Information about handling special offerings, gifts-in-kind, and non-deductible gifts is also available. Tracking and reporting of Memorial Gifts and Giving Statements preparation is covered.

Contributions Pledging

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

Contributions Reports

In this session, we review many of the reports within Contributions. Comparative reports and exports are investigated. Learn how to create Contributions letters to givers that include their Year-to-Date giving totals right in the text of the letter! Listing reports, including Giving Detail by fund(s) and Giving by Date, are effective evaluation tools for Stewardship committees. Giving Receipts and Statements are examined, as well as the new feature for e-mailing Giving Statements!

Enhanced Notices

The Enhanced Notices feature available in CDM+ 8.1.2 takes your communications to a higher level! Learn how to use the word-processor-like features to create eye-catching, personalized, cards, letters and e-mails from within CDM+. See how easy it is to use personalized notices to update member information.

Event Registration

This class covers the powerful CDM+ Event Registration program, in which you can track fees and payments, send confirmation letters, print name badges (with graphics even!) and much more. This program can be used for Vacation Bible School, youth events, community services, mission outreach, and church dinners and many other events.

Fundamentals of CDM+

A key element of using CDM+ is the common features between all programs. The skills presented are foundational to effectively use CDM+. The class reviews the dynamic find features, the Find Results window setup, user management, grid options, split window view and basic report generation. *The manual is provided in this Conference notebook for your reference, the class is offered regularly using our Group Online Training option.* Attendance is FREE and registration is completed on our website: www.cdmpplus.com.

Getting Started – Membership

We begin with an in-depth review of the Address and Individual Records, including the membership records screens and fields, their features and tool bars. The relationship between Address Records, Individual Records, and Giving Unit records is explained. Adding Address Records and Individual Records is demonstrated. You are introduced to Pastoral and Visitation Records and the Report Menu options. This class is an effective introduction to Membership, providing the beginning user everything needed to get started. It's also a good refresher for the experienced user.

Membership Procedures

Learn to customize CDM+ Membership with an in-depth look at the Master Coding System and how to best setup Membership to support the ministries of your church. Learn how to use the List Maintenance, Field Maintenance and list transfer to manage groups and personal data. Discover the expansive possibilities the Other Information fields offer you to track a wide variety of family and personal information. This is the next step to investigate the multiple features of the Membership program.

Membership Ministry

This class goes deeper into special situations that arise in Address and Individual database management such as dealing with couples who have different last names and the use of an Alternative Address. Become comfortable with preparing records for Archiving from the Membership program. Enhance your ministry to members through the use of Visitation and tickler files. Explore how your ministerial staff can use confidential, password-protected Pastoral Records. This class is your opportunity to address your more advanced Membership questions.

Membership Custom Reports

Discover the many reports and their multiple configurations that CDM+ offers. Learn how to create Yearbook Directories for your members or staff use. The custom setup for Name Badges and Custom Membership Lists is presented. Join us as we shine a light on these reports that will enrich your effectiveness and productivity.

Membership Notices & Exports

Further discover the reporting features of CDM+ including personalized letters, cards and emails. Need to send letters to all the families of your active members or just the members of a class? Discover how easy it is with the powerful search capabilities of CDM+ and the "built-in" word processing feature (Letter Notices) for personalized letters to families or individuals. (Attend the Enhanced Notices class for more in-depth exploration of formatting notices.) Learn to create Individual or Address exports, PDA exports and use of the Clipboard "cut and paste."

PhoneTree® and Other CDM+ Menu Items

Ever wonder what those "other" items on the menu do? There is more to Statistics and Preaching Aids than meet the eye. This class uncovers some of the often under-utilized features of CDM+. Learn how to create labels for electronic media such as CD/DVDs and audio/video cassettes. And what about that PhoneTree menu item under Membership Reports? Learn how CDM+ works directly with the PhoneTree messaging system to help you get the word out with very little work.

Getting Started – Payroll

Proper Payroll setup is the goal of this class. You will learn timesaving steps to assist with adding new employees. Participants also receive an in-depth understanding of exactly how CDM+ calculates payroll, writes checks and posts to the Ledger. The relationship of CDM+ Payroll with Accounts Payable and the General Ledger is also demonstrated. This class is for both the new or experienced user of CDM+ Payroll.

Payroll Procedures & Reports

You have just run this quarter's 941 and it shows you owe money! How could this be? This class features a review of the basic Payroll reports including explanations with particular attention to the impact of correcting errors. Considerations on how to assure that 941, W-2, W-3 and 1099 printing will run correctly are covered. If you have responsibility for payroll then fit this class into your training schedule.

Roommate

Roommate is your solution for facilities scheduling. This class presents in detail how to utilize CDM+ Roommate to track your events, rooms, equipment, whether on campus or off. Discover other uses of this powerful tool in scheduling staff, categorizing events by Department, and keeping an up-to-date inventory listing of your church property.

Training Skills

You may have come to the CDM+ Users Conference with the expectation of going home to train others on what you have learned. But do you know that not all people learn the same way? And that all training has some common methods? This class introduces training techniques for use in your office environment. You'll take away practical training helps for you to use back home.

Visitor Ministry

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

Web Ministry Tools

CDM+ Web Ministry Tools is a complementary product to CDM+ that links your website to your CDM+ data, essentially publishing your data online and keeping it up to date with very little maintenance. From event listings to online directories to online event registration with credit card processing, Web Ministry Tools offers something for everyone. This class will explain how Web Ministry Tools works and give you an in-depth demonstration of the software.

Web Ministry Tools Usage

Have you ever considered offering your yearbook directory online to your congregation members? What if you could publish the church events listing on your homepage and see changes you make in CDM+ appear instantly on the web? Is your church interested in accepting online registrations and credit card payments for youth camps, classes, retreats and more? Come, see for yourself how CDM+ Web Ministry Tools can solve all these needs and much more in this class.