

2011 CDM+ Users Conference Classes

See the **2011 Users Conference Schedule** for class times. Please note that some classes are offered multiple times during the event.

These descriptions and the conference schedule are provided for planning purposes. No prerequisite for individual classes is required.

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 material will be covered in the *Getting Started - Accounting class.

Getting Started – Accounting

Great starts lead to great outcomes. Beginning with the Chart of Accounts, moving forward to the Accounting Setup window and then entering account Beginning Balances are the right steps to a great start in CDM+ Accounting. This class provides the path. Participants receive a solid "how to" introduction to non-profit fund accounting. Check formatting, Vendor setup, Beginning Balances entry and basic Ledger entries are previewed. (Payroll is covered in separate classes.)

Accounting General Ledger

This class takes the next step in CDM+ Accounting and looks in depth at ledger entries, budget, bank reconciliation, and period closing procedures. Learn how to use Ledger recurring transactions for month-end transactions and check writing to save time. Emphasis is given to finding and correcting ledger mistakes and understanding the relationship between contributions, accounts payable and payroll. Ledger daily/weekly work reports, budget reports and month-end reports will be demonstrated.

Accounts Payable

This session covers in-depth the Accounts Payable process. Vendor setup and reports, including 1099 vendors, will be presented. Creating recurring and non-recurring invoices and the use of invoice reports will be demonstrated. Understand the purpose and function of accrual accounting and how easy it is in CDM+. This class will cover how to select invoices for printing, print and re-print checks if necessary. The Post to Ledger option and posting reports will be detailed.

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.

Accounts Receivable

The Accounts Receivable area of CDM+ Accounting Pro is a valuable tool for any type of invoice/billing needs of your organization; i.e., churches with a school or day care center. This class reviews all aspects of Accounts Receivable. See how easy it is to keep track of money owed your organization and to present professional invoices / statements.

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+

This class covers 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

Expand your use of CDM+ beyond the limitations of a simple search by the skills taught in this class! 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 program data 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

Confused about archiving? Learn the purpose and benefits of archiving. This class teaches not only how to archive CDM+ data, but when and what data to archive. We'll also cover the vital importance of backing up your CDM+ data, including the auto-backup feature in CDM+. Learn to prepare, protect and prevent costly data problems.

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. How to easily accomplish Class promotion and create Attendance Histories demonstrated.

Attendance Analysis & Reports

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

CDM+ Mobile

This class will introduce the CDM+ app for iPad® in detail from configuring device access in CDM+ to using the app on the iPad hardware. We will also host an open forum to discuss the next features you'd like to see in CDM+ for iPad, iPhone® and other mobile platforms. Come learn about CDM+ in a mobile environment and help shape the direction of this exciting project.

CDM+ Regional

This class is for conference attendees who are using the Regional version of CDM+. The class will include a question and answer session to allow us to cover items not addressed by other conference classes. We will also introduce a new development program, scheduled for release in the first half of 2012, which will be beneficial to state/regional offices doing fundraising.

Check In/Check Out

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 (*including the NEW family multi check-in in CDM+ 9.1*), and running reports. 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.

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!

Contact Management

Need an effective way to stay in contact with the needs of church members? Do you have a system for new member assimilation or for grief ministry follow-up? CDM+ Visitation program can assist. In this class we demonstrate how to set up a custom follow-up ministry process with reminders for when action should be taken. Learn how to enter contact and ministry actions completed for each individual (or family) and to keep this contact history confidential. If your church needs a custom solution in these vital ministry areas, come to this class.

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. The use and setup "Special" and "Visitor" giving codes to track loose cash and visitor gifts are explained. Information about handling special offerings, gifts-in-kind, and non-deductible gifts is given. Tracking and reporting for Memorial Gifts is also 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 Statements

Accurate and timely Giving Statements promote good stewardship by church members. This class reviews the Contribution Statement report options built into CDM+ so you can decide which is best for your church. This one class covers the creation of both paper and emailed Giving Statement reports. Every feature option of these reports will be thoroughly covered. The use of contribution Receipts will also be covered. If you have the responsibility to prepare Giving Statements—do not miss 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. Analysis of giving by dollar ranges and increase/decrease in giving by individuals or giving to specific Giving Funds is taught.

Recurring Contributions & Online Access to Giving History

This class will explore using Recurring Contributions to track gifts that regular givers make via electronic submissions. If you receive regular check or transfers generated by givers' banks then this class will teach you how to streamline entering them in your contributions records. This class will also introduce a **NEW Giver's Portal Web Ministry Tool** that allows regular givers to manage recurring contributions via ACH or credit/debit card transactions initiated by the church/organization. We will cover in detail how this new Web Ministry Tool also provides a secure login from your website for regular givers to check their giving history. *If you don't have a good working knowledge of the Giving Tool, we suggest you take the Web Ministry Tools - Giving class BEFORE you take this class.*

Electronic Banking

The Internet has not only changed how we interact with people and gather information, it has also changed the way in which we conduct business. Electronic banking and e-commerce is safe and secure. CDM+ has partnered with Stewardship Technology to bring you this powerful, yet easy, way of receiving and transferring funds. This class demonstrates how CDM+ tracks activity from receipt of funds to posting to the ledger. CDM+ electronic banking is done through Web Ministry Tools, recurring contributions, direct payroll and one-time charges. Our unique deposit-processing window will automatically reconcile electronic deposits made to your bank account and create ledger entries that track the income and fees associated with these transactions. With CDM+ and a Stewardship Technology merchant account, you can accept credit, debit and ACH payments for donations and services the church provides.

Enhanced Notices

The Enhanced Notices feature available in the Pro level CDM+ programs takes your communications to a higher level! Learn how to use the word-processor-like features to create eye-catching, personalized, cards, letters and emails from within CDM+. See how easy it is to use personalized notices to update member information. This class will expand your imagination with new ways to use CDM+ data in communication to members and prospects.

Event Registration

This class covers the powerful Event Registration program, in which you can keep up with registrations for any ministry event, send confirmation letters or emails, print name badges (with graphics even!) and much more. Track fees and payments, and optionally, automatically create deposit transactions in the Accounting Ledger. This program can be used for Vacation Bible School, youth events, community services, mission outreach, church dinners and 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.

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 membership 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+ Membership including personalized letters, cards and emails. Need to send letters to all the families of your active members or email 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; Email Notices) for personalized letters and emails to families or individuals. *Even if you're a whiz with notices, you want to*

attend to learn about the **NEW** notice organization feature in CDM+ 9.1. (The Enhanced Notices class has more in-depth exploration of notice formatting.) This class also covers creating Individual or Address exports and use of the Clipboard “cut and paste.”

Getting Started – Payroll

Proper Payroll setup and payroll procedures are the goals 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 presented. 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. Direct Deposit payroll setup and processing is explained. 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. Creating effective reports for staff and members is taught.

Small Group Ministry

Involving members and prospects in discipleship and ministry is challenging! CDM+ supports your church’s efforts to track enlistment and enrollment, attendance and completion of individuals for any small group, team or committee. This session thoroughly presents strategies in group setup and maintenance. We also look at a variety of reporting options to help you know who is, and is not, active in small group ministry. Effective small group ministry can involve contribution and financial tracking, as well as attendance and registration for ongoing or one-time events—CDM+ has you covered! And we cover all these topics in this class!

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 Fundamentals

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 and online directories to online event registration and giving with credit card processing, Web Ministry Tools offers something for everyone. This class explains how Web Ministry Tools work and gives you an overview of these powerful tools! *We recommend that you take this class BEFORE you take other Web Ministry Tools classes.*

Web Ministry Tools – Basic Tools

This class provides an overview of the five tools—the Directory Tool, the Search Tool, the Event Listing Tool, the Stats Tool and the Account Balance Tool—included in the Web Ministry Tools Basic Toolkit. We also point out unexpected uses for some tools. For example, don’t assume that since basic tools don’t allow changes to CDM+ data, you can’t use them to gather relevant information from your always-connected flock. You can! Learn how the Basic Toolkit from CDM+ can bring your website to life with info that’s always fresh and up-to-date. *Web Ministry Tools Fundamentals should be taken BEFORE you take this class.*

Web Ministry Tools - Event Registration

With CDM+ Event Registration and the Single Event Registration Tool—a premium tool from the CDM+ Web Ministry Toolkit—a harried mom can visit your website and register little Johnny for VBS after he’s tucked in for the night. If any activity has a fee, she can pay for that online, too, with a secure debit, credit or ACH transaction. Best of all...when the first person arrives in your office the next day, little Johnny is already entered in CDM+ Event Registration! In this overview class we’ll cover how to set up activities in CDM+ Event Registration so that they make sense online, what the various tool options do, how to set up automatic e-mail confirmation notices, how to use the designer to integrate your tool into your website, and much more. *Web Ministry Tools Fundamentals should be taken BEFORE you take this class.*

Web Ministry Tools – Giving

Online giving options are plentiful, but only one solution—the CDM+ Giving Tool—automatically enters donations into CDM+ Contributions! Learn how to set up this premium tool from the CDM+ Web Ministry Toolkit to allow easy, secure online giving via debit or credit card or ACH bank account transaction. A single gift may be split among several funds. Find out how to choose which funds a tool will include, how to designate what payment types will be accepted, and how to handle gift notifications, confirmation e-mails, memorial designees, processing fees and more. Also learn “best practices” for designing the tool and how to test it. *Web Ministry Tools Fundamentals should be taken BEFORE you take this class.*