

Creating New Giving History

Determining whether you own CDM+ Contributions Pro or Standard

The screenshot shows the CDM+ software interface. The 'File' menu is open, and the 'About CDM+' option is selected. The 'About CDM+' dialog box is displayed, showing the 'Serialization' tab. The 'Level' column for 'Contributions' is highlighted with a red arrow, indicating 'Pro'. The 'Platform' column shows 'X' and a Windows logo icon. The 'Re-activate Database' button is visible in the top right corner of the dialog box.

	Level	Platform
Membership/Attendance:	Pro	X
Contributions:	Pro	X
Accounting/Payroll:	Pro	X
Event Registration:	Pro	X
CDM+ Roommate:	Pro	X
Check-In/Check-Out:	Pro	X

Payroll ACH: Yes Initial version is CDM+ 8.1.2 or Later: No
Check Scanner: Yes Enhanced Notices: Yes

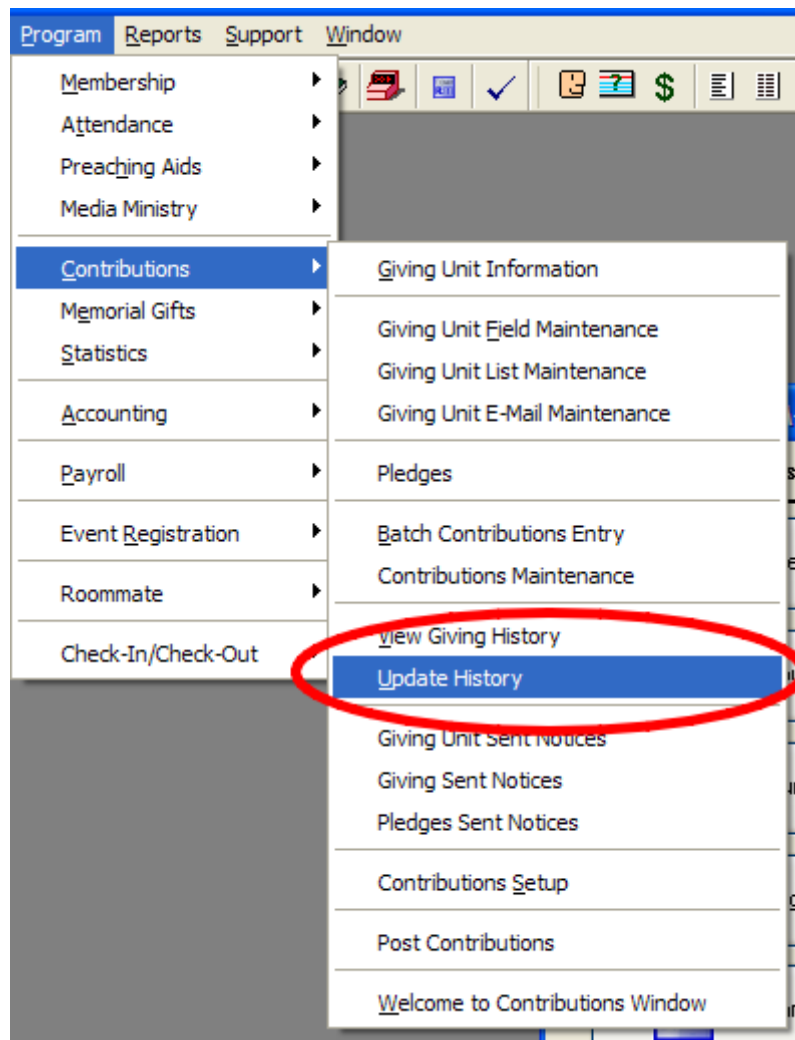
For information on purchasing licenses, additional programs, or a cross-platform upgrade, please visit us at www.cdmpius.com or call us at 877-891-4236 Monday-Friday, 8:30 AM-5:00 PM Eastern time.

Giving Histories are only available in CDM+ Contributions Pro. To determine which version you own, open "About CDM+" from the File Menu in Windows or the CDM+ Menu in Mac OS X.

Select the Serialization tab and refer to the Level displayed on the Contributions line.

If you own Contributions Standard and find that the Giving History functionality is something you want to add, please contact CDM+ Sales at 877-891-4236.

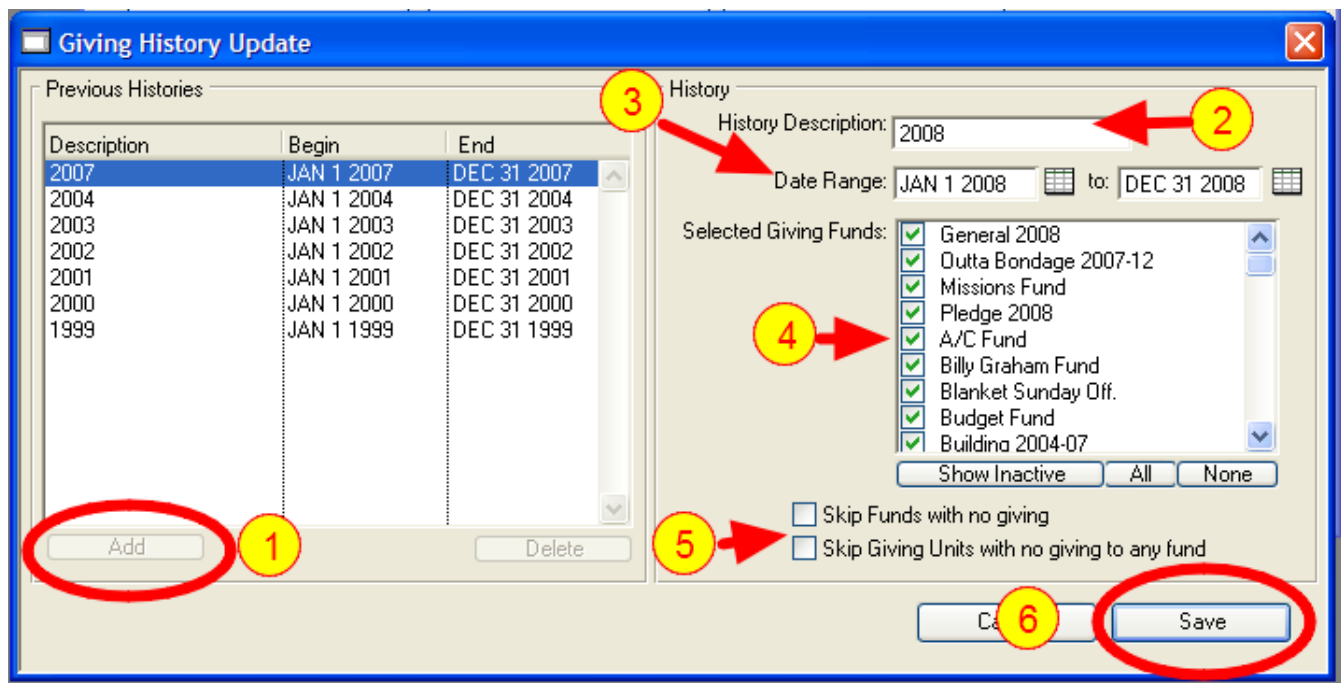
Open Update History Window



Open Update History Window

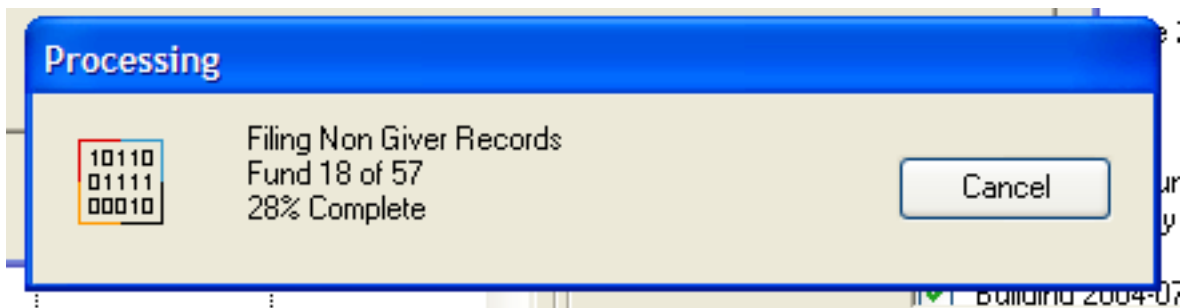
Program>Contributions>Update History

Add a New History Period



1. Click the add button in lower left area.
2. Enter appropriate History Description.
3. Enter desired Date Range. This is the Offering Date Range, not deposit date.
4. Select desired Giving Funds. In most cases, selecting ALL Giving Funds is the proper selection.
5. Review the selection of the two check-boxes. In most cases, you will not want to "Skip Giving Units with no giving to any fund."
6. Click the save button. The process will begin.

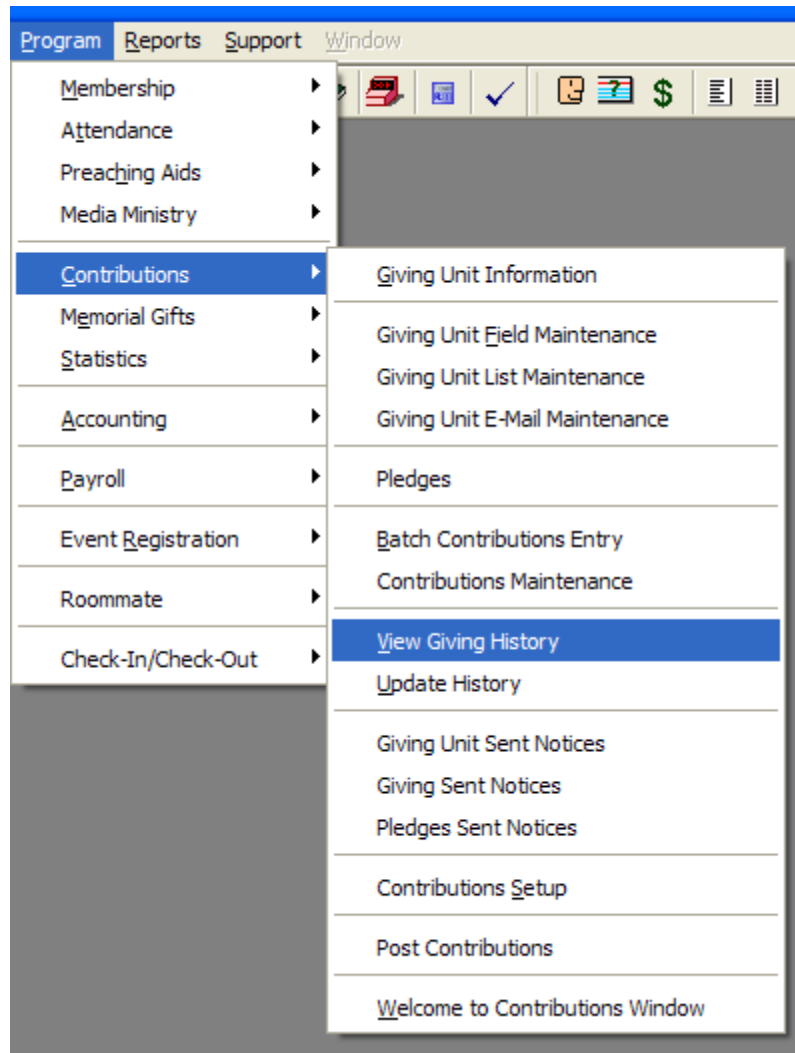
Add a New History Period



A process indicator window will open and display the progress.

This entire process may take a long period of time and will depend on the number of giving units, the number of giving funds selected, and whether you elect to skip Giving Funds with no giving or to skip non-contributing Giving Units.

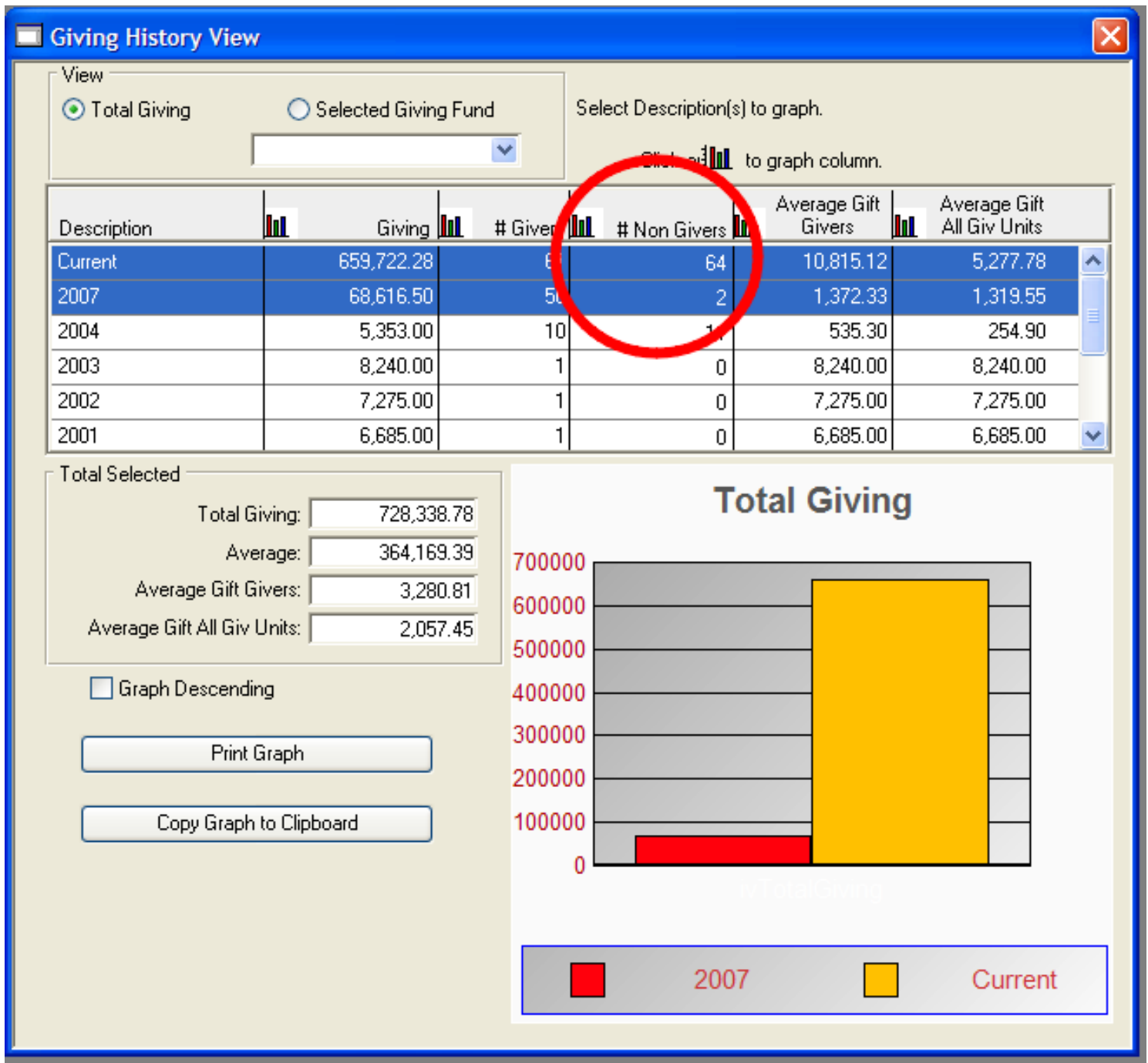
Viewing Giving History



Open View Giving History Window

Program>Contributions>View Giving History

Effect of "Skipping Giving Units with no giving to any fund"



The Giving History will present a view of the total number of Givers, total number of non-givers, the average gift of the givers, and the overall average gift of all giving units.

If you elect to skip Giving Units with no giving to any fund, the giving history view for that period will be skewed, indicating that you had no non-contributing giving units and the two average gift figures will be the same.

Recreating a Giving History

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Description	Begin	End
2007	JAN 1 2007	DEC 31 2007
2004	JAN 1 2004	DEC 31 2004
2003	JAN 1 2003	DEC 31 2003
2002	JAN 1 2002	DEC 31 2002
2001	JAN 1 2001	DEC 31 2001
2000	JAN 1 2000	DEC 31 2000
1999	JAN 1 1999	DEC 31 1999

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History Description: 2007

Date Range: JAN 1 2007 to DEC 31 2007

Selected Giving Funds:

- General 2008
- General 2007
- Debt Cancellation 2007-12
- Hurricane Relief
- Hunger Relief
- North American Mission Fund
- World Changes
- Christmas Offering
- Organ Fund

Buttons: Add, Delete, Cancel, Save

There may be times when it is necessary to recreate a giving history. To do this, you would generally delete the existing giving history that is to be recreated by:

1. Highlighting the desired line.
2. Pressing the delete button.
3. Beginning the process of adding a new history. See page #2.

Special Notes

Why would you recreate an existing Giving History? One case would be if you made contribution entries with an offering date in 2008 AFTER the 2008 Giving History has been created. These will not be automatically entered into the Giving History. You will need to delete the original 2008 Giving History and recreate it.

Note: If you adjust a contribution that is included in a giving history, that giving history will be updated to reflect the change.

DO NOT delete a Giving History that contains information for a date range that you have already archived out of your CDM+ database. You may only recreate a giving history for a period where the giving detail still remains in the database.