

Development News

CDM+ 9.3 for December Release

by Alex Clay

Exciting new products are coming from Suran Systems, Inc. in the coming months! CDM+ 9.3 is scheduled for release in December and adds several major new features and many enhancements and fixes. CDM+ 9.3 brings a complete overhaul to the Master Coding System window, focusing on a modern design. Other Information, which is renamed “Details,” gets close attention, with the ability to move items between sets. We’ve brought in several related preferences, so the Master Coding System window is now called “Customization.” Look for it under the File menu after logging into CDM+ 9.3.

In Accounting, we’re now using the Aatrix forms viewer to generate 1099s. In addition to the great features Aatrix offers for working with tax forms, this change means you can eFile your 1099s - a definite time-saver during the busy start of a new year.

During the first quarter of 2016, CDM+ 9.3 will get an update adding built-in direct deposit support through Stewardship Technology. After generating payroll, a click of a button will transfer funds from your bank account to your employees’ bank accounts. CDM+ 9.3 will eliminate the need to void and re-issue lost paychecks, and employees will appreciate the convenience of direct deposit payroll.

In Contributions, CDM+ 9.3 will offer new, customizable fields for custom listings and exports that allow you to list giving and

pledging trends. Want to see how givers who attended in the last three years pledged and gave over that time period? Now you can with CDM+ 9.3.

Beyond the desktop, a new Member’s Portal application will debut alongside CDM+ 9.3. This attractive application allows any member to log in from a phone, tablet or computer. Members can view their family information and the members of any group in which they are enrolled, provided the church administration sets that group to be visible online. Photos are visible throughout, making the Member’s Portal the perfect pictorial directory that’s updated live as you work in CDM+. Additionally, online giving with an intuitive, modern and mobile-friendly interface is planned for early 2016, and initiating gifts via text message is also in the works.

The Member’s Portal will be available free for any hosted user who owns the basic Web Ministry Toolkit. And, anyone running CDM+ 9.2 will be entitled to CDM+

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Holiday Closings

All Suran offices will be closed:

Thanksgiving

Closed Thursday, Nov. 26 and Friday, Nov. 27

Christmas

Closed Thursday, Dec. 24 and Friday, Dec. 25

TRAINING OPPORTUNITIES

Group Online Classes

Tues., December 8

- CDM+ Membership Reports

Thurs., December 10

- CDM+ Accounting Setup
- CDM+ Accounting Entry

Tues., December 15

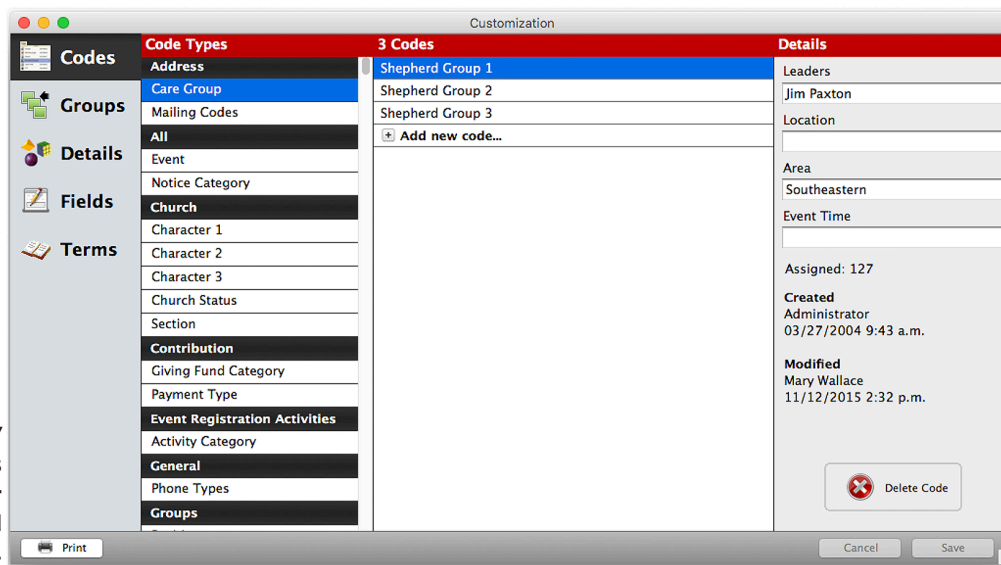
- CDM+ Year-End Accounting Closing

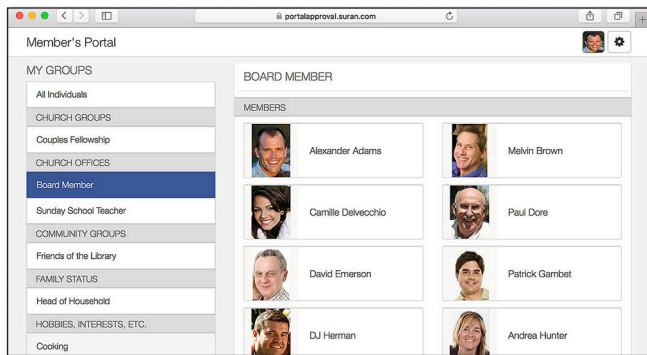
Get a complete schedule at: cdmplus.com/Training/GroupOnline

Training Videos

Access our complete series of free CDM+ training videos at: kb.cdmplus.com/videos

The new “Customization” window in CDM+ 9.3 brings a modern design and greater flexibility to connect and communicate with members.





A glimpse into the new Member's Portal, an online resource for churchgoers to connect with the church and with each other.

Development Update *(continued from front page)*

9.3 for free, regardless of support status. If you're not running CDM+ 9.2 or enrolled in support, now is a smart time to upgrade. Plans are underway for CDM+ 10.0 to be released later in 2016, and enrolling in support today will ensure you can upgrade to 10.0 upon release at no extra charge.

Many great things are in the works at Suran, and we hope all these new features will empower your ministry and greater work in the world.

Getting Ready for 2016 The CDM+ Budget Tool

by Ron Bearden

No one I know actively plans to fail, but many of us fail to plan. Finances seem especially vulnerable to this mistake. One way to avoid a problem is thoughtful budgeting. The CDM+ Budget Tool is an excellent start. With this handy tool you can:

- Create separate budgets for each fund or any combination of funds
- Budget expenses only, income only, or both by equal amounts or by unique monthly amounts
- Copy your current-year budget to the new year, and make changes without having to re-select accounts
- Print a budget worksheet with prior income/expense totals for the date range of your choice, with a blank column for entering next year's proposed amounts
- Use the *Budget Comparison Report* to study selected budget years, displaying columns for the dollar amount difference between the years, along with the percentage change between the years
- Use the Ledger Year-to-Date Report's *Monthly Summary* to break down income/expense totals by account number and calculate a monthly average based on historical data

So give up the guessing game and use CDM+ to help you manage your budget Wish List with prayer and mathematical logic. And remember, if you need it, help is available at 1-800-633-9581.

Save the Date
2016 Users Conference
September 12- 14, 2016
Lexington, KY Hilton Downtown

Prepare and Prosper Backup Your Data

by Kristi Murray

One of the most critical and often forgotten tasks in using CDM+ is keeping good backups of your data. Backups become a lifeline to months and sometimes years of work when catastrophe strikes.

Why should I backup my CDM+ data?

- All hardware is guaranteed to fail at some point - save time and effort when it happens to you
- Peace of mind
- You're about to archive or otherwise delete large amounts of stored data, so it's a good time to store a copy *just in case*

How often should I backup my data? I'll answer that with another question, how much data do you want to re-enter? If you've just spent hours entering gifts and new records, would you want to re-enter that? Once a day or two has passed, would you have the information at hand to be able to re-create all those entries?

You may do backups daily, weekly, or if you've just spent hours entering or cleaning up data, you can do a backup when you've finished making your changes.

Doesn't our IT person backup our data for us? If you have a system backup that runs on a regular schedule, chances are it is NOT capturing your CDM+ data. If your scheduled backup from within CDM+ saves data to a folder that your system backup captures, then you are covered as long as the backup drive does not fail. It's still worthwhile to have a copy of your backup off-site and/or online in that case.

How do I do a backup? There are several ways to backup your data.

From your Database browser

- Logout from your File menu.
- Choose File menu >Database Browser.
- Select your database and click Backup.
- Select a location where your backup file will be stored.

From your File Menu >Backup

- Go to your File menu and select Backup.
- Select a location where your backup file will be stored.

Set up an Automatic Backup – You must be working on the computer that serves as your database server:

- Logout from your File menu.
- Choose File menu >Database Browser.
- Click on Backup Settings button.
- Set the time and frequency for your backups.

Let us do it for you! CDM+ clients who are enrolled in Data Hosting don't have to worry about backups – we automatically do it for you each night! Users on CDM+ Premier Support can call us, and we'll back up your CDM+ database.

To restore a backup, you must be working on the computer that serves as your database server.

- At the Login screen *before* logging in, go to File >Database Browser.
- Click the Restore button.
- Browse to the location of your backup file, select it and click Open.
- At this point, it's a good idea to rename your databases to avoid confusing the restored backup with other databases you may have.
- All backups should be tested periodically - either restore it and check it yourself, or send it to CDM+ Data Services and we'll test it for you.
- Remember, restoring will not replace your existing database - if appropriate, you may want to make one of your databases *inactive*.

For more detailed information on performing these critical functions, check our online manual: kb.cdmpplus.com/node/4346, or call Tech Support at 1-800-633-9581 for assistance.