

CDM+ 9.3 Release

New Members Portal and Greater Customization Among More Than 125 Features and Fixes in CDM+ 9.3

CDM+ 9.3 will be released on *Wednesday, December 30, 2015*. This update will be available via a web update to anyone on version 9.2. If you have your preferences set to check for updates automatically, you'll see the option to install 9.3 when you log into CDM+. If you prefer not to install 9.3 at that time simply cancel the update installation.

If someone in your office has already installed 9.3, you'll be prompted to update your version of CDM+ automatically. If you have a version of CDM+ prior to 9.2, then you can purchase 9.3 by contacting our sales team at **877-891-4236** or email sales@cdmplus.com.

Key Enhancements in CDM+ 9.3

- New Vendor 1099 forms support through Aatrix - this enhancement ensures that you are using the latest forms from the IRS and allows for e-filing of 1099s. Those used to doing tax forms in CDM+ Payroll will find the new forms interface uses the same Aatrix viewer

and allows for more control in editing and producing 1099s. The payer information that is used for both payroll tax forms and 1099s is now available from both the Payroll and Accounting menus.

- Producing 1099s from CDM+ Payroll is no longer supported. If you have been using CDM+ Payroll to generate 1099 payments, you will need to contact our support department so we can help you migrate this information from CDM+ Payroll to Accounts Payable.
- The custom listing interface has a new design and supports totaling of columns that have two decimal points.
- The master coding system has been re-worked from the database side to provide for enhanced functionality in the future. In addition the Master Coding System window has been redesigned.
- An enhanced check scanning window for CDM+ Contributions has been created that is more responsive and robust.

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The screenshot shows the 'Payer Records' window. At the top, there's a search bar with 'Find records where All Results' and a 'Find' button. Below that, a table lists search results for 'First Community Church' with Federal ID Number 61749573. The main area is divided into 'Company' and 'Contact' sections. The 'Company' section includes fields for Name, Trade Name, Address 1, Address 2, City, State (KY), Zip (40123), Phone (859/555-1234), Fax, and Email (bookkeeper@fcc-bigcity.org). The 'Contact' section includes fields for First Name (Ruth), Last Name (Stokes), Title (Bookkeeper), Address, and Phone (859/555-1234). To the right, there's a 'States' table with columns for State and Tax ID, showing 'KY' and '245678'. At the bottom, there's a '941 Depositor Frequency' section with 'Monthly' selected and 'Semiweekly' as an option. The window also has a 'Print' button and a 'Grid' checkbox.

GET READY FOR 2016

Year-End Task Checklist

Click here, or look under the Current Users tab at cdmplus.com for a handy list of CDM+ procedures to guide you through your year-end tasks.

TRAINING

OPPORTUNITIES

Group Online Classes

Enroll in free, live webinars on specific CDM+ topics, many designed to help with year-end tasks. Class size is limited, so please register early.

Tues., January 5

- CDM+ Contributions Statements
- Year-End Accounting Closing, Checklist

Thurs., January 7

- Getting Started in CDM+ Accounting
- W-2 Preparation

Tues., January 19

- Getting Started in CDM+ Accounting
- W-2 Preparation

Thurs., January 21

- CDM+ Contributions Statements
- Year-End Accounts Payable, 1099 Vendors, Checklist

Thurs., January 28

- Getting Started in CDM+ Contributions
- CDM+ Contributions Entry

Tues., February 2

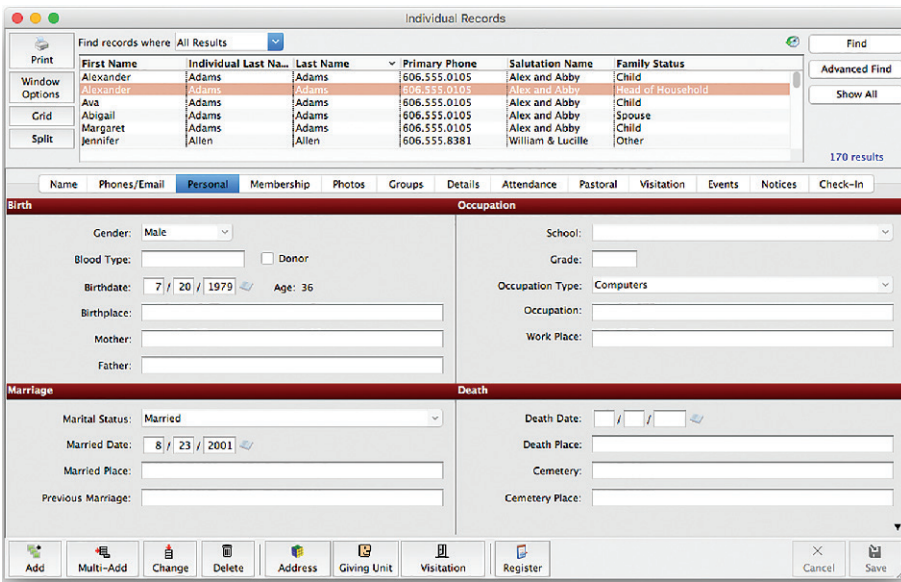
- CDM+ Contributions Pledging
- CDM+ Contributions Email Statements

Register online at: cdmplus.com/Training/GroupOnline

Training Videos

To access our complete series of free CDM+ training videos, including Setting up and Printing W-2s and IRS Form 941, please visit: kb.cdmplus.com/videos

The Payer Records window is now accessible from either CDM+ Payroll or CDM+ Accounting. Now users who may need to produce 1099s but do not own CDM+ Payroll will find it easier to quickly generate the year-end information required by the IRS.



The Personal Tab on Individual Records received a redesign in CDM+ 9.3, and the system behind it tracking codes, groups, and details has been completely overhauled. CDM+ will now ensure only valid data is entered, and when types or sets are updated or deleted all related records will reflect those changes.

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CDM+ 9.3 Features and Fixes

- Expanded term support provides for additional personalization of CDM+ to fit your ministry or organizational focus. For example the Other Information tab can be renamed to better describe your use of the information you manage.
- The personal tab in Individual Records has been redesigned for better presentation of this key information.
- 9.3 provides database support for our latest web technology, Engage. Available on January 6, 2016, Engage is a members portal that provides dynamic membership directory information with photo and group support and that looks great on mobile devices and the web.



By choosing CDM+, you've created something powerful—a flexible and complete database of every individual, family and business connected to your church. These enhancements will help you save time and get more benefit out of your CDM+ data.

What Do You Want to Know About?

Please submit questions or newsletter article suggestions to

connection@cdmplus.com

A Crucial Check

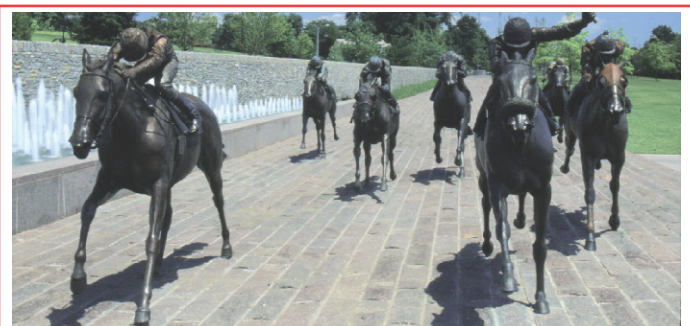
How to Verify Your W-2s and 941s

The Taxable Income Summary report is your best tool to verify your W-2 and 941 information for both Federal and State/Local tax information. Tax forms always key off of the Date paid. When running this report, select the detail option on the report tab, and be sure to select Date Paid for your date range.

Payroll records consist of two layers. There is the detail record and the summary record. That's why the report menu shows both types (Taxable Income Summary and Taxable Income Detail). Because a payroll can have multiple detail lines and each

line may have different taxing statuses, the Taxable Income Detail report can help you verify you are classifying taxable wages accurately. When this report is run in a detail format, gross pay, taxable pay, and pay that is treated as taxable income on the W-2/941 will be separated out. Pay particular attention to the last number. It is this number that shows up on your W-2s as income (Box 1) and as FICA/Medicare wages. These values are controlled by the Employee Information Pay setup checkboxes when payroll is created. If you find a discrepancy on any of these numbers, adjust them in the View Payroll window.

If you include housing, 403-B or other information on the W-2s in boxes 12-14, you can verify this information from the Pay Item Summary and/or Deduction Detail reports. How this information is to be presented on the W-2 is set on the pay item and deduction windows, respectively. Taking a few extra minutes to verify your W-2 and 941 information is very important in assuring accurate filing of these critical reports.



Save the Date

2016 CDM+ Users Conference

September 12- 14, 2016

Lexington, KY Hilton Downtown



VISIT LEX