

**NOTE: We'll post detailed class descriptions for 2017 soon, but this 2016 list may help you while you plan your personalized Conference experience.**

## **2016 CDM+ Users Conference Classes**

### **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 troubleshooting tools is demonstrated.

### **Accounting General Ledger**

This class takes the next step in CDM+ Accounting and delves deeper into 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. Learn about ledger daily/weekly work reports, budget reports and month-end reports.

### **Accounting, Getting Started**

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. This class also 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. (Payroll is covered in separate classes.)

### **Accounts Payable**

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

### **Accounts Receivable**

The Accounts Receivable area of CDM+ Accounting 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.

### **Administering CDM+**

Get familiar with the essential CDM+ administrative features of Users 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! 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!

### **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. We present a thorough review of the advanced fund accounting structure in CDM+. 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+. Need to produce a balance sheet for each of your funds? Concerned about fulfilling all the regulations? This is the class for you.

## Archiving & Backup

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.

## Attendance, Getting Started

Learn how to enter event, class, and list attendance for worship services, Sunday School, small groups, and even board meetings! Putting individuals in classes or groups, as well as preparing attendance worksheets (barcoded and not) is taught. See how easy it is to take live attendance with the CDM+ Mobile app, easily accomplish Class promotion and create Attendance Histories.

## Attendance 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 highlights accessing and analyzing the significant individual and group attendance information tracked in CDM+.

## CDM+ Mobile

This class introduces the CDM+ Mobile app for iPad®, iPhone® and Android™ phones and tablets. We cover how to connect your device to your database and control which features each device can use. Using the CDM+ Mobile sub-apps (Individuals—including Visitation and Pastoral, Attendance, Check-In, Check-Out and Churches) is covered in the relevant classes. Note: Other than in demo mode, use of CDM+ Mobile requires enrollment in the CDM+ Data Hosting Service.

## CDM+ Regional (Specialized Class)

This class is specific to users of the CDM+ Regional custom version, *regardless of denomination*. It focuses on the integration of Church Records and Individual Records for special tracking of clergy and lay church positions.

## 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, and running reports. We 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, including using the CDM+ Mobile app.

## COG Treasurer Report (Specialized Class)

This class is specific to Church of God (Cleveland, TN) users only. 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

Looking for 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 (both in CDM+ Membership desktop software and using CDM+ Mobile) and to keep this contact history confidential. If your church needs a custom solution in these vital ministry areas, come to this class.

## Contributions Comparison 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.

## Contributions, Getting Started

Here we cover everything you need to begin entering contributions, including setting up Giving Codes and Giving Funds, viewing individual Giving History (both in CDM+ Contributions and CDM+ Mobile), 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 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 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 as demonstrating its printing capabilities. The use and set up of "Special" and "Visitor" giving codes to track loose cash and visitor gifts are explained. If you receive regular checks or electronic fund transfers that are generated by givers' banks, you'll also learn how to streamline entering those in your contributions records. Information about handling special offerings, gifts-in-kind, and non-deductible gifts is given. Tracking and reporting of Memorial Gifts is also covered.

### **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 e-mailed Giving Statement reports. Every feature option of these reports will be thoroughly covered. Using contribution Receipts is also covered. If you have the responsibility to prepare Giving Statements—do not miss this class!

### **Event Registration**

This class covers the powerful CDM+ Event Registration program, in which you can track fees and payments, send confirmation letters or emails, print name badges (with graphics even!) and much more. This program can be used for Vacation Bible School, youth events, camps, community services, mission outreach, church dinners and many other events. Want to do online event registration on your church website through the Event Registration Web Tool? Be sure to take this class in addition to the Web Ministry Tools – Event Registration class.

### **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 reports. New CDM+ users should begin with this class in order to get the most out of this training experience. Even experienced users — especially if you started with a much earlier version of CDM+ — can benefit from this class.

### **Membership Custom Reports**

Discover the many membership reports you can create using CDM+ and its multiple configurations. Learn how

to create Yearbook Directories and Name Badges for your members or staff to use. Discover the strengths of the Custom Listing reports and how they enhance your capacity to view your data. Learn how to create personalized letters, cards and emails using the built-in word processing feature. Join us as we look at how CDM+ Membership Reports can enrich your effectiveness and your productivity.

### **Membership, Getting Started**

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. The class also covers the Individuals feature of the CDM+ Mobile app.

### **Membership Procedures**

Learn to customize CDM+ Membership with an in-depth look at the Master Coding System and how to best set up 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.

### **Notices**

Want to save yourself the extra steps of exporting email addresses or creating merged letters? This class covers how to use the word-processor-like features of the Notices feature in CDM+ programs to create eye-catching, personalized cards, letters and emails from within CDM+. We also cover how to organize notices by category and set access to saved notices. Put the power of your CDM+ database to work in your communications!

### **Online Giving**

- Giving Toolkit
- Engage Giving
- Electronic Banking

Online giving options are plentiful, but only one solution—the CDM+ Giving Toolkit—automatically enters donations into CDM+ Contributions and into CDM+ Fund Accounting! Learn how to set up the Giving Tool to allow easy, secure one-time 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.

Explore Engage Giving, the new mobile-friendly Web Ministry Tool that accepts online gifts from anyone and allows regular givers to manage recurring contributions via ACH or credit/debit card transactions. Finally, we cover in detail how Engage Giving provides a secure login from your website for regular givers to check their giving history.

The Internet has 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 this powerful and yet easy way of receiving and transferring funds to you. This class demonstrates how we track this activity from receipt to posting into the ledger. Our unique deposit-processing window will automatically reconcile electronic deposits made into your bank account and create ledger entries that track the income and fees associated with these transactions. With CDM+ and a merchant account from Stewardship Technology, you can accept credit, debit and ACH payments for any services that the church provides.

*The Online Giving class is one class spread over two class periods repeated three times. Participants should plan to take the same Part A & Part B together.*

### **Payroll, Getting Started**

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 are responsible for payroll, fit this class into your training schedule.

### **Roommate Facilities Manager**

Roommate is your solution for facilities scheduling. Here we present in detail how to use 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. Looking to use the Calendar Web Ministry Tool on your website? Take this class also!

### **Visitor Ministry**

Growing churches know who is visiting 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.

### **WMT Basic Tools (with Engage Membership)**

This class provides an overview of the Web Ministry Tools Basic Toolkit as well as Engage Membership. The Basic Toolkit is comprised of the Monthly Calendar, Directory, Search, Event Listing, Stats and Account Balance tools. All pull up-to-date information from your CDM+ database and publish it to your website for the benefit of those you serve. Engage Membership, included with the Basic Toolkit, is a mobile-friendly online directory that will help your members stay connected to the church and to each other. 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, and how Engage Membership can give you an instant online directory that looks great on any device.

### **WMT Event Registration**

With CDM+ Event Registration and the Event Registration Tool—a premium CDM+ Web Ministry Tool—visitors to your website can register for anything from vacation bible school, to education classes, to volunteer sign-ups. This overview class covers 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.

### **WMT Fundamentals**

*Take this class BEFORE you take other Web Ministry Tools classes.*

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 offer something for everyone. This class explains how Web Ministry Tools work and gives you an overview of these powerful tools!