2025 CDM+ Users Conference Classes

Aatrix Tax Reporting

CDM+ partners with a third party provider, Aatrix, to produce all state and Federal Forms. Information from CDM+ payroll is passed onto the Aatrix form viewer. Corrections to tax forms can be done through the Aatrix form viewer, but it is highly recommended that all corrections be made in CDM+. This class will prepare you to produce an accurate 941, W-2 and 1099 forms.

Accounting General Ledger A & B

This class takes the next step in CDM+ Accounting and delves deeper into ledger entries, budget, bank reconciliation, period closing procedures, and Advance Fund Accounting. Learn how to save time by using Ledger recurring transactions for month-end transactions and check-writing. Emphasis is also given to troubleshooting issues such as finding and correcting ledger mistakes, and understanding the relationship between Contributions, Accounts Payable, and Payroll.

The General Ledger class is one class spread over two class periods repeated two times. Participants should plan to take the same Part A & Part B together.

Accounting, Getting Started

In this class, we cover the basics of CDM+ Accounting beginning with the Accounting Setup Window and moving through the Chart of Accounts to the General Ledger. Participants receive a solid "how-to" introduction to Accounting Beginning Balances and Ledger entries. Deposits and Journal entries are also explained. This class also covers an introduction to double-entry accounting including Account Types, Debits and Credits, Funds, Fund Accounting, and the relationship of Ledger Entries to Income/Expense and the Balance Sheet reports.

Accounting Reports

This class will go over all the Accounting reports in CDM+, the different features found in ledger daily/week work reports, budget reports, and month-end reports. This class offers an in-depth review of 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 also demonstrated.

Accounts Payable

This session covers the Accounts Payable process. Vendor setup and reports, including 1099 vendors will be presented. Creating recurring and non-recurring invoices, the use of Mobile Receipts 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; 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 to your organization and to present professional invoices/statements. We will also cover Engage Billing, will allows customers to see their balance and make online payments.

Administering CDM+

Get familiar with the essential CDM+ administrative features. We'll discuss best practices for managing user's permission and review systems and user preferences to get the most of CDM+. Using the Audit log to review detailed record changes will also be covered.

Archiving & Data Cleanup

Confused about archiving? Learn the purpose and benefits of archiving and tips and techniques for cleaning up your data. This class teaches not only how to archive CDM+ data, but when and what data to archive. Tools to make bulk updates and corrections are also covered, as are best practices for standardizing your data to improve reporting and data analysis.

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 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. Master accessing and analyzing the significant individual and group attendance data tracked in CDM+.

CDM+ Mobile

People serving in faith-based or other non-profit organizations are not stationary. They need data that is on the move with them. In this class, we will learn how the CDM+ Mobile app keeps you connected to CDM+ from your iOS or Android mobile device. We will learn how to use CDM+ Mobile to work with people, attendance, visitation contacts, and charge receipts.

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, 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 Regional

This class is specific to staff of the State Offices of the Church of God (Cleveland, TN). We will examine importing and processing Treasurer, Minister, Girls Club, and Women's Reports. The online Women's Reporting tool will be covered along with specific items related to church tracking, minister tracking, and all of the special reports that the state office receives from local congregations.

Contact Management

Faith-based and other non-profit organizations are in the people business. Building trust through regular contact and timely follow-up remains a high priority. Visitation and Pastoral records in the CDM+ Membership program provide an effective means of tracking contact with people connected to your organization. In this class, we will learn how to use the CDM+ Mobile app and the CDM+ desktop program to record contacts, create reminders, and push reminders to CDM+ Mobile devices. We'll also learn how to secure visitation and pastoral information to ensure that confidential information remains confidential.

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. 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 members and donors . 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, paper, e-mailed, and online Giving Statement reports. Using contribution Receipts is also covered. If you have the responsibility to prepare Giving Statements, don't miss this class!

DOC Search and Call

The CDM+ Search and Call program allows regional offices of the Christian Church (Disciples of Christ) to retrieve and share minister profiles, manage congregational profiles, and maintain a history of activity with ministers and search committees. We will explore Ministry Position Records and Minister Records. We will also describe how to publish and share minister and congregational profiles.

DOC Minister Reporting

The master list of ministers is maintained in the minister database at Disciples Home Missions. The Design stipulates that regions hold responsibility for timely reporting of minister data, especially regarding standing and the credentialing region. The CDM+ Regional program for the Christian Church (Disciples of Christ) is customized so that regions can both manage minister information and report that information to the wider church through Disciples Home Missions.

Engage Administration

Bring fresh, enriching content to your organization's website and know that any information you publish there is updated whenever you make changes in CDM+. This class walks you through setting up CDM+ Engage, managing Engage user accounts, and publishing Engage to your members, supporters, and visitors. How to work with Web Ministry Tools is included, as is granting access to staff to manage just the right areas of Engage. If you administer Online Giving, Directories, Payroll, or Events, this class is strongly recommended for you!

Engage Giving and Online Payment Processing

Online giving and payment options are plentiful, but only one solution – Engage Giving with Payment Processing – automatically enters donations and payments into CDM+ Contributions and CDM+ Fund Accounting! Learn how to set up Engage Giving to allow easy, secure one-time and recurring online giving via debit card, credit card, or ACH bank account transactions. Find out how to organize funds using giving sets, and how to handle gift notifications, confirmation emails, processing fees, and more. Plus, we will discuss how to track these online gifts, event registrations, and payments from receipt to positing to the ledger. Our unique Deposit Processing tool automatically reconciles electronic deposits made into your bank account and creates ledger entries that track the income and fees associated with these transactions. Learn how to track the status of payments, including failures and returns, and how to issue refunds.

Event Registration A & B

This is a two-part class that will cover both the setup of an Event and how to utilize tools to manage your event. In Part A we will walk through the steps to create an event record, structure custom activities, setup confirmation emails, create an online registration option through Web Ministry Tools, and record manual registrations. We will also highlight how to tie event payments and fees to CDM+ Fund Accounting and how you can see historical event registrations for members in CDM+ Membership. In Part B we will explore the tools to help make your event a success. In this class we will focus on what to do with all of your online and manually entered registrations. From our robust reporting system to creating name badges to sending out follow-up emails and letters we will walk through these features that will help you manage your event like a pro!

Grow Your Giving

CDM+ allows you to turn your data from your database into a powerful fundraising tool. Whether you're raising money from a capital campaign, mission trip, or just want to find ways to increase your weekly Tithes and Offerings, CDM+ provides effective tools to increase your giving. In this class, we'll focus on ways you can pull different reports to see live data on your givers, customize your giving links, and provide marketing tips and tricks on how you can publish your links. We'll also hear from other users on ways they successfully use their giving links.

Make CDM+ Work For You

CDM+ offers rich customization at every level from window options to core terms in CDM+. Ever feel like you were working against CDM+ instead of CDM+ working for you? This must-see general session will provide tips & tricks for customizing CDM+ into a powerful partner for your mission. From Membership to Accounting, Engage to Desktop, this session has something for everyone!

Membership Data Management

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 List Maintenance, Field Maintenance, and list transfer to manage groups and personal data. Discover the expansive possibilities the User Fields offer you to track a wide variety of family and personal information. This class will focus on cleaning up Membership records and maintaining them on an ongoing basis.

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 toolbars. The relationship between Address Records, Individual Records, and Giving Unit records is explained. This class is an effective introduction to Membership, providing the beginning user everything needed to get started.

Membership 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. We will review how to export data from CDM+ to other programs and how to manage simple and complex queries. Join us as we look at how CDM+ Membership Reports can enrich your effectiveness and your productivity.

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 Notices in CDM+. You can create eye-catching, personalized cards, letters, and emails from within CDM+. We also cover organizing notices by category and set access to saved notices. Put the power of CDM+ to work in your communications!

Payroll, Getting Started

Proper payroll setup and payroll procedures are the goals of this class. You will learn time saving steps to assist with adding new employees. Participants also receive an in-depth understanding of exactly how CDM+ calculates payroll, writes checks, posts to the ledger, and can be viewed in Engage Payroll. The relationship of CDM+ Payroll with Accounts Payable and the General Ledger is presented. This class is both the new or experience user of CDM+ Payroll.

Payroll Procedures & Reports

The focus of this class is to understand the inner workings of CDM+ Payroll to help deal with situations that you may encounter. We will look at the process of voiding a payroll, reissuing a payroll check, correcting payroll not set up correctly, validating 941 and W-2 information, and verifying balance sheet payroll liabilities. An overview of the optional ACH direct payroll deposit payroll process will be presented. If time permits we will take an in-depth look at using the features in payroll to track employee sick, vacation, and comp time.

Regional

The CDM+ Regional program tracks data for multi-level organizations that manage data for multiple entities, such as a state or regional office that oversees a group of local churches. We will explore Church Records in the CDM+ desktop as well as additional data for individuals, households, and giving units. We will also look at additions to CDM+ Mobile and Engage with CDM+ Regional.

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 of your organization's assets. We will also cover how to use Web Ministry Tool to publish your calendars online.

Searches/Custom Listings

At its core, CDM+ is both a database of people and an accounting database. People relate to your organization in a variety of ways. For example, people are related to one another in households. They donate to your organization. They register for and attend events. Likewise, an accounting database is more than journal entries for income and expenses, Journal entries relate to donations as well as to customers and vendors. Those database relationships make CDM+ a robust and powerful database. In this class, we will explore how to harness that power by learning how to search the data so that we can produce reports or export data.

Visitor Tracking

Growing churches know who's visiting and follow a process to minister to and assimilate visitors 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 ministering to visitors and prospects.