

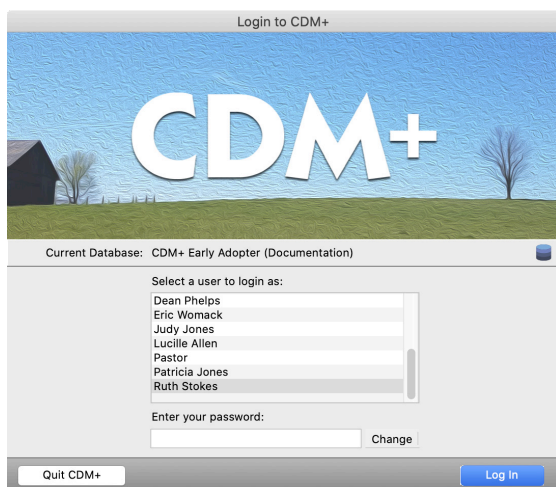
# Fundamentals of CDM+

This course covers common features of all CDM+ programs. CDM+ has been designed to have a consistency across record frame windows. Once you are comfortable moving around one, for example, Address Records, you won't have much trouble finding your way around Individual Records, Contributions, Ledger Entries, or many other windows throughout the program. Knowledge of this material is foundational for all users. A little time spent reviewing this section will streamline your work throughout CDM+.

- | Logging into and navigating CDM+
- | Creation and use of a basic Find
- | Sorting and Selecting records on record frame windows
- | Configuring record frame windows for each individual user
- | Working with tabs on record frame windows
- | Printing of Selected Record or Results List
- | Previewing and printing with the use of the Grid View
- | Report setup window features
- | CDM+ System Preferences and CDM+ User Preferences

## Logging in to CDM+

The Login window will open each time you launch the CDM+ desktop application, and it will display a list of users and the name of the database CDM+ is currently accessing.



At the very least, the username for the Administrator you defined during the initial program setup will appear in the user list on the Login window.

If additional people will use CDM+, the Administrator must log in first and set up the other users on the Users pane of the Administration window.



**TIP:** Create a User-for Each Person Who Uses CDM+

We strongly recommend that the Administrator create a user for each individual who uses CDM+. Besides limiting access to particular areas of CDM+, users retain their own specific settings.

Most preferences, report setups, and even how you arrange the CDM+ windows on your desktop are user-specific. Logging into CDM+ with your own user lets you create your own work environment within CDM+.

Finally, unique users allows the program administrator to see a log of who was using the program, actions each user took, and when each user was logged into the program.

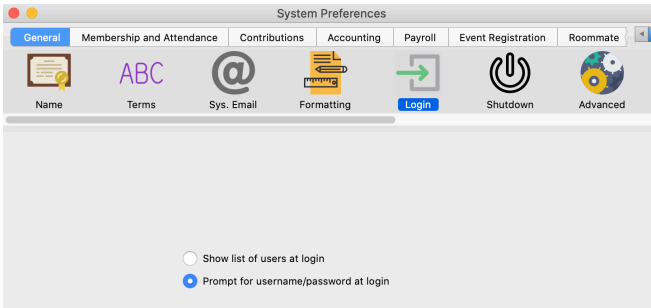
Any user with administrative access can open Administration under the File menu and view, create, and edit user profiles on the Users pane.

## Alternate Log In Method

The CDM+ administrator may choose to require all users to enter their usernames and passwords each time they log in. With this method, a user cannot see a list of all users or who is already logged into CDM+.

The CDM+ Administrator can change the log in method under System Preferences.

► CDM+ (macOS)/File (Windows) ► Preferences ► CDM+ System ► General tab ► Login icon



Any user logging into CDM+ will now need to enter both a username and its related password to access the program.

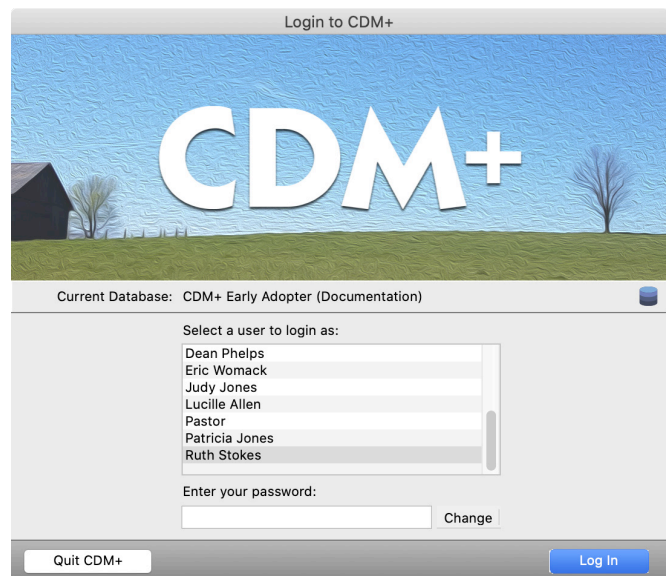
## User Login

You must log into CDM+ each time you launch the program.

To log into CDM+, click once to select your name from the user list, enter your password, and click Log In.

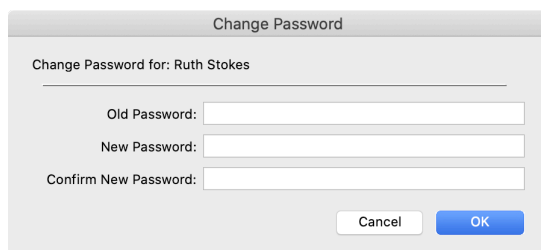
**NOTE:** Users who are already logged in will appear in gray, and you will not be able to select one of those usernames from the list.

Note that both usernames and passwords are case-sensitive (*make sure your caps lock is not on*).



## Passwords

Each CDM+ user can change their own password on the Login window, regardless of what program access permission the user has. Click Change next to the password field.



Enter your current password, the new password you wish to use (confirming that password by re-entering), and click **OK**.

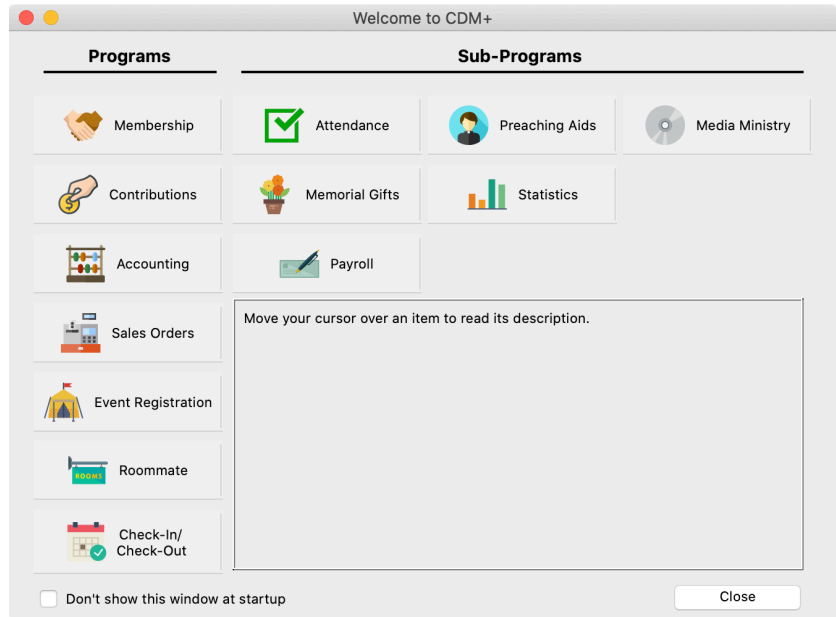
If you have lost your password, ask your CDM+ system administrator to give you a new one. If you are the system administrator and have lost your password, contact CDM+ Technical Support for help resetting your password.

## Navigating CDM+

CDM+ gives you options in how you move around in and access different areas of the software. Programs and sub-programs can be selected using buttons on welcome windows, toolbars, and traditional drop down menus. You can also set shortcut keys to open menu items.

### Welcome to CDM+ Window

After logging into CDM+, you will be presented with the Welcome to CDM+ window. This window has a button for each program and sub-program of CDM+ on it. Move your cursor over each button to see a description of that program or sub-program. If a button is grayed out, you either do not own a license to that CDM+ program, or you don't have permission to access it set on the Users pane of the Administration window.



**NOTE:** Payroll is an optional sub-program of the Accounting program. Payroll may be unavailable even if you have a license for and access to the Accounting program.

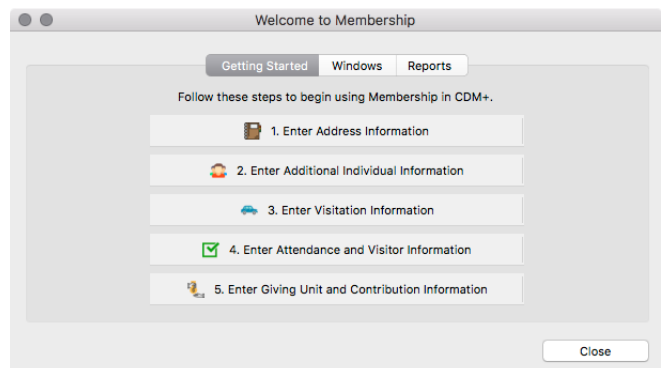
You may check the box at the bottom next to Don't Show This Window at Startup to avoid seeing it again.

To re-enable the automatic opening of this window at any time, choose Open the application Welcome window from the Startup options of the General User Preferences window.

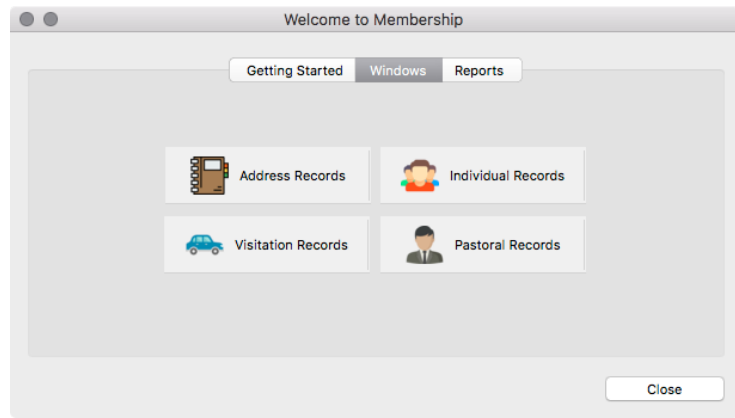
To view this welcome window at any time, select Welcome to CDM+ Window from the Help menu.

### Program Welcome Windows

Click on one of the buttons to open a new Welcome to [Program or Sub/Program] window. The Getting Started tab lists steps to begin using that program or sub-program. Click on a numbered button to open the relevant CDM+ data entry window.



Click on the Windows tab to open a new pane. Click on one of the buttons found here to open that record window.



Click on the Reports tab to open another pane, listing the reports within this particular program or sub-program. Click on a report type to see a list of reports. Double-click on the desired report name to open the report setup window.



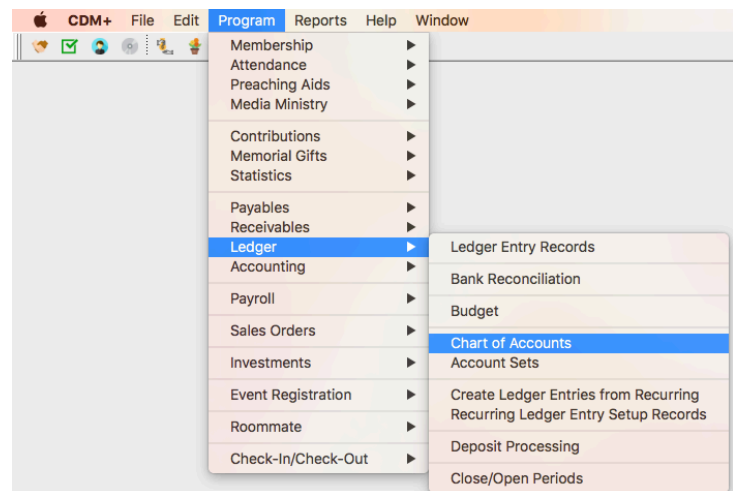
**NOTE:** Depending on the CDM+ programs in your suite and/or your user access settings, these windows may appear slightly differently from those shown above. Those programs or sub-programs for which you do not have a license or have not been given access to will be grayed out. Users' program access is set by the CDM+ administrative user on the Users pane of the Administration window.

## Menus

The menus in CDM+ are perhaps the easiest way to see all available record windows and reports at a glance

### Program Menu

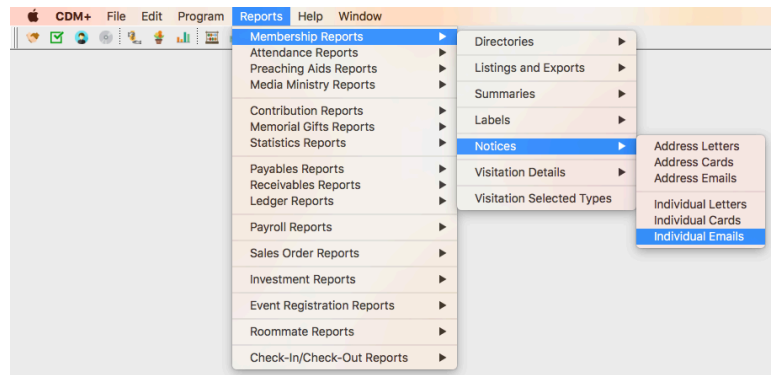
Click on **Program** in the menu bar to display a drop list of CDM+ programs and sub-programs. Move your mouse to highlight a menu item and a secondary menu will display. Click an item on that menu to open that record window.



**NOTE:** Those programs and sub-programs for which you do not have a license or user access to will appear on the menus but will be grayed out and not selectable.

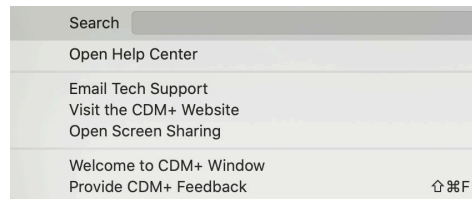
## Reports Menu

Click on Reports in the menu bar to display a drop list of CDM+ program and sub-program reports. Move your mouse to highlight a menu item and a secondary menu of the available reports or report types for that program or sub-program will display. Many report types, such as Notices, will have a third menu of the reports within that type.



## Help Menu

The Help menu provides access to user support for CDM+, including the electronic manual, links to the Tech Support email address, CDM+ website, a screen-sharing website optionally used during a tech support call, and a form for providing feedback on the program.



**Open Help Center** – Click to open your web browser to the online CDM+ help manuals. You may enter a keyword and click the Search button to bring up a list of relevant entries.

**NOTE:** On the Suran Help Center website, you do not need to login to access CDM+ Manuals or Videos.

**Email Tech Support** – Click to open your email program to send an email to the CDM+ Tech Support Department. Be as specific as possible when asking your questions about using CDM+. Also, please include your name and the name and location of your church or organization in the email message so we can identify you. All instances of CDM+ Tech Support are logged with a CDM+ User Record in our database so it helps to connect your email to the correct church or organization.

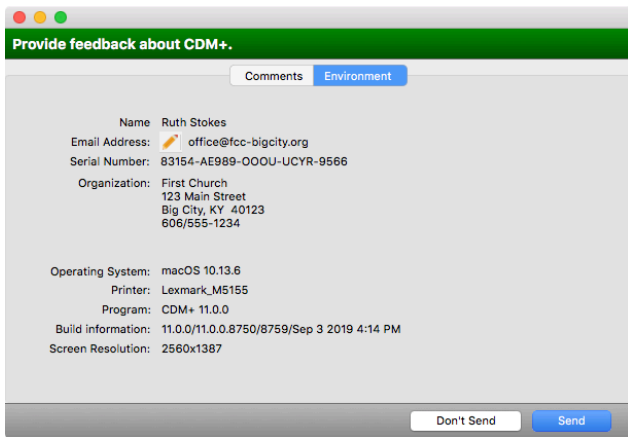
**NOTE:** Whether you use the Help Center, email, or call, you'll create a ticket in our support queue. The most direct path to our support team is using the Help Center at [help.suran.com](http://help.suran.com). Click Contact Support in the lower right-hand corner of help center website or use the Support Requests link at the top of the page. Fill out the form and include screenshots if available. If you have an urgent need please feel free to call CDM+ Tech Support (Monday-Friday 8:30 AM - 5:00 PM Eastern time at 800-633-9581).

**Visit the CDM+ Website** – Click to open the CDM+ website with your web browser.

**Open Screen Sharing** – When prompted by a Suran support technician or while waiting for a callback, click to open a screen-sharing website with your web browser to facilitate assistance.

**Provide CDM+ Feedback** – Select to report a bug, make a suggestion, or provide any other type of feedback (other than requesting tech support).

To use the Provide CDM+ Feedback feature, just type a detailed description of your feedback on the **Comments** pane. You may also include pertinent screenshots of open windows by checking them in the Include these screenshots list. Choose the type of Feedback from the drop down list.

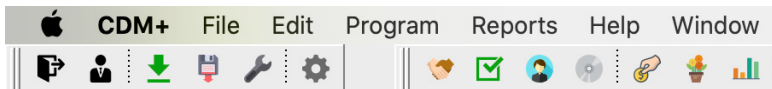


Click on the **Environment** tab and make sure the information there is correct. Particularly be sure to include your correct email address in case our development team has any questions. Click Send.

**NOTE:** The Provide CDM+ Feedback function does NOT take the place of contacting CDM+ Tech Support. You will not get a response from the CDM+ software developer working on the issue unless they have a question. For timely help with a problem, please call (800-633-9581) or email (support@cdmplus.com) CDM+ Tech Support.

## Toolbars

In addition to accessing the CDM+ programs through the welcome windows and menus, you can use toolbars.



**Default Toolbar - macOS**

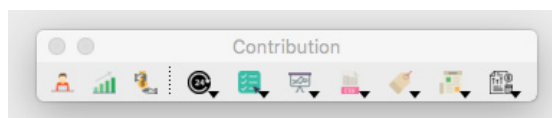
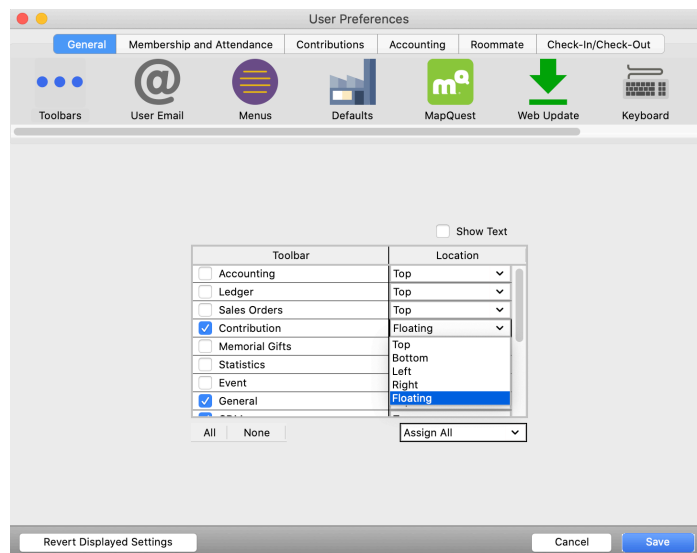
The Program toolbar will display at the top of your screen by default. Hover your mouse over an icon to see its description.

### ► CDM+ (macOS)/File (Windows) ► Preferences ► CDM+ User ► General ► Toolbars

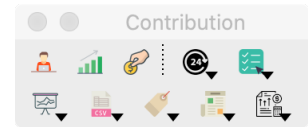
Use User Preferences to customize your CDM+ workspace. You can: select other toolbars, change their location, or choose to show text. Each time you log into CDM+ your toolbars will display as you set them.

For example, the Financial Administrator who only works in the Contributions program may choose to set his CDM+ User Preferences to display only the Contributions toolbar. In order to have the maximum amount of space top to bottom on his screen, he chooses to display the toolbar on the left side. He also wants a reminder of what each icon opens, so he clicks the Show Text checkbox.

If you choose Floating as the Location of a toolbar, it will display as a movable, re-sizable palette.



To re-size a floating toolbar palette, hover your mouse over a corner until the cursor changes to a line with arrows, then drag to re-size the palette. Floating toolbar palettes can be dragged to any location on your desktop. Toolbars with all other Location options selected are anchored to the edges of your screen.



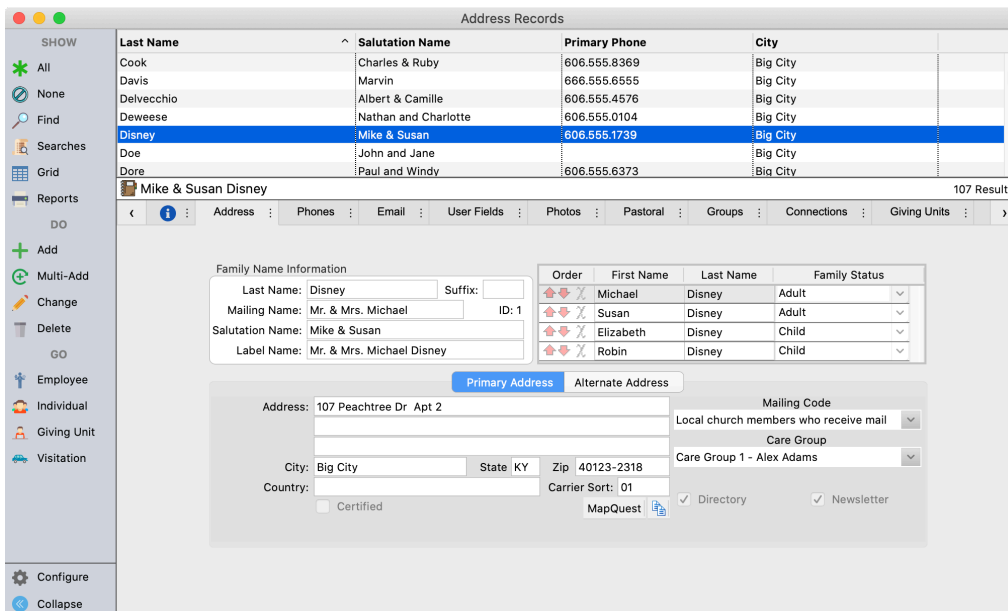
**NOTE:** Toolbars are not automatically displayed just because you have added a program to your CDM+ suite or your administrator has given you access to a new program area. You must set your User Preferences to display them.

## Record Frame Window Basics

Many of the data entry windows in CDM+ are "Record Frame" windows and share common features. Windows with names ending in "Records" are record frame windows.

### Re-sizing the Window

A record frame window may be re-sized by placing your cursor on the border of the window until it changes to a double-arrow, then clicking and dragging it larger or smaller. The results list area may be enlarged by placing your cursor on the line above the menu tabs until it changes to arrows, then clicking and dragging it larger or smaller.







**Application Name** - The name of the application making this change

**Transaction ID** - An identifier used to link related changes

**NOTE:** CDM+ only displays changes made to the primary record. Changes to related records like groups or connections will not be displayed. However the audit logs track these changes and a future update to CDM+ will allow you to view them.

## Navigating Tabs

To move between tabs simply click a tab. If there are more tabs visible than can be displayed, left and right arrows will appear on the tab bar.



Click or hold down on these arrows to scroll the tab bar left or right until you see the desired tab. You can also position your cursor over tabs and on macOS, scroll left or right to scroll the tabs. On Windows, hold down the shift key and scroll up and down to move the tabs left or right.

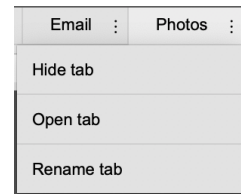
## Moving Tabs

Tabs can be re-positioned to put frequently-access tabs next to each other. To move a tab, click and hold on it, then drag the tab to the desired position. This position will be recalled for your user each time you open that record frame window.

You can also re-arrange tabs and restore them to their default order under Configure.

## Renaming Tabs

You can rename a tab to give it a more meaningful name. Click the three dots next to a tab and choose Rename tab. Enter the new name when prompted. This custom name will be recalled for your user on this record frame. You can also rename tabs and see their original name under Configure.



## Hiding Tabs

If a tab represents a function of CDM+ that you do not want to use, you can choose to hide that tab to simply the interface. Click the three dots next to a tab and choose Hide tab. That tab will remain hidden for your user on that record frame. You can un-hide tabs under Configure.

**NOTE:** Some tabs like the default tab and tabs on Ledger Records cannot be hidden.

## Exploded View of Windows

Many windows in CDM+ have additional panes accessed by clicking on tabs. This is a lot of information in a small amount of desktop real estate. However, sometimes you need to be able to see more than one pane at a time. The secondary panes can be separated from the main window by clicking on the three dots next to the desired tab's name.

The screenshot shows the 'Address Records' window with a table of records. Below the table, a secondary pane is open for the record 'Mike & Susan Disney'. This pane has several tabs, including 'Address', 'Phones', 'Email', 'User Fields', 'Photos', 'Pastoral', 'Groups', 'Connections', and 'Giving Units'. The 'Phones' tab is active, showing a table of phone numbers and their types.

Primary	Type	Number	Extension	Note	Unlisted
<input type="checkbox"/>	Primary	813.555.8936			<input type="checkbox"/>
<input type="checkbox"/>	Primary	606.555.1739			<input type="checkbox"/>
<input type="checkbox"/>	Primary	606.873.1504		Work Phone	<input type="checkbox"/>
<input type="checkbox"/>		606.555.9173		Cellular line	<input type="checkbox"/>
<input type="checkbox"/>		606.555.4675		Fax number	<input type="checkbox"/>
<input type="checkbox"/>		606.555.8156		Work Phone	<input type="checkbox"/>


This will open the pane in a separate window.

The screenshot shows a separate window titled 'Phones' with the same table of phone numbers and their types as seen in the previous screenshot.

Primary	Type	Number	Extension	Note	Unlisted
<input type="checkbox"/>	Primary	813.555.8936			<input type="checkbox"/>
<input type="checkbox"/>	Primary	606.555.1739			<input type="checkbox"/>
<input type="checkbox"/>	Primary	606.873.1504		Work Phone	<input type="checkbox"/>
<input type="checkbox"/>		606.555.9173		Cellular line	<input type="checkbox"/>
<input type="checkbox"/>		606.555.4675		Fax number	<input type="checkbox"/>
<input type="checkbox"/>		606.555.8156		Work Phone	<input type="checkbox"/>

As you change records in the main data entry window, the exploded windows will change accordingly.

To restore an exploded pane, simply close it.

If you wish this tab to always open in a separate window, click the Configure button  **Configure** on the record window and check the box to save the exploded state. Otherwise, exploded tabs will automatically return to the main window when closing and re-opening the record frame.

### Other Options

Save pane exploded state

**NOTE:** The primary tab of a record frame window cannot be exploded.

## Grid View

Grid

Although most often you will view information in the basic record windows, CDM+ does allow you to view the information in another way. The Grid View displays records in a familiar spreadsheet-like format. This format lets you easily modify multiple records.

The Grid View allows for viewing and changing the results list data in a grid format. This may be a substitute to scrolling the results list when there are a large number of results.

Some data fields may be changed while in the Grid View, making updating your data more simple. A Grid Report may also be printed from the Grid View screen.

**NOTE:** Contributions, Purchase Orders, Invoices, and Ledger Grids will not allow cells to be edited.

	Last Name	Salutation Name
1	Disney	Mike & Susan
2	Allen	William & Lucille
3	Cook	Charles & Ruby
4	Hunter	Mark & Andrea
5	Lucas	Ralph & Peggy
6	Ross	Jim and Joy
7	Church	Pastor Brown
8	Church	Pastor Williams
9	Big City Gazette	
10	Andrews	Robert & Elizabeth
11	Patterson	Dean & Sharon
12	Smith	Vance & Angela
13	Smith	Hugh
14	Emerson	David & Glenda
15	Brown	Melvin & Dorothy
16	McAllister	Osa
17	Maslowski	Nancy
18	Delvecchio	Albert & Camille
19	ZZZZ Various Giving Codes	
20	Odle	Josh and Ashley
21	Lane	Rogan and Amanda
22	Dore	Paul and Windy
23	Deweese	Nathan and Charlotte
24	Lowe	Dan and Kerri
25	Robinson	Gatewood and Anne
26	Ullom	Lee and Tracee
27	Bates	Matt and Ashley
28	Strickland	Don & Melissa
29	Grant	Michael and Jackie

An Address Records grid

Select which columns to view by clicking on Configure. Select the column fields to be changed or added.

Click Print to open the Grid Report window where the report may be re-named, sort criteria selected, and printed.

To work with specific data, you can select all or part of the grid. To select a column, move your cursor to the top of the column until it becomes a down arrow and click. Command-click (macOS) or Control-click (Windows) to select multiple columns.

	Last Name	Salutation Name
1	Disney	Mike & Susan
2	Allen	William & Lucille
3	Cook	Charles & Ruby
4	Hunter	Mark & Andrea
5	Lucas	Ralph & Peggy
6	Ross	Jim and Joy
7	Church	Pastor Brown
8	Church	Pastor Williams
9	Big City Gazette	
10	Andrews	Robert & Elizabeth
11	Patterson	Dean & Sharon
12	Smith	Vance & Angela
13	Smith	Hugh
14	Emerson	David & Glenda
15	Brown	Melvin & Dorothy
16	McAllister	Osa
17	Maslowski	Nancy
18	Delvecchio	Albert & Camille
19	ZZZZ Various Giving Codes	
20	Odle	Josh and Ashley
21	Lane	Rogan and Amanda
22	Dore	Paul and Windy
23	Deweese	Nathan and Charlotte
24	Lowe	Dan and Kerri
25	Robinson	Gatewood and Anne
26	Ullom	Lee and Tracee
27	Bates	Matt and Ashley
28	Strickland	Don & Melissa
29	Grant	Michael and Jackie

To select just one row, move your cursor to the left of the row until it becomes a horizontal arrow and click. Command-click (macOS) or Control-click (Windows) to select multiple rows.

DO	Last Name	Salutation Name
1	Disney	Mike & Susan
2	Allen	William & Lucille
3	Cook	Charles & Ruby
4	Hunter	Mark & Andrea
5	Lucas	Ralph & Peggy
6	Ross	Jim and Joy
7	Church	Pastor Brown
8	Church	Pastor Williams
9	Big City Gazette	
10	Andrews	Robert & Elizabeth
11	Patterson	Dean & Sharon
12	Smith	Vance & Angela
13	Smith	Hugh
14	Emerson	David & Glenda
15	Brown	Melvin & Dorothy
16	McAllister	Osa
17	Maslowski	Nancy
18	Delvecchio	Albert & Camille
19	ZZZZ Various Giving Codes	
20	Odlie	Josh and Ashley
21	Lane	Rogan and Amanda
22	Dore	Paul and Windy
23	Deweese	Nathan and Charlotte
24	Lowe	Dan and Kerri
25	Robinson	Gatewood and Anne
26	Ullom	Lee and Tracee
27	Bates	Matt and Ashley
28	Strickland	Don & Melissa
29	Grant	Michael and Jackie
30		

To select all the columns and rows, place your cursor in the corner of the box and the top left of the grid. Move it until it turns into a diagonal arrow and click.

DO	Last Name	Salutation Name
1	Disney	Mike & Susan
2	Allen	William & Lucille
3	Cook	Charles & Ruby
4	Hunter	Mark & Andrea
5	Lucas	Ralph & Peggy
6	Ross	Jim and Joy
7	Church	Pastor Brown
8	Church	Pastor Williams
9	Big City Gazette	
10	Andrews	Robert & Elizabeth
11	Patterson	Dean & Sharon
12	Smith	Vance & Angela
13	Smith	Hugh
14	Emerson	David & Glenda
15	Brown	Melvin & Dorothy
16	McAllister	Osa
17	Maslowski	Nancy
18	Delvecchio	Albert & Camille
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20	Odlie	Josh and Ashley
21	Lane	Rogan and Amanda
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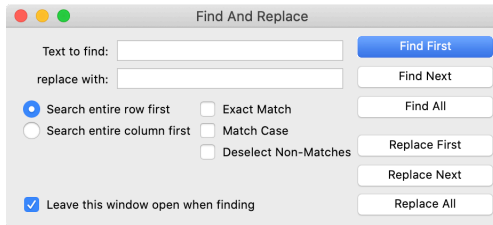
To edit the content of a cell, select it by double-clicking. Once you are in the edit mode, you may use the tab key, shift+tab keys, or arrow keys to navigate the grid.

Click Save to save your changes and return to the main window. Click Cancel to discard your changes and return to the main window.

## Grid View Sidebar

Tools to manipulate the data in the grid are accessible on the sidebar on the left of the window. The available actions are:

**Find and Replace** – Select the cells containing the text you want to find or change and click on this icon.



**Find Again** – Repeats the most recent Find.

**Replace Again** – Repeats the most recent Find and Replace.

**Add Rows** – Adds row(s) to the end of the list. (This tool is disabled on the View Payroll grid.) Note: Columns are added or removed using the Choose Columns button.

**Delete Rows** – Removes the records represented by each row from the database

**Swap Lines** – Select 2 lines or columns and click on this icon to swap the 2 lines or columns.

**Sorts**– Select the columns to sort and click on this icon. This opens a Sort Grid window where you may select columns to sort by in either ascending or descending order.

**Select All** – Selects all cells

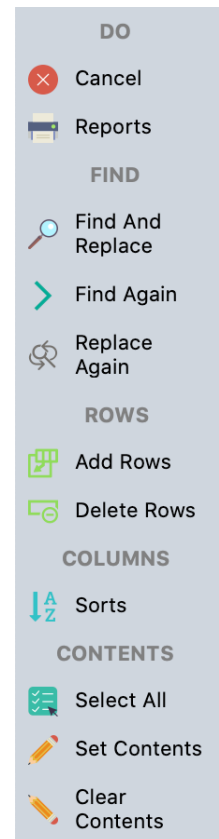
**Set Contents** – Select the cells you wish to change and click on this icon.

**Clear Contents** – Select the cell(s), column(s), or row(s) you wish to clear and click this icon to delete the content only, not the cell(s). **USE THIS FUNCTION WITH CAUTION!** It will permanently clear data from records.

**Revert** – Undoes all changes to the list since the last Save. This is the same as clicking on the Revert button at the bottom of the window.

**TIP:** All the sidebar functions are also accessible from a contextual menu. Control-click (macOS) or right-mouse click (Windows) on the grid to bring up the menu.

Click Save to save your changes and return to the main window. Click Cancel to discard your changes and return to the main window.

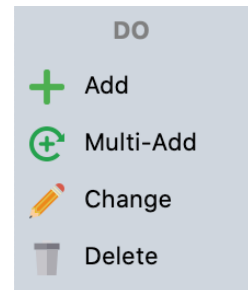


## Data Entry Function Buttons

To add one or more records or change any information on an existing record, you must first select one of these four buttons at the left of the data entry window.

### ADD

To add a new record to your database, click Add. You may now begin entering information in the various data entry fields, tabbing from field to field. When you are finished entering all the required information on the first pane of the main data entry window, move to the next pane by selecting the next tab at the top of the data entry section. When you have finished entering all the necessary data for this record in all the panes of the data entry window, click Save. You have added one record to your database



### MULTI-ADD

To add more than one new record at a time, click Multi-Add. You'll notice that your choices at the left of the window are Save and Finish. Enter information as you would for just one record. When you are finished entering data for the first record, click Save or press the Return key on your keyboard. Because you have chosen Multi-Add Mode, the first data entry pane will automatically reappear, ready for you to enter information for the next record. You do not have to click anything except Save between records. When you have input all information for all of the records you are adding and clicked Save after the last record, click Finish to exit Multi-Add Mode.

**NOTE:** Make sure to click Save after entering the last record! *Clicking Finish does not save the currently displayed record; it simply exits the multi-add mode.*

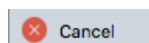
### CHANGE

Click Change to change information for an existing record or to add information to an existing record. Do not click Add if the information you wish to add is for a record that already exists (for example, to add phone numbers to an individual, click Change, then click Add Other Phone/E-Mail). The Add button inserts an entirely new record in the database.

### DELETE

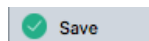
Use Delete to remove an entire record. CDM+ safeguards you from accidentally deleting the record by forcing you to navigate through several warning screens before the program will actually allow you to delete the record.

### CANCEL



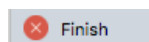
Ends a data entry session without saving the changes you have made.

### SAVE



Ends a data entry session by updating the data (Change mode) or adding a new record (Add or Multi-Add modes).

### FINISH

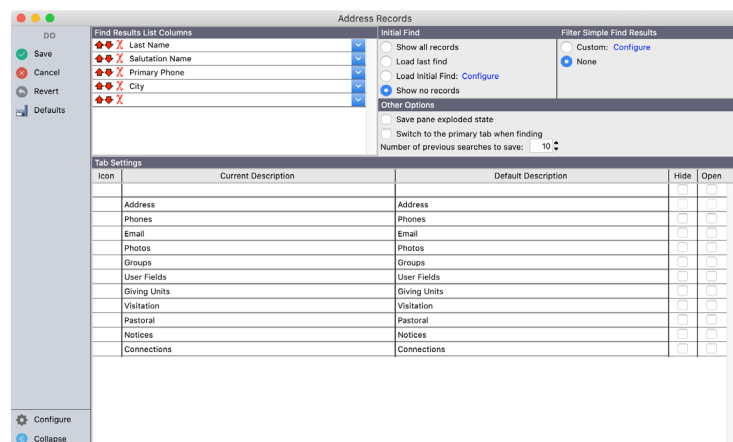


Ends a data entry session in Multi-Add mode.

## Configure

Each user of CDM+ can customize the display of find results on data entry windows in CDM+, choosing which fields to include, and what order they display across the window. You can also adjust the order, name, and selections made in Configure will be saved for that particular data entry window for a user until they change them.

 **Configure** To change or add to the columns shown on a record window, click on the **Configure** button.



To select a different column to display, click on the Down Arrow on the right of the drop-down menu and choose the column you wish to include.

Click the red **X** to remove a column field.

Click on the red up or down arrows to change the column order.

Click on Revert on the Configure window to return the view to the original columns. You will be prompted to revert changes to tabs, columns, or all settings. Choose Columns or All to reset your column selection.

When you have finished making your changes, click Save to save them or Cancel to discard them.

**NOTE:** You can also change the width of the columns. From the main window, move your cursor to the line between headers until it changes to a double line with an arrow on either side. Click and hold the mouse button down and you can make the column wider or narrower.

Use the scroll bar at the bottom of the columned list window to view more columns, if necessary. To have CDM+ automatically size the columns to fit the contents of the results list, move your cursor to a line between columns and when it changes to a double line with an arrow on each side, double-click.

## Configure Find Options

Also, you may specify in Configure the Find Options:

1. What you want displayed when this window is opened (Show all records, Load last find or Show no records),
2. Number of previous searches to save for quick access
3. Save pane in exploded state
4. Switch the view of a record window to the primary tab when finding
5. Set the Filter for Simple Find Results

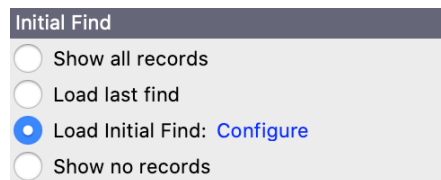
**NOTE:** These settings are user-specific and tied to the user that is logged in. CDM+ will save your most recent settings when you log out of the program and automatically load them the next time you log in.

## Filtering Options for Windows

Filtering can be turned off or set on each window. There are two types of filters: filters that control what shows when a window is first opened and filters that affect Simple Find Results.

### Opening the Window with an Initial Find

Click on the radio button under Initial Find labeled "Load Initial Find:" and click on the Configure button. An Advanced Find window will appear. Define the criteria to limit a select list of results to appear on the window when it is first opened. Make sure you select the OPTION for Initial Find in Configure, and then click the SECOND Configure button.



### Filtering Simple Find Results

Some windows will have a default option. For example, the default filter on Individual Records is not to show records where Do not print is checked. A custom filter can also be set up or filtering can be turned off. If a filter is selected and you do a find on that window if there are filtered results then a Filtered button will show next to the number of results that were displayed. Click on the Filtered button to see the results unfiltered.



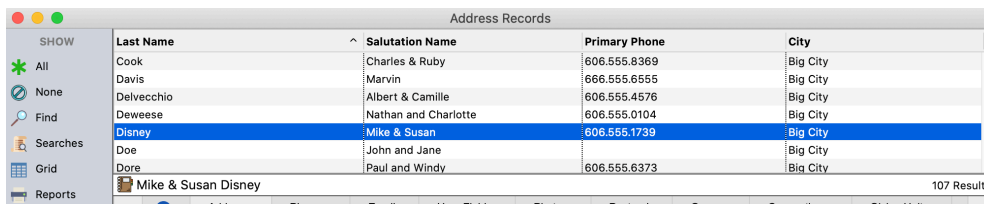
## Finding Data on Record Frame Windows

CDM+ has a powerful **Find** feature that allows you to locate and work with the exact information you want. This Find feature is on all CDM+ record frame windows.

After performing a find, the search results display in a results list in the pane just below the definition area. Select a line in the results list to work with that record.

### Show All

Click on the **Show All** button to display all items in the columned results list.

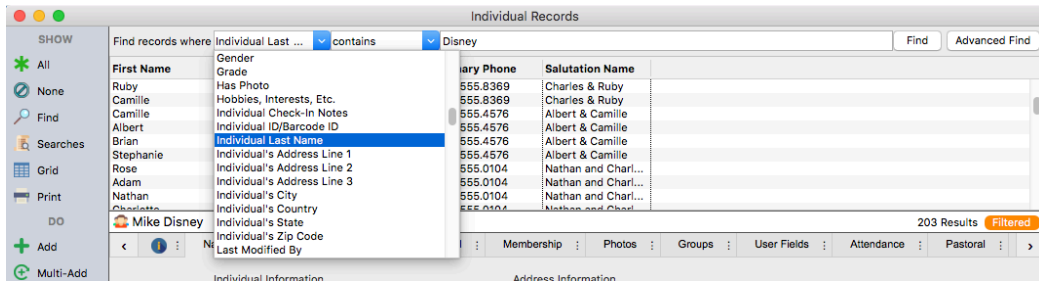


You may sort on a column by clicking on the header bar. Once the column header is selected, click on it to toggle the sort order between ascending and descending. See the Configure section of the manual for more information about setting what columns display in the Find Results List.

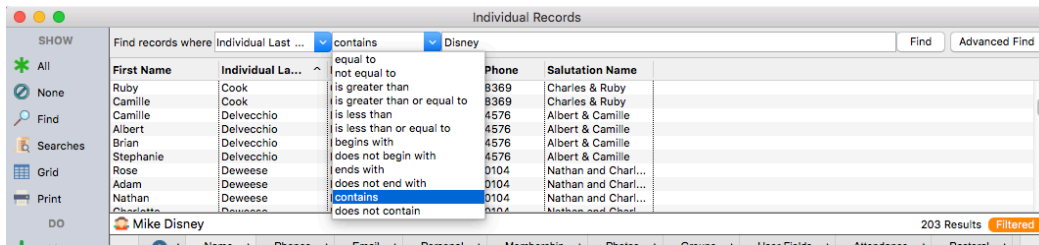


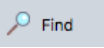
## Fields

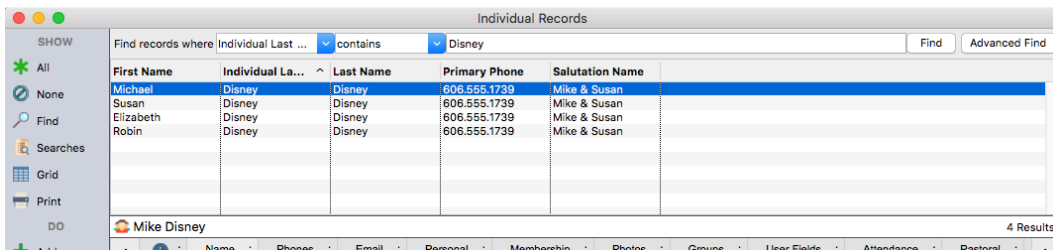
Fields are grouped together for easier selection by headings such as Address, Individual, etc.



Select the modifier from the drop down menu at the center top arrow.



Enter the criteria in the third field and click **Find**  or press **Return/Enter**. The search results appear in the results list below.




## Advanced Find

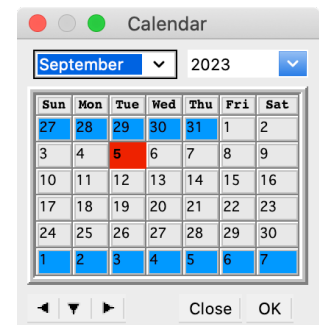
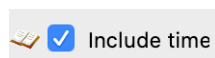
To perform a more complex search, a powerful Advanced Find is included in CDM+. To learn more about Advanced Finds, take the Advanced Finds class or see the chapter for that class in this manual.

## Find Interfaces

**Find interfaces** assist in the selection of the criteria; click the interface icons at the end of criteria field for detail.

**Date** fields include a desk calendar icon  to allow date selection via the mouse. Click the icon to open a calendar pop-up window. Date fields will default to the current date/time.

**Date/Time** - you may optionally choose to include Time on the date field by checking the include Time box next to the Date/Time icon.



**Partial Date fields** – Individual Records offer a number of partial date fields, including Birth Date, Married Date, Baptism Date, etc. These fields allow you to track the month and day of an individual's birth date, but not the year.

11 / 16 / 1956

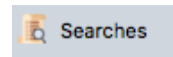
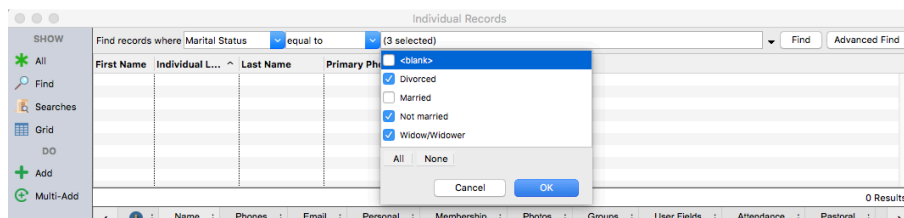
Find records where Birth Date equal to 11 / 16 / 1956

Date/Time  
Time: 12 : 00 AM  
September 2023

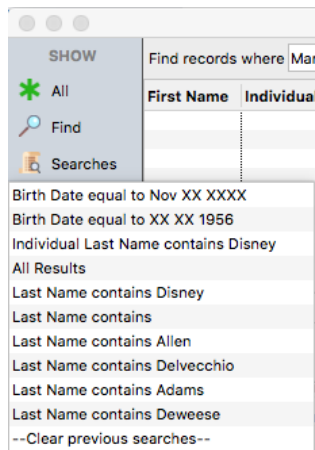
**Time** – a time find interface simplifies finding a time. Up and down arrows for hour, minute, and AM/PM allow you to select the time via the mouse, or you can enter simply type in the time.

Up and down arrows for hour, minute, and AM/PM allow you to select the time via the mouse, or you can enter simply type in the time.

**List** – Perhaps the most useful and time-saving find interface is the list interface. The list interface appears for many types of fields, including built-in codes (such as Family Status, Mailing Code or Ledger Entry Type), user-defined groups, and a variety of other fields in CDM+, such as giving funds in Contributions. When you select a field that uses this list interface, a small down arrow appears next to the entry field. Click the arrow to display the list. Click the box or boxes of the items you wish to include and click OK. To find records that have nothing entered in the field, click the checkbox for <blank>.



Searches stored in the Previous Searches list are accessed by clicking on the Searches icon.

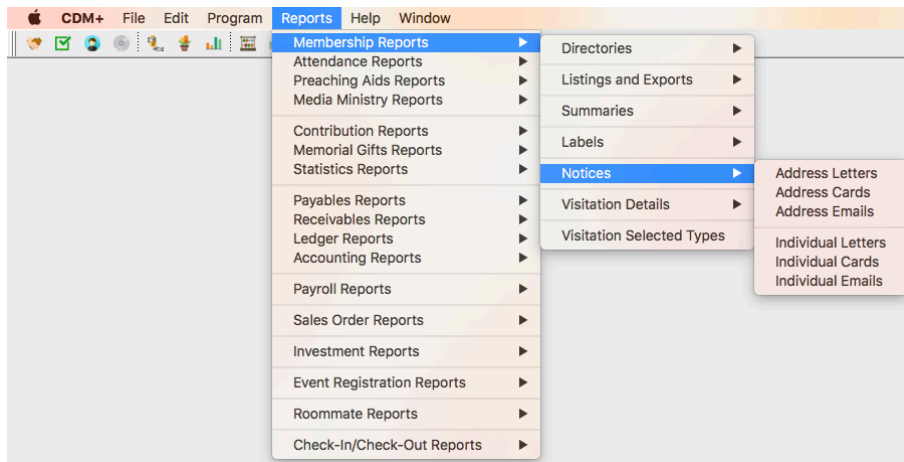


## CDM+ Reports

CDM+ allows you to generate a variety of reports in a number of different formats. All reports are highly customizable by search criteria, information included, and fonts and colors used. Each report setup window will allow you to see a preview of the report before you send it to the printer.

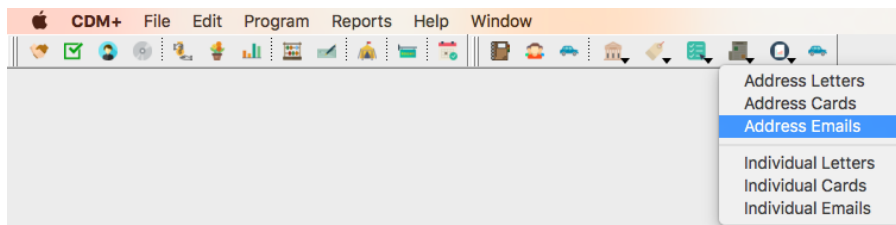
### Accessing Reports

All reports may be accessed from the Reports Menu. Note that some menus will have sub-menus.



### Accessing Reports from the Toolbar

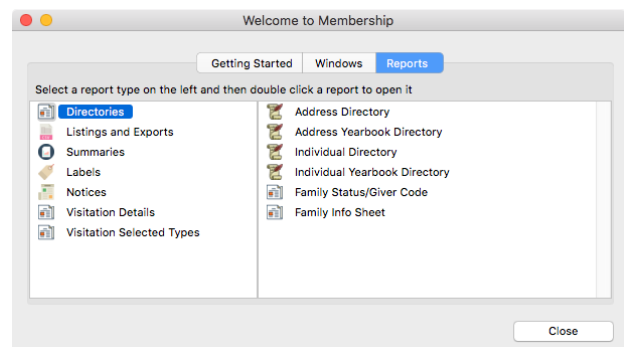
Reports are accessible from the Toolbar if you have specified in Toolbars section of the Preferences window to display the relevant program toolbar(s).



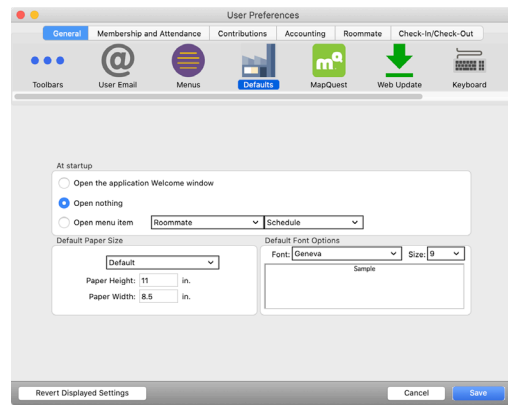
### Accessing Reports from the Reports pane of the Welcome to [Program] window

The Welcome to... window for any program can be opened by selecting it from the program menu.

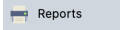
Or, if you work exclusively in one program, you may wish to set your User Preferences Defaults to open that window at startup (as shown opposite):



Set your User Preferences General Defaults to open a Welcome to [Program] window at startup:



## Print Reports from Find Results

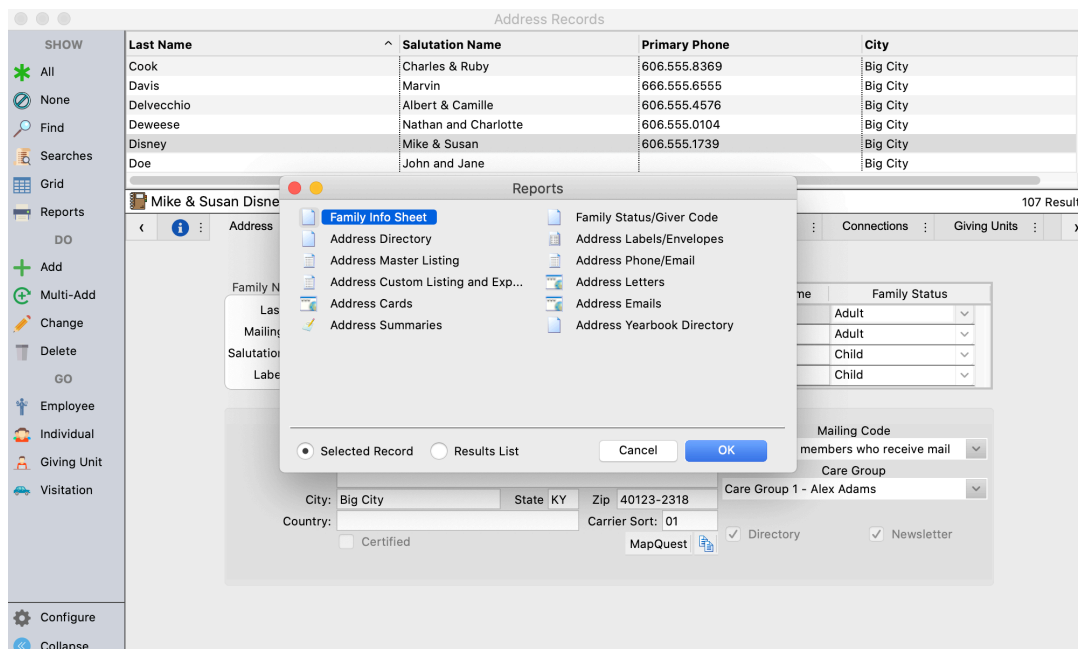
Clicking on the Reports button  on the left of a record window will bring up a list of available report options. Click to highlight the report you wish to print. By clicking the appropriate radio button (Results List or Selected Record), you can choose to print:

- the entire results list
- a selected record (highlighted)
- multiple selected records (highlighted).



## Print Selected Records from Find Results

Multiple records may be selected (highlighted) by holding down the Control or Command key while clicking on the desired records. Click OK and the Report Setup window will open. Note that the search description will state that results from the record window will be used to produce the report.

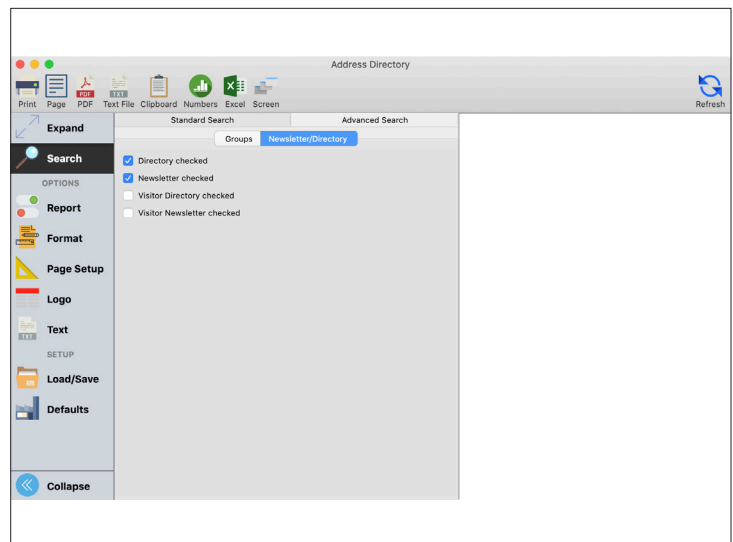


You can also quickly print the results list by right-clicking it and choosing Print.

## Report Setup Window

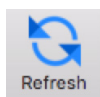
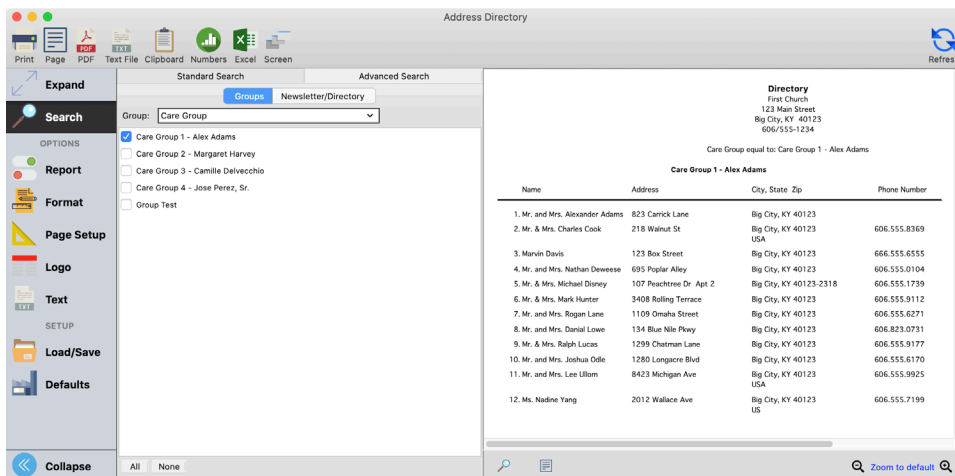
Report setup windows in CDM+ share a common interface from program to program in your suite. This means the user sees the same format on all report setup windows, making CDM+ easier to use. Report settings are user-specific. Once you have printed a report, CDM+ will remember your settings for that report for the next time.

There are three main areas in a report setup window: the **Search**, **Options**, and **Setup**. These areas are available on nearly all report setup windows in CDM+, and are listed on the left sidebar of the window. Depending on what report you are trying to run, the number of options may vary under these headers.



## Report Preview

All CDM+ reports also have a preview that lets you review your report before printing to screen, saving to a PDF, or sending to a spreadsheet program.



Click the blue circular arrow, the Refresh icon, in the top right corner of report setup windows to refresh the Report Preview section. To see more of the preview, enlarge the window or use the scroll bars. To see a revised preview after making a change, click the Refresh icon or press Command-R (macOS) or Control-R (Windows). You can also use the Preview to refine reports before printing.

## Search Within the Report Preview

Click the magnifying glass icon below the preview pane to open a search box.

Results of your search will be highlighted in the report preview.

73. Allie Thompson	907 Veterans Way	Big City, MO
74. April Thompson	907 Veterans Way	Big City, MO
75. Angela Ullom	8423 Michigan Ave	Big City, MO USA
76. Tracee Ullom	8423 Michigan Ave	Big City, MO USA
77. Sonya Wang	662 Bryan Ave	Big City, MO USA

Produced on Aug 29 2017 at 6:06 PM by Dana

## Preview Page Thumbnails

Click the page icon below the preview to open a pane of page thumbnails.

Click on a thumbnail to jump to that page.

Click the black magnifiers to zoom in.

The screenshot shows a report preview window with a list of names and addresses. The list is as follows:

Name	Address	City, State, Zip	Phone
Abby Adams	801 1st St	Big City, MO 65611	417-555-1234
Ava Adams	801 1st St	Big City, MO 65611	417-555-1234
Greta Adams	801 1st St	Big City, MO 65611	417-555-1234
Jenny Adams	801 1st St	Big City, MO 65611	417-555-1234
Lucy Adams	801 1st St	Big City, MO 65611	417-555-1234
Elizabeth Adams	801 1st St	Big City, MO 65611	417-555-1234
Annet Adams	801 1st St	Big City, MO 65611	417-555-1234
Dorot Adams	801 1st St	Big City, MO 65611	417-555-1234
Jennil Adams	801 1st St	Big City, MO 65611	417-555-1234
Patty Adams	801 1st St	Big City, MO 65611	417-555-1234
Adrie Adams	801 1st St	Big City, MO 65611	417-555-1234
Jessic Adams	801 1st St	Big City, MO 65611	417-555-1234
Camil Adams	801 1st St	Big City, MO 65611	417-555-1234
Ruby Adams	801 1st St	Big City, MO 65611	417-555-1234
Camil Adams	801 1st St	Big City, MO 65611	417-555-1234
Steph Adams	801 1st St	Big City, MO 65611	417-555-1234
Charl Adams	801 1st St	Big City, MO 65611	417-555-1234
Rose Adams	801 1st St	Big City, MO 65611	417-555-1234
Susar Adams	801 1st St	Big City, MO 65611	417-555-1234

The sidebar on the right contains a list of names corresponding to the report entries, numbered 1 through 20.

## Search Button

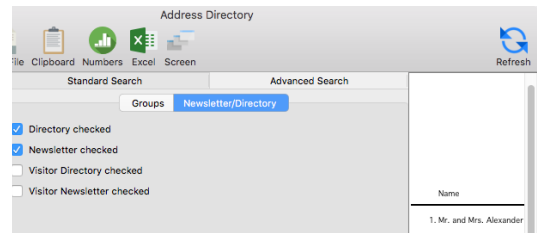
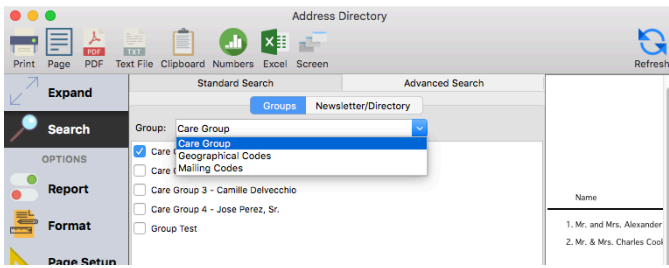
Within each area of the window are several other common features. In the Search area, many reports offer Standard and Advanced Search options accessible by clicking the tabs at the top of the window.

If a report setup window is opened by performing a search on a Record window, and then clicking on Print, the report will reflect the results of the search criteria you entered on the Record window.

## Standard Search

The options under the Standard Search will vary from report to report. Some reports have sub-tabs to access other panes. However, reports that are accessing the same record type will have identical or nearly identical Standard Search options.

For example, two reports that include information from Address Records will both have a **Groups** tab with a drop list to select a group and checkboxes to select codes within that group.



In addition, both will have a Newsletter/Directory tab where you make selections based on the Newsletter and/or Directory check boxes on the Address Records and Visitors Records windows.

## Advanced Search

The Advanced Search option on the Report Setup windows in CDM+ allows you to further fine-tune your report contents.

Click on the Configure Advanced Search button to open the Advanced Find window. This window is the same as the Advanced Find window accessed by clicking on the Advanced Find button on data entry windows. Because of all the options inherent in Advanced Searches, this is covered in a separate class, Advanced Finds, summarized elsewhere in this manual.

## Options Buttons

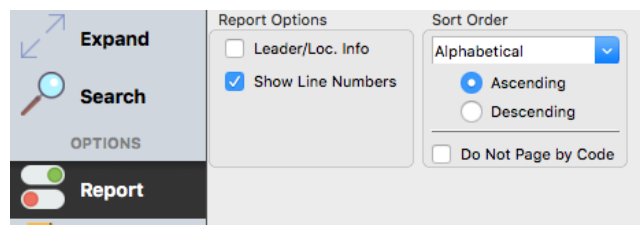
The items under Options on the left sidebar of most CDM+ report setup windows allow you to further customize the content and the appearance of a report. The Options will vary depending on the report type you have chosen and the program—such as Membership or Accounting—you are currently using.

When setting up a report in CDM+, be sure to review all of the options available and make the appropriate choices in each one. Most reports do have the following options: Report, Format, and Page Setup. Other reports – such as Custom Listings, Exports, and Labels/Envelopes reports – have specialized options.

## Report Options

The Report option is where you make additional choices specific to the report you are creating. Options under Report will vary greatly from report to report.

Options for sorting the report are located here.



## Format Option

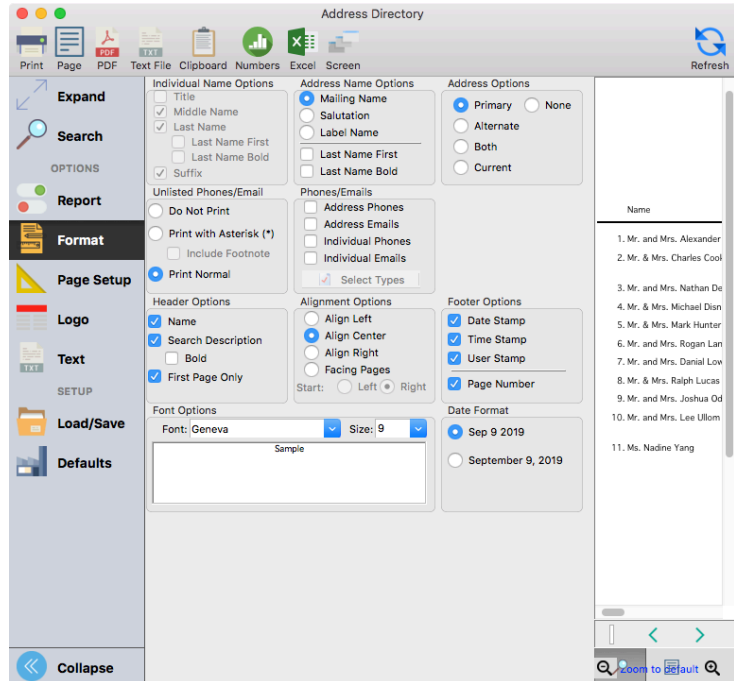
The Format option, found on most CDM+ report setup windows, varies according to the report. In general, it allows you to precisely specify how information appears on the report. As noted above, the content of a report is primarily controlled by what is specified under Search on the report setup window, but the Format tab controls how that content is displayed.

For example, the Format Options pane on the Address Directory report setup window (shown below) lets you specify Individual Name and Address (Family) Names, which (if any) address to print, how to treat Unlisted Phone Numbers, and provides an option to include Other Phone Numbers or Email Addresses on the report.

In addition to specifying content of a report, Format Options also allows you to customize the appearance of a report. Here you can select:

**Header Options:** The checkboxes in the Header Options section allow you to specify whether or not to print the Church Info and Search Description at the top of a report. The information you choose will appear on all pages unless you select First Page Only.

**Alignment Options:** Here, you can select the alignment of text on a report – left, center or right. Also, you can choose Facing Pages. The Facing Pages option is ideal if you are going to print a multi-page report on both sides of the paper and 3-hole punch it for placement in a ring binder.



**Footer Options:** The checkboxes in the Footer Options section allow you to specify the information you wish to have printed at the bottom of a report.

**Font Options:** In this section of the General tab, you can select from droplists the font and its point size to be used on the report. CDM+ shows you a preview of your font selection in the box.

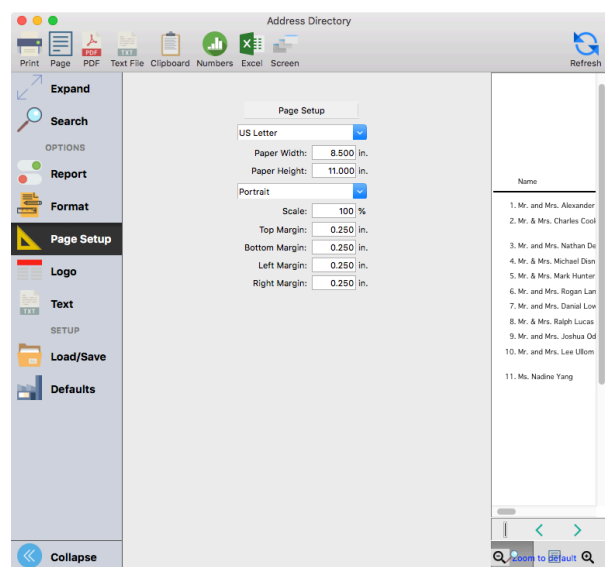
**Date Format:** In this section of the General tab, you can select the date format you wish to use on the report.

## Page Setup

Page Setup provides much flexibility when printing a report. Here you can specify the paper size, orientation, and margins.

1. Either select one of the standard paper sizes from the droplist or enter the dimensions for a custom paper size.
2. Select the orientation of the paper. Some reports are better suited to a wider Landscape orientation.
3. If desired, change the scale at which the report prints.
4. Enter the desired margins for this report.

**NOTE:** Clicking on the Page Setup button on this pane will open your computer's standard page/print setup window. This is an alternative to making your paper size selections here.

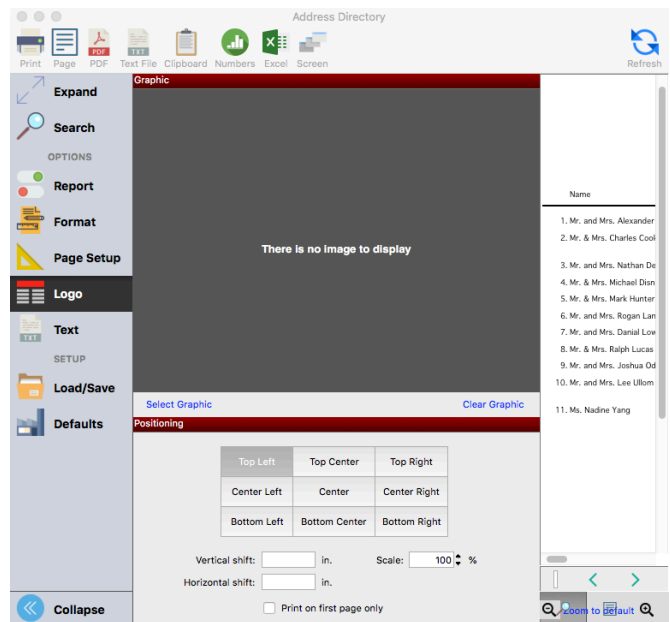




## Logo

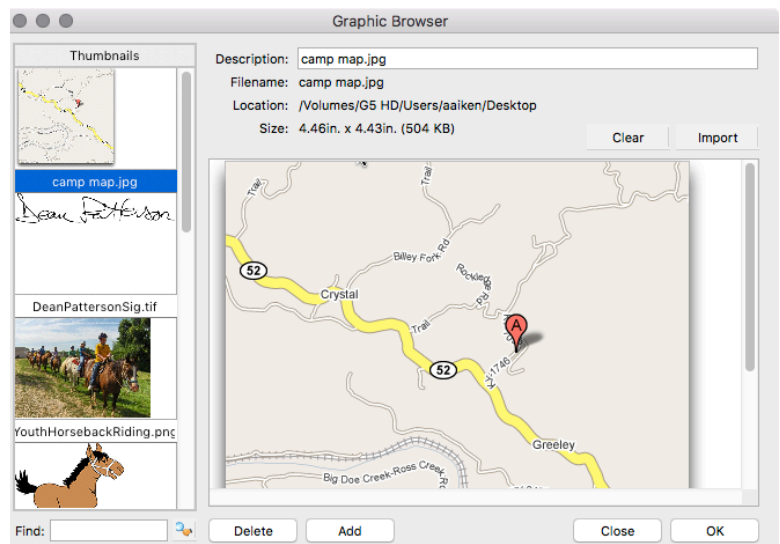
Select the Logo tab on the report Options menu to place graphics on most reports in CDM+.

The Logo tab accesses graphic files added to your CDM+ database in Graphic File Browser. To choose a graphic to include on your report, click Select Graphic below the graphic preview pane.

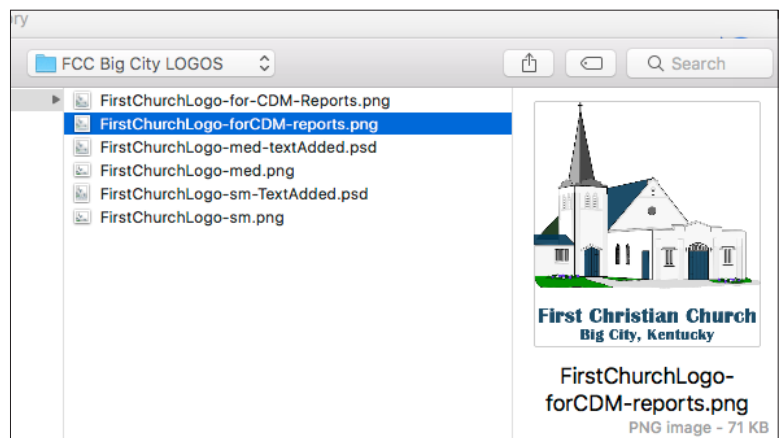


This action will launch the Graphic Browser. You will see thumbnails of the images already in your CDM+ database.

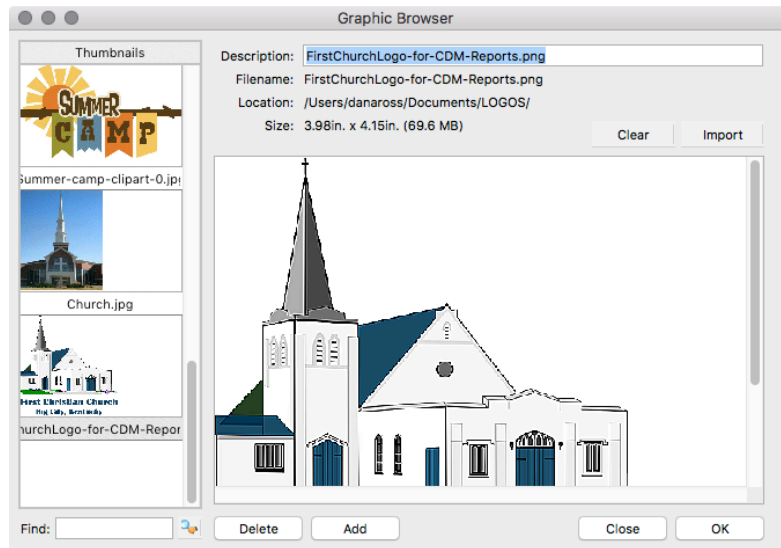
If the image you wish to place on your report is not already in the CDM+ Graphic Browser, click Add.



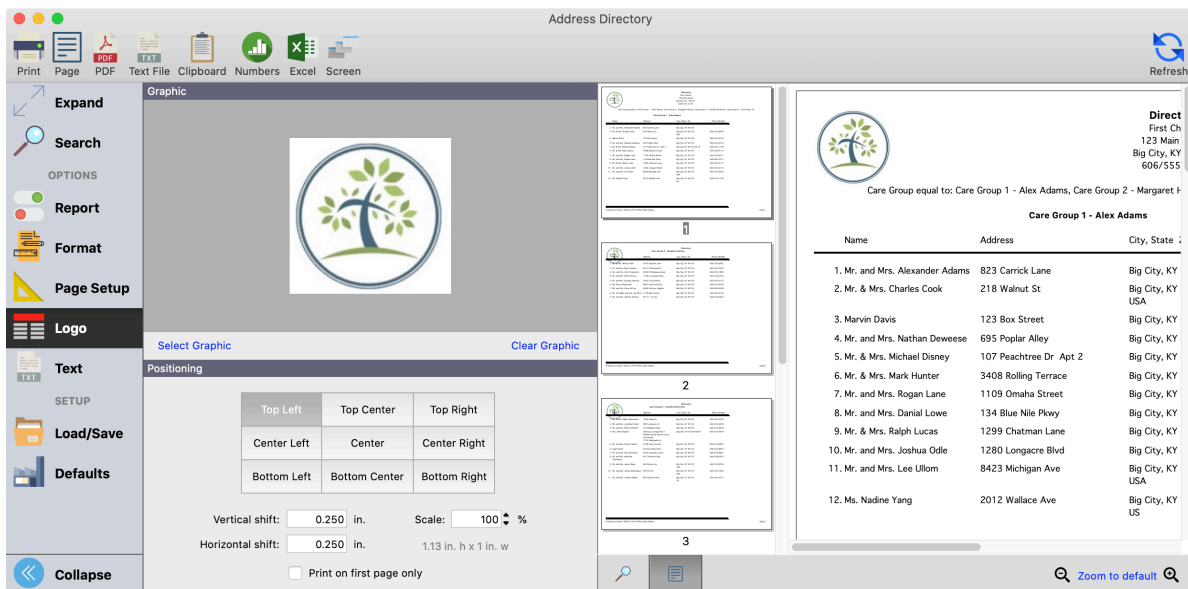
On your computer, locate the file you wish to add to the CDM+ Graphic Browser, click on the file name, and click Open. This action will import the selected file to your CDM+ database.



You should now see a thumbnail for the graphic you imported. Select (click on) the thumbnail and click OK.



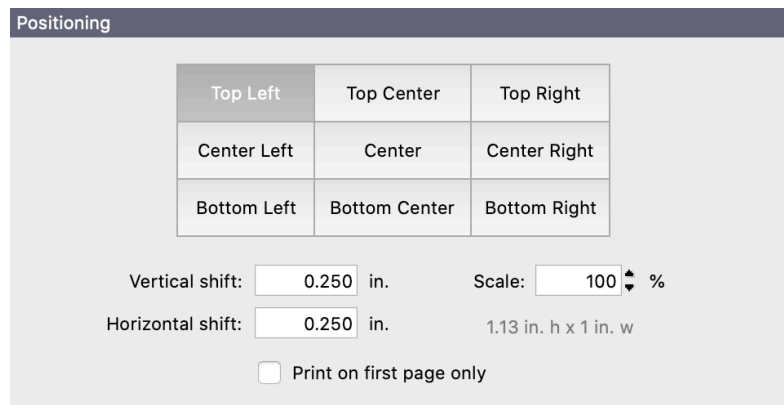
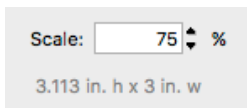
You will now see the selected graphic, positioning controls, and, if you click Refresh, you will see the graphic on your report preview window.



Use the positioning controls to fine-tune your selections.

Adjust the size using Scale.

If the image is too large, scale it to less than 100%. If it is too small, scale it to more than 100%. Enter the percentage and hit the tab to see the new dimensions for your selection below the Scale percentage, or use the up/down arrows to the right of the percentage.



You can also use the Positioning palette to place the image on a specific area of the page. Select an area of the page, such as Top Left, and use Vertical Shift and Horizontal Shift to adjust the placement of the image within that area.

Again, use the Refresh option to preview the effects of your changes. It may be necessary to return to the Page Setup option to adjust where the contents of the report appear in relation to the report header and Logo graphic.

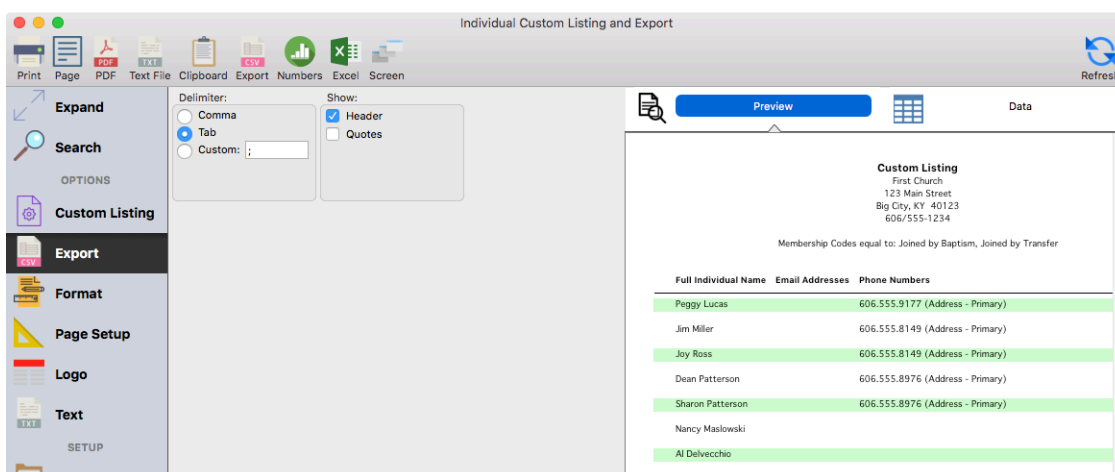
## Columns

Custom Listing and Export reports let you choose one or more columns to print or export. These columns are organized into sets.

Select which field(s) of information to include in the export by choosing a Set from the drop list. To modify a set, select the appropriate Set, then select the arrow next to the set, and Modify Custom Listing Sets will open in a new window. Under Available Fields, select the fields that you would like to include, and double click the field to add it to the Fields in Set. If no sets appear in the list, you will need to create one by selecting the "+" sign and create a new set.

If you click on Refresh for an Export report, you will see the first record in the preview area. Scroll over to see all the fields. To view other records in the list in the Preview pane, click on the right and left arrows at the bottom.

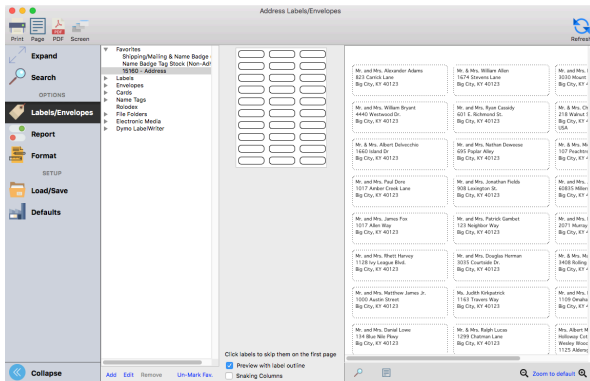
### An Individual Export, with Preview:



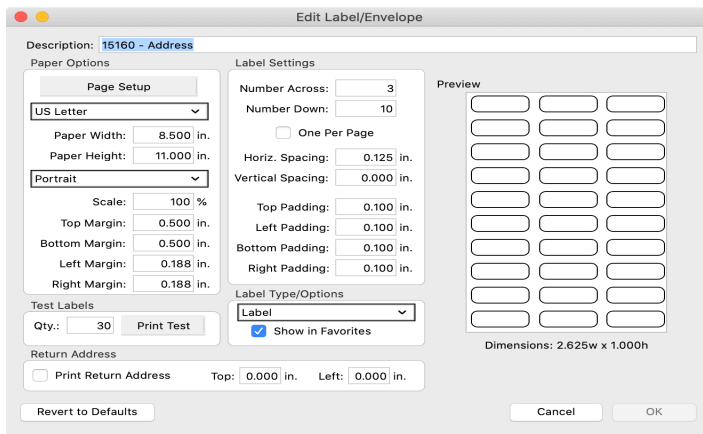
Click Export in the top left to complete the export. When prompted, enter a name and location to save your exported file.

## Labels/Envelopes

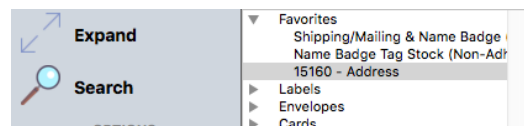
Labels/Envelopes reports have an additional icon under Options where you can select from pre-defined label formats, including every label sold by Avery®. Click on a numbered label format in the list on the left and you'll see a graphical representative of it on the right.



You can edit this list of label and envelope formats. Click on either the small Add or Edit button below the list to open a window where you can add your own custom label format or edit an existing one.



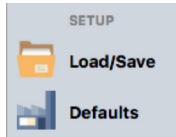
Highlight a label or envelope format and click the Mark Favorite button to move it to the top of the list under Favorites.



A useful feature in printing sheets of labels from CDM+ is the ability to mark individual labels on the page you want to skip. In that way, you can easily use a sheet of labels that may be missing one or two labels. Just click on the location(s) of the missing label(s) to highlight them on the graphic.

**NOTE:** The skip labels function only applies to the first page of a report.

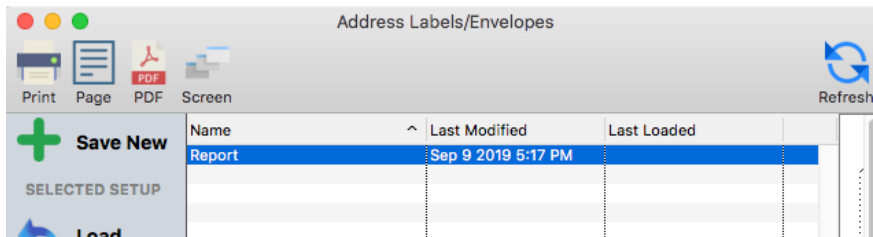
## Report Setup Buttons



### Load/Save

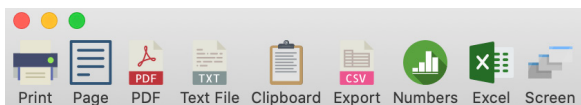
If your office is like most, you tend to need the same reports over and over. With the **Load/Save** report feature, you can now save the search criteria for an oft-repeated report, along with its formatting and other options.

If you have previously set up the report you need, simply click the Load/Save icon, highlight the report in the list, and click Load.



If you have not yet created the report you need, you may set up the search and formatting options for the report first, then click Load/Save Report when you're ready to save and name the report. Or, you may click Load/Save Report before creating the report and use the Load Defaults feature as a starting point for your new report. There is a Saved Reports Window for each type of report, and you're likely to return to them often. The Saved Reports Windows are also where you find options to Replace, Rename, or Delete previously saved reports.

## Outputting Your Report



You have access to several report output options directly from the Report Setup/Preview window.

**Printer:** To send your report to a printer, select Print on the Select Report Destination window and click OK. You will then see your computer's print dialog box. Make necessary setup adjustments and print the report.

**Page** – Click to send only the page showing in the Preview screen to the printer.

**PDF:** To save the report as a PDF file, select PDF on the Select Report Destination window and click OK. Give the file a name, such as FCC Directory, browse to select the desired location, and click Save. A PDF file preserves all your formatting of the report, including fonts, regardless of whether the computer it is opened on has that font file or not. This makes the PDF report option ideal for distributing reports via email to board or committee members.

**Text File:** To save the report to a plain text file (.txt) that can be opened by any program that can read a tab-delimited format (such as a word processor or spreadsheet), select Text File on the Select Report Destination window and click OK. Give the file a name, browse to select the desired location, and click Save. This option preserves the original columns and spacing.

**Clipboard:** To save the entire report to the clipboard for copying and pasting directly into a document, select Clipboard and click OK. After copying the report or a portion of the report, switch to the destination program and paste.

**Numbers:** On a macOS computer, reports that support a text output can be sent to Numbers, if installed. Click the Numbers icon and the text version of the report will be opened in Numbers.

**Excel:** Many reports can be sent directly to Microsoft Excel®. If CDM+ detects that Excel is installed on your computer and the report supports a text output, an Excel icon will appear. Click Excel to open the text version of the report in Excel.

**Screen:** If you wish to only copy a portion of the report to your Clipboard, first send it to the Screen. Then drag your mouse to select the area of the report you wish to copy and click the Clipboard icon. After copying the report or portion of the report, switch to the destination program and paste. This option also produces a tab-delimited format that preserves original columns and spacing.

## Preferences

CDM+ allows for both User Preferences and System Preferences to be setup, which determine how selected features work within the programs. System Preferences affect all users; User Preferences are chosen by the individual user and affect only that user. To access Preferences, select CDM+ (macOS) or File (Windows) on the menu.

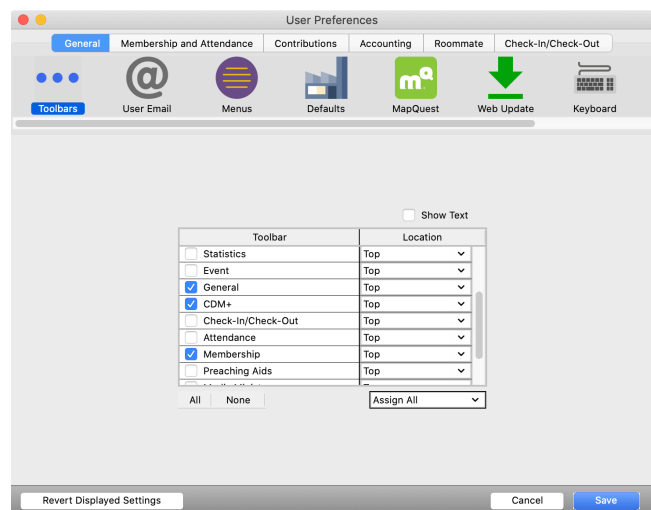
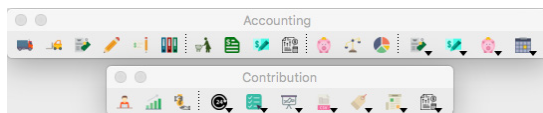
## User Preferences

### Toolbars

In addition to accessing the CDM+ programs through the menus, you can choose to display toolbars. The Program toolbar will display at the top by default.

►CDM+ (macOS) or File (Windows) ►Preferences  
►CDM+ User ►General ►Toolbars

Floating toolbar palettes can be re-sized, if you desire.



### Web Update

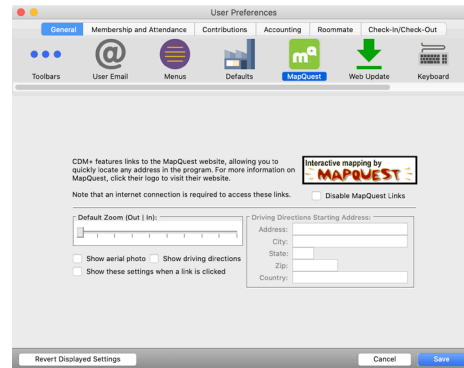
CDM+ includes a robust Web Update utility that will check for updates to the version of CDM+ you are running. This option requires an active Internet connection. We recommend that a check for program updates be made at least once a week, and install any updates that are available via Web Update. There are two ways of checking for updates:

**Manually-** select Update under the File menu or click on the Update icon in the toolbar.

**Automatically-** set CDM+ to check the Web for updates each time you log into the program. To enable this option, open Preferences, CDM+ User, select the Web Update icon on the General tab, and check the option to "Check for program updates at startup."

## MapQuest

The MapQuest® pane of the General Preferences window contain options related to the MapQuest link that is found on most CDM+ record frame windows that contain an address.

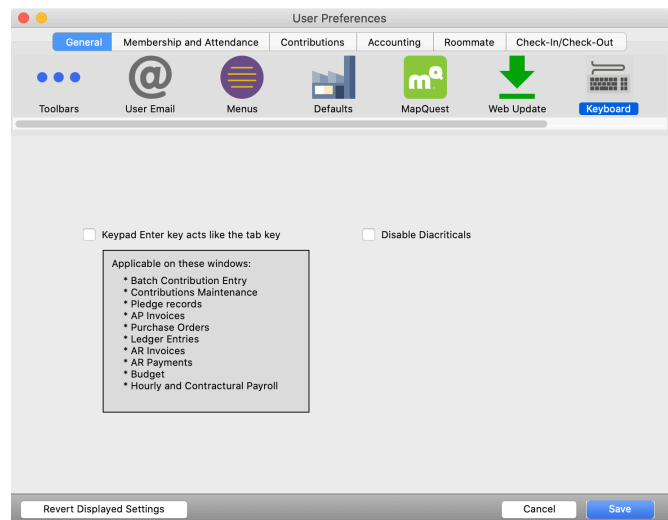


## User Email

All users of CDM+ should click the User Email icon on the General tab and enter their individual work email information. SMTP setup is done on the CDM+ System Preferences window.

## Enter Key functions like Tab Key

On selected data entry windows, the numeric Enter key may be set to function as the Tab key to facilitate easy entry. To activate this function, go to User's Preference window, click on the General tab, click the Keyboard icon, and check the box.



## System Preferences

► CDM+ (macOS) or File (Windows) ► Preferences ► CDM+ System

### Name

Enter the name and address of your church or organization as you want it to appear on the top of CDM+ reports.

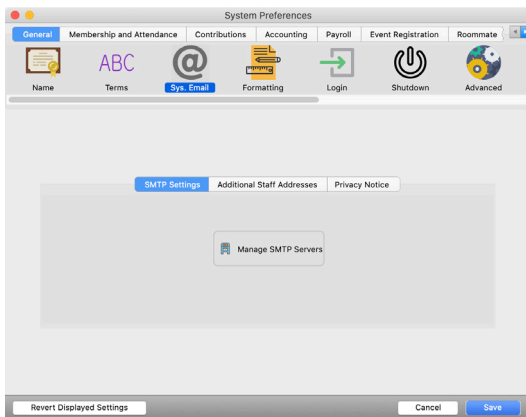
### Terms

CDM+ allows for the user to rename some of the terms used in the software. **Terminology changes made here affect all users.**



## System Email

Complete the system SMTP settings for sending email from CDM+.



On the Additional Staff Addresses tab, enter the email addresses of staff members; by default, outgoing emails will be sent to these addresses. You can edit the list at the time you send the email.

A privacy notice may be added under the Privacy Notice tab that will append to the end of outgoing emails. You can edit this notice at the time you send the email.