Getting Started – Membership

The Membership program stores, tracks, and manages information about people. As such, it is the heart of CDM+.. The Attendance, Contributions, Event Registration, Check-In/Check-Out, Accounts Payable, Accounts Receivable, Payroll programs, CDM+ Engage, and CDM+ Mobile apps all access data in the Membership program. Here you maintain records for members, visitors, and others connected to your church/organization.

Address Record

▶ **Program** ▶ **Membership** ▶ **Address Records**

People in CDM+ are grouped by Addresses or households. This makes the Address Record a key part of the Membership program. Household information is kept on the Address Record and a change here affects all individuals in the family and address links in other CDM+ programs.

Household information such as Address, Last Name, Family Status, Giving Units, and Photos are maintained here.

Record Frames can be filtered. For example, a selection of 'All' can now be secondarily filtered to show all who have 'Directory' checked.

Address tab contains basic family address information:

Name: Last Name
Mailing Name (Mr. & Mrs., Mr. and Mrs.)
Salutation (first names for letter or label)

Address: Place apartment numbers, suite numbers, lot numbers, etc. on same line as the street.

Rural Route numbers and boxes also are on 1 line in this format: RR 2 Box 123. (**NOTE:** Many addresses have changed from RR Box to a street address to facilitate 911 emergency services.)

If a family has their mail delivered to a PO Box, put the PO Box in the 2nd or 3rd Address Line and the street address in the Address Line immediately above it. Since the Post Office machinery reads an address from the bottom up, the mail should be delivered to the PO Box, but you will also have the street on file for visitation purposes.

NOTE: Any information that is not part of the USPS mailing address, such as a company name, care facility name and/or room number, or private mailbox (PMB) number, should *always* be placed on a separate line ABOVE the street, PO Box, or Rural Route mailing address line.

Address Record used for connections to:

Giving Unit records attached to the Address Record and Individual Record

Attendance records attached to the Individual Record

Visitation Records and Pastoral Records

Registration records in the Event Registration program

Vendor records in the Accounts Payable program

Customer records in the Accounts Receivable program

Employee records in the Payroll program

CDM+ Mobile app

Engage

Mailing Code – Important field for selection of records to include in mailings, directories, and archiving out non-current records. This field can also be used to identify addresses for other purposes like: other local churches, news release agencies, and denominational offices.

Care Group Code – Designed to assign a code to the Address Record for grouping purposes. For example, Shepherding Groups, Prayer Chains, Stewardship Teams, or Geographical areas. **NOTE:** the title of this field may by changed in: ▶**CDM+(macOS)/File(Windows)** ▶**Preferences** ▶ **CDM+ System** ▶ **Membership & Attendance** tab ▶ **Fields** icon; select Address Fields and change the title.

Newsletter and Directory Checkboxes – Address reports and labels can be printed for just those addresses that have either or both of these boxes checked. These checkboxes are also on the Visitors record window.

Alternate Address – Two addresses for each family may be tracked in CDM+; such as winter/summer or college/home address combinations. Use the Alternate Address tab to enter the second address. Use the Swap button or set the effective dates on the Alternate Address tab to set the current address.

If using the effective dates with an Alternate Address, you may want to chose the Current Address option on the Format tab of Address reports to insure the current address is used for mailings or labels.

Individuals – All individuals related to this address are listed here.

Family Status codes are User Defined fields and can be edited or added under:
▶ **CDM+(macOS)/File(Windows)** ▶ **File** ▶ **Master Coding System**

Double-click on a name to open that person's Individual Record. Click the Individuals button in the sidebar to open Individual Records for everyone connected to the address.

To add an individual to the address, click Change, place your cursor in First Name field and begin typing.Use the red arrows to reorder individuals in the list; the red ✗ deletes an individual.

More information accessed by clicking on other tabs:

Phones – Enter phone numbers for the entire family or household on the Phones tab. You can assign phone numbers to individuals in the household by selecting 'Address' in the Individuals column. You can assign a phone number to an individual in the household by selecting their name in the Individuals column.

Email – Enter email addresses on the Email tab. As with phone numbers, you can enter email addresses that apply to the entire household or assign them to specific individuals.

Photos – Enter phone numbers for the entire family or household on the Phones tab. You can assign phone numbers to individuals in the household by selecting 'Address' in the Individuals column. You can assign a phone number to an individual in the household by selecting their name in the Individuals column.
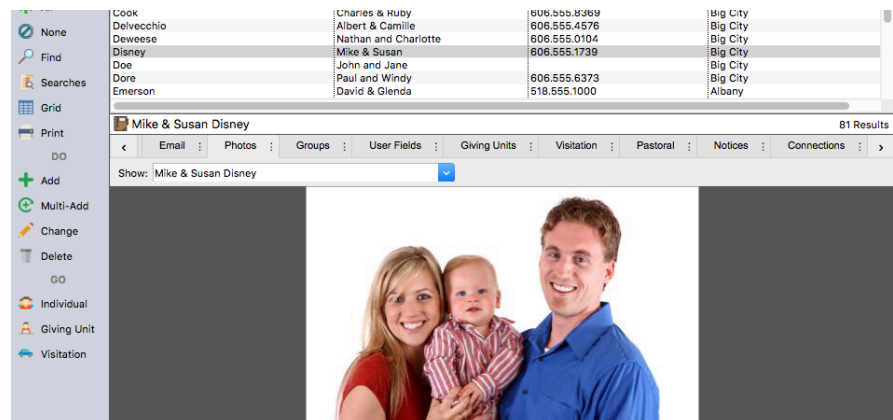
Groups – used for groups related to this family (not individuals)—for example, geographical groupings.

User Fields – information related to this family in a wide variety of formats—text, whole numbers, currency, dates, yes/no (Boolean) check boxes, Web pages (URL), and raw data. Other Information sets created on the Master Coding System window can organize types of information.

Giving Units – click this tab if you are using CDM+ Contributions and wish to assign Giving Units to this family. All units, individual and family, are listed here.

One default Giving Unit is automatically created for the family. This default entry may be deleted or changed. You may also add additional Giving Units.

Giving Units can be assigned at any time on this tab or through the CDM+ Contributions program.

Visitation – visits made to this family (not individuals) entered through the Visitation Records window.

Pastoral - Pastoral notes for this family can be viewed (access settings apply) or added here. Selecting an Individual when adding a pastoral note will cause this note to appear on that person's Individual Record also. Double-clicking on an entry will open the Pastoral Record window. **NOTE!** Care should be taken entering pastoral notes from this tab. Unless you open the Pastoral Record window to change the Access Setting for an entry, it will have your Default setting (viewable by all users you have marked under ▶**CDM+(macOS)/ File(Windows)** ▶**Preferences** ▶**User** ▶**Membership and Attendance** ▶**Pastoral icon**.

Notices – displays a list of all Notices (letters, cards or emails) that have been sent to the family address. Requires setup in Preferences to activate this pane and the tracking of notices under ▶**CDM+(macOS)/ File(Windows)** ▶**Preferences** ▶**System** ▶**Membership & Attendance tab)**. Notice tab may also be present on the Individual and Giving Unit records.

Individual Records

All information that you track on an individual is conveniently organized here on tabs: Name, Phone Numbers, Email Addresses, Personal, Membership, Photos, Groups, User Fields, Attendance, Pastoral, Visitation, Events, Notices, and Check-In. (Some of these tabs may not appear depending on your CDM+ suite licensing.)

An individual's Engage account connects to the database through their Individual Record.

▶**Program** ▶**Membership** ▶**Individual Records**

Connected to Address Record:

CDM+ can handle different last names in a blended family

Preferred name field - click checkbox to 'Use Preferred Name' as First Name on reports

Do Not Print check box - keeps individuals off lists and reports

>   -use for deceased and transferred out

>   -may override during report setup

Guidelines for changing information of a deceased individual:

• Go to Individual Records and find the record of the deceased

• Under the Name tab, in the Individual Information section, check the "Do Not Print" box

• Under the Personal tab, complete the Death Date and Death Place fields

• Go to the Address Record and make appropriate changes to the Family Status options, including Mailing, Label, and Salutation names. If this is the only person on the Address Record you may wish to change the Mailing Code to "Archive" to prepare the record for removal the next time you archive.

• Go to the individual Record of the spouse of the deceased and change the Marital Status found on the Personal tab to the appropriate code.

Phones tab and **Email** tab – enter individual phones and email addresses by user-defined type; extensions and notes can also be entered. Individual emails can be sent by clicking the icon by the Type column. Phone numbers and email addresses can be marked as Unlisted.

Personal

Complete appropriate personal information for the individual:

- Age will automatically calculate
- Grade field can be quickly updated by using Membership Utilities (▶**Program** ▶**Membership** ▶**Address Utilities**)

Membership

Care should be taken when defining and using Membership Code and Membership Status since these fields are often used for reporting purposes. These codes are setup/modified under the Master Coding System.

Photos - Individual photos may be imported into CDM+ by selecting one of the three buttons: Import from File; Import from Clipboard; or Retrieve. **NOTE:** Individual photos are not used in the Individual Yearbook Directory.

Groups

User-defined code types and related codes allow you to track virtually any type of information for an individual; example – Current Church Groups, Church Offices, Children Ministries, Time and Talent, interests and skills, Spiritual Gifts, etc.
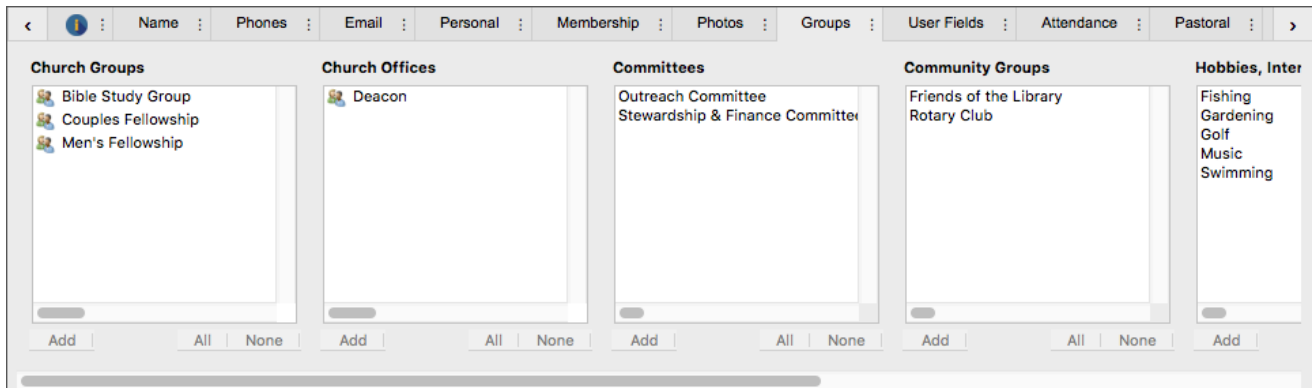
User Fields

Use the User Fields tab to track additional personal information, such as:

- Date Background Check Completed
- Emergency Contact information
- Medical information or Allergies
- Attach scanned documents such as Baptism Certificate or Living Will

Record information related to the individual in a wide variety of formats – text, dates, whole numbers, currency, yes/no check boxes, web pages, and raw data (scanned documents, audio, and video files).

Create User Fields sets on the Master Coding System window to organize types of information.

Attendance

This pane lists the individual's Attendance history. Attendance information for the individual may be added or deleted from this pane by clicking the appropriate button.

Pastoral

Pastoral notes for this person can be viewed (access settings apply) or added here. Double-clicking on an entry will open the Pastoral Record window. **NOTE:** Care should be taken entering pastoral notes from this tab. Unless you open the Pastoral Record window to change the Access Setting for an entry, it will have your Default setting (viewable by all users you have marked under ▶**CDM+(macOS)/File(Windows)** ▶**Preferences** ▶**User** ▶**Membership and Attendance tab** ▶**Pastoral icon**).

Visitation

View existing or add visits made to this individual here. Highlight an entry and click the Visitation button at the bottom of the window to open the Visitation Records window, where more information can viewed or added. **NOTE:** Care should be taken adding visitation notes from this tab because it will use the Default access.

Events

Displays a list of all the events this individual has registered for utilizing CDM+ Event Registration program. This tab only displays if you have the CDM+ Event Registration program.
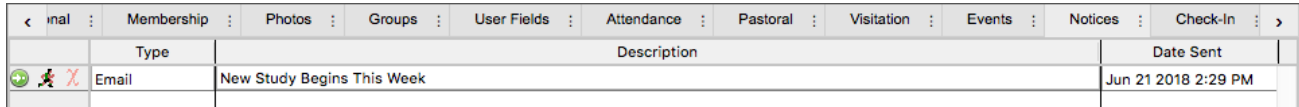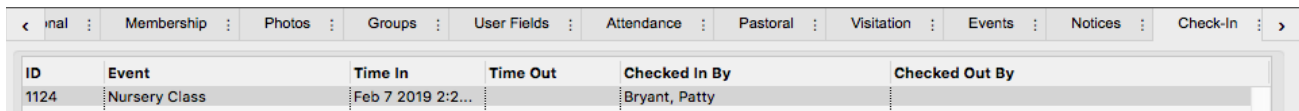
Notices

Displays a list of all the Notices (letters, cards, or emails) which have been sent to the individual. Requires setup in System Preferences to activate this pane and tracking of notices (▶**CDM+(mac)OS/File(Windows)** ▶**Preferences** ▶**System** ▶**Membership and Attendance tab** ▶**Notices icon**). Notices tab is also present on the Address record and Giving Unit record.

	Type	Description	Date Sent
	Email	New Study Begins This Week	Jun 21 2018 2:29 PM

Check-In

Displays Authorization information, Preferences, and History on individuals entered through CDM+ Check-In/Check-Out program. Tab only displayed if you have the Check-In/Check Out program in your CDM+ suite.

ID	Event	Time In	Time Out	Checked In By	Checked Out By
1124	Nursery Class	Feb 7 2019 2:2...		Bryant, Patty	

Actions in the Individual Record sidebar:

Address - opens Address Record of this individual.

Giving Unit - opens Giving Unit Information for this individual.

**Visitation** - opens Visitation Records for this family.

Register - quick link to register this individual for an event already setup in Event Registration.

Connections

Using Connections, CDM+ gives you a deeper perspective on how individuals and entities in your database relate to one another and to the church as a whole. The Connections tab is now the last tab on the Individual Record, and you can click on a connection to expand records to reveal the greater "web" of connections at the heart of your organization .

Under the Connections Tab, now the last tab inside the Individual Record, other records in CDM+ can be linked to track relationships.
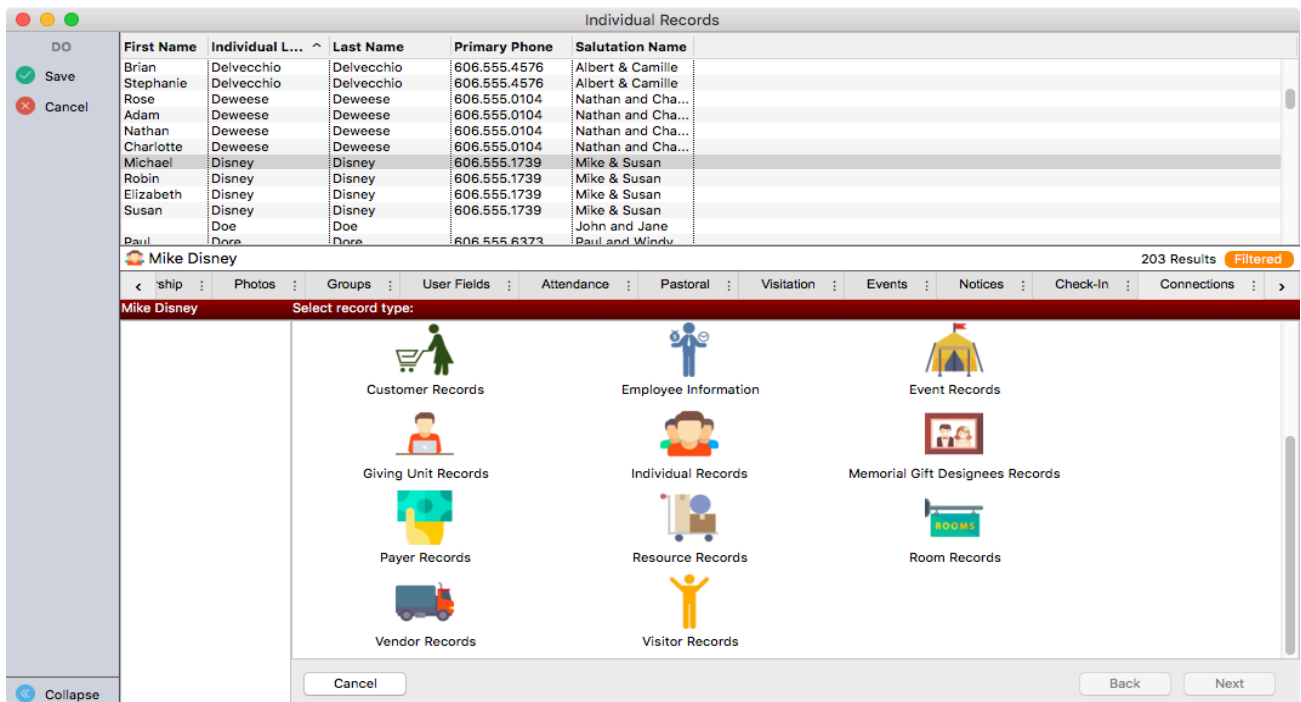
NOTE: Church Records and Contacts will only appear if you have the CDM+ Regional Program.
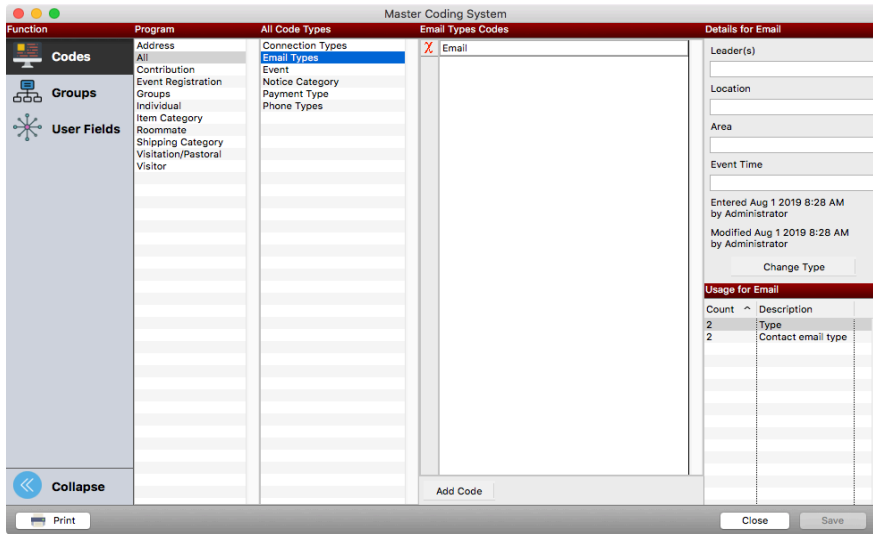
Individual Record Connections

Inside Master Coding, a list of connection types can be created and used across all connection records. Codes can also be created and added to Master Coding as connections are being created.

A few examples of individual Connections (Codes) could be:

Mother	Stepmother	Aunt	Spouse
Father	Stepfather	Uncle	Partner
Sister	Stepsister	Cousin	Friend
Brother	Stepbrother	Godmother	Employer
Grandmother		Godfather	Co-Worker
Grandfather			Neighbor
			Babysitter

▶**File** ▶**Master Coding System** ▶**Codes** ▶**All**

To add a connection code on the fly, simply type the words that describe the relationship you wish to define and you'll be prompted to add the code to the Master Coding System:
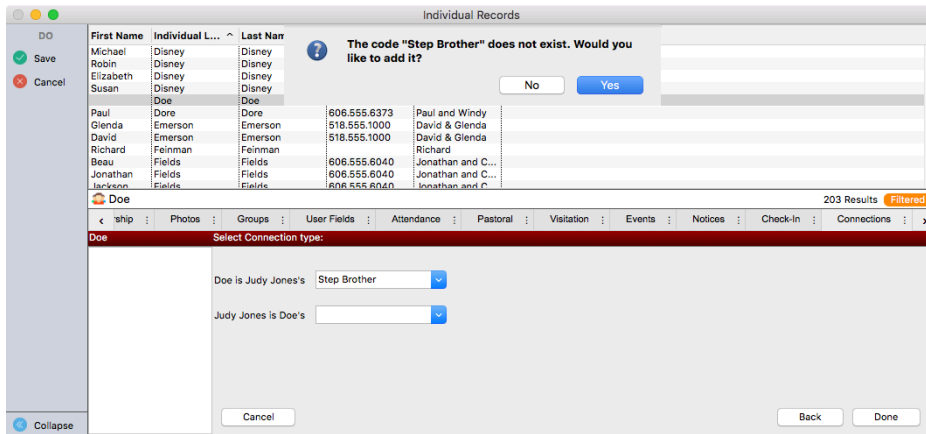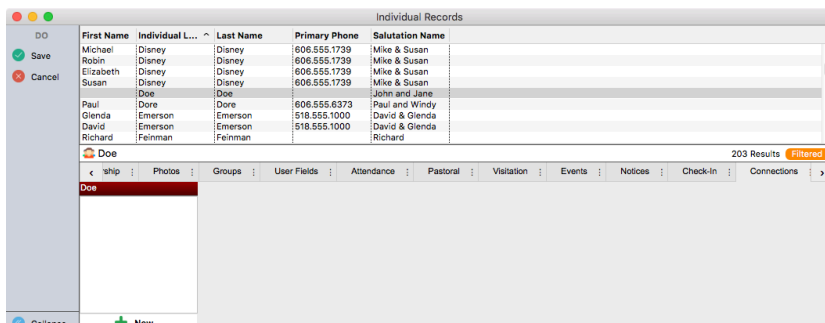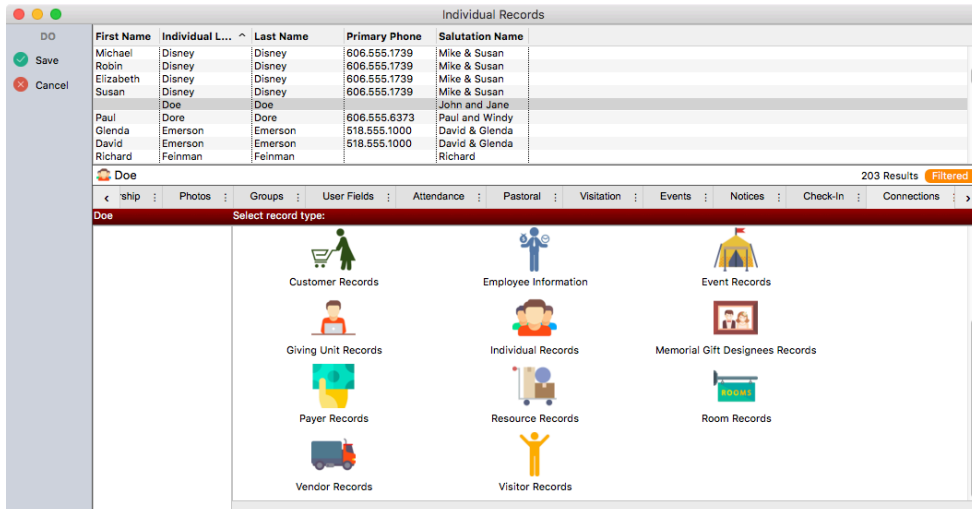

Entering a Family Connection

▶**Program** ▶**Membership** ▶**Individual Records** ▶**Connections tab**

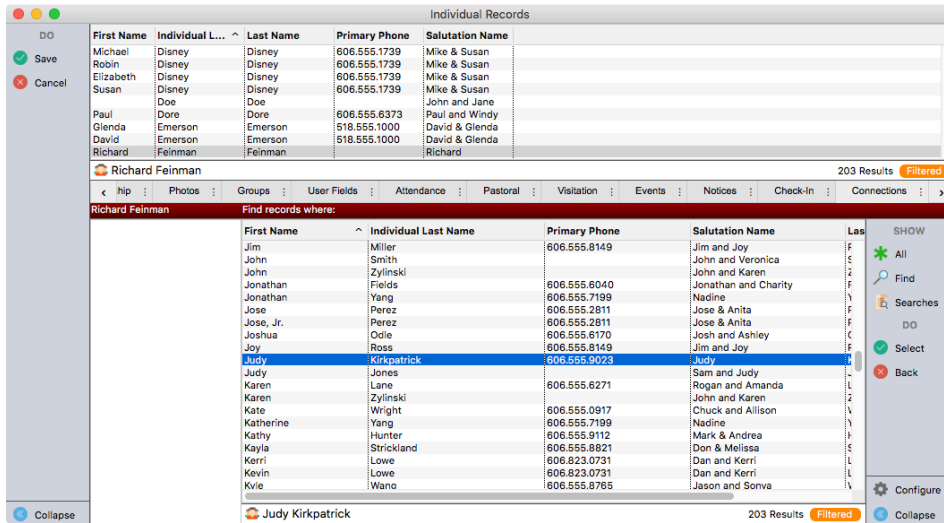After locating the individual for whom you would like to create a connection:

1. Change Record (located on left hand side)
2. New (located under the individual's name)

3. Select the type of connection to add, in this instance, "Individual Records"
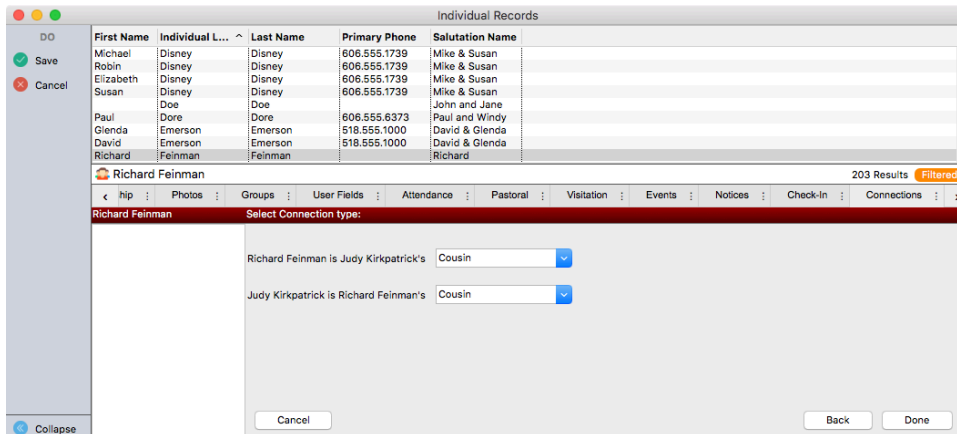

4. Locate the record of the individual to connect:

5. After selecting an individual, click Next in the lower right corner.

6. Enter or use the drop down arrow to choose a connection code.

7. Choose Done in bottom right-hand corner. Then click Save in the upper left hand bar.

Viewing Connections

To expand the family connections, simply click the individual you would like to view and a second window will open to the right showing their connections. As the viewer continues to click, windows open to follow the web of connections.
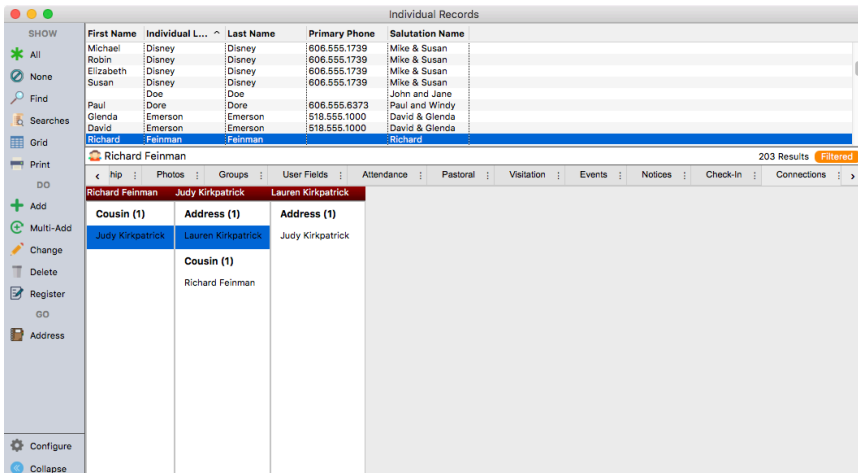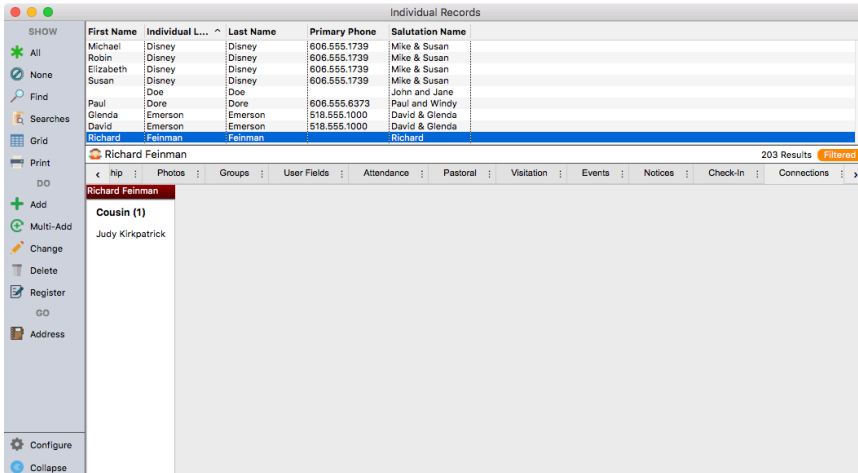
Following the same directions, Connection Types can be added for the following records:

Address	Event	Resource
Check-In/Check-Out Event	Giving Unit	Room
Church	Individual	Vendor
Contact	Memorial Gift Designees	Visitor Address
Customer	Payer	
Employee		

Adding an Address Record

▶Program ▶Membership ▶Address Record

Click on the Add button; if you are adding multiple records, click the Multi-Add button to allow the entering of multiple records without clicking on the Add button each time. Complete the information on the appropriate tabs for each family. Click the Save button after each record; click the Finish button to complete the Multi-Add session.

After entry of the Address record, click Individuals in the sidebar OR click on the name of the individual in the Family Listing to open the Individual Record.

How to Enter Couples with Different Last Names

Some married partners choose to continue using their own family names. Here is the procedure for entering their Address Record in CDM+ so that it appears correctly in the directory and on address labels.

For example, you wish to enter a record for Jim Miller and Joy Ross. Type *Ross* in the Last Name field and Jim Miller and Joy in the Mailing Name field. This way, when the address label prints for the newsletter, for instance, the label will read, *Jim Miller and Joy Ross*.


This takes care of the mailing label, but what about the church directory? If someone wishes to find Jim Miller, he would be printed with the Rs under Ross. To remedy this situation, add another Address Record so this family can be cross-referenced under Miller.

Click Add and type Miller in the Last Name field. There is no need to enter any other family name or address information because this record will be used strictly for directory cross reference purposes.

In the Mailing Code field, select Directory Cross Reference. If this mailing code does not appear on the drop-down list, create it either through the Master Coding System or by typing it in the Mailing Code field.

NOTE: Always include the Directory Cross Reference code when printing a church directory. Never include it when doing a mailing.
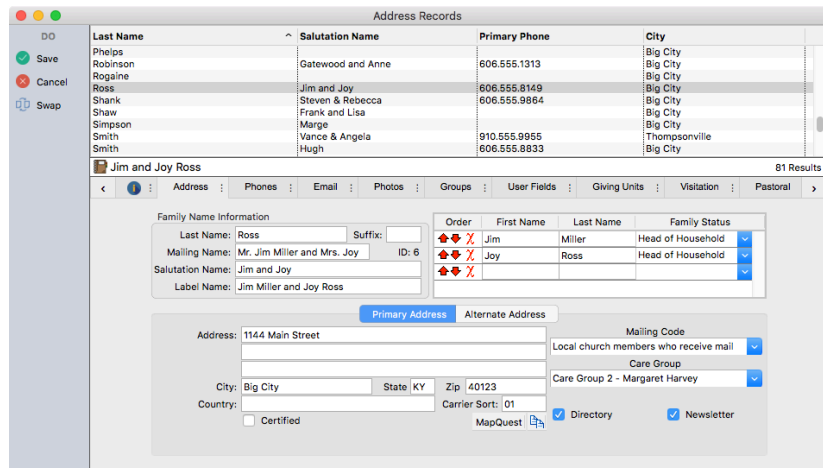
The additional Address Record would look like the one at right. Miller appears in the Last Name field and Directory Cross Reference in the Mailing Code field.

Insert an Individual Record for this Address Record. Type *Miller* in the Last Name field and *See Ross* in the First Name field (since the family actually appears under Ross in the Address Record). The new Individual Record will look like the screen shown here.
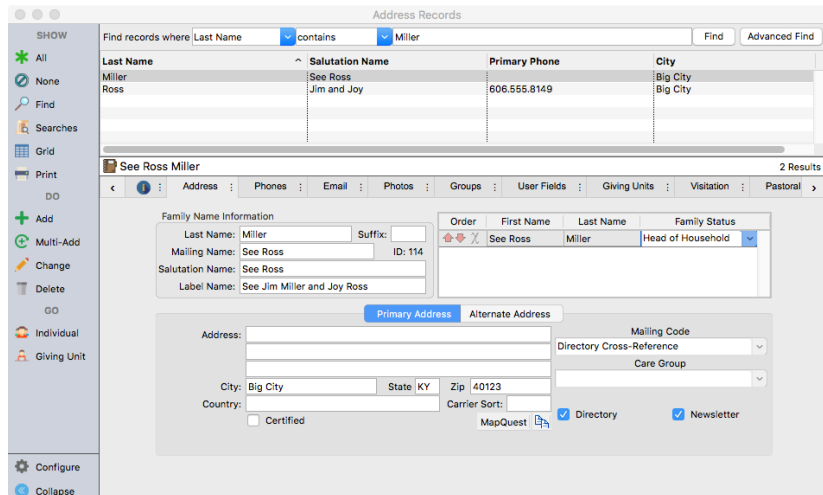
When entered in this way, the two Yearbook Directory entries print as follows:

Family entry:

Jim Miller & Joy Ross
        1144 Main Street   Big City, KY 40123   859/555-8149
        Jim Miller*   Joy Ross*

Cross-reference entry:

Miller
        See Ross

In this way, when looking up Miller in the directory, you are referred to Ross, where the family appears with complete information. Of course, if you wish, you may place the husband's name last on the first Family Address record so it reads Joy Ross and Jim Miller. Ross would then be cross-referenced and referred back to Miller.

Adding an Individual Record

▶**Program** ▶**Membership** ▶**Individual Record**

Click on the Add button; if you are adding multiple records, click the Multi-Add button to allow the entering of multiple records without clicking on the Add button each time. CDM+ will prompt you to select an Address Record for the new individual. Individual Records in CDM+ must be connected to an Address Record. After selecting the address, CDM+ will return you to the Individual Record window. Complete the information on the appropriate tabs for each individual. Click the Save button after each record; click the Finish button to complete the Multi-Add session.

Moving an Individual to a Different Address Record

1. Key question: to which Address record is the Individual going to be moved?

2. Find the Individual record of the person who is to be moved and click on the Change button in the sidebar.

3. In the Address Information section of the pane, click the Select Address button.

4. If it is an existing address in CDM+ Membership, find it, highlight it and click OK.

5. If it is a new address, create a new Address record by clicking on the Add Address button and entering the new information; click OK when finished.

6. The individual is now moved to the new address. You may need to update their family status.

7. If there are Giving Units tied to an individual you are moving, you will be asked if you wish to update the address for the Giving Unit record also.

8. If no Individual records or Giving Unit records remain tied to the old Address record when you are finished, you may delete it.
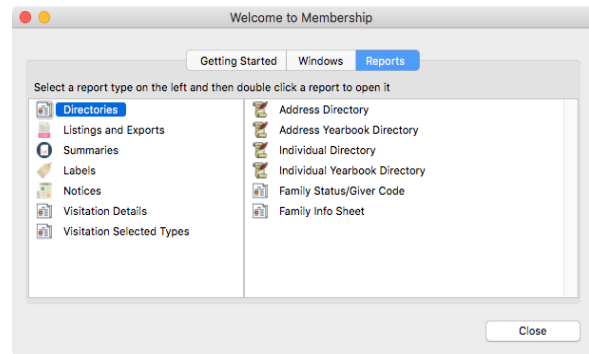
Membership Reports

Print Reports from Find Results

Clicking on the **Reports** button will bring up a list of available report options related to the Membership window you have open; i.e., Address reports if the Address record window is open.

You can choose to print

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

NOTE: Multiple records may be selected (highlighted) by holding down the Command or Control key while clicking on the desired records.

Reports Menu

▶Reports ▶Membership Reports

CDM+ Membership Reports are grouped into seven headings for ease of use: Directories, Listings and Exports, Summaries, Labels, Notices, and Visitation Details.
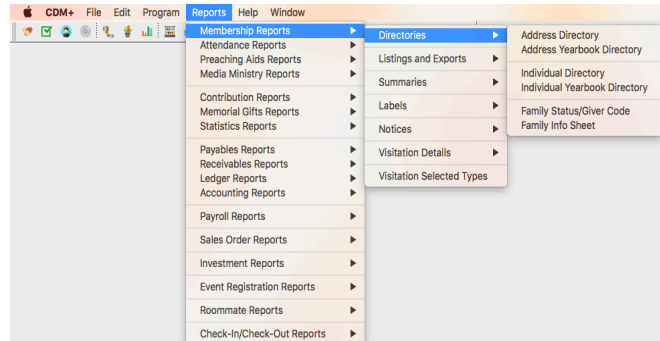
Directories	Listings and Exports	Summaries	Labels	Notices	Visitation Details	Visitation Selected Types
Address Directory	Address Master Listing	Address Summaries	Address Labels/ Envelopes	Address Letters	Detail by Staff	
Address Yearbook Directory	Address Phone/ Email	Individual Summaries	Address Name Badges	Address Cards	Detail by Address	
Individual Directory	Address Custom Listing and Export	Visitation Summary by Type	Individual Labels/ Envelopes	Address Emails	Detail by Individual	
Individual Yearbook Directory	Visitation Custom Listing and Export	Visitation Summary	Individual Name Badges	Individual Letters		
Family Status/ Giver Code	Individual Master Listing		Pastoral Records Labels/Envelopes	Individual Cards		
Family Info Sheet	Individual Phone/ Email			Individual Emails		
	Individual Custom Listing and Export					
	New Member Listing					
	Birthdates by Month					
	Anniversary by Month					
	Pastoral Records Listing					
	Pastoral Custom Listing and Export					