

# Membership Data Management

## Master Coding System

The Master Coding System allows you to customize CDM+ to meet the ministry needs of your church or organization. There are three types of code options found under the Function column: Codes, Groups, and User Fields. Select the desired option under the Program, and Field Code Types will appear. Edit or Add Codes as desired. Attendance may be taken on any Groups code and selected Codes options. The Master Coding System is found under the File menu: ►File ►Master Coding System

Tab	Action	Displays Where
<b>Codes</b>	Defines codes of system fields; (these fields cannot be deleted; some field names can be changed under System Preferences)	Appropriate fields on Address, Individual, Contribution, Attendance, Visitor, and Roommate records
<b>Groups</b> (unlimited number)	Create user-defined lists and codes	On Groups tab of Address, Individual, Visitor, and Giving Unit records
<b>User Fields</b> (unlimited number)	Create user-defined fields: text, number, date, time, Yes/No, web page (URL), raw data (documents, video, spreadsheets etc)	On User Fields tab of Address, Individual, Event Registration, and Roommate Resources records

Codes are organized by program. Only programs which can be accessed will appear

Click on the red X to delete a code

Click a code to start editing it

See everywhere a code is in use

See when a code was entered and last modified

Print a report of the Master Coding System data at any time

Use the sidebar to switch between window functions

Click Add Code or click into the list and tab to a new line to add new codes

The Save button will light up when there are changes to be saved

## Codes

### ►File ►Master Coding System ►Codes tab

Because of their widespread use, some important codes to remember are:

- Mailing Codes – Address records
- Care Group – Address records
- Membership Codes – Individual records
- Membership Status Codes – Individual records
- Church (Sunday) School Class Codes – Individual records
- Notice Category - All Notices

## Groups

### ►File ►Master Coding System ►Groups tab

Count	Description
1	Group Assignments

**Moving Groups** - For instance, you have accidentally added the Education committee Group to Current Church Groups. You wanted it to be under Current Church Committees. Select the Group under Current Church Office Groups column and click the **Move to Group Type** button. This reveals a list of all the defined Group Types. You select the Current Church Committee and the group is moved.

Count	Description
1	Group Assignments

**Detail Tracking** – Select this box to activate a feature to track group membership history, including terms, dates enrolled and de-enrolled, and position for each Individual group, Address group, Visitor group, or Giving Unit group.

**Track Attendance** – Select this box to activate Attendance tracking for the selected Group Type. Attendance will be entered in the Attendance program of CDM+.



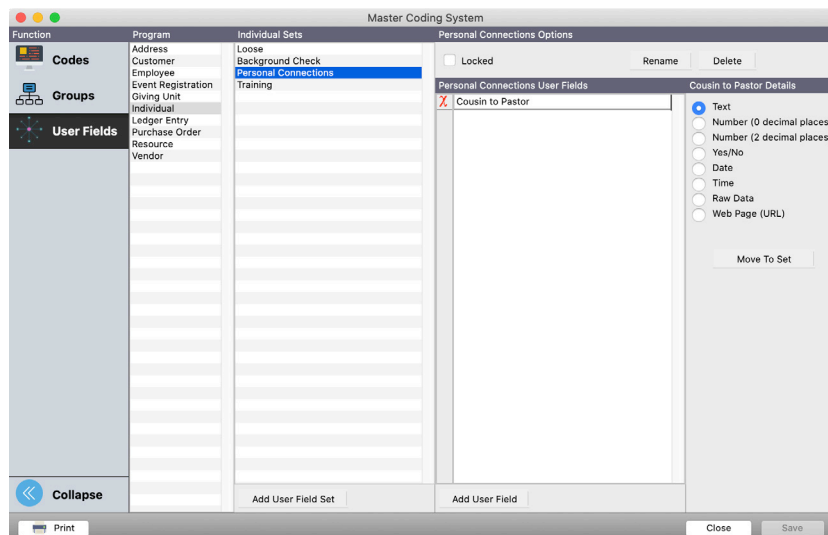
One Time Mailing: Create a Code Type (group) called “Special Temporary List” or “Temporary List” to group unrelated records together for a one-time mailing or emailing. Use Individual List Maintenance to add individuals to the Temporary List (and remove them after use); this Code Type (group) can be used over and over again.

**Ranked** – Groups normally display their assigned records in alphabetical order. If you want to specify the assignment order of a group, select the group and check the Ranked box. Use List Maintenance to re-order assignments on ranked groups.

## User Fields Codes

►File ►Master Coding System ►User Fields tab

The User Fields option allows you to create user-defined codes of various types including: text, numbers, yes/no, date, time, raw data, and web pages (URL). These fields are set up to display on various record types throughout CDM+.



User Fields Codes may be organized into Sets for ease of use.

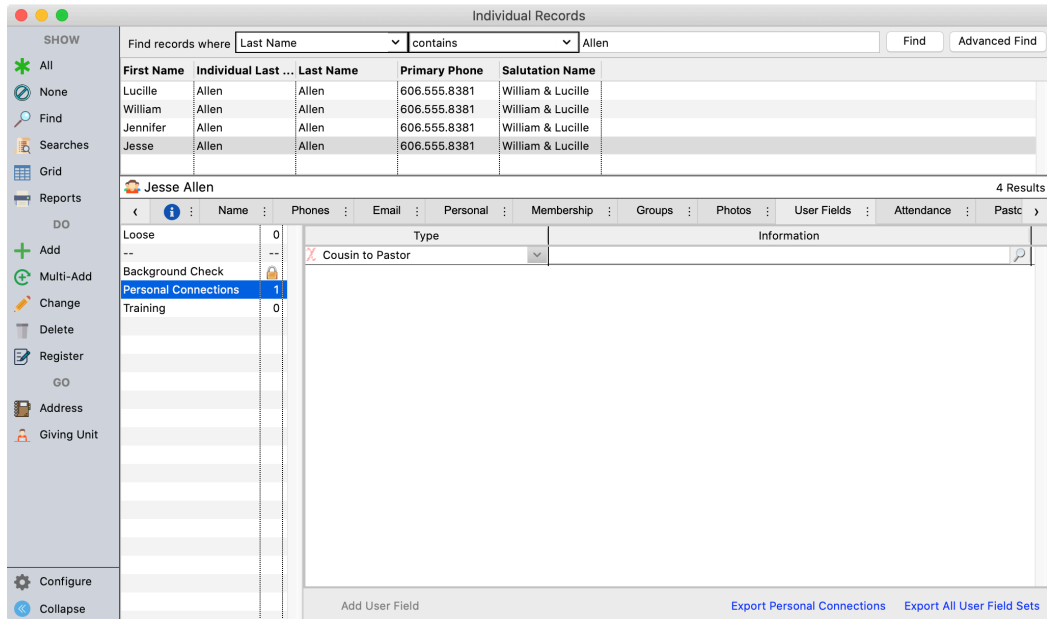
Unassigned Codes will appear by default in a Loose set. Note there is a Loose set on the User Fields tab of the Master Coding System window for each Code Type of record. Click to highlight any of the Loose sets to see all unassigned User Fields Codes for that record window type.

**NOTE:** Codes can be moved from one Set to another. Click the **Move To Set** button and select the desired Set.

To create a User Fields set, first select the record window type from the Program column on the Master Coding System window, then click the small Add User Field Set button at the bottom of the Sets column. Type a Description for this Set and click Save.

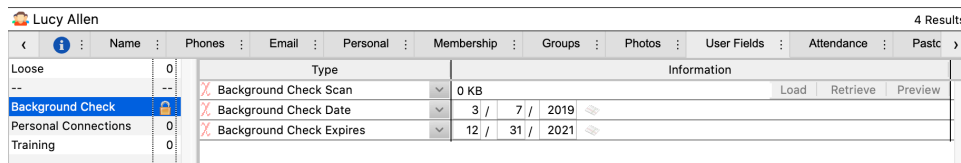
This User Fields set will now appear on the User Fields pane of the record window type you chose. But you must also add codes to the set. Users Field codes can be added by clicking the Add User Field button on the Master Coding System window or "on the fly" on a record window.

To add User Field codes to a User Fields Set on the Users Fields tab of a record window, click the Set once in the list on the left to highlight it, then click the small Add User Field button, type the description, and when finished adding, click Save.



## Locked Set

If the box in the Locked column is checked for a User Field set in the Master Coding System, all codes within that set will display on the record window when the set is selected, instead of choosing a code from a drop list. For example, the Background Check set on the Individual Record contains codes that relate to the steps of completing a background check for persons who work with youth.



Examples of uses of User Fields codes:

- Address Text field – Comments or Diocesan code
- Address Web page – Family Web Page
- Individual text field – Medical Info (Allergies to food or medicine; medical conditions)
- Individual Raw Data field – Scanned Trip Permission Form
- Individual Date field – High School graduation, College graduation, or Completed training

## Address/Individual Field Maintenance

Address Field Maintenance and Individual Field Maintenance allow you to quickly make additions or changes to multiple records from one window. You can narrow your list of records based on a query (Standard or Advanced Find) or you can show all records in the database. To open the Address Field Maintenance window, follow these steps:

### ► Program ► Membership ► Address Field Maintenance

To add the Zipcode as shown in the example at left, click the Add Field button and choose the Zipcode from the list. With a field chosen, you can then make the additions and changes you want on multiple fields.

To replace all the data in a column, click the Pencil icon, choose Assign Columns, enter the new data, and click OK.

To find certain text and replace it with something else, click the Pencil icon on a column, and choose Find/Replace Columns.

**NOTE:** You can also swap data in different fields. This is done by choosing at least two fields (they will display in different columns) and clicking the 2-Window icon beside the Pencil icon. You will be asked to choose whether you want to Swap the data or Copy the data. Choose Swap the data and the data will be moved from one column to the other.

This works exactly the same in the Individual Field Maintenance.

## Address/Individual List Maintenance

The Address and Individual List Maintenance provides a quick and easy way to add records to your groups and lists. To get to the Individual List Maintenance, follow these steps:

### ► Program ► Membership ► Individual List Maintenance



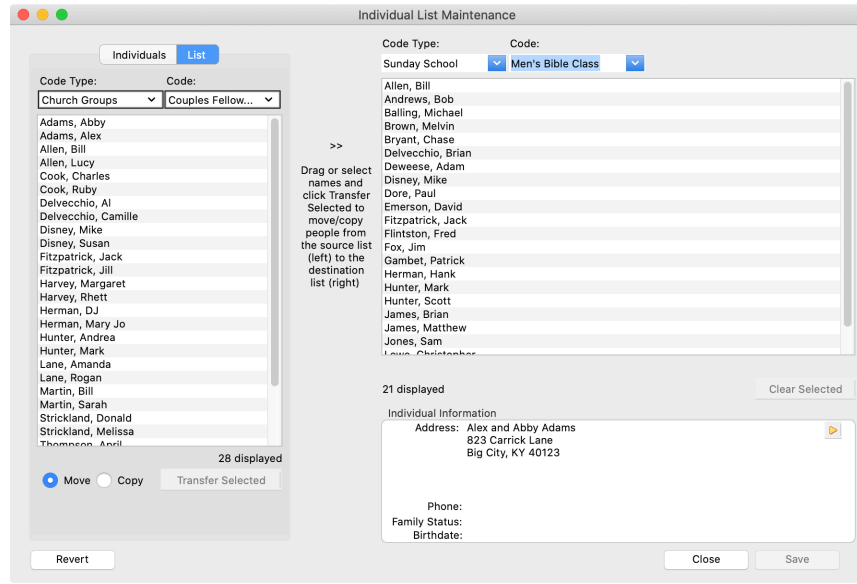
Note the Individual Information section provides Address, Primary Phone, Family Status, and Birthdate of the highlighted Individual record; this can be used to verify the correct individual has been selected.

## Adding Individuals to a Group or List

On the left side of window, you will see tabs for Individuals and List. With the Individuals tab selected, you may either Show All records or use the Advanced Find to query for a specific list of records. Select a Code Type and Code using the drop lists above the right hand panel. To assign individuals to the selected list, double-click their name on the left-hand list to transfer it to the right-hand list. Or you may select multiple names and transfer them by dragging or clicking on the Transfer Selected button. When all the individuals have been added, click Save.

## Moving Individuals from one Group to another Group — Promotion Sunday

With the List tab selected, you may choose an existing Group or List. Click on the down arrow and select a Code Type, such as Sunday School Class. Then click on the down arrow and select a Code, such as College Class. The list of all records with that assigned code will appear in the left hand panel.



Now select the Code Type above the right hand panel, again choosing Sunday School Class; now select the Code of the class the individuals are moving in to, such as Single Adult Class. To assign individuals to their new class, double-click their name on the left-hand list to transfer it to the right-hand list. Or you may select multiple names and transfer them or clicking on the Transfer Selected button.

**NOTE:** There are two modes of transfer—Move and Copy. Click on the radio button to select one. A name that is moved will be cleared from the original list; one that is copied will remain.

## Ranked Groups

When working with a ranked group, assigned records will be listed with their ranking. To adjust ranking, select one or more records and drag them to the desired position. You can also use the To Top and To Bottom buttons to easily move record(s) to the top or bottom of the list.

## Common Uses for List Maintenance


- Assigning/changing mailing codes to Address Records through Address List Maintenance
- Assigning individual membership and status codes
- Adding individuals to groups, offices, committees, etc.
- Adding individuals to Church School Classes
- Sunday School/Church School promotion

## Updating School Grades

Note that school grade promotion is done on the Membership/Address Utilities window. Note that this action does not automatically move children from one class or group to another. You must use Individual List Maintenance as explained above.

### ►Program ►Membership ►Address Utilities

This window includes three utilities to aid in maintaining your database: Update Grades, CASS Certification, and National Change of Address.

**Update Grades** facilitates the quick updating of the “Grade” field on the Personal tab of the Individual record. Set the update chart to move the Current grade to the New grade; when setup is correct, click the Update button. Clicking the Swap button reverses the grades; clicking the  displays a list of the individuals in the Current grade for previewing.

For information on the **CASS Certification** and **National Change of Address** portions of this window, see the Discount Mailing section of the online CDM+ manual.

## Detail Tracking in User-Defined Groups

This feature tracks group membership history, including terms, dates enrolled and de-enrolled, and position for each Individual group, Address group, Visitor group, or Giving Unit group. Detailed Tracking for a group type must be turned on in Master Coding System as described above (see Master Coding section).

To add detail for codes (groups) assigned to individuals, open the Individual List Maintenance window and select one of the codes (groups) for which you checked the DT box on the Master Coding window.

Name	Position	Date Enrolled	Date De-Enrolled	Term Begin	Term End	Comment
Cook, Charles	Deacon	Jan 1 2006		Jan 1 2019	Jan 1 2020	
Disney, Mike	Deacon	Jan 1 2006		Jan 1 2019	Jan 1 2020	

2 displayed

Individual Information  
 Address: Charles & Ruby Cook  
 218 Walnut St  
 Big City, KY 40123  
 USA  
 Phone: 606.555.8369  
 Family Status: Head of Household  
 Birthdate: Jan 29 1979



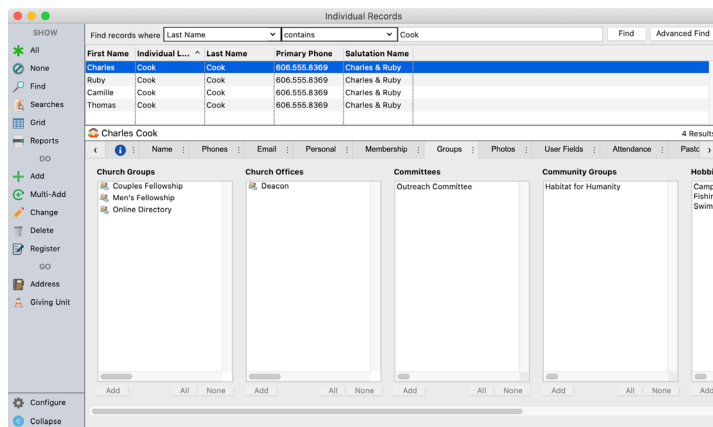
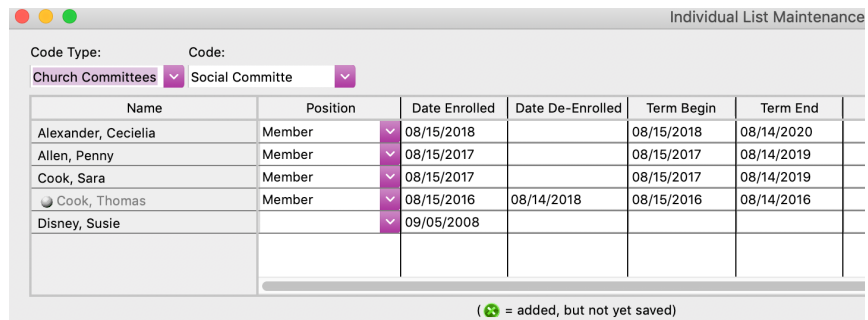
To the right of the list of individuals assigned to this code are columns for Position, Date Enrolled, Date De-Enrolled, Term Begin, and Term End. This is the detailed information you can now track. Click on Modify to change information for existing individuals. Select a Position from the drop list or type to add a new Position code, such as Member or Chair.

**NOTE:** While working on the list you may choose to hide the source list on the left, which allows you to expand the window to the right to avoid scrolling. To do this, just click the Hide Source check box.

**Default values** - You may set default values for any or all 5 fields that are tracked. Click the Defaults button to open a pop-up window.

Enter the desired information, click OK, and those fields with default values will auto-fill when you add a new individual to the group. To change all individuals in the group to one or more default values, check the Reset box next to the desired field(s), and click the Reset button.

**Historical entries** - You may choose to display Historical entries by clicking the Show Historical check box in the top right corner of the Individual List Maintenance window. Historical entries will display with the name grayed out and a gray circle next to the name. An entry becomes Historical either when a Date De-Enrolled is entered or by clicking the Mark Historical button below the list.



The detailed tracking information entered in Individual List Maintenance is available on the Individual Record window. For example, if you choose to enable Detail Tracking for Current Church Offices, when you select the Groups tab on an Individual Record window, you will see a "people's heads" icon next to the groups listed under that type. Click on the icon to see details of this individual's membership in the group.

## Membership and Attendance Preferences

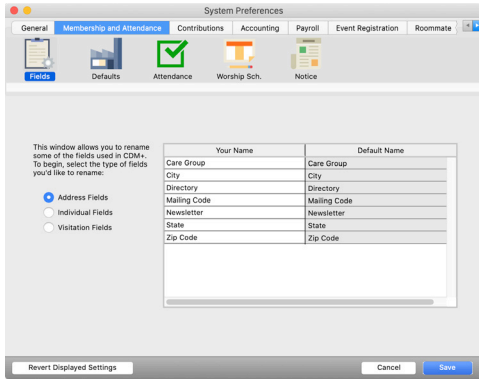
CDM+ allows for both User and System Preferences to be setup which determine how selected features work within the programs. System Preferences are chosen or setup and effect all users; User Preferences are chosen by the individual user and effect only that user.

### System Preferences

► CDM+(macOS)/File(Windows) ► Preferences ► CDM+ System ► Membership and Attendance tab

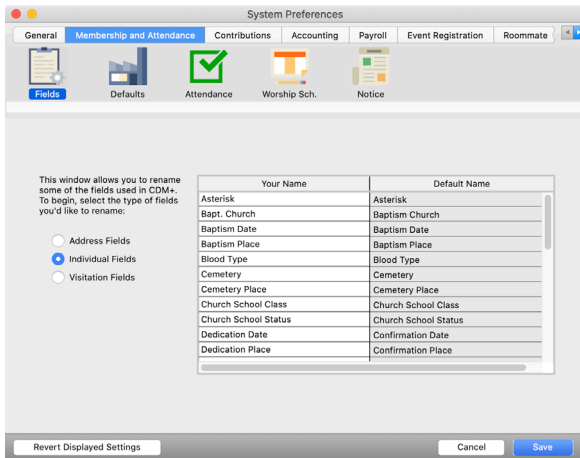


## Fields icon

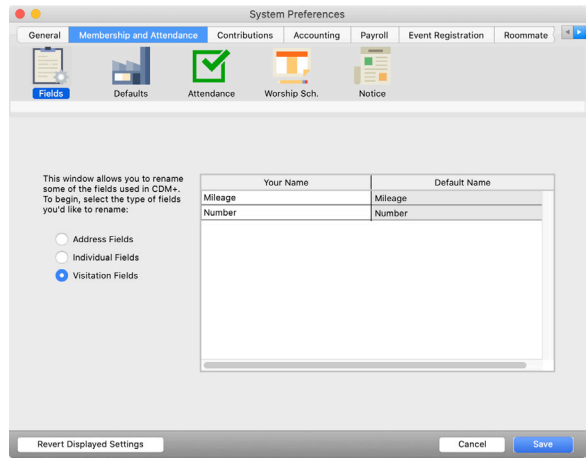


This window allows you to rename some of the fields used in CDM+.

The panel in this window has two columns. The column on the right is the default name of the fields on the Address Record that can be renamed. The column on the left is where you rename those fields.

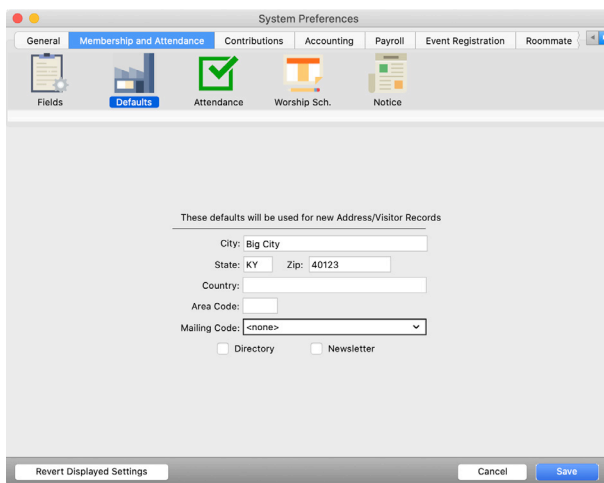


This renaming can also be done for fields in the Individual Record.



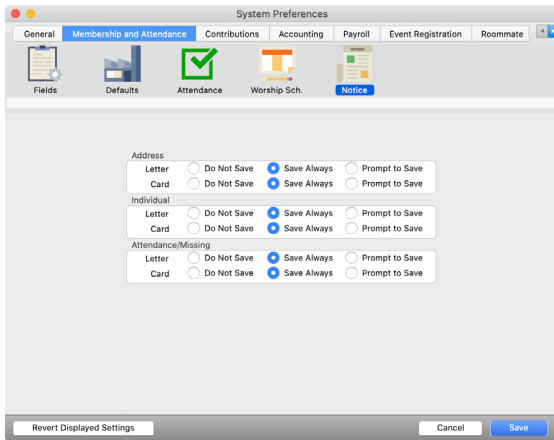
Renaming is also an option for Visitation Fields.

## Defaults icon



The defaults portion allows you to define your default city, state, ZIP, country, area code, and Mailing code.

## Notice icon



**Save Sent Notices** – allows users to optionally save sent Letter and Card from Membership, Attendance, and Contributions. Email Notices are always saved.

The screenshot to the left shows the three options for each of the notices sent from the program: Do Not Save, Save Always, and Prompt to Save. Make your selection for each item and click Save.



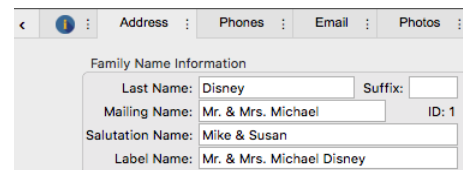
Once you click Save Always or Prompt to Save for any of the items, a new Notices tab will show on the Address Record, Individual Record, and/or Giving Unit Information window(s). When you send a Letter, Card, or Email Notice and it is saved, it will appear under this tab.

## User Preferences

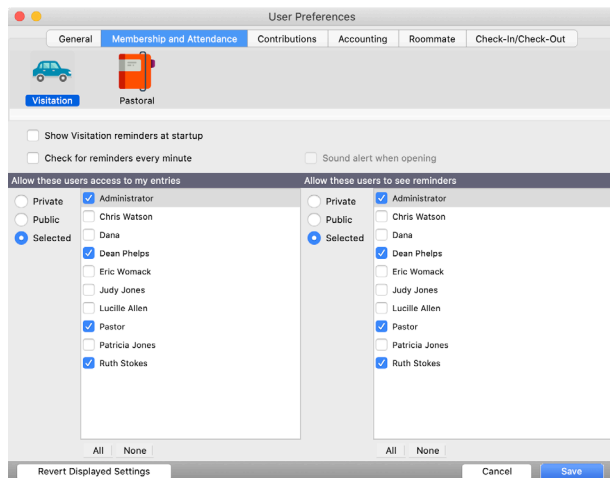
► CDM+(macOS)/File(Windows) ► Preferences ► CDM+ User ► Membership and Attendance

## Fields icon

You have the option to include Address IDs on the Address and Individual Records window and in Find lists and Export lists.



## Visitation icon

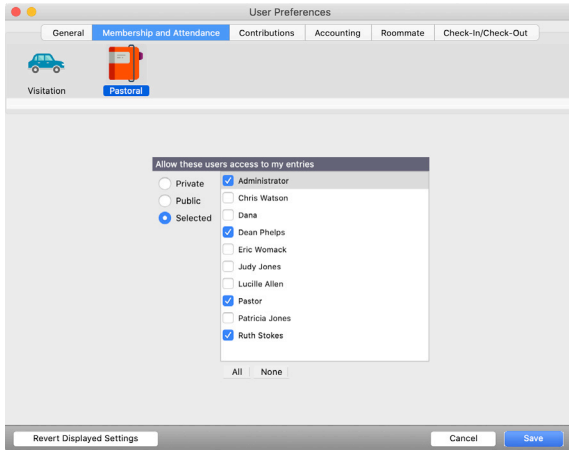


Provides two options for the display of Visitation Reminders:

- during startup of CDM+
- checks for reminders every minute and displays the reminder at the time entered on the reminder

Set other user's access to this user's Visitation Records and Reminders using the two code lists on this tab.

## Pastoral icon



Set default access to user's Pastoral Records on this tab.

