# Membership Reports

Reports in CDM+ share a common framework. This framework provides for rapid development, easier and more effective maintenance, and a lower learning curve for the user.
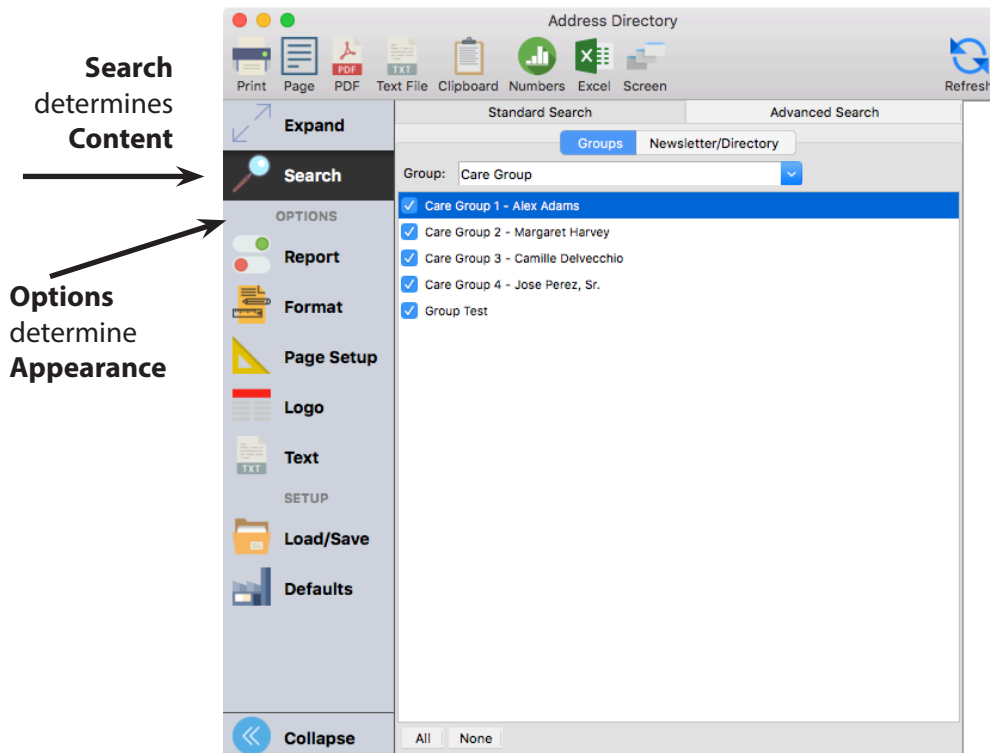
Reports Menu

▶Reports ▶Membership Reports ▶(selected heading)

CDM+ Membership Reports are grouped into seven headings for ease of use: Directories, Listings and Exports, Summaries, Labels, Notices, Visitation details, and Visitation Selected Types.
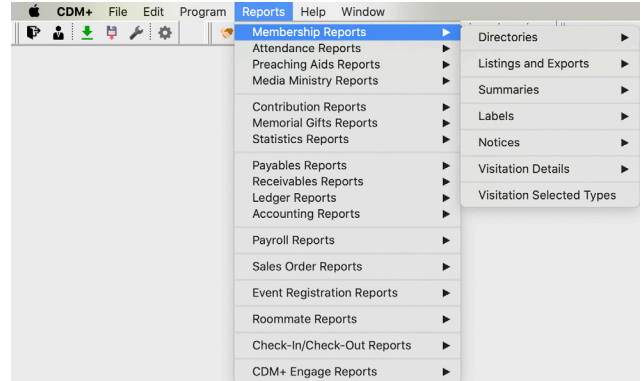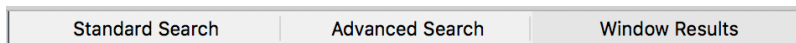

Report Windows

There are two main components to a report window: the search and the options.


These components are available on nearly all reports in CDM+. Within each main component of this window are several other common features. In the search area, many reports offer Standard and Advanced Search options, and when opened from a record frame window, a Window Results option.

Report Window Options

In the Options area, there are various tabs available that allow you to customize the report. Which tabs are available depends on the type of report and the specific report itself. Here are some tabs you might see on CDM+ reports:
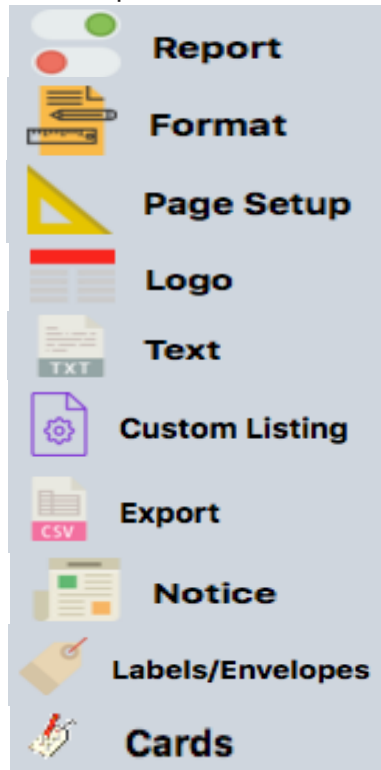
Report - Report-specific options

Format - Make report column selections, etc.

Page Setup -Choose paper size, orientation, margins, and scale

Logo

Text -Set font, header/footer options, etc.

Custom Listing

Export - Select fields to export or include on a custom list

Notice

Labels/Envelopes - Select and edit the label/envelope for Labels/Envelopes and Card Notice
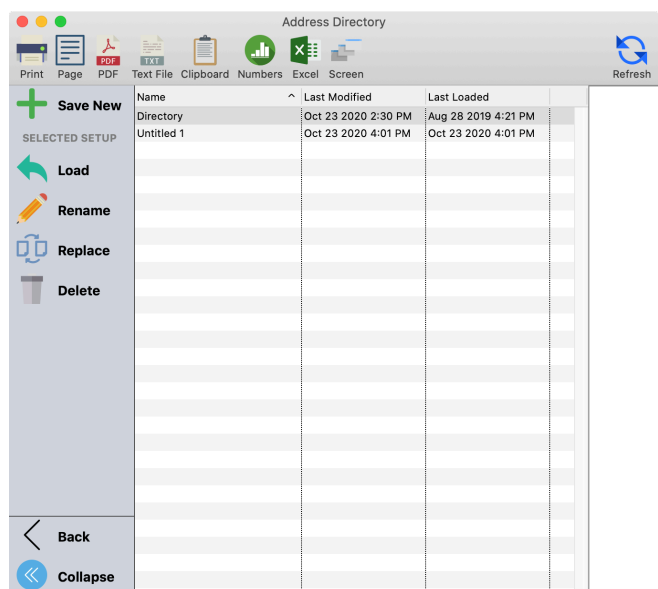
Cards

Some reports have additional report-specific options tabs.

Load/Save Report

If your ministry is like most, you tend to need the same reports over and over. With the Load/Save Report feature, you can save the search criteria for an oft-repeated report along with its formatting and other options. What a time saver!

If you have previously set up the report you need, simply click the Load/Save Report button at the bottom of the report setup window, 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.

Labels/Envelopes

▶Reports ▶Membership Reports ▶Labels ▶Address or **Individual Labels/Envelopes**

Creating labels from CDM+ provides you with many choices. The Labels/Envelope report window allows for the selection of : Labels, Envelopes, Cards, Name Tags, Rolodex, File Folders, Electronic Media, Dymo Labelwriter, and Favorites.
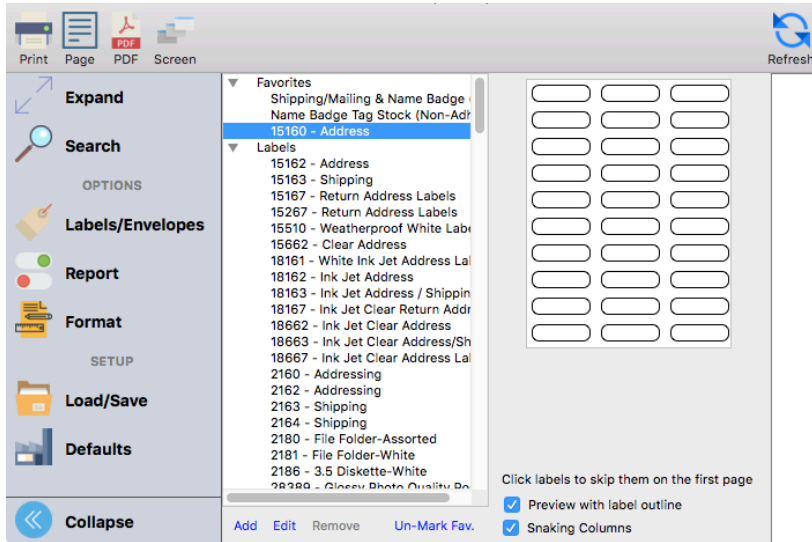

Under the Labels/Envelope tab, click the arrow beside Labels, scroll down to select the appropriate label; a preview of the label shows to the right.
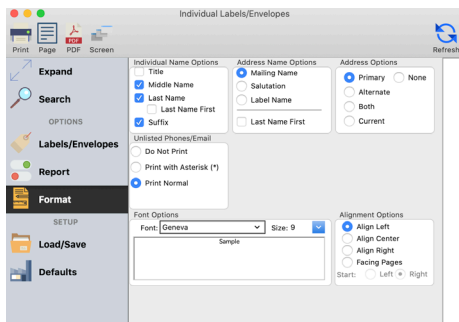
• Report, Format, and Text options further customize your selections

• Hundreds of editable label and media types to choose from

• Option to skip labels on the first page of printing

• Edit paper/page options and label setting for page

• Name Badge printing including Barcode

For label formats that you use often, click the Mark Favorite button to move that label up under the Favorites section for quick re-use.
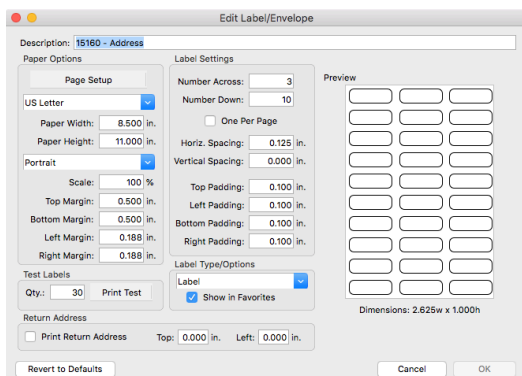

The Edit button allows you to change the setup on the selected label.

Directories

▶**Reports** ▶**Membership Reports** ▶**Directories** ▶**Address** or **Individual Directory**

A very popular and useful report, the Directory lists the results of a Standard Search, Advanced Find, or Newsletter/Directory grouping (Address reports only) in an easy to read numbered format: Name, Address, Phone. The report is also available to print the results of a Find from the Print button on the Address or Individual record window.
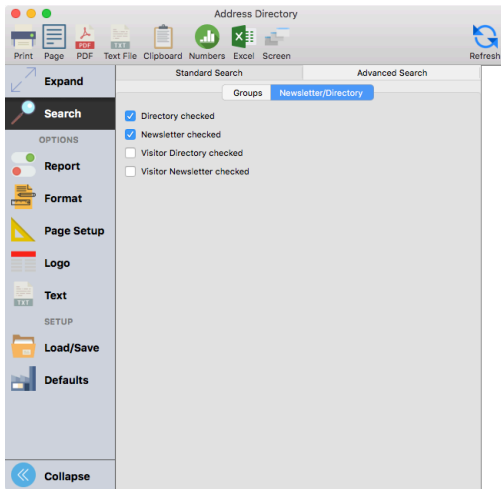

Report Options and Sort Order are selected on the Report tab.

Format tab provides selection of Individual Name Options, Address Name Options, Address Options, Unlisted Phone Numbers, and Other Phone Numbers.

Directory

Current Church Offices equal to: Board

Board

| Name	Address	City, State Zip	Phone Number
1. Mitchell Alexander	699 Shady Lane	Big City, KY 40123	859-864-2366
2. William Allen	1674 Stevens Lane	Big City, KY 40123	859-333-4455
3. George Baldwin	890 W Oak Lane	Big City, KY 40123	859-863-4499
4. Lincon Barrymore	450 Main Street	Big City, KY 40123	859-863-9955

Yearbooks

▶**Reports** ▶**Membership Reports** ▶**Directories** ▶**Address** or **Individual Yearbook Directory**
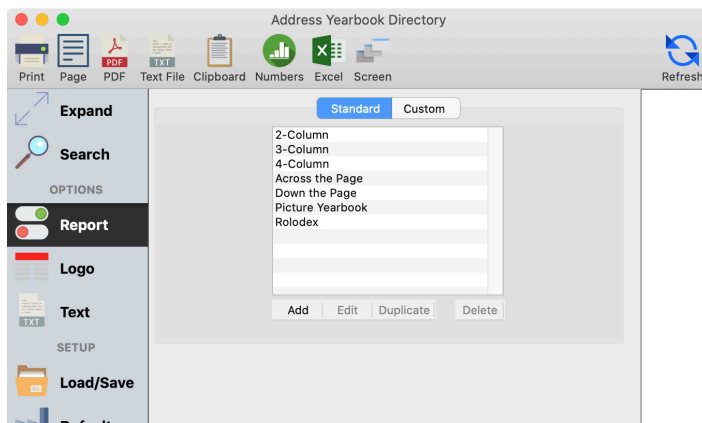

Click Add, select a template, enter a description, then click OK – OR – select an existing report and click Edit. The Modify Yearbook Directory window will open.

Create custom designed Family (Address) directories
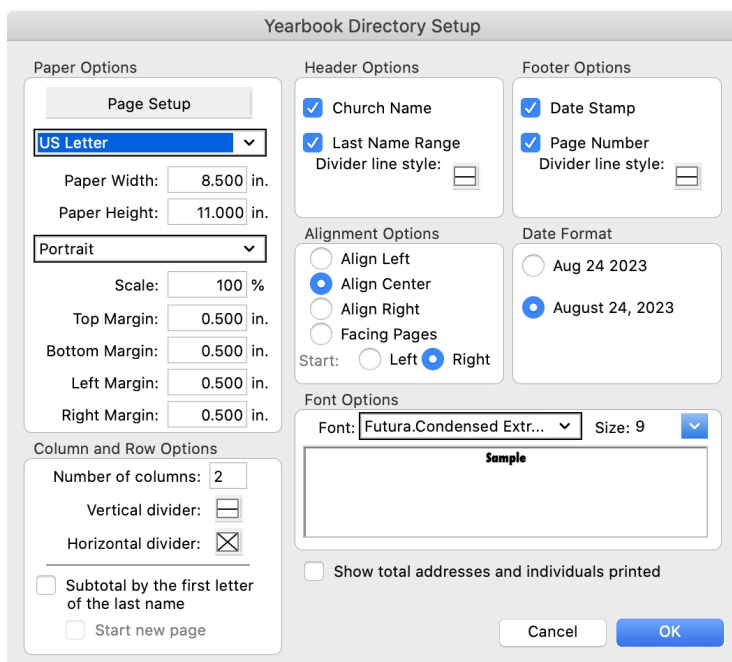
Click Directory Setup at the bottom of the Modify Yearbook Directory window to choose page and margin, column, header and footer, and other options that apply to the overall report layout.
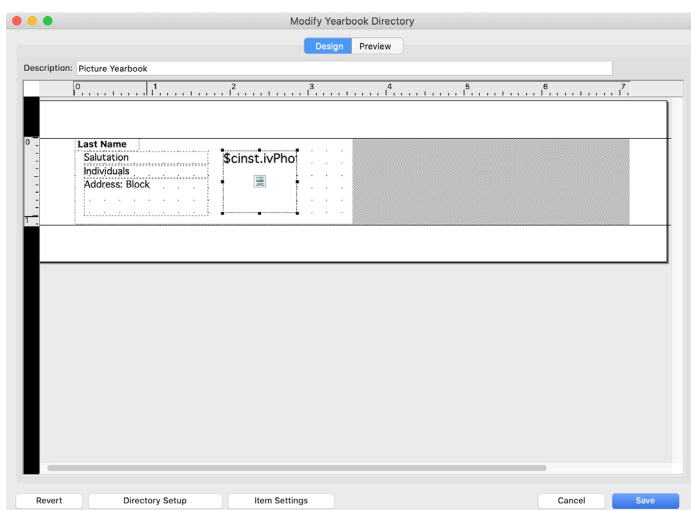
The report has a completely user-definable layout area. Click to select a field, then click Item Settings to change font, size, style, alignment, and other options. Click the Fields tab to click-drag and add new fields to the layout. Click the Drawing tab to add lines, shapes, text boxes, or graphics.

Some fields on the yearbook directory have additional settings under the Options tab on the Item Settings window. Those fields include:

- Address: Block
- Address: City, State, Zip, and Country
- Address: Lines 1 and 2
- Full Name
- Individuals
- Other Phones
- Phone
- Work Information

Click to select the field on the Design pane, then click the Option tab on the Item Settings window to see available options for that field.

Notices

Notices provide the CDM+ user the option to create custom communications using Letters, Cards, or Emails. Multiple Notices (Letters, Cards, or Emails) can be created and saved for repeat use. Each option includes word processor-like capabilities and embedded data fields. A wide selection of Formats, Alignment, and Spacing selections are supported, and Graphics and signatures can be inserted into all Notices. As a result, personalized letters, cards, and Emails can be created.

To learn more about creating/formatting notices in CDM+, take the Notices class or see that section of this manual.

▶**Reports** ▶**Membership Reports** ▶**Notices** ▶**Address** or **Individual Letters**
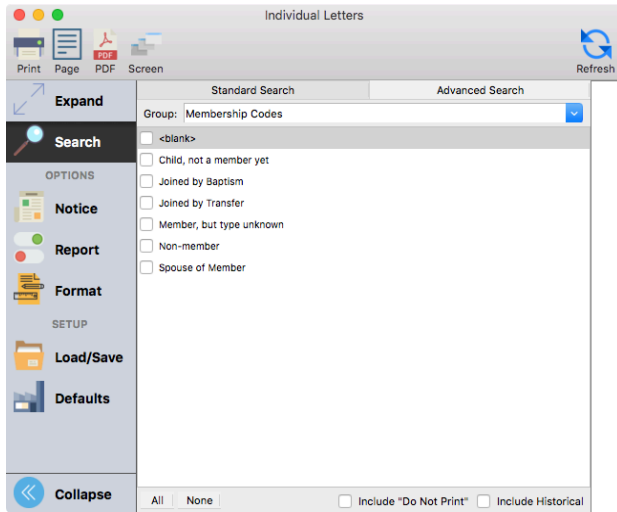
You may choose an existing Letter Notice to edit or use as is, or you can create a new Letter Notice. Begin by clicking the small Select/Add button.

A new window will open in which you'll see any existing notices. On this window, you have the option to choose an existing notice, add a new notice, duplicate an existing notice, rename an existing notice, or delete an existing notice.
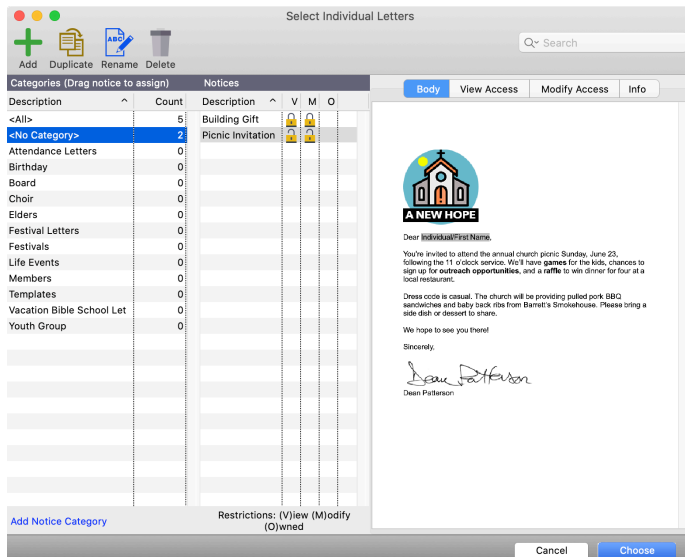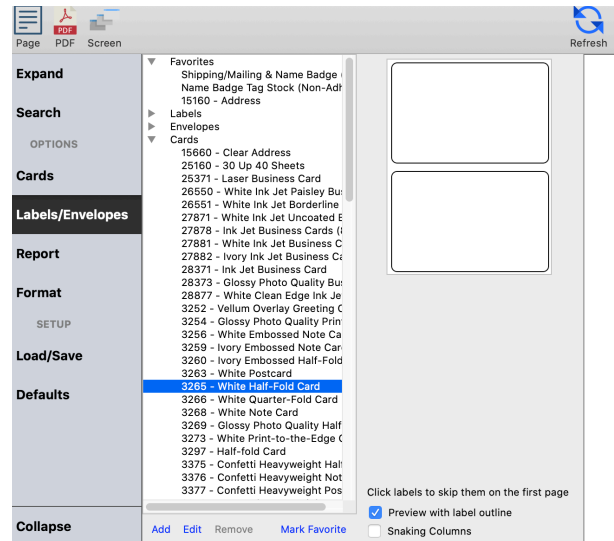
▶**Reports** ▶**Membership Reports** ▶**Notices** ▶**Address** or **Individual Cards**

Click Select/Add to view existing cards or add a new card.

Add, Duplicate, Rename, or Delete cards.

Click the Cards tab to select the desired card format.

The Edit button allows you to change the setup on the selected card or label format.

Saving Sent Notices

In the Membership, Attendance, and Contributions programs of CDM+, sent Letters and Cards have an optional Saved status. All letters or cards selected to be Saved will update the recipients' Individual or Address Records Notice tab with a Saved entry.

NOTE: All Email Notices will be automatically Saved and noted on the recipients' Notices tab.

▶**CDM+(macOS)/File(Windows)** ▶**Preferences** ▶**CDM+ System** ▶**Membership and Attendance** ▶**Notice** icon
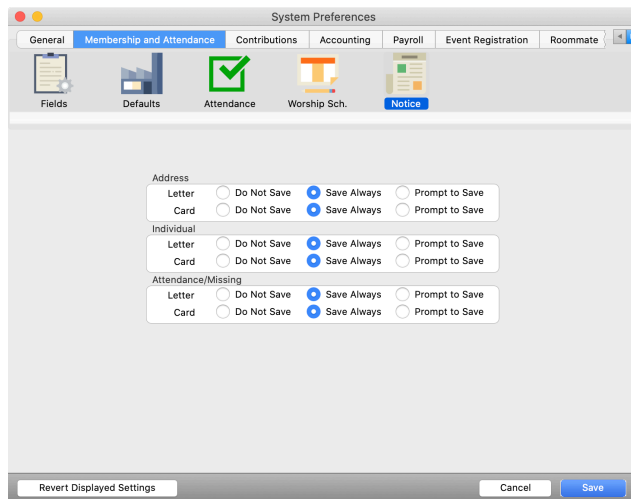
There are 3 options for each type of Letter and Card notices sent from the program: Do Not Save, Save Always, and Prompt to Save. Make your selection for each item and click Save.

After you set the Notices preference to 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 or Card Notice and you marked it to be saved, it will appear under this tab. All Email Notices sent from CDM+ will be saved on the Notices tab.

	Type	Description	Date Sent	Name	Email	
	Email	Sermon Info	Aug 24 2023 2:55 PM	Mike Disney	noreply@suran.com	

Email Notices

Email Notices provide an effective means to contact the groups, classes, and teams already set up in CDM+ via the efficiency of email. Select the Add button to begin a new email.

▶**Reports** ▶**Membership Reports** ▶**Notices** ▶**Address** or **Individual Emails**
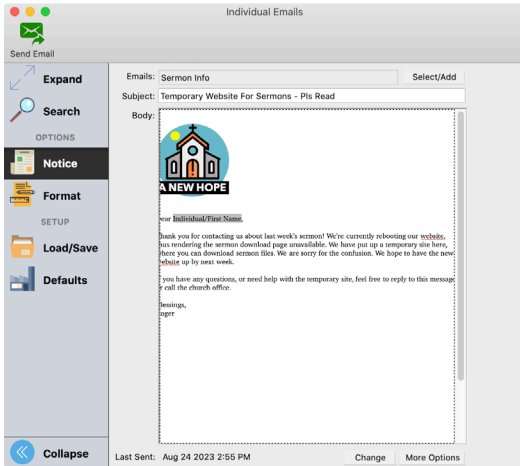
Address Email Notices use email addresses entered on both Address Records AND Individual Records windows, while Individual Email Notices use ONLY email addresses entered on Individual Records.

Select the Change button to modify an existing Email Notice; database fields, pictures, or artwork and textboxes can be added. (The Notices class covers these functions.)

Click the More Options button to preview the recipients list, add an Attachment and/or chose to "Send a copy to the Sender."
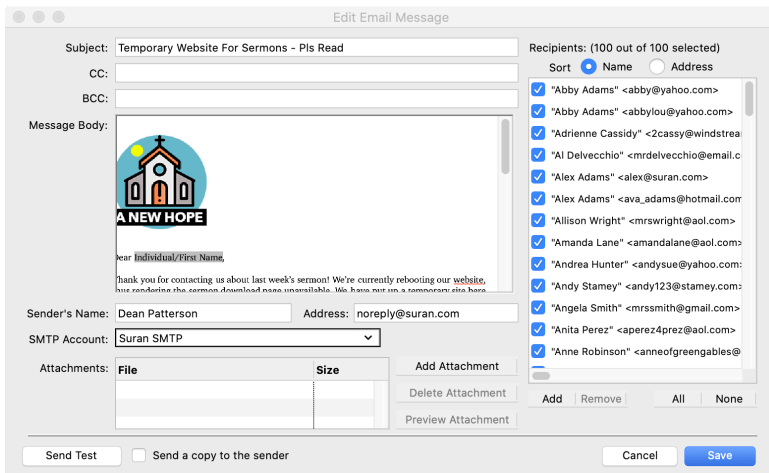

Checking "Send a copy to the Sender" will result in you getting a copy of EACH email sent. To receive just one copy of an email, do not check the box and make sure your email is listed in the staff addresses on the Confirm Email window before sending.

NOTE: If the email is personalized with embedded database fields, any copy sent using the staff addresses will show the database field names only.

Custom Listings and Exports

▶**Reports** ▶**Membership Reports** ▶**Listings and Exports** ▶**Address or Individual Custom Listing and Export**

Custom Listing and Export reports are the most versatile reports in CDM+. These reports allow the creation of user-defined sets of fields to display on a custom-titled report, as well as exports that can be opened in such programs as Numbers, Excel, or Word.
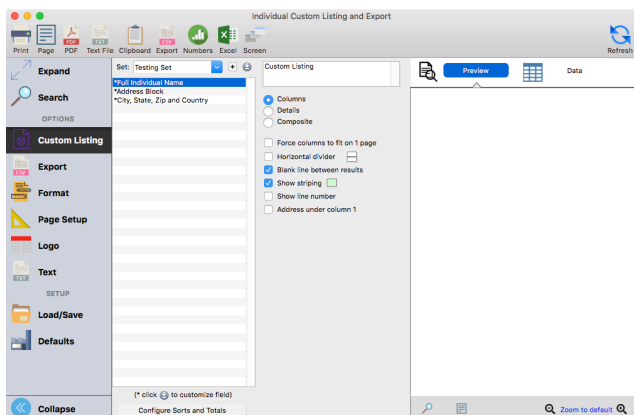

Sets can be created for one user; or shared with all users

Click the Add button to create a new custom list set; or click Modify to change an existing set.

Type the custom report title in the Report Title field

To set the sort order for the listing click on the Choose Sort Fields button or

The default layout of selected fields is across the page. Click the Details checkbox to have fields display
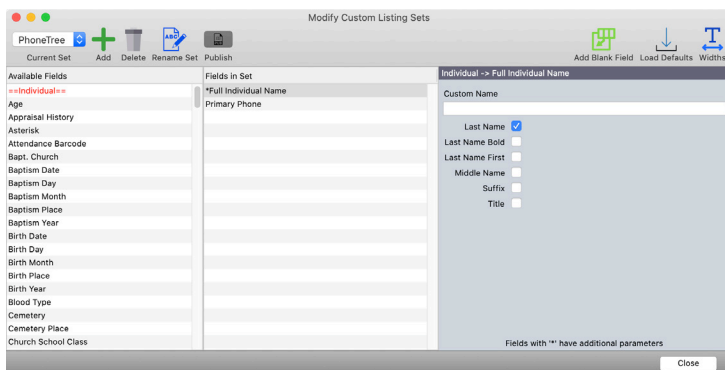

To edit the Custom Listing, click the small grey icon next to the plus sign near the Set dropdown bar. The Modify Export Sets window will open. In the Modify Export Sets window, double-click or drag fields from left to right. In the Fields in Set list on the right, click, drag, and drop fields to set their order.

Add Blank button allows for a custom blank field to be inserted in the report.

Widths button allows you to set the column widths for the report.

Check the Publish button so other CDM+ users can access your set.

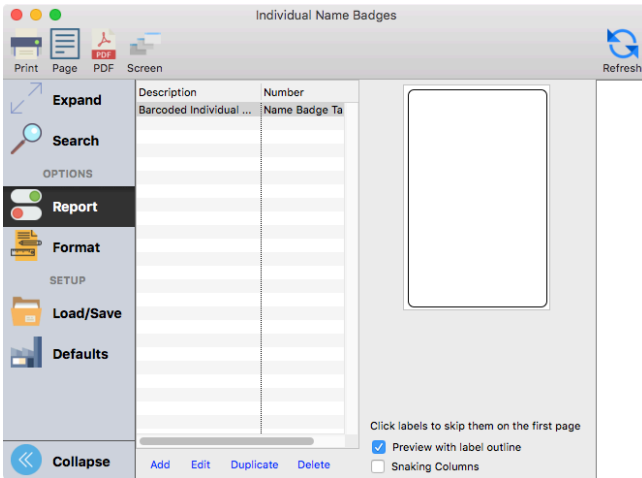Click Close when finished – set will automatically save.
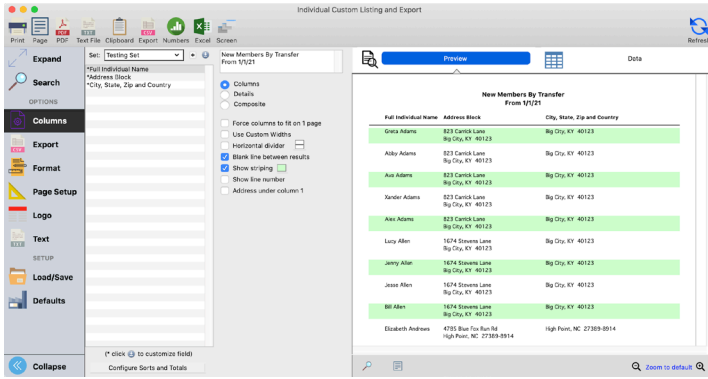
To Export, click on the Export tab, and choose the settings you want. Then, click any of the options on the top of the window, to export the file, such as to a PDF, .csv, Numbers, or Excel.
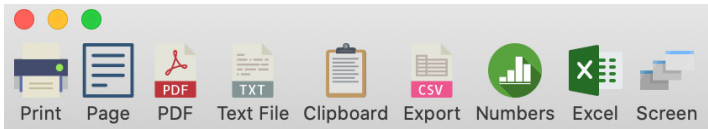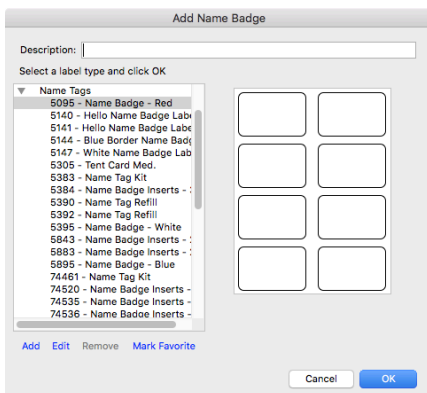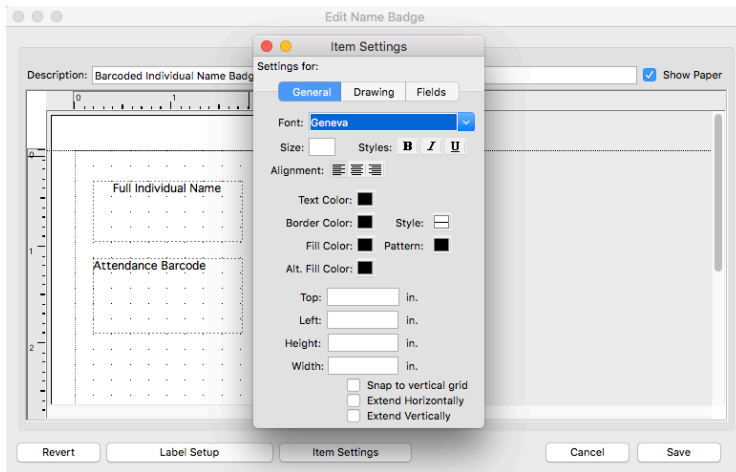

Name Badges

▶**Reports** ▶**Membership Reports** ▶**Labels** ▶**Address** or **Individual Name Badges**

Click Add on the Name Badges report window. Give the label a description and choose a label format, then click OK.

Create a custom-designed label and use it over and over. Once a label has been created it can be Duplicated, altered appropriately and Saved with a new name.

Name Badge gives the option of adding a new badge or use an existing one. A new badge can be created by clicking Add.

Click to select a field, then click Item Settings to change font, size, style, alignment, and other options.

Click the Field tab to add new fields to the layout.

Working with name badges is very similar to the yearbook directory layout – you can add fields, lines, shapes, text, and graphics. Be sure to work only in the white area.

Summaries

▶**Reports** ▶**Membership** ▶ **Reports** ▶**Summaries** ▶**Address** or **Individual Summaries**

Address and Individual Summaries provide "totals only" reporting on Membership information. These reports may be useful in completing annual reports.
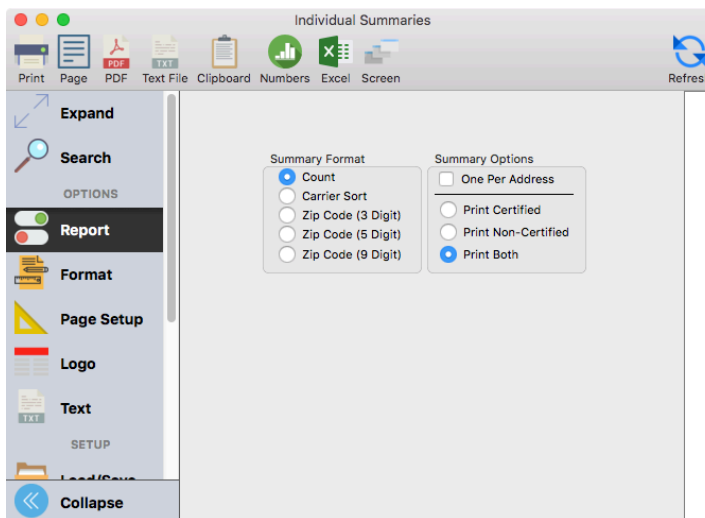
First Church
123 Main Street
Big City, KY 40123
606/555-1234

All Church Groups

Summary Counts: Church Groups	
Adult Choir	24
Altar Guild	11
Bible Study Group	25
Children's Choir	20
Couples Fellowship	28
High School Youth Group	8