

# Contact Management

Churches and non-profit organizations are in the “people business.” Maintaining contact and updated information remains a high priority for your organization. This class will focus on the use of CDM+ Visitation Records emphasizing the use of reminders with the push notification feature, Pastoral Records, Individual Connections Tab, and other features as means to stay connected.

The Visitation and Pastoral records provide an effective means of tracking ministry with individuals and families in the Membership program. Ministry actions already completed may be entered or set reminders for future ministry actions, or both. By enabling push notifications on a phone or tablet, reminders can now pop up giving you real-time information.

For example, Mr. Stevens dies and entries can be made in Visitation records to track ministry to the family during this time of bereavement. Follow-up actions may be scheduled in Reminders to insure contact on an on-going basis as Mrs. Stevens adjusts to life without her husband of 55 years. One reminder may include an invitation to her to join the “Life without Spouses” class scheduled in 5 weeks. A second reminder could be scheduled to push to the Lead Pastor's phone one year later to call Mrs. Stevens and let her know the church hasn't forgotten.

Due to the personal nature of such information access to Pastoral and Visitation records can be limited by both a default setting or on a per entry basis. This insures people who need to view and work with this information have access while maintaining the access restrictions of other users. There are three types of access control: User Permissions, User Preferences, and the Pastoral and Visitation record Access tab.

## ►File ►Administration ►Users tab

Use the Administration window to set access to all Visitation and Pastoral Records.

The screenshot displays the 'Administration' window with the 'Users' tab selected. The interface is divided into several sections:

- Users Table:** A table listing users with columns for Name and Last Logged In. The 'Administrator' user is highlighted.
- User Profile:** A form for editing the selected user, showing fields for Name, Username, Password, and Access Setting.
- Permissions:** A section with two tabs: 'Membership' and 'Contributions'. Each tab contains a list of items with checkboxes for 'View', 'Add/Change/Delete', and 'Print'.
- Access Settings:** A section for configuring user access, including fields for Description, Bookkeeper, Mobile Attendance, and Pastors.

Name	Last Logged In
Administrator	Jan 16 2023 3:37 PM
Chris Watson	May 20 2022 4:10 PM
CICO Church Class	Never logged in
CICO Nursery	Never logged in
CICO Preschool	Aug 18 2015 12:21 PM
Dana	Dec 20 2017 6:14 PM
Dean Phelps	Jun 20 2022 5:42 PM
Eric Womack	Never logged in
Judy Jones	Jan 7 2023 12:53 PM
Lucille Allen	May 4 2022 3:52 PM
Pastor	Feb 27 2019 4:15 PM
Patricia Jones	Jan 16 2023 8:58 PM
Ruth Stokes	Sep 6 2023 9:13 AM

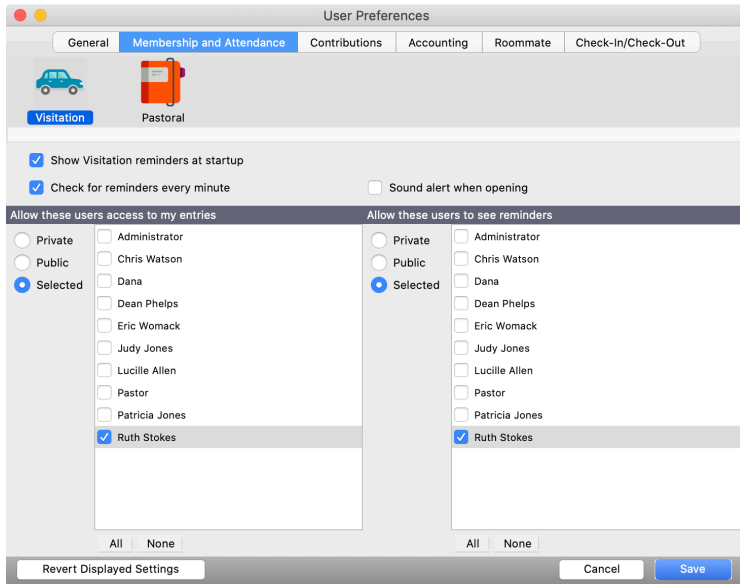
Membership	All	None
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Individual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pastoral	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Visitation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preaching Aids	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Media Ministry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> User can access Membership preferences		
<input checked="" type="checkbox"/> User can modify Visitor Records		

Contributions	All	None
Giving Unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contribution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Giving History	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pledae	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

Use User Preferences to set the default access to Visitation and Pastoral Records created by this user. Access settings can be changed for any particular Visitation or Pastoral Record.


This screen displays the list of users defined in Administration. Click on the names you wish to set as default to see Visitation Records and/or Visitation Reminders. The option to select users as default to see Pastoral Records are accessed by clicking the Pastoral icon. All users that are selected to see reminders, that have a device with push notifications enabled, will have the reminder pop up on their device.



## Visitation Records

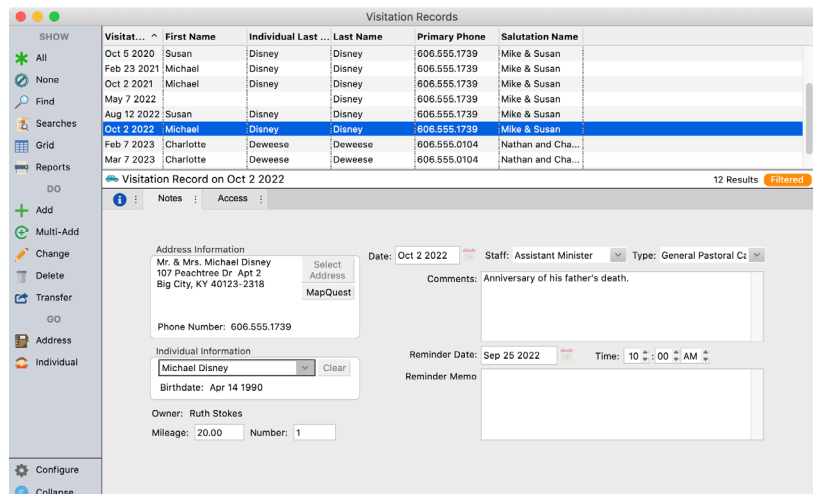
► Program ► Membership ► Visitation Records

Provides for the tracking of visits and contacts to people in the Membership program. Visitation Reminders can be created to prompt you of follow-up actions (visits, calls, or other contact) at a scheduled date and time. Staff Codes and Visit Types are defined by the Mater Coding System; reports can be printed by these codes and a Summary report printed that includes mileage and number totals.

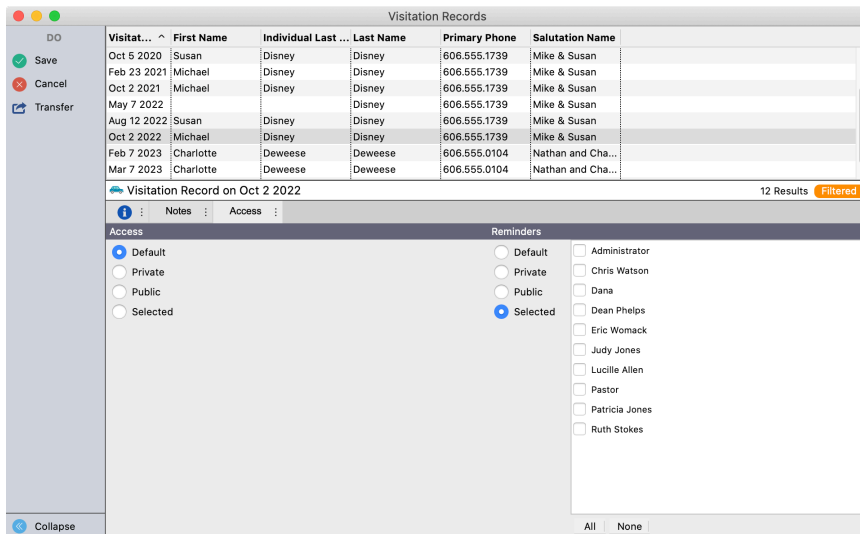
 Visitation Records may also be used to track Volunteer hours worked.

If a visit is made to only one member of the family, click the down arrow beside the Individual Information field and make your selection.

**NOTE:** You can rename "Mileage" and "Number" under **CDM+ System Preferences ► Membership and Attendance tab ► Fields icon ► Visitation Fields** radio button.



Click on the Access tab to change the access options for a specific entry; the default settings will appear. Selecting Private will allow this record to only be viewed by the user who entered it. Public will make it available to all users. Click on Selected to give limited access to persons other than your default choices.

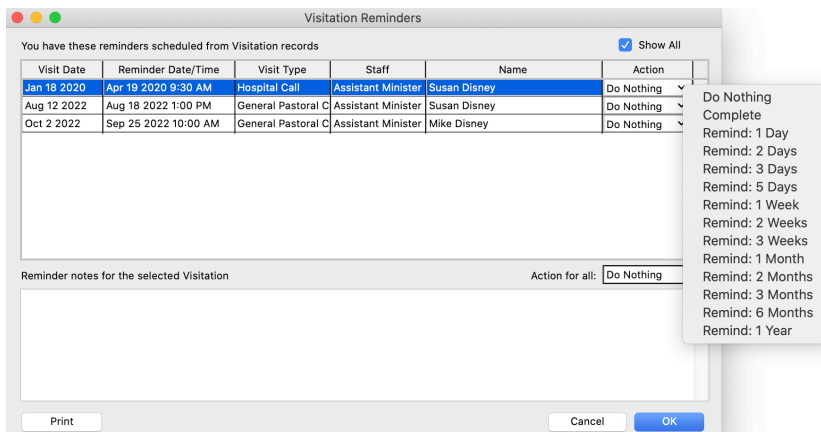


**NOTE:** Visitation of prospective members to your church may be tracked through Visitor Records in the Attendance program.

## Visitation Reminders

### ►Program ►Membership ►Visitation Reminders

Visitation Reminders may be accessed from the menu or set to display when you log into CDM+. Click the down arrow to select an Action.

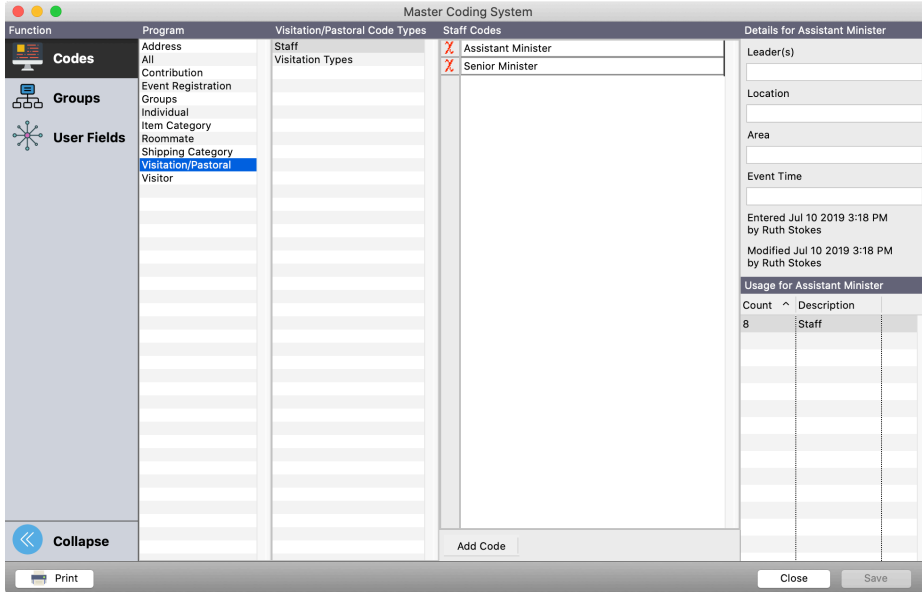


Click the Visitation icon under the Membership and Attendance tab of User Preferences to choose when Reminders will display.

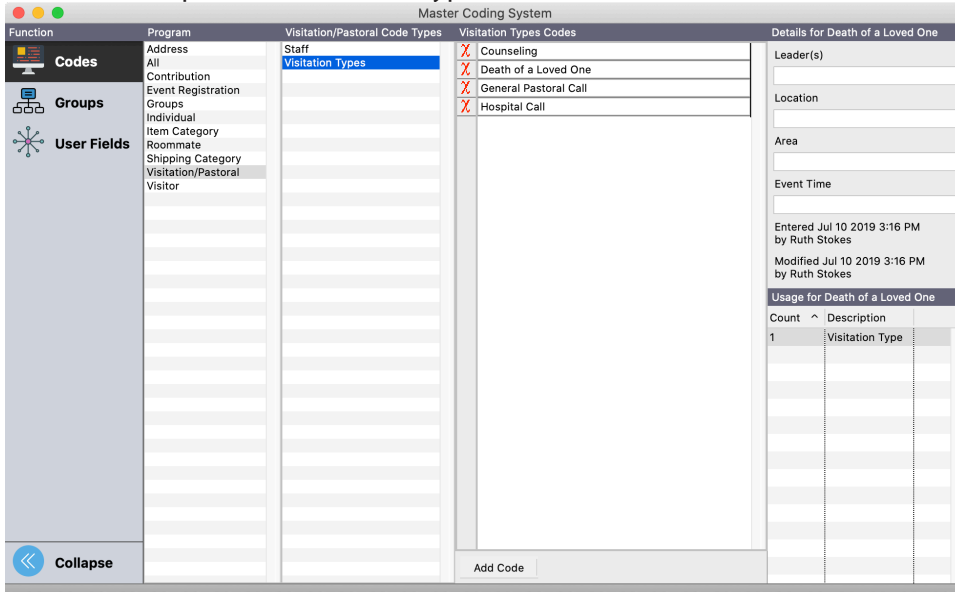
Visitation Records and Reminders may be used to track a variety of ministry applications. Some examples include: Death of Member, Grief Follow-up, New Members Assimilation, and Volunteer Tracking. The key to this multiple usage is setup in the Master Coding System:

►File ►Master Coding System ►Codes tab ►Visitation/Pastoral

The Staff and Visitation Type fields allow for specific code setup. Below is a sample of Staff codes.



Below is a sample of the Visitation type codes.



## Visitation Reports

A number of visitation reports are available and allow for effective administration of the ministry of your organization. Get Detail reports by Staff, Family, or Individual. Summary reports by Visitation Type and Staff are easily created. Standard and Advanced Searches provide complete flexibility.

### ► Reports ► Membership Reports ► Visitation Details ► Detail by Staff

#### Detail Record of Visitation Calls by Staff

First Church  
123 Main Street  
Big City, KY 40123  
606/555-1234

All Staff  
From Oct 1 2022 To Oct 31 2022

Details by Staff report pages by staff member and totals Miles Driven and Number of persons contacted.

Assistant Minister		
<b>Date</b>	Oct 2 2022	<b>Mileage</b> 20.00
<b>Type</b>	General Pastoral Call	
<b>Number</b>	1	
<b>Name</b>	Michael Ray Disney 107 Peachtree Dr Apt 2 Big City, KY 40123-2318	<b>Phone</b> 606.555.1739
<b>Comments</b>	Anniversary of his father's death.	
	<b>Reminder Date</b> Sep 25 2022	<b>Memo</b>
<b>Summary for Assistant Minister</b>		
	Number of Calls Made	1

### ► Reports ► Membership Reports ► Summaries ► Visitation Summary

#### Summary of Visitation Records by Individual

First Church  
123 Main Street  
Big City, KY 40123  
606/555-1234

All Staff  
From Oct 1 2022 To Oct 31 2022

Summary by Individual or Family contacts; pages by Staff Code if desired. Select the Staff codes to include and the Visitation Types.

Name	Type of Visit	Number of Calls
Mike Ray Disney	General Pastoral Call	1
	Mike Ray Disney Total	1
<b>Total</b>		<b>1</b>

## CDM+ Mobile Visitation

Open **Individuals**, find an individual and tap the **Visitation** tab to bring up visitation information for that individual. Note that it may be under the **More** tab.

Any visitation records you have permission to view will display by date, with a blue **Add New Visitation Record** button at the top.

If there are no Visitation Records (or any to which you have access) for this individual, the screen will read “No Visitation records found” and a blue **Create New Visitation Record** button.

### To Add a Record

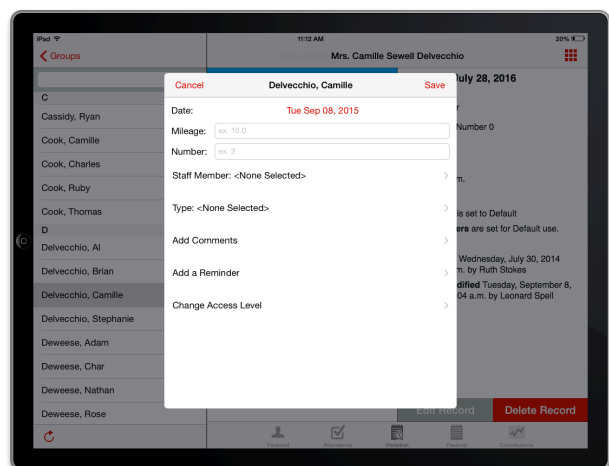
Tap either the blue **Add New Visitation Record** or **Create New Visitation Record** button.

On iOS, a popover will appear. On Android, the area will change.

On this screen you can alter all, some or none of the options present. To save the visitation record, tap the **Save** button.

The visitation date is always preset to today’s date, if you want to change this, tap inside the field for iOS and with the date picker that shows up, choose the preferred date, then tap **Save Date**. On Android, tap the **Edit Date** button and a pop-up will appear with a calendar. Select the date you desire and tap **Done**.

To change the **Number** or **Mileage** of the Visit, tap into their respective input fields.

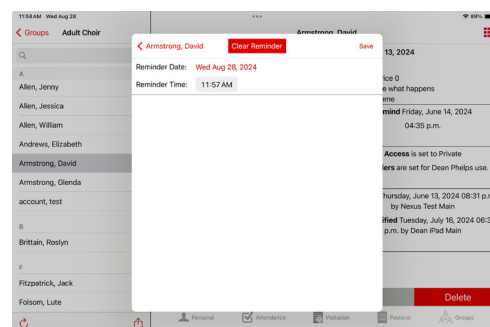


To change the staff person associated with this record, tap the **Staff Member** button and a list of staff positions will appear. You may select one or none.

To change the type associated with this record, tap the type button and a list of types of visitation will appear. Again, you may select one or none.

To add a comment to the visitation record, select **Comment**. Here you may enter a message about the visitation. When you are finished entering the message, tap **Save**.

Select **Add a Reminder** to enter a reminder message, change the date of the reminder, and set the time of the reminder. Reminders will push to all devices of the individuals who have been given access, this will only occur if push notifications are allowed on the device and settings have been set in Administration.



Just like the Visitation Date, the Reminder Date is always preset to today’s date and it can be changed in the same manner.

The Reminder Time is always preset to 9:30 am. If you want to change this time, tap inside the field for iOS and with the time picker that shows up, choose the preferred time and tap **Save Time**. On Android, tap the **Set Time** button and a pop-up will appear with a calendar. Select the time you desire and tap **Done**.

To change the access level for either viewing or reminders, tap the **Change Access Level** button. Here you may select from Default, Private, Public, or Selected for both Access or Reminder. Access and reminder are always enabled for the creator of the record, for other users, a green check mark will appear next to their names if they are selected.

Default reflects the defaults set for the user here:  
 ► **CDM+(macOS)/File(Windows) ► Preferences**  
 ► **CDM+ User ► Membership and Attendance**  
 ► **Visitation**

If a user is selected by Default, they will have a green check mark next to his/her name.

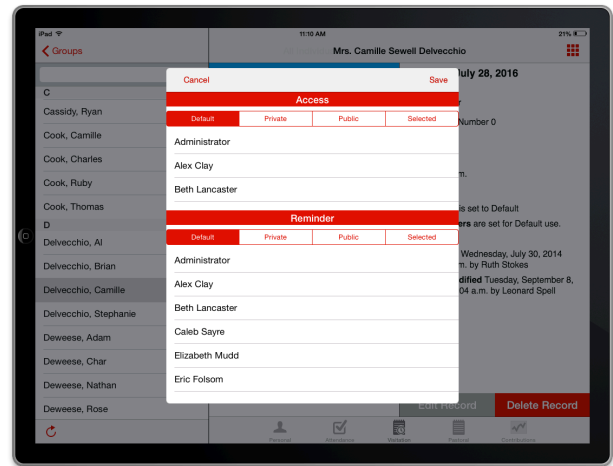
Private is restricted to the user who creates the record. In this case, no other users will be selected.

Public is set for everyone, including the creator of the record. In this case, everyone has green check marks.

Selected allows you to select who gets access. Simply tap on each user to whom you want to give viewing access and a green check mark will appear.

Setting Reminder access is the same process. **NOTE: Access and Reminder** are separate, so you must set both.

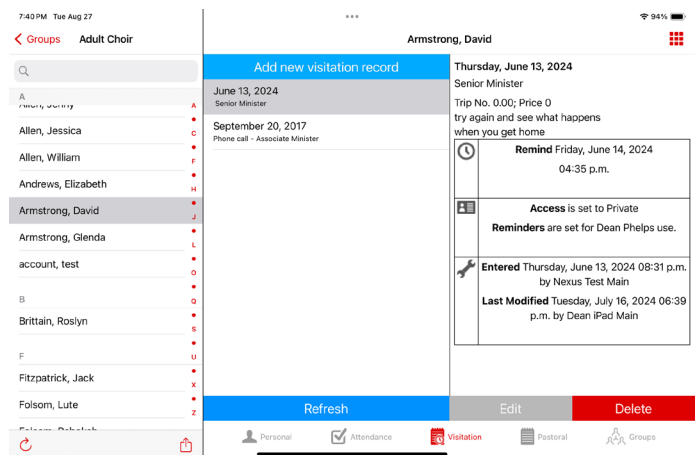
When all your fields are set, tap **Save** to save the record.



## To View a Record

When you have access to existing visitation records for an individual, tapping the **Visitation** tab will display a list of those records. The list will contain the date of the visitation, the staff member that made the visitation record (if set), the type of visitation (if set), and a clock icon if the visitation record has a reminder that is set for today or later.

Tap on a record and it will appear in the detail view with all the information associated with that record. **NOTE:** Records are viewable only to those that have access to the record, or have created it.



Each Mobile Provision can be linked to a user in CDM+, and thereby inherits the access that user has to visitation records set in CDM+. This user assignment is set on the Mobile Provisioning window under Administration.

## To Edit a Record

Only the creator of the record can edit or delete a record.

Tap on the record you want to edit, and on the details page, select **Edit**.

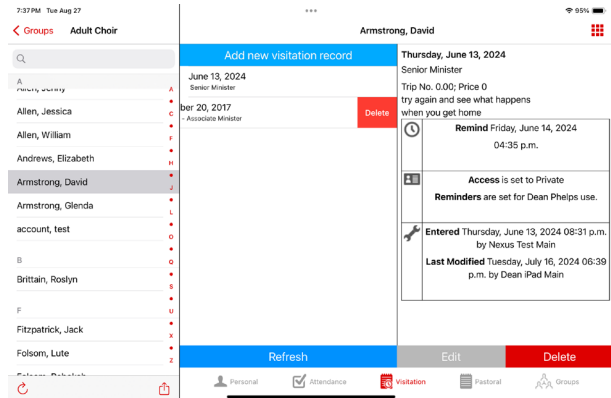
After adjusting the field(s) that you want changed, tap **Save**. The record will now be updated both in the CDM+ Mobile app and the CDM+ Visitation Records window on the Membership menu.

## To Delete a Record

There are two ways to delete a record.

1. On the Visitation Record list for iOS slide the record to the left, and a Delete button will appear. Tap it and a pop up will appear asking you to confirm the action. Once confirmed, the record will be deleted. On Android, press and hold down on the record for one second, and a pop-up will appear asking you to confirm deleting the record. Once confirmed, the record will be deleted.

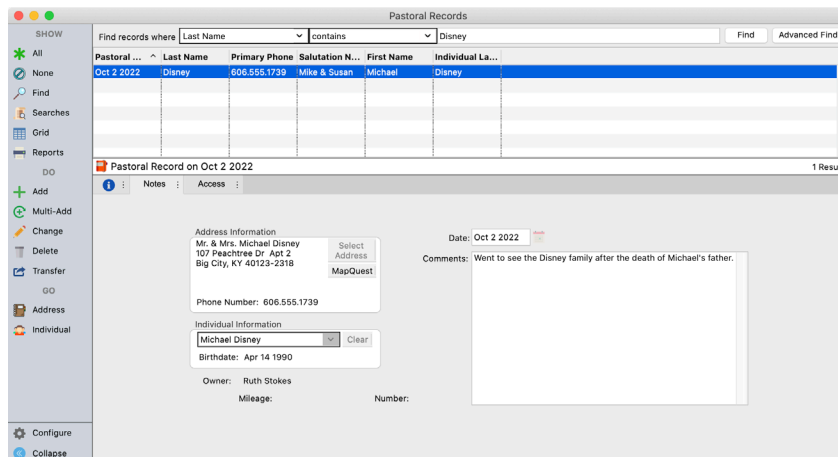
2. When viewing the detail of a record, you will see a Delete Record button at the bottom of the page. If you tap it, a pop up will appear asking you to confirm the action; once confirmed, the record will be deleted.



## Pastoral Records

Pastoral records provide tracking of ministry actions by ministerial/pastoral staff separate from Visitation records to enhance privacy. Staff members may opt to share entries made with other staff members or keep them completely private on an entry by entry basis.

### ► Program ► Membership ► Pastoral Records



Click the Access tab to set user access for this specific Pastoral entry.

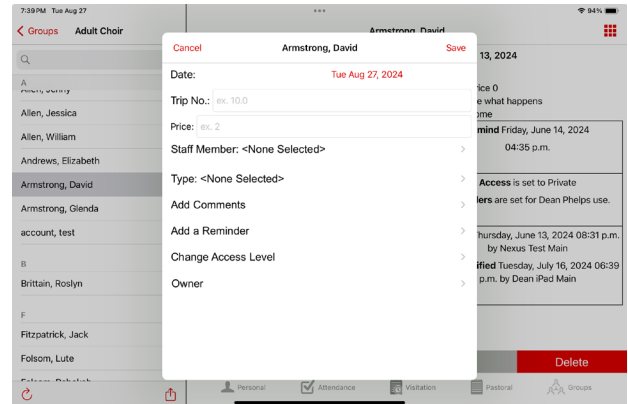


## CDM+ Mobile Pastoral.

Open **Individuals**, find an individual and tap the **Pastoral** tab. Note that it may be under the **More** tab.

Viewing, adding, editing, and deleting Pastoral Records via the CDM+ Mobile app works in the same way as described above for Visitation Records.

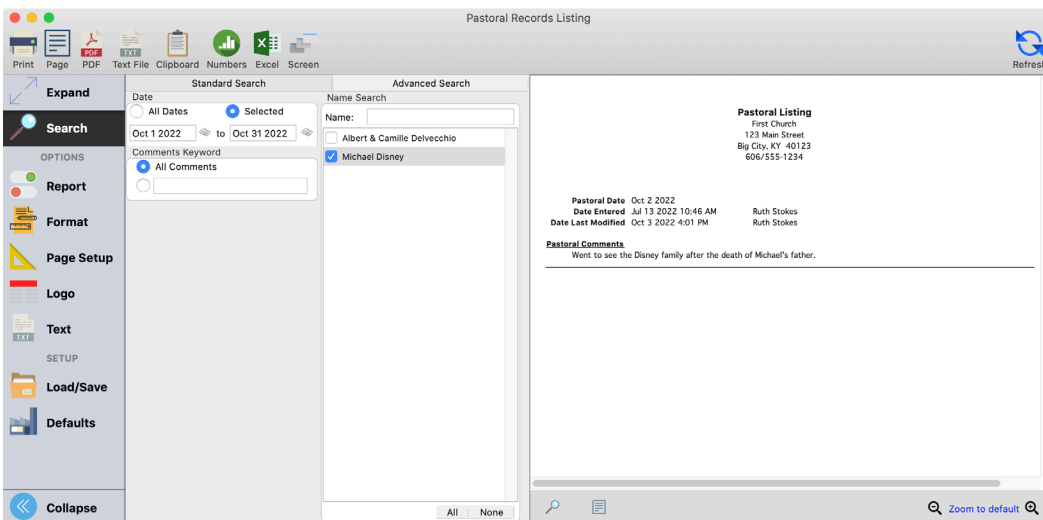
Records are viewable only to those that have access to the record or have created it. Each Mobile Provision can be linked to a user in CDM+, and thereby inherits the access that user has to pastoral records. Default access to Pastoral Records is set for the user in **CDM+ User Preferences ► Membership and Attendance ► Pastoral** icon. The user assignment is set on the Mobile Provisioning window under Administration in CDM+. Only the creator of the record can edit or delete a record.



## Pastoral Reports

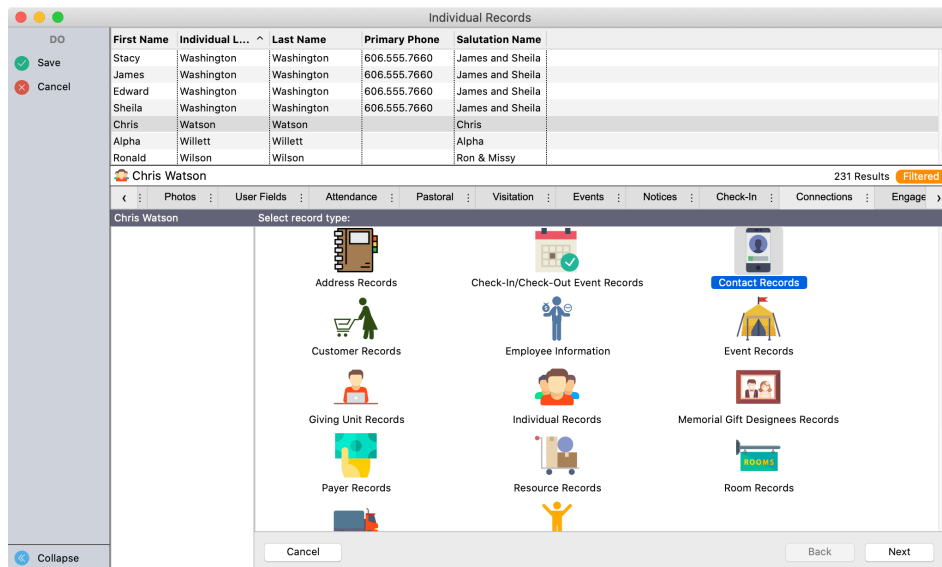
► **Reports** ► **Membership Reports** ► **Listings and Exports** ► **Pastoral Records Listing**

Search on key words to locate records using the “Comment” field and the “Contains” modifier in addition to standard searches on date fields, name fields, etc.



## Connections

Throughout the program, there is a tab called "Connections". Under the Connections Tab, 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

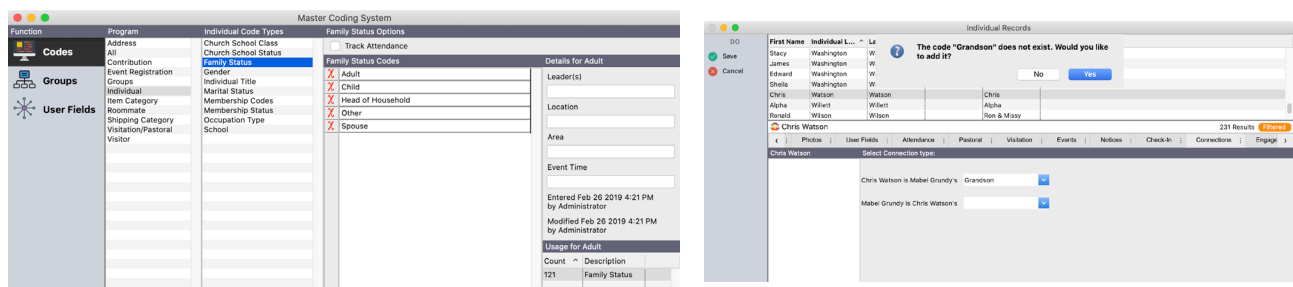
Relationships among individual records can easily be tracked and linked giving the user the ability to click and expand records to reveal the "web" of connections.

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

- |             |         |             |
|-------------|---------|-------------|
| Mother      | Sister  | Stepmother  |
| Father      | Brother | Stepfather  |
| Grandmother | Aunt    | Stepbrother |
| Grandfather | Uncle   | Stepsister  |

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

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.

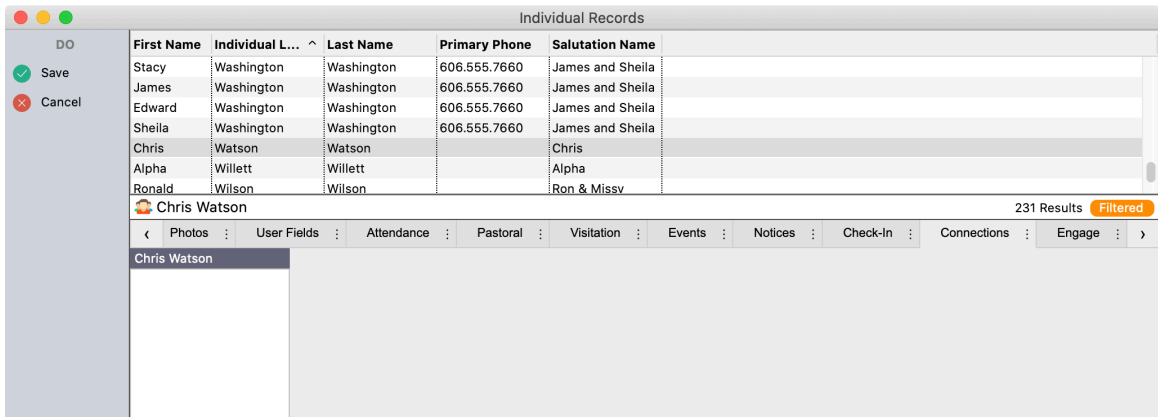


## Entering a Family Connection

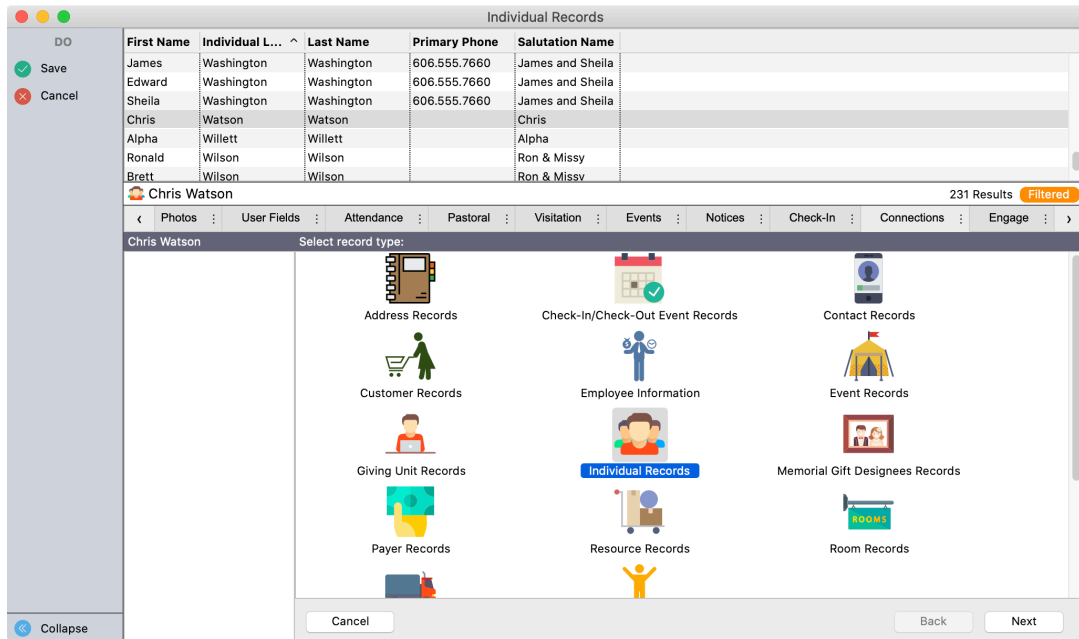
### ►Program ►Membership ►Individual Records ►Connections Tab

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

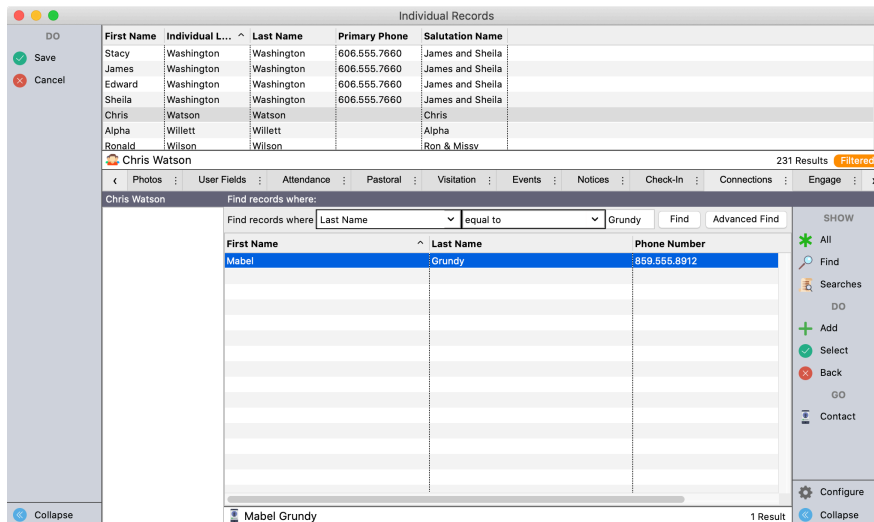
1. Change Record (located on left hand side)
2. New (located under the individuals name)



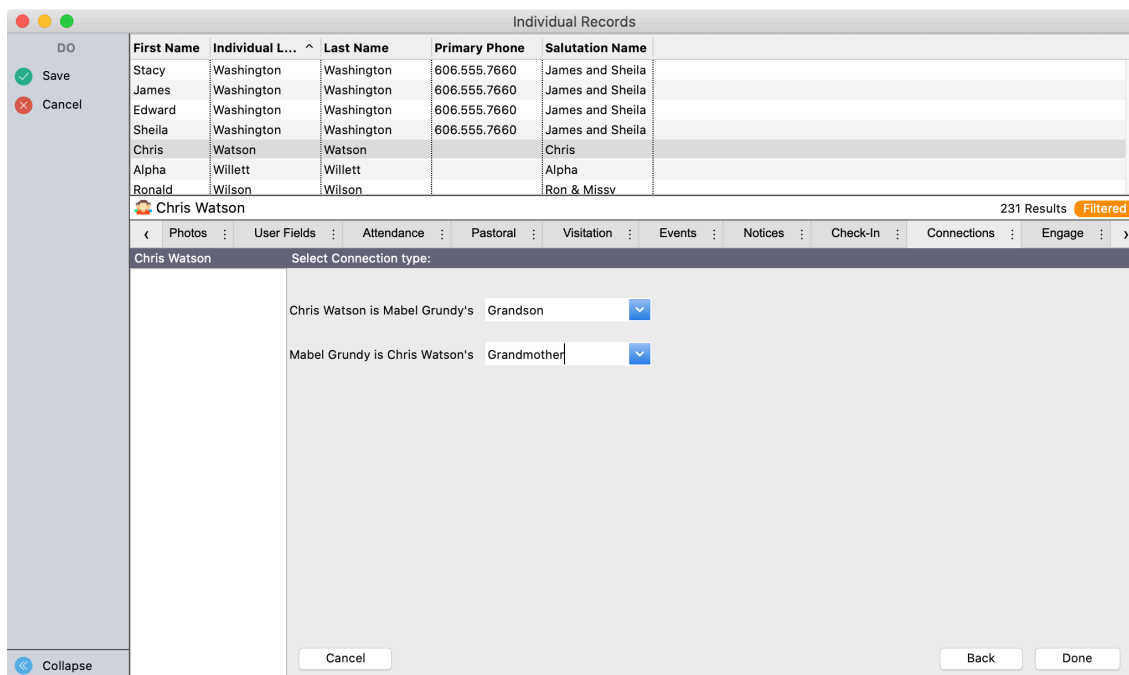
3. Select the type of connection to add, in this instance, "Individual Records"



4. Locate the individual to connect.



5. After selecting an individual, click Next in the lower right hand corner.
6. Enter or use the dropdown arrow to choose the connection code to use.



7. Click Done in bottom right-hand corner.
8. When finished adding all connections, click Save on the left sidebar.

## 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.

Individual Records

First Name	Individual L...	Last Name	Primary Phone	Salutation Name
Nathan	Deweese	Deweese	606.555.0104	Nathan and Cha...
Rose	Deweese	Deweese	606.555.0104	Nathan and Cha...
Elizabeth	Disney	Disney	606.555.1739	Mike & Susan
Susan	Disney	Disney	606.555.1739	Mike & Susan
Michael	Disney	Disney	606.555.1739	Mike & Susan
Robin	Disney	Disney	606.555.1739	Mike & Susan
Jane	Doe	Doe		John and Jane

231 Results Filtered

Mike Disney

Address (3)  
Liz Disney  
Robin Disney  
Susan Disney

Company (1)  
Consolidated Copier Company

Daughter (2)  
Liz Disney  
Robin Disney

Wife (1)  
Susan Disney

Individuals that have online credentials cannot be deleted. Clear or transfer the credentials first.

Individual Records

First Name	Individual L...	Last Name	Primary Phone	Salutation Name
Nathan	Deweese	Deweese	606.555.0104	Nathan and Cha...
Rose	Deweese	Deweese	606.555.0104	Nathan and Cha...
Elizabeth	Disney	Disney	606.555.1739	Mike & Susan
Susan	Disney	Disney	606.555.1739	Mike & Susan
Michael	Disney	Disney	606.555.1739	Mike & Susan
Robin	Disney	Disney	606.555.1739	Mike & Susan
Jane	Doe	Doe		John and Jane

231 Results Filtered

Mike Disney

Susan Disney

Address (3)  
Liz Disney  
Robin Disney  
Susan Disney

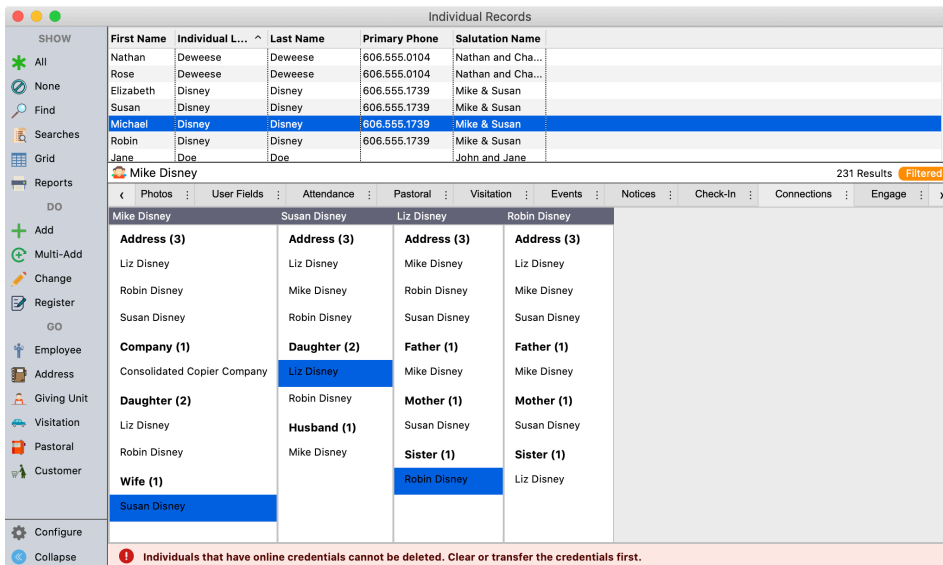
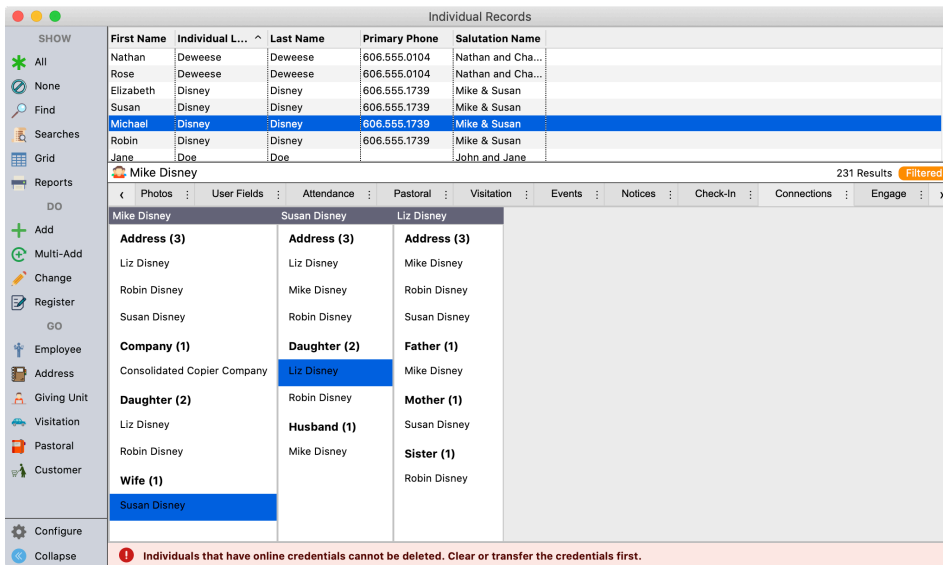
Company (1)  
Consolidated Copier Company

Daughter (2)  
Liz Disney  
Robin Disney

Husband (1)  
Mike Disney

Wife (1)  
Susan Disney

Individuals that have online credentials cannot be deleted. Clear or transfer the credentials first.



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                 |                         |                 |