

Getting Started - Contributions

An organization depends upon the stewardship of its people. They depend on and expect the organization to be a good steward of its resources. CDM+ supports the work of the individuals who each week have the responsibility of accurately recording contribution giving. After contributions entry is completed, a variety of effective reports providing powerful analysis of the financial support of the organization are immediately available. An unlimited number of user-defined designations for contributions (Giving Funds) can be recorded in CDM+. These Giving Funds are printed directly on Contribution Statements and reports to show exactly how much money was given for each designation for the selected time period. Contribution Statements for givers may be printed at any time and report an accurate account of their gifts to the organization.

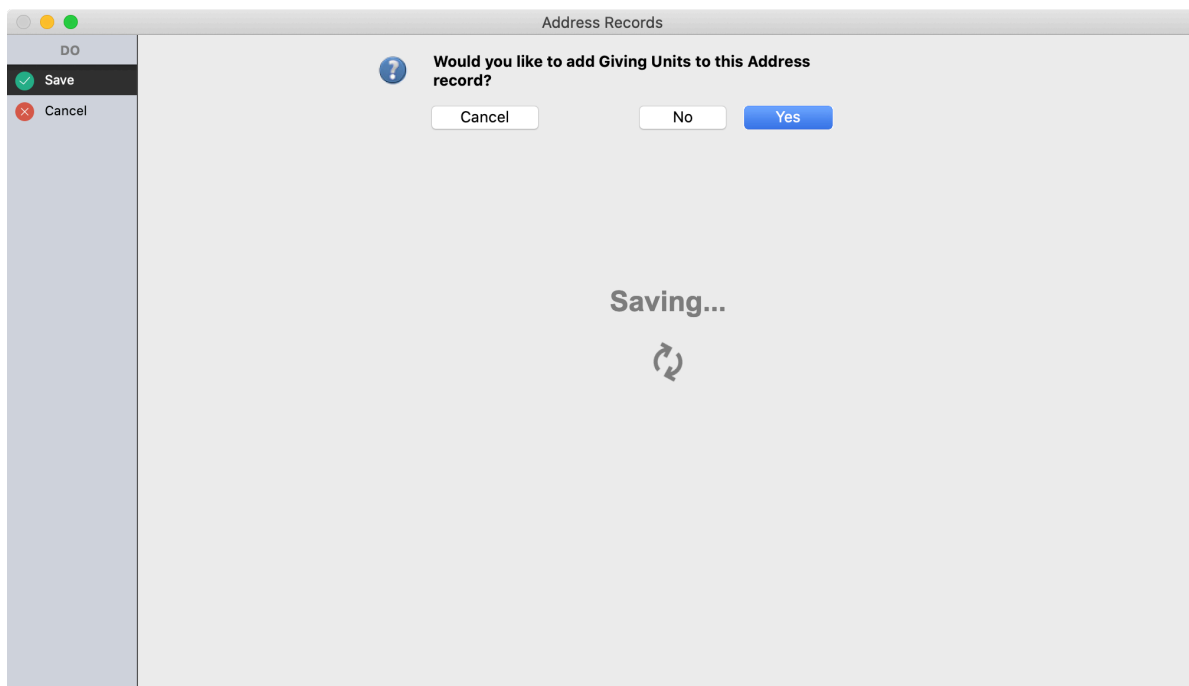
Giving Unit Records

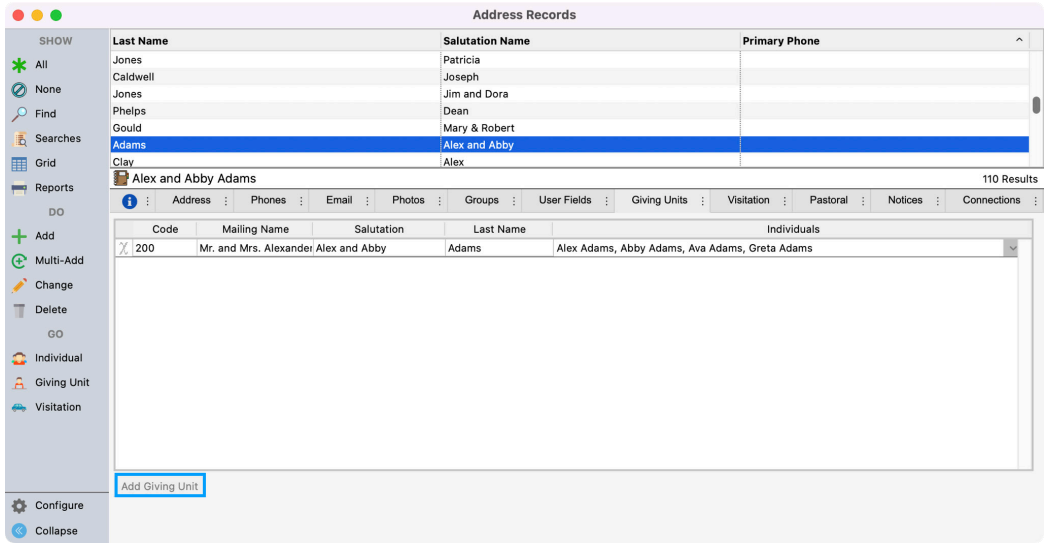
Before contributions can be entered in CDM+, a **Giving Unit Record** must be created for each giver. In order for a contribution to be posted in CDM+, a **Giving Unit Code** must be established.

Giving Unit Records are attached to Address Records and may also be linked to Individual Records. Giving Unit Records are accessible via “jump” buttons on the Individual Record and Address Record, as well as from the Contributions program menu and toolbar.

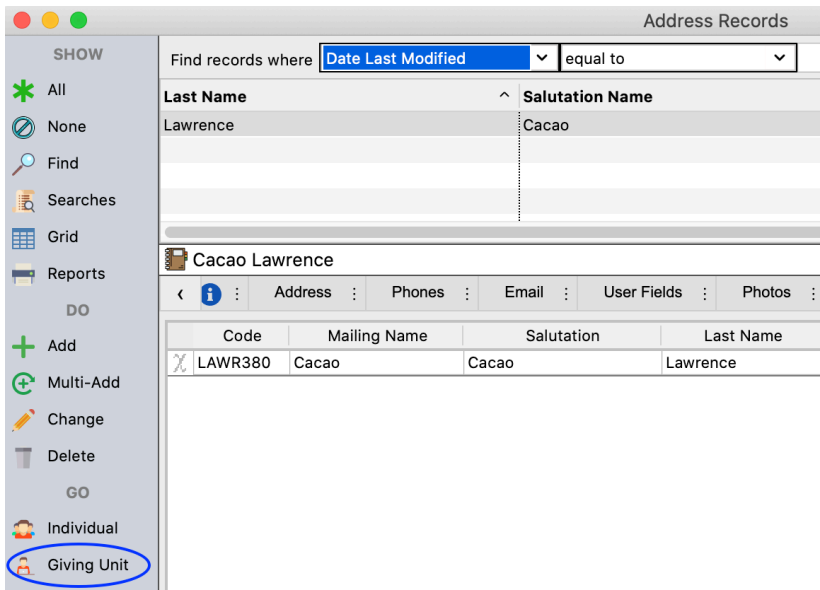
Creating Giving Unit Records

When creating a new Address Record, you will be automatically prompted to create a Giving Unit Record. A Giving Unit Record can also be created later, in Address Records, by going to the Giving Unit tab.





►Program ►Membership ►Address Records/Individual Records ►Giving Unit jump button



You are not limited to one Giving Unit Record per household. To add an additional Giving Unit Record linked to this Address Record, select Add Giving Unit on the bottom left.

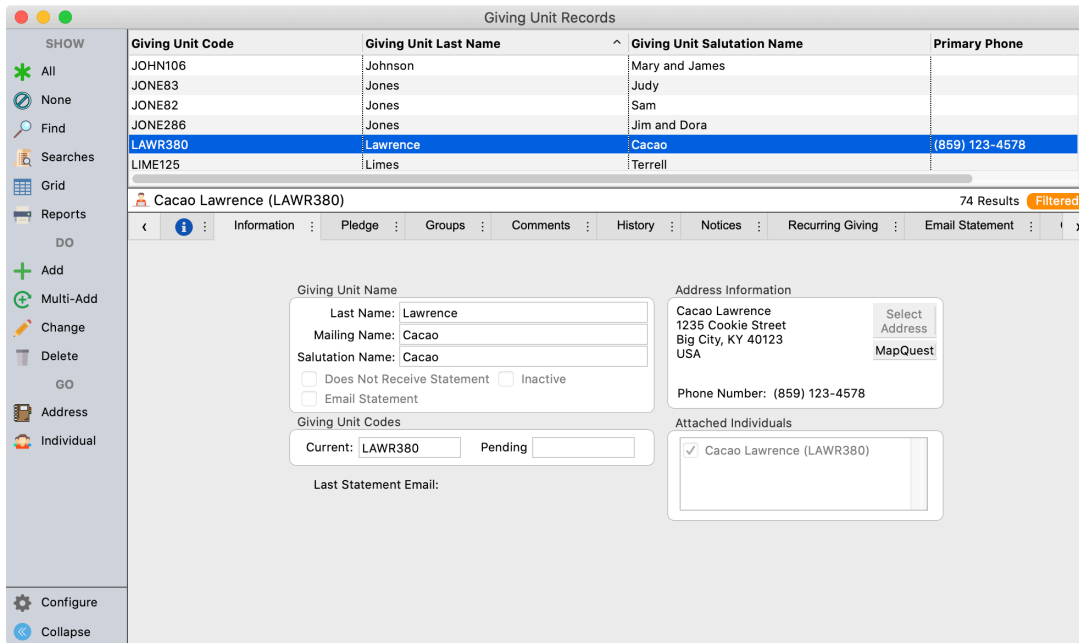
Current Giving Unit Code will be auto-filled by CDM+ and defaults to first four characters of the last name plus a number.

The Donor's Name entered here will be used on the Giving Statement and other Contribution Reports.

NOTE: If you don't have permissions to access Contributions, or if you choose to hide the Giving Unit tab on the Address Record, you will not be prompted to add a giving unit when adding an address record.

Giving Unit Records

► Program ► Contributions ► Giving Unit Records



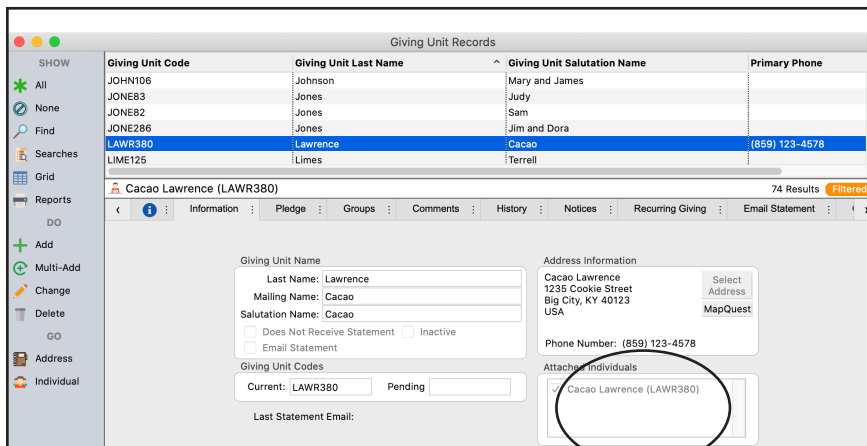
Information tab

Click Add or Multi-Add to enter a new Giving Unit Record; click Change to edit an existing record. Name entered here will be used on the Giving Statement and other contributions reports.

Check the **Does Not Receive Statement** box to block a Giving Statement from printing for this record.

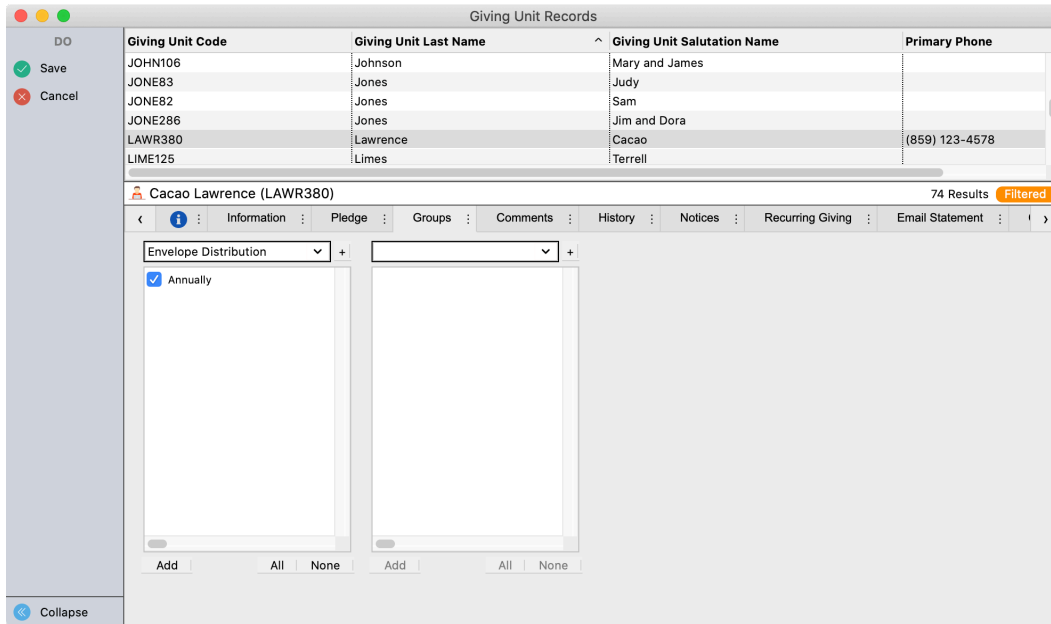
Check the Email Statement box to select this giving unit to receive a Giving Statement via email; selecting to receive an Email Statement means the giver by default will not receive a printed (paper) statement. However, an override of this default may allow a paper statement to be printed.

Check the box next to a name or names in the Attached Individuals list to link the Giving Unit record to an Individual Record or Records. This is critical when using Engage Giving for recurring giving and for any sort of analysis such as determining the giving from individuals aged 30-45 or the giving from your board members. An Individual Record may be linked to ONLY one Giving Unit Record, but multiple Individual Records may be linked to the same Giving Unit Record as is the case with married couples giving jointly.



Groups tab

User-defined codes may be defined allowing for grouping of giving units for searching and reporting purposes. Examples may include a group of giving units that give by EFT (electronic funds transfer); or a group of giving units that should not receive envelopes. Codes may be set up in Master Coding System or added during entry.



As with all other Group codes, such as Address Record or Individual Record groups, Giving Unit Groups can be used in Finds and Advanced Finds/Searches, and various reports and exports to filter results.

History tab

In order for information to be displayed on the History tab, go to

► **Program** ► **Contributions** ► **Update History**

Make sure you have all the years listed - if not, you can add it here. When finished, you can then re-open the Giving Unit Records and return to the History tab. View the giving unit's giving history here. Click on history description to see detail by fund. Command-click (Mac) or Control-click (Windows) to select multiple years to view—great for comparison.

The screenshot shows the 'History' tab for 'Alex and Abby Adams (200)'. It features a 'Summary' table and a 'Detail' table. The 'Summary' table has columns for 'Description' and 'Total Giving'. The 'Detail' table has columns for 'Giving Fund' and 'Current'.

Description	Total Giving	Giving Fund	Current
Current	0.00	General Fund 2023	0.00
2022	1300.00	Tithes	0.00
2021	600.00	Missions	0.00
2020	400.00	Building Fund	0.00
2019	1198.00	Capital	0.00
2016	0.00	FTH	0.00
		Memorial	0.00
		A/C Fund	0.00
		Recreation Teams	0.00
		Camps	0.00
		Missionaries	0.00
		Organ Fund	0.00
		Blanket Sunday Off.	0.00
		Christmas Offering	0.00
		Easter Offering	0.00
		Needy Families	0.00
		Thanksgiving Offering	0.00
		Respon...	0.00

Pledge tab

View pledge history for the giving unit. Can edit existing pledges, but cannot enter new pledges here.

Comments tab

Note pad area to record information. Example – record conversation you might have with giver after statements are distributed.

Email Statements tab

Cacao Lawrence (LAWR380) 74 Results Filtered

Use	Address/Individual	Email	Notes
<input checked="" type="checkbox"/>	Family	dean@suran.com	
<input checked="" type="checkbox"/>	Family	cacaolcrk@email.com	

Email Maintenance can be used to select multiple Giving Unit Emails at one time.

Check the box beside the email address to which the giving statement should be sent; multiple email addresses may be selected for the same giving unit.

You can also do this in the Email Maintenance window.

► Program ► Contributions ► Giving Unit Email Maintenance

Mike & Susan Disney (102) 52 Results Filtered

Use	Address/Individual	Email	Notes
<input type="checkbox"/>	Family	disneyfamily@aol.com	E-mail address
<input checked="" type="checkbox"/>	Mike Ray	mike.disney@suran.com	E-mail address
<input checked="" type="checkbox"/>	Susan Michelle	susand234@aol.com	E-mail address

Notices tab

Displays a list of all Notices (letters, cards, or e-mails) that have been sent to the giving unit's mailing or email address. View, Resend, or Delete saved Notices from this tab.

NOTE: This requires setup in Preferences-System to activate this pane and the tracking of notices.

► CDM+(Mac)/File(Windows) ► Preferences ► CDM+ System ► Contributions ► Notice icon

Mike Disney (MIKED) 74 Results Filtered

Type	Description	Date Sent	Name	Email
Email	Contribution Notice	Sep 8 2023 3:29 PM	Mike Disney	noreply@suran.com
Email	Contribution Notice	Sep 8 2023 3:29 PM	Susan Disney	susand234@aol.com
Email	Contribution Notice	Sep 27 2019 5:38 PM	Mike Disney	mike.disney@suran.com
Email	Contribution Notice	Sep 27 2019 5:38 PM	Susan Disney	susand234@aol.com

Recurring Giving tab

Set up repetitive contributions for givers. These contributions may be scheduled Weekly, Bi-Weekly, Monthly, Bi-Monthly, Quarterly, Annually, or at other intervals and feature full gift breakdown and payment options.

The screenshot shows the 'Recurring Giving' tab for 'Mike Disney (MIKED)'. The interface includes a navigation bar with tabs for Information, Pledge, Groups, Comments, History, Notices, Recurring Giving (selected), and Email Statement. The main content area displays a list of recurring gifts:

Amount	Start Date	Schedule	End Date
100.00	Starting on Aug 1 2017	and scheduled monthly	
General Fund 2017 100.00			
150.00	Starting on Aug 15 2017	and scheduled Monthly	ending Dec 15 2017
Building Fund 2017 75.00, Camps 75.00			
300.00	Starting on Sep 1 2019	and scheduled Weekly	ending Dec 29 2019
Missions 300.00			

Connections tab

The connections tab allows you to define different relationships to giving units from many areas of CDM+. For example, if you want to identify all of the giving units that work for a particular employer in your vendor file then this would be represented here.

The screenshot shows the 'Connections' tab for 'Mike Disney (MIKED)'. The interface includes a navigation bar with tabs for Comments, History, Notices, Recurring Giving, Email Statement, Connections (selected), User Fields, and Engage. The main content area displays a list of connections under the heading 'Address (3)':

- Liz Disney
- Robin Disney
- Susan Disney

User Fields tab

The user fields can store any other information that would be pertinent to the giving unit. For example, if a Charitable Gift Endowment was established the instructions on its use can be recorded here.

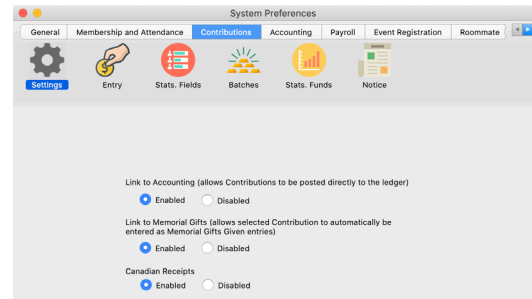
The screenshot shows the 'User Fields' tab for 'Mike Disney (MIKED)'. The interface includes a navigation bar with tabs for Comments, History, Notices, Recurring Giving, Email Statement, Connections, User Fields (selected), and Engage. The main content area displays a table with columns for 'Type' and 'Information':

Type	Information
Charitable Gift Instructions	The endowment fund established by the Disney family is to be used for the music

Contribution Setup

► CDM+(macOS)/File(Windows) ► Preferences ► CDM+ System ► Contributions tab ► Settings icon

Link to Accounting – enabling this option allows for the direct posting of batch contribution totals to the Accounting Ledger. When this link is “Enabled”, the option—Post Contributions to Ledger—appears on the Contributions menu. After completion of the batch entry, go to this menu item and execute the batch posting to the Accounting Ledger (► Contributions ► Post Contributions to Ledger). This will create a Deposit ledger entry to the correct accounting ledger accounts and for the correct amounts.



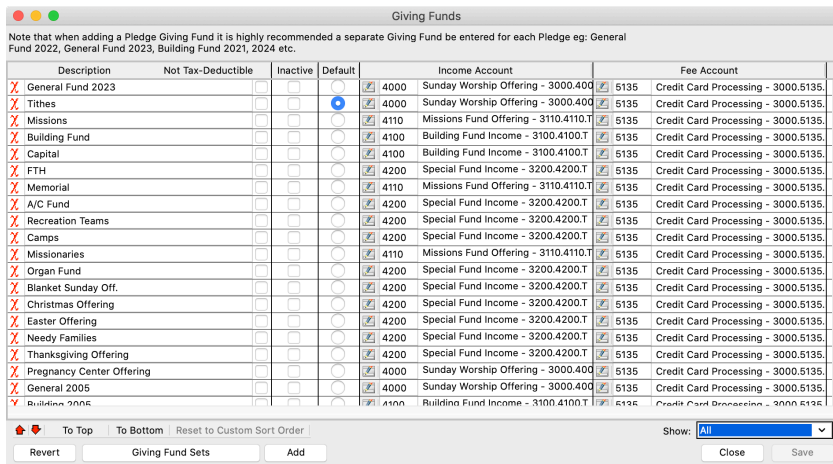
Link to Memorial Gifts – allows the memorial contribution to automatically create a memorial gift record.

Canadian Receipts – enabling this option will add a special report that creates Contribution statements that comply with government standards for reporting contributions to Canadian non-profit organizations.

Giving Funds

Setting up Giving Funds in Contributions

► Program ► Contributions ► Giving Funds



The order that Giving Funds appear in this window from Top to Bottom is the order the Giving Funds will display throughout Contributions and on Contributions reports. This order may be changed by highlighting a link and using the red Up and Down buttons.

Giving Funds are user-defined designations for contributions. Each organization defines the Giving Funds needed based on the purposes/designations for which gifts are received.

- If you are entering pledged funds, you must create separate Giving Funds for each pledge period. For example, if people make pledges for the 2022 General Fund and may also make pledges for the 2023 General Fund, you should create a 2022 General Fund and a 2023 General Fund. Likewise, if there is a building campaign that people pledged to give to over a three year period, you might have a Building 2020–2023 Fund. In this way, you are sure to credit donations against the pledge made.
- One fund may be designated as the default for all giving. This is usually your current General Fund. Turn

on the “default” radio button for the desired fund.

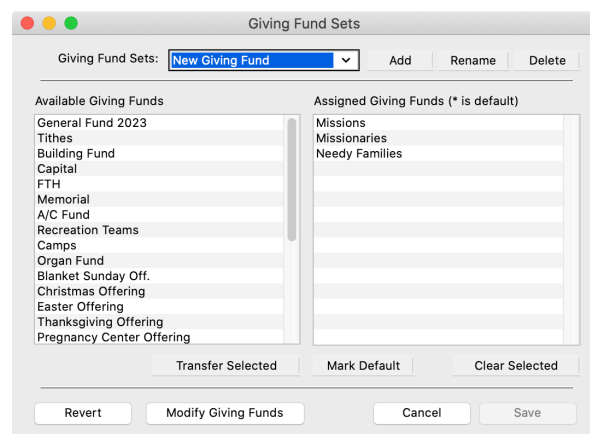
- Check the **Not Tax-Deductible** box to flag contributions to a fund as non-deductible giving. The Not Tax-Deductible checkbox can be overridden at the time a donation is entered.
- Check the **Inactive** checkbox as required to flag this fund as inactive. A Giving Fund marked as Inactive will not appear in the Giving Fund drop-down lists in Batch Contributions Setup nor Contributions Reports.
- **Income Account** – links an income account in the Ledger to this Giving Fund. When linked, posting contributions credits this income account and debits the asset number recorded on the Contributions Entry screen.
- **Fee Account** – links online giving fees to specified expense account.
- An unlimited number of giving funds can be established as necessary.
- If linking to Accounting, use caution when dealing with “Gifts-in-Kind” and gifts of stock. Make sure and mark these Giving Funds as Not Tax-Deductible. When entering Contribution Records for these type of gifts, make sure and put a checkmark in “Do Not Post to Ledger”.

Setting up Giving Fund Sets in Contributions

►Program ►Contributions ►Giving Fund Sets

For ease of contribution entry and reporting, Giving Funds can be grouped into Giving Fund Sets.

- Unlimited number of Giving fund sets may be created.
- Same Giving Fund may be included in multiple Giving Fund Sets. For instance, General Fund may be included in the “Normal” Giving Fund Set as well as in the “Lenten” Giving Fund Set.
- Giving fund sets can determine which funds will automatically display in the Contributions Entry screen.
- It is always possible to use a Giving Fund not in the chosen Giving Fund Set during Batch Contributions Entry.



Click the **Modify Giving Funds** button to open a list of all Giving Funds and make your selection. A Giving Fund Set simply consists of those giving funds to which you are most likely to enter donations during a Batch entry.

Contribution Entry

1. **Batch Contribution Entry** method – is better suited for the bulk entry of donations from events such as Sunday morning collection.
2. **Contribution Records** method – is better suited for the entry of a small number of contributions.

Batch Contributions Entry method

►Program ►Contributions ►Batch Contribution Entry

The Batch Contributions Entry window is the quickest and easiest way to enter contributions in CDM+.

A batch is simply a group of contributions defined in any number of ways. In a small-to-medium sized church, all offerings may be entered as a single batch. In a larger church, contributions may be grouped in smaller quantities.

Batch entry

- makes it easier to check accuracy of data entry
- allows work to be shared among several people
- reports can be generated by batch
- common information to all batches include asset, offering, and deposit dates
- create batch codes to differentiate multiple batches for the same date

Setting Batch Entry Preferences

►CDM+(Mac)/File(Windows) ►Preferences ►CDM+ System ►Contributions ►Entry

Specify settings during entry

- how givers' names appear; Mailing Name or Salutation.
- whether to automatically load pledge information
- enable batch date protection

►CDM+(Mac)/File(Windows) ►Preferences ►CDM+ System ►Contributions ►Batches

Specify how batches appear

- including how many batches to show on the entry window
- whether to show or hide control methods and batch codes
- auto-load giving fund line for batch entry

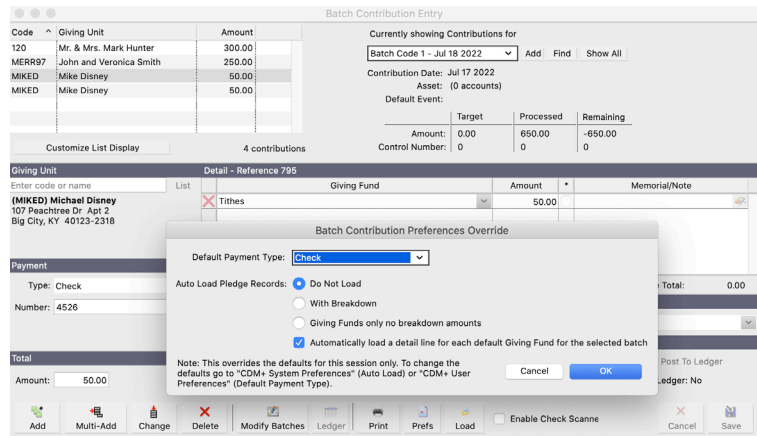
►CDM+(Mac)/File(Windows) ►Preferences ►CDM+ User ►Contributions ►Entry

- Select default payment type
- link to check reader/scanner

Changing Preferences in the middle of batch entry is possible.

Prefs button – use to quickly change certain entry preferences such as default payment type, auto-load pledge information, and automatically create detail line for selected funds. Very helpful if you enter all checks first and then enter all cash contributions.

Likewise, if you separate and enter envelope numbers first followed by entries by name, this may save you some extra keystrokes.



Check Reader

A Check Reader can read the MICR account information on a check. Using this device will:

- reduce the number of key strokes required to make an entry
- improve accuracy of entry (especially when givers have similar names)
- increase the speed of entry.



Check Readers supported for use with the CDM+ Contributions program may be purchased through the CDM+ Sales Department. Call 877-891-4236 or email sales@cdmplus.com for more information.

Creating a Batch

► Program ► Contributions ► Batch Contribution Entry ► Add

When you select Add, the Batch Contribution Setup window will appear.

Enter appropriate information for this particular group of contributions – i.e., offering date, deposit date, which asset [checking account, savings account] to post to, a predetermined total of all contributions if known, and choice of a Giving Fund Set.

Code	Giving Unit	Amount
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Customize List Display 0 contributions

Currently showing Contributions for: [Dropdown] Add Find Show All

Contribution Date: Asset: Default Event:

	Target	Processed	Remaining
Amount:	0.00	0.00	0.00
Control Number:	0	0	0

Giving Unit: [Field] Detail: [Table with Giving Fund, Amount, Memorial/Note]

Payment: Type: [Dropdown] Add Line Item Total: 0.00 *Not Tax Deductible Total: 0.00

Total: Amount: 0.00

Enable Check Scanner [Buttons: Add, Multi-Add, Change, Delete, Modify Batches, Ledger, Print, Prefs, Load, Cancel, Save]

Batch Code	Deposit Date	Contribution Date	Default Event	Asset	Amount	Control Method/No. (*)	Giving
1	Sep 4 2023	Sep 3 2023	[Dropdown]	[Icon]	0.00	0	[Dropdown]

Revert Add About Control Methods Cancel OK

Giving: [List of Giving Funds]

Entering a Batch

► Program ► Contributions ► Batch Contribution Entry

Code	Giving Unit	Amount
LAWR380	Cacao Lawrence	100.00

Giving Unit	Detail	Giving Fund	Amount	Memorial/Note
(DELV21) Albert & Camille Delvecchio 1660 Island Dr Big City, KY 40123	<input checked="" type="checkbox"/>	General Fund 2023	50.00	
	<input checked="" type="checkbox"/>	Missions	100.00	
	<input checked="" type="checkbox"/>	Building Fund	25.00	

Total	Amount	*Not Tax Deductible Total
	175.00	0.00



Flag this section or copy these instructions to use as reference when entering Batch Contributions. These are also a helpful starting point for training a new person to enter contributions.

1. To begin the batch process, click the **Multi-Add** button at the bottom of the window.
2. Enter either the giver's code or giver's name.
3. If using codes, enter the appropriate Giving Unit Code or click the List button to lookup and select from a drop down list.
4. If using names, enter as much or as little of the giver's name to match or to narrow, in which case, you select from a drop down of matches.
5. If Payment Type is set in Preferences to Cash, the prompt will move to the Total Amount field.
6. If Payment Type is NOT set to Cash, select the appropriate type from the drop down and enter the necessary information. **NOTE:** You can change the preference of which type will default by clicking on the Prefs button on the bottom of the screen. You can also change the default for every batch through your User Preference settings.
7. Enter total amount, and then the breakdown by Giving Fund.
8. If linked to Memorial Gifts, can select an established Memorial or may create a new one.
9. Enter any appropriate notes.
10. Use the Entry Memo area to note name and address of any ZVISITOR type contributions.
11. Click the **Save** button to record this entry and move to the next.
12. When you have finished all entries, click the **Save** button to record the last entry and then click the **Finish** button to complete the batch entry.
13. Click the **Print** button to print a Daily Report of Contributions.

Daily Reports

►Program ►Contributions ►Batch Contributions Entry ►Print

OR

►Reports ►Contribution Reports ►Daily Reports ►Daily Report of Contributions

Daily Report of Contributions

Run this report after each entry session and file. Acts as a check on the accuracy of your input. If inaccuracies are found during review, go back to the batch, correct the entry or entries, and reprint the report. Lists all contributions by Giver, Type, Total gift, and Giving Fund. Select report by either deposit date, entry date, or batch code. Sort by Giving Unit Code, Giving Unit Name, or Entry Order. Totals by Payment Type and Giving Fund.

Daily Report of Giving
Contribution Date Sep 3 2023
 First Church
 123 Main Street
 Big City, KY 40123
 606/555-1234
 Batch for Sep 3 2023

Giver	Type	Total	
Albert & Camille Delvecchio - DELV21	Check	175.00	
Cacao Lawrence - LAWR380	Check	100.00	
Grand Totals			
Type	Amount	Giving Fund	Amount
Check	275.00	General Fund 2023	100.00
		Missions	150.00
		Building Fund	25.00
		Total	275.00

Check Deposit Report

►Reports ►Contribution Reports ►Daily Reports ►Check Deposit Report

Lists contributions made by check or by cash and can be used as detail list with a check deposit ticket. Report created by deposit date, entry date, or batch code. Sort by Giving Unit Code, Giving Unit Name, Pending Code, Check Number..

Check Deposit Report
Deposit Date May 30 2022
 First Church
 123 Main Street
 Big City, KY 40123
 606/555-1234

All Events
 All Assets

N/A

Name	Amount	Check Number
Charles & Ruby Cook - 108	400.00	910
Mr. and Mrs. Alexander Adams - 200	300.00	320
Mr. and Mrs. Ryan Cassidy - CASS40	500.00	620
Albert & Camille Delvecchio - DELV21	1,200.00	6245
Albert & Camille Delvecchio - DELV21	100.00	
Mr. and Mrs. Jonathan Fields - FIEL47	300.00	320
Mr. and Mrs. Douglas Herman - HERM39	200.00	710
Kevin Lowe - LOWE112	600.00	
Stewart & Nancy Maslowski - MASL20	465.00	
Michael Disney - MIKED	350.00	483
Mr. and Mrs. Steven Shank - SHAN55	625.00	
Mr & Mrs Roger Smith - SMIT72	700.00	
Me Stokes - STOK78	600.00	

Daily Contribution Breakdown

►Reports ►Contribution Reports ►Daily Reports ►Daily Contribution Breakdown

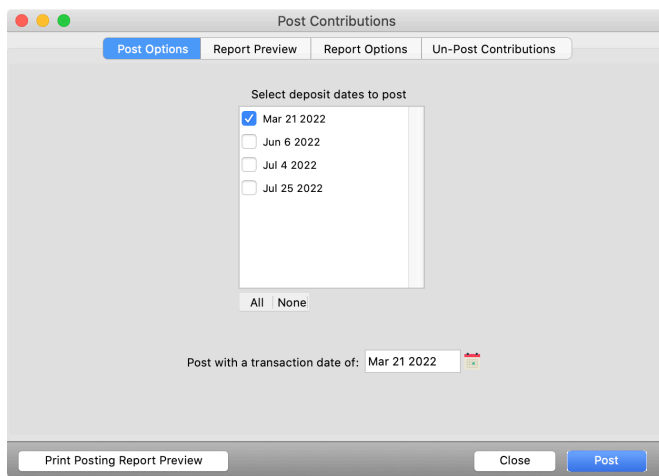
Lists contributions for a selected deposit date, entry date or batch code. Lists all gifts by Name/Code, Total amount, Type (check or cash), and Giving Fund. Totals by Payment Type and Giving Fund.

Post Contributions

If you also own CDM+ Accounting and have linked Contributions to Accounting on the **System Preferences** window, the **Post Contributions to Ledger** menu item will appear on the Contributions menu.

When you have finished entering contributions, select **Post Contributions to Ledger** from the Contributions menu.

►Program ►Contributions ►Post Contributions to Ledger



Turn on the checkbox next to the deposit dates of contributions that you wish to post to the ledger. Enter the transaction date either by typing or by clicking on the calendar icon and double-clicking a date.

NOTE: Checked dates will post together on one ledger entry.

If you are making multiple deposits on one day and do not want the deposits combined into one ledger entry, post Contributions after entering each Contribution Batch.

You may preview the posting report by clicking on the **Report Preview** tab or by clicking on the **Print Posting Report Preview** button at the bottom of the window. Both of these options will allow you to check the posting report on your screen before printing the report. Clicking the button also gives you the option to send the preview report to your printer. If you see an error in the report, correct it before posting the deposit.



Click on the **Report Options** tab and specify the header, alignment, footer, font, and date format options for the posting report.

After review of the Report Preview for accuracy, click the **Post** button to execute the posting of the batch totals to the Accounting Ledger.

Print the final posting report after the posting is complete.

Viewing Contributions in CDM+ Mobile

The CDM+ Mobile app for iOS and Android provides the capability to view a 12 month rolling detail listing of an Individual's contributions. Access to this can be controlled through the administration of the mobile application.

Note: CDM+ Mobile is only available as part of the CDM+ Data Hosting Service and is included in the hosting charge.

The screenshot shows the CDM+ Mobile app interface. On the left is a list of individuals under the 'Adult Choir' group. On the right, a table displays the contribution history for Susan Disney. The table has four columns: Giving Fund, Contribution Date, Amount, and Check Number. The 'Contributions' icon is highlighted in the bottom navigation bar.

Giving Fund	Contribution Date	Amount	Check Number
Tithes	Feb 22 2023	200.00	9856
General Fund 2018	Feb 21 2023	55.55	0
Missions	Feb 9 2023	100.00	0
Tithes	Oct 26 2022	25.00	0
Needy Families	Oct 8 2022	25.00	0
Missionaries	Oct 8 2022	25.00	0
General Fund 2018	Oct 8 2022	75.00	0
Tithes	Sep 26 2022	25.00	0
General Fund 2010	Sep 25 2022	25.00	5260
Missions	Sep 25 2022	300.00	0

Tap the Contributions icon at the bottom of the window to view contributions for that individual over the past year.

Note: The above illustration shows CDM+ Mobile on a tablet. The phone app differs in that the Contributions icon may be found under the More tab and the list of Individuals on the left will not appear.

Restricting Access to Contributions in the CDM+ Mobile app

Access to view Individuals contributions history is set on a per-device basis when a mobile device is provisioned to connect to your CDM+ database. For more information, attend the CDM+ Mobile class or consult that section of this manual.

