

Contributions Procedures

“Special” Giving Unit Codes

Many churches wish to record and “account” for anonymous contributions and other types of cash deposited within batch contributions entry. These may be loose cash placed in the collection plate or Sunday School offerings. Other cash might include “coffee and cookie” donations, refunds or rebates, reimbursements, etc.

Before contributions can be entered in CDM+, a **Giving Unit Record** must be created for each giver. In order for a contribution to be entered in CDM+, a **Giving Unit Code** must be established. Therefore, to control these anonymous-type monies in CDM+, create an Address Record and name it such as “ZZZZZ – Misc Giving Codes” and assign it a unique mailing code so it can easily be filtered out. Create as many Giving Unit Codes attached to this same Address Record as you need. Again, name them such as “ZZLoose”, “ZZSunday School”, or “ZZRebates”. Begin the names with ZZ to assure they fall at the very bottom of alphabetic lists, not buried in with other L’s or S’s.

During batch contribution entry, simply use these Giving Unit Codes when entering the anonymous monies. You may also want to create separate Giving Funds, which are linked to the appropriate chart of account income numbers in CDM+ Accounting.

Visitor Giving Unit Codes

Visitor Giving Unit Codes are not much different from other “special” Giving Unit Codes, except in most cases they aren’t anonymous.

Repeat the above instructions, except type “Non-Member Offering” or “Visitor Offering” in the Last Name field and assign a current Giving Unit Code such as “ZZNon-Member” or “ZZVisitor.”

NOTE: These special Giving Unit Codes may all be connected to a single Address Record, with something such as “Misc. Codes” entered as the last name. Assign a Mailing Code which would NOT be included in regular mailings or directory printing.

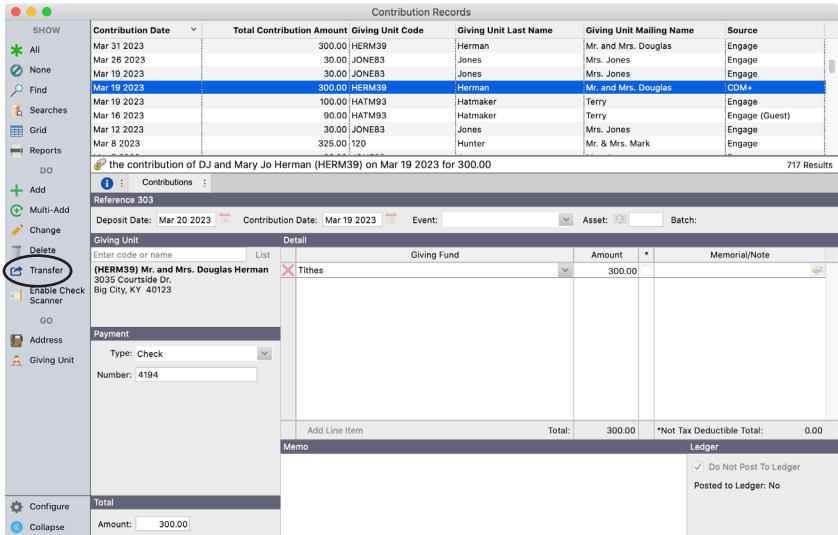
When using the Non-Member/Visitor code during contribution entry, type the giver’s name and address in the Entry Memo field on the Contribution Entry window. Later, if the giver continues to attend and contribute, he or she can be given a regular Giving Unit Code and these Non-member/Visitor contribution records can be selected and transferred to the new Giving Unit Code, making their contribution record up-to-date.

NOTE: We suggest that you enter names with last name first in the Entry Memo field; this will assist in later identification.

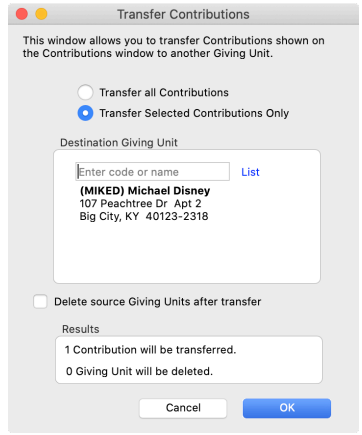
Transferring Contributions between Giving Units

► Program ► Contributions ► Contribution Records

Transfer on Contributions Records window allows transfer of detail giving records (contributions) from one Giving Unit Code to another. Use to combine husband and wife when necessary; or the reverse, to split husband and wife. Also use to move contributions from ZZVisitor code to a different Giving Unit Code.



- On Contribution Records window, find contribution entries you wish to transfer.
- Click Transfer button.

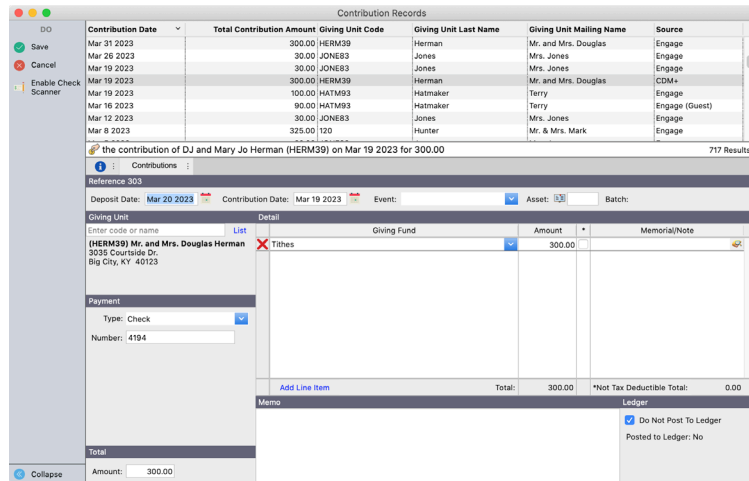


- Option to transfer all displayed contribution entries or to transfer only those selected contributions.
- If you choose Transfer Selected Contributions Only, you can select Contribution Records by Ctrl-clicking those displayed contribution entries before clicking Transfer.
- Enter destination Giving Unit Code or name, or select from list. From the list, you can “add giver”

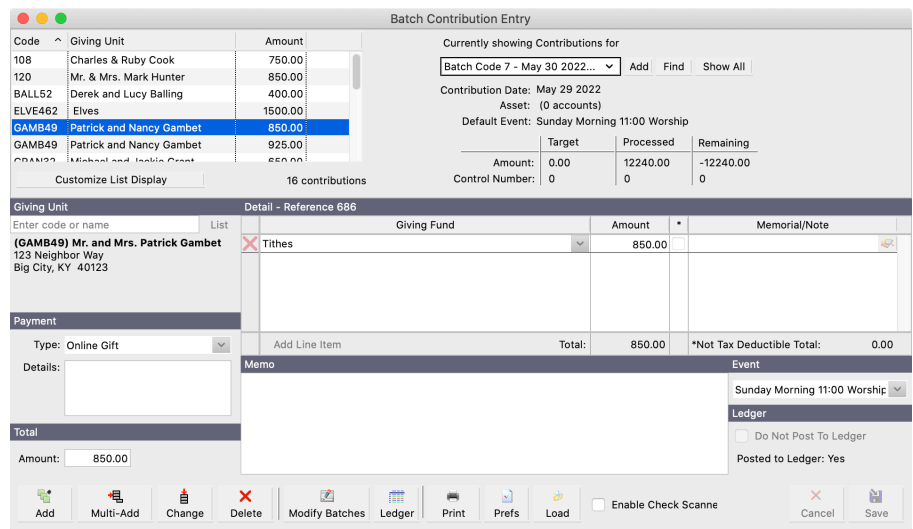
Mass Contributions Edit

►Program ►Contributions ►Contribution Records

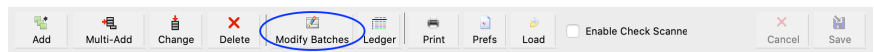
- Find the Deposit, Offering Date, or Show All.
- Edit individual entries by selecting the appropriate entry and click 'Change'.



- Delete the entries within an entire contribution batch here. To delete the batch itself, use the 'Modify Batches' function within Batch Contribution Entry.
- Changes made here **DO** make a corresponding change in Memorial Gifts



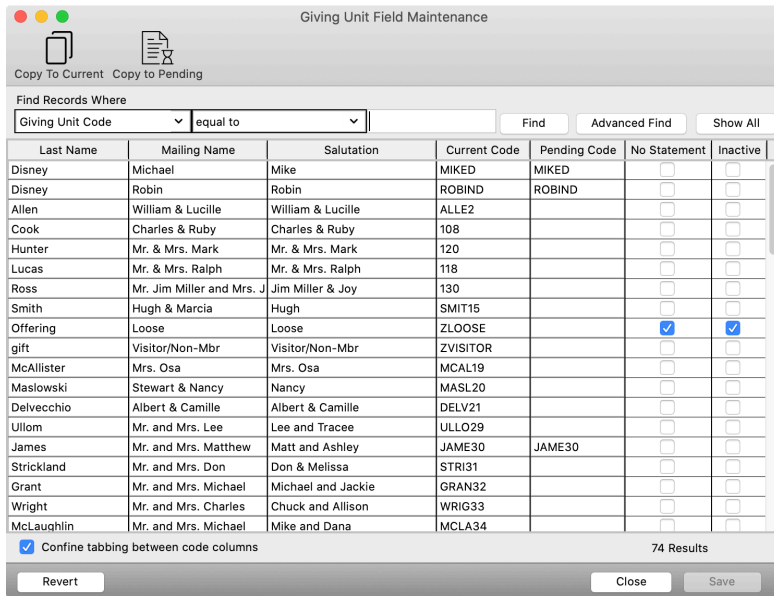
- To change deposit or contribution date for entire batch, use the 'Modify Batches' function within Batch Contribution Entry.



Updating and Editing Giving Unit Codes [in mass]

►Program ►Contributions ►Giving Unit Field Maintenance

Two different Giving Unit Codes can be maintained for each giver: the current Giving Code and the Pending Code. If you need to assign new envelope numbers for all giving units or for a segment of them, this feature allows you to quickly accomplish this.



The screenshot shows a window titled "Giving Unit Field Maintenance" with a search bar and a table of 74 results. The table has the following columns: Last Name, Mailing Name, Salutation, Current Code, Pending Code, No Statement, and Inactive. The "No Statement" and "Inactive" columns have checkboxes. The "Offering" row has both checkboxes checked. The "Revert", "Close", and "Save" buttons are at the bottom.

Last Name	Mailing Name	Salutation	Current Code	Pending Code	No Statement	Inactive
Disney	Michael	Mike	MIKED	MIKED	<input type="checkbox"/>	<input type="checkbox"/>
Disney	Robin	Robin	ROBIND	ROBIND	<input type="checkbox"/>	<input type="checkbox"/>
Allen	William & Lucille	William & Lucille	ALLE2		<input type="checkbox"/>	<input type="checkbox"/>
Cook	Charles & Ruby	Charles & Ruby	108		<input type="checkbox"/>	<input type="checkbox"/>
Hunter	Mr. & Mrs. Mark	Mr. & Mrs. Mark	120		<input type="checkbox"/>	<input type="checkbox"/>
Lucas	Mr. & Mrs. Ralph	Mr. & Mrs. Ralph	118		<input type="checkbox"/>	<input type="checkbox"/>
Ross	Mr. Jim Miller and Mrs. J	Jim Miller & Joy	130		<input type="checkbox"/>	<input type="checkbox"/>
Smith	Hugh & Marcia	Hugh	SMIT15		<input type="checkbox"/>	<input type="checkbox"/>
Offering	Loose	Loose	ZLOOSE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
gift	Visitor/Non-Mbr	Visitor/Non-Mbr	ZVISITOR		<input type="checkbox"/>	<input type="checkbox"/>
McAllister	Mrs. Osa	Mrs. Osa	MCAL19		<input type="checkbox"/>	<input type="checkbox"/>
Maslowski	Stewart & Nancy	Nancy	MASL20		<input type="checkbox"/>	<input type="checkbox"/>
Delvecchio	Albert & Camille	Albert & Camille	DELV21		<input type="checkbox"/>	<input type="checkbox"/>
Ullom	Mr. and Mrs. Lee	Lee and Tracee	ULLO29		<input type="checkbox"/>	<input type="checkbox"/>
James	Mr. and Mrs. Matthew	Matt and Ashley	JAME30	JAME30	<input type="checkbox"/>	<input type="checkbox"/>
Strickland	Mr. and Mrs. Don	Don & Melissa	STRI31		<input type="checkbox"/>	<input type="checkbox"/>
Grant	Mr. and Mrs. Michael	Michael and Jackie	GRAN32		<input type="checkbox"/>	<input type="checkbox"/>
Wright	Mr. and Mrs. Charles	Chuck and Allison	WRIG33		<input type="checkbox"/>	<input type="checkbox"/>
McLaughlin	Mr. and Mrs. Michael	Mike and Dana	MCLA34		<input type="checkbox"/>	<input type="checkbox"/>

You do not need to update ALL Giving Unit Codes at the same time. If a giver's number hasn't changed, leave the Pending Code field blank. CDM+ requires unique Giving Unit Codes, so if you mistakenly attempt to assign the same code to multiple records, CDM+ will open an error resolution box, identifying the problems, and allowing you to correct them.

This feature is helpful if you wish to re-assign adult envelope numbers at one time, children's envelopes numbers at a different time, and non-envelope givers at yet another time.

If you only need to change a few givers' codes, make those changes directly in the Giving Unit Code field on the Giving Unit Information window.

If you use envelope numbers and have giving units that are not going to receive envelopes for the next year (transferred out people, deceased people, or people who simply don't want envelopes), you will need to either archive these giving units OR change the giving unit codes in order to give the envelope number to new people. The recommended method is to simply add a letter X in front of the old envelope number. In this way, John Smith, who had envelope #123 in 2015, will have a Giving Unit Code of X123 in 2016, and you will be able to give someone else the envelope number 123. Note that all existing contributions for John Smith are not affected by this change.

Merge Giving Funds

Sometimes it is necessary to merge two separate Giving Funds into one Giving Fund, or to move contributions entries from one Giving Fund to another. CDM+ provides a Special Function for these situations. Make sure you have a current backup of your database, then call CDM+ Support for assistance in running this Special Function. Do not attempt it on your own!

History File and Updating

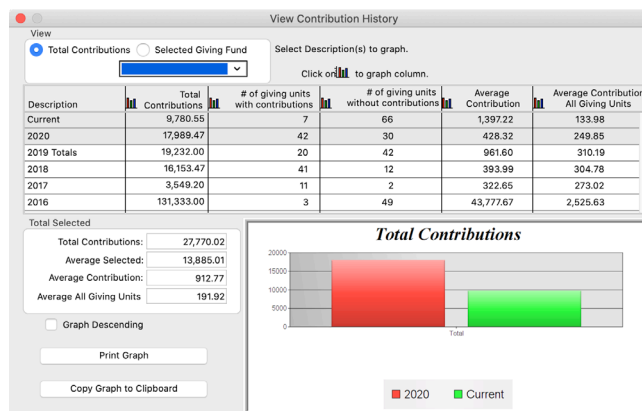
Viewing Contribution History of a Single Giving Unit

► Program ► Contributions ► Giving Unit ► History tab

View a single Giving Unit's summary record of contributions here. Click on history description to see detail by fund. Ctrl-click (Windows) or Shift-Click (macOS) to select multiple years to view—great for comparison.

Viewing Contribution History of all Giving Units (in Total)


► Program ► Contributions ► View Contribution History



Creating/Updating Contributions History File

► Program ► Contributions ► Update History

The screenshot shows the 'Update Contribution History' window. It has two main sections: 'Previous Histories' and 'History'. The 'Previous Histories' section is a table with columns for Description, Begin, and End. The 'History' section includes a 'Description' field (set to 2020), a 'Date Range' (Jan 1 2020 to Dec 31 2020), and a list of 'Selected Giving Funds' with checkboxes for various categories like Tithes, Missions, Building Fund, Capital, FTH, and Memorial. There are also checkboxes for 'Skip giving fund with no contributions' and 'Skip giving units with no contributions to any giving fund'.

 Create a Contribution History file each year as a part of the Year End Contributions process after the Contribution statements have been distributed. Don't worry – any changes made to a contribution entry after the History File for that date has been created, will update the History File.

- It is important to create your history file BEFORE performing any archive process.
- The "CURRENT" contributions period is all dates since the last History file was created. Example: If you have created a "2020" history file, then the "CURRENT" file period would include 1/1/2021 through the current date.
- Multiple history files can be created for the same date range. Example: 2020 Total Giving history; 2020 General Fund history; 2020 Building Fund history.
- History files can span several years – great for capital campaigns.
- History files can span a period less than 1 year – great for comparing first 6 months of this year against first 6 months of last year.
- In most situations, it is recommended that you do NOT check the "Skip giving units with no contributions to any giving fund" box.

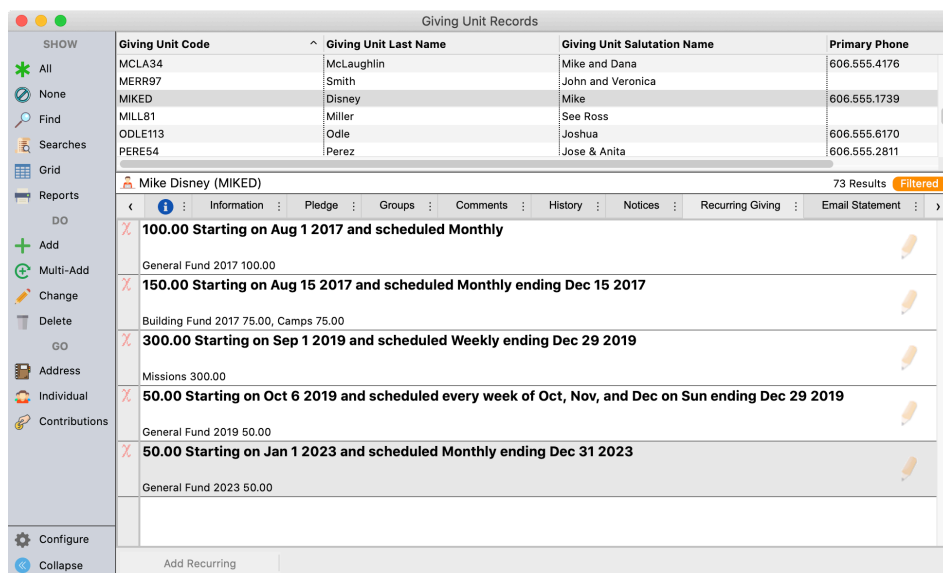
Recurring Contribution Entries

Recurring Contribution Entries allow for the control of manually entered repetitive entries or electronic giving you may receive through your bank. Recurring entries made by the member using Engage Giving or the Giver's Portal are not displayed here.

Recurring Contribution Entries not entered via the Giver's Portal are entered on the Giving Unit Information screen. All maintenance of recurring contribution entries is performed from this same window.

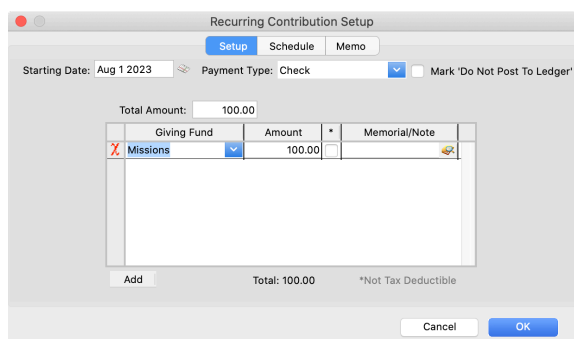
Setting Up Recurring Gifts:

►Program ►Contributions ►Giving Unit Records



Click on the Recurring Giving tab. Select the desired giving unit and enter the edit mode by clicking the **Change** button. This will activate the **Add Recurring** button at bottom left.

Click the Add Recurring button to open the Recurring Contribution Setup window. There are three tabs on the setup window – **Setup**, **Schedule** and **Memo**.



On the **Setup** tab . . .

Starting Date: Enter the first date of the recurring contribution. The schedule of repeats begins from this date.

Payment Type: Select desired payment types from your defined types. You may find it beneficial to create a new type—Recurring, ACH, EFT, or some term that will enable you to differentiate these entries.

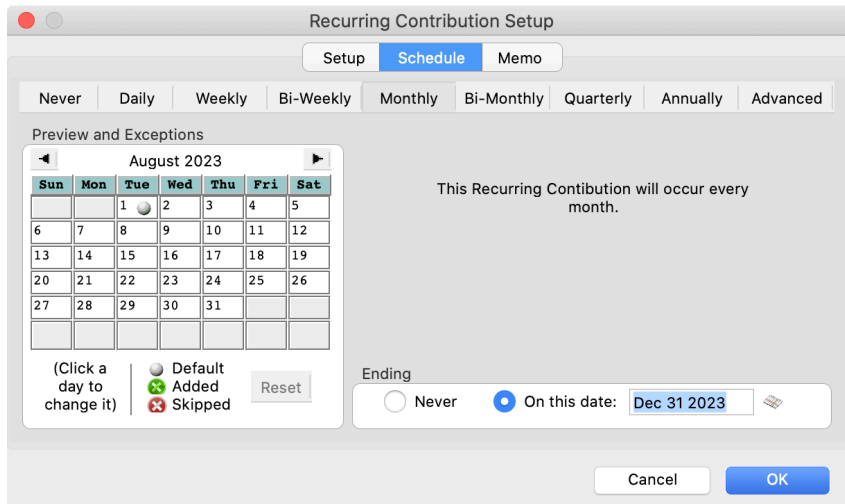
Mark 'Do Not Post To Ledger': Selecting this will cause each entry to be flagged as "Do Not Post To Ledger" and these will not be included in the Posting Process. Use this for contribution entries that are made through an external source to CDM+, such as outside ACH or EFT transactions, that have already be entered into the ledger as a deposit.

Total Amount: Just as in batch contributions entry, this is the overall total amount of the contribution.

Giving Fund Breakdown: Again, as in batch contribution entry, identify the giving funds and amounts per

giving fund. Note that you may enter a **Memorial** or **Note** in this fund breakdown as well.

Next, click the **Schedule** tab to define the frequency of this recurring entry. There are eight standard frequencies and an advanced frequency.



Never – does not repeat.

Daily – repeats each day

Weekly – repeats once each week

Bi-Weekly – repeats every 2 weeks

Monthly – repeats once each month

Bi-Monthly – repeats every 2 months

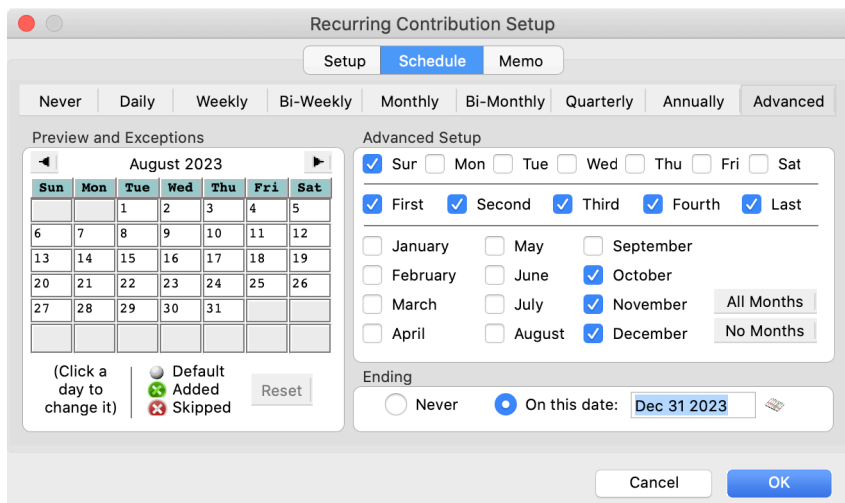
Quarterly – repeats once every three months

Annually – repeats every 12 months.

Once you have selected the desired frequency, the displayed calendar will reflect the dates of each recurring contribution. This begins with cycles based on the starting date entered on the prior **Setup** tab.

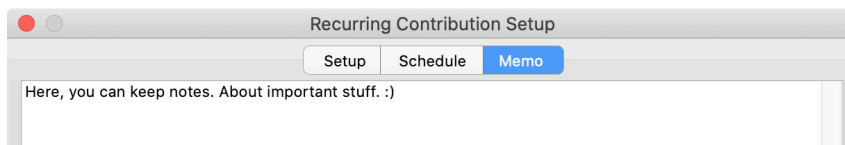
You may also enter an **Ending** date if desired.

The **Preview** calendar is a live calendar, meaning that you can mark any date to skip or you can add additional dates by clicking on those dates.



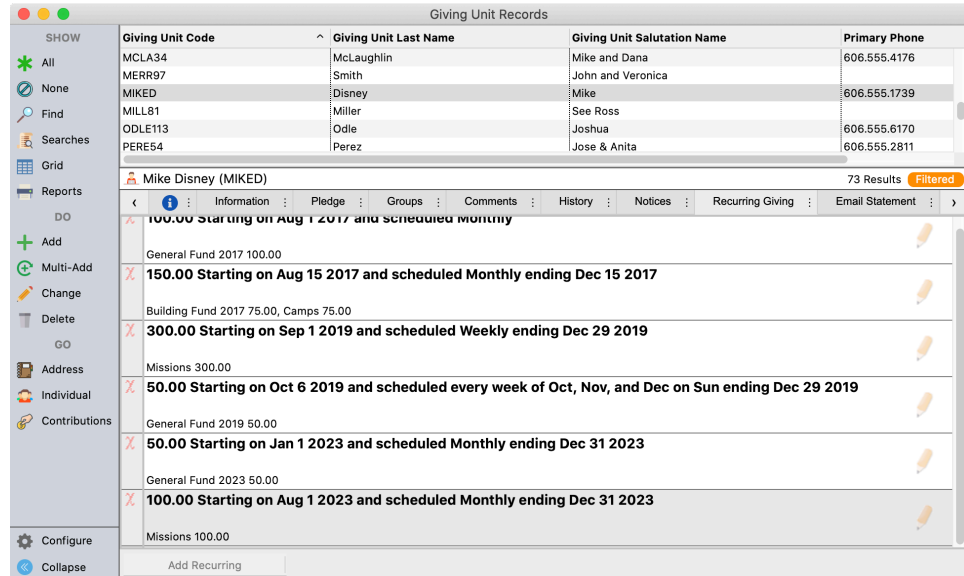
The **Advanced Schedule** tab provides you with the ability to create a custom schedule. The screen to the left illustrates a setup of a recurring contribution made on Friday of all weeks of all months.

Use the **Memo** tab to record any notes concerning this recurring entry.



After a recurring contribution is entered and saved on the **Recurring Contribution Setup** window, the Recurring Giving tab of the **Giving Unit Record** window will display the summary of the recurring entry. If you need to edit this entry, click the Change button on the bottom of the Giving Unit Record window, then click the pencil on the right side of the recurring entry you wish to change. This will open the **Recurring Contribution Setup** window.

The example to the right displays a Giving Unit with two different recurring entries in effect. This would be the case with a giver wanting to give on two different frequencies, for example.

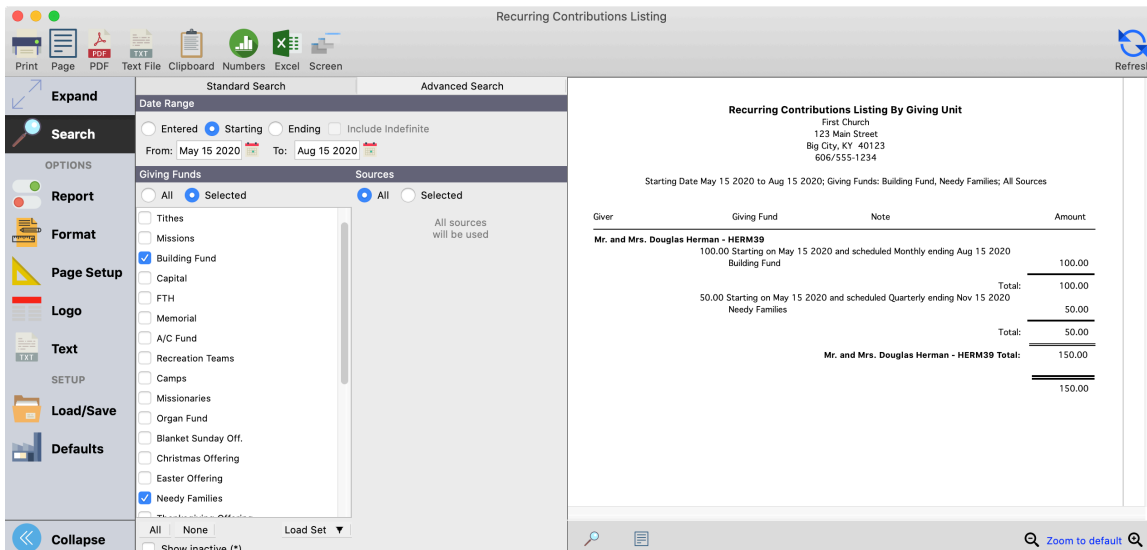


Recurring Gifts Reports

There are two Contribution Reports for Recurring Gifts: a composite listing and a detail report.

The standard Contributions Report setup window allows you to fine-tune these reports.

► Reports ► Contribution Reports ► Recurring Contributions ► Recurring Contributions Listing



► Reports ► Contribution Reports ► Recurring Contributions ► Recurring Contributions Forecast

Recurring Contributions Forecast
 First Church
 123 Main Street
 Big City, KY 40123
 506/555-1234

Jul 1 2023 to Dec 31 2023; All Giving Funds; All Sources

Giver	Giving Fund	Recurring Date	Note	Amount
Mr. and Mrs. Alexander Adams - 200	Camps	Jul 16 2023		25.00
		Aug 1 2023		25.00
		Aug 16 2023		25.00
		Sep 1 2023		25.00
		Sep 16 2023		25.00
		Oct 1 2023		25.00
		Oct 16 2023		25.00
		Nov 1 2023		25.00
		Nov 16 2023		25.00
		Dec 1 2023		25.00
		Dec 16 2023		25.00
Total Camps:				275.00
Mr. and Mrs. Alexander Adams - 200 Total:				275.00
Tricia Sallee - SALL96	Operating Fund	Jul 20 2023		29.00
		Aug 3 2023		29.00
		Aug 17 2023		29.00

Initiating Recurring Gifts:

After the Recurring Contribution Entries have been set up, they can be initiated.

NOTE: The following procedure applies ONLY to recurring gifts NOT received through Engage Giving Portal.

► Program ► Contributions ► Batch Contribution Entry

Recurring Contribution Entries are initiated through the Batch Contribution Entry process. You may either add these recurring contribution entries to an existing batch, or you may create a new batch for these recurring entries only.

Whichever method you select, click the Load button at the bottom of the Batch Contributions Entry window. This will open the Recurring Gifts selection window shown below.

Recurring Gifts

From: Aug 5 2019 To: Sep 29 2019

No gift selected

Code	Name	Pay Type	Amount	Date	Last Gift
102	Mike & Susan Disney	ACH	100.00	Sep 1 2019	Sep 29 2019
102	Mike & Susan Disney	Cash	300.00	Sep 1 2019	Sep 29 2019
102	Mike & Susan Disney	Cash	300.00	Sep 8 2019	Sep 29 2019
102	Mike & Susan Disney	Cash	300.00	Sep 15 2019	Sep 29 2019
102	Mike & Susan Disney	Cash	300.00	Sep 22 2019	Sep 29 2019
102	Mike & Susan Disney	Cash	300.00	Sep 29 2019	Sep 29 2019
WAKE57	Roger Wakefield	Check	100.00	Sep 1 2019	Jan 7 2018

7 gifts totaling 1,700.00

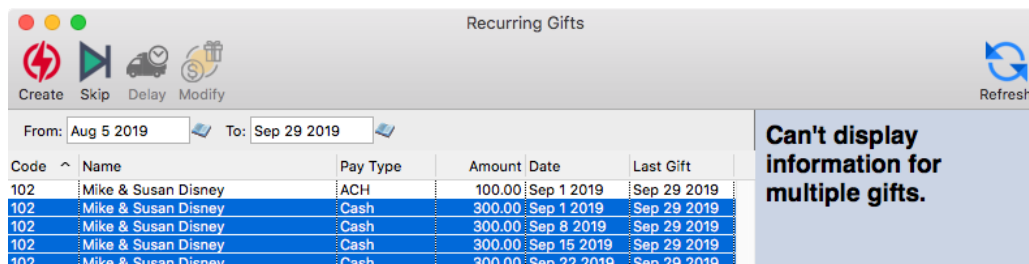
This window chooses dates based on the selected batch on the Batch Contributions window. The end date

is the offering date from the batch. To determine the begin date, CDM+ finds the last offering date used in any batch prior to the selected batch. The day after that offering date will be used as the beginning date for Recurring Gifts.

For example, consider these batches:

Batch Offering Date	Recurring Begin	Recurring End
October 26, 2019	October 20, 2019	October 26, 2019
October 19, 2019	October 13, 2019	October 19, 2019
October 12, 2019	October 6, 2019	October 12, 2019
October 5, 2019	n/a	n/a

Recurring gifts within this date range are displayed. Expand the From and/or To dates to display more or fewer entries. Selecting a specific line item displays more detailed information on the selected gift including prior activities.



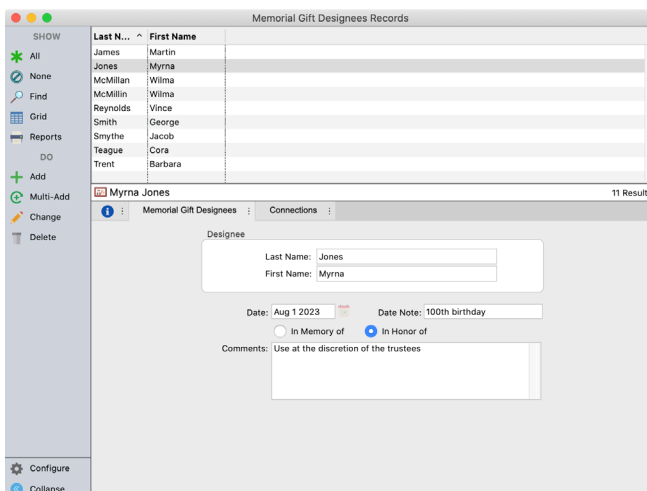
Select each recurring gift you wish to load. Use Control-click, Shift Click, Control-A, or Edit | Select All to mark each desired line. Once you've identified each desired line, click the Create button on the toolbar. This will create the contributions in the selected batch, which can viewed and modified in the Batch Contributions window like a regular contribution.

Memorial Gifts

Memorial Gifts is a separate feature of the CDM+ Contributions program. It tracks memorial gifts given, as well as how these gifts are used. Enter a Memorial Designee, and Memorial Gifts may be linked to regular contributions for ease of entry. This link is enabled under **CDM+(Mac)/File(Window) ► Preferences ► CDM+ System ► Contributions tab ► Setting icon**

Adding Memorial Designees

► Program ► Memorial Gifts ► Memorial Gift Designees Records



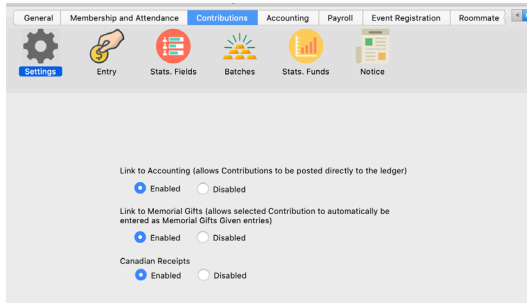
Enter first and last name of designee, date, specify "In honor of" or "In memory of", and add any comments.

Entering Memorial Gifts Given

There are two methods that can be used to enter Memorial Gifts given. Contributions can be linked to Memorial Gifts. This will allow you to automatically create a Memorial Gift record during Contribution Batch Entry. If you don't activate this, you may still use Memorial Gifts, but will need to manually enter each Memorial Gift received and enter the contribution entry.

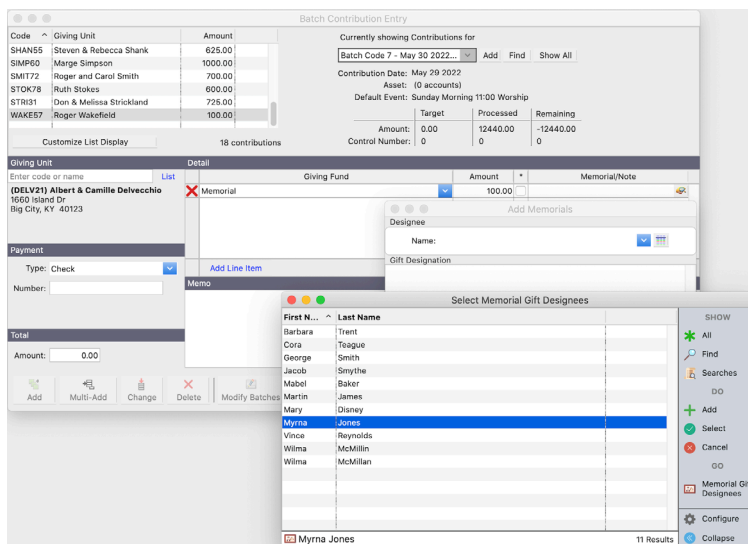
Activating Memorial Gifts / Contribution Link


CDM+(Mac)/File(Window) ► Preferences ► CDM+ System ► Contributions tab ► Setting icon



Entering Memorial Gifts as contributions

► Program ► Contributions ► Batch Contribution Entry



Click the “magnifying glass & paper” icon  at the right side of the fund designation line of the contribution entry. This will open the Memorial Gift Designation window.

Contribution will post in Memorial Gifts to appropriate person.

NOTE: Edits in Memorial Gifts **DO NOT** make corresponding changes in Contributions Entry.

Entering Memorial Gifts not as contributions

► Program ► Memorial Gifts ► Memorial Gifts Given Records

Amount	Date Ack. Sent	Date Given	Designation	Given By Last Name	Given By Mailing Name	Zip	First Name
50.00		Oct 6 2021		Grant	Michael and Jackie	40123	Myrna
35.00		Oct 6 2021		Flintston	Fred	40123	Myrna
50.00		Oct 6 2021		Harvey	Rhett and Margaret	40123	Myrna
100.00		May 29 2022		Delvecchio	Albert & Camille	40123	Myrna
25.00		Jul 16 2022		Disney	Mike	40123-2318	Mary
30.00		Jul 16 2022		Delvecchio	Albert & Camille	40123	Mary
50.00		Jul 31 2022		Disney	Mike & Susan	40123-2318	George

Myrna Jones - 100.00 29 Results

Designee: Myrna Jones

Gift: Date: May 29 2022, Amount: 100.00

Given By: Last Name: Delvecchio, Mailing Name: Albert & Camille, Address: 1660 Island Dr, City: Big City, State: KY, Zip: 40123, Phone Number: 606.555.4576, Email Address: mrdelvecchio@email.com

- Gifts given and entered in this manner do NOT create contribution entries. If you wish for these gifts to be displayed on the member's giving statement, you will need to also enter these as contributions.
- When entering a new gift given, if the giver has an existing address record, click "Link to Address Record" and select appropriate address record from pop-up. This will ensure that as the address record address changes, it will also be updated in the Memorial Giving.

Reporting options will group givers by Memorial Designee.

Using Memorial Gifts

► Program ► Memorial Gifts ► Memorial Gifts Used Records

In recording memorial gifts, it is often necessary to track how much money has been used for a specified purpose.

Amount	Date Used	Used For	First Name	Last Name
200.00	Aug 5 2021	Added to the Parlor Fund in Myrna's honor	Myrna	Jones
2000.00	Jul 1 2017	New sound system for sanctuary	Wilma	McMillin

Myrna Jones - 200.00 2 Results

Designee: Myrna Jones

Gift: Date: Aug 5 2021, Amount: 200.00, Used For: Added to the Parlor Fund in Myrna's honor



A Memorial Gifts Used report could be printed and given to the family to inform them of how the monies were used.

Memorial Gifts Reports

Memorial Gifts Designee

►Reports ►Memorial Gifts Reports ►Listing and Exports ►Memorial Gift Designee Custom Listing and Export

These reports detail information on Memorial Gift Designees.

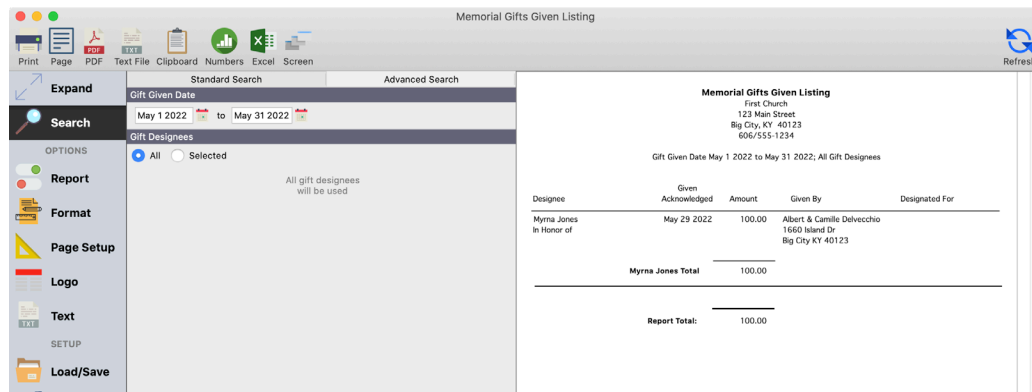
Memorial Gifts Given

This group of reports provide detailed information on Memorial Gifts Given. These include a Custom Listing, which allows you to “build” your own report, Gift Given Letters, Cards, and Emails. These notice-type reports allow you to create personalized thank-you communications to the donor.

Memorial Gifts Given Listing

►Reports ►Memorial Gifts Reports ►Listings and Exports ►Gifts Given Listing

This report has a number of excellent uses: give the list to family members as a record of those who have given in memorial or honor of their loved ones; provide the list for use in church publications or website; for use by committee or staff to know the source of gifts given for their use.



Options: The giver's Address and designation notes can be added to the report. The report can be printed with or without the Gift Detail (the amount given by the donor) by checking the Show Gift Detail button.

Memorial Gifts Given Composite

►Reports ►Memorial Gifts Reports ►Listings and Exports ►Gifts Given Composite

Report provides a listing of the total amount given for Memorials during a selected date range. The report can include all or selected Gift Designees.

Memorial Gifts Given Composite

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

Gift Given Date May 1 2022 to May 31 2022; All Gift Designees

Designee	Amount
Myrna Jones	100.00
Report Total:	100.00

Memorial Gifts Given Custom Listing and Export

►Reports ►Memorial Gifts Reports ►Listings and Exports ►Memorial Gifts Given Custom Listing and Export

Build your own report by choosing fields to include in a list that can be printed and provided to family members or other interested parties for data management.

Custom Listing

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

Gift Given Date May 1 2022 to May 31 2022; All Gift Designees

Date Given	Given By Last Name	Amount	In Memory/Honor Of	First Name
May 29 2022	Delvecchio	100.00	In Honor of	Myrna

Memorial Gifts Given Labels/Envelopes

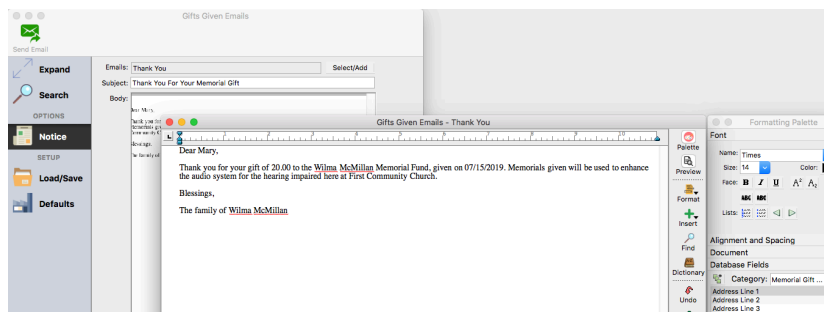
Reports ►Memorial Gifts Reports ►Labels ►Memorial Gifts Given Labels/Envelopes

Labels can be printed for selected Designees and filtered by date range. This report is a helpful tool to provide family members with labels for sending acknowledgments.

Memorial Gifts Given Letters, Cards or Emails

►Reports ►Memorial Gifts Reports ►Notices ►Memorial Gifts Given Letters, Cards or Emails

Similar to Letter, Card, and Email Notices found elsewhere in CDM+. Embed database fields to personalize.



Memorial Gifts Used

►Reports ►Memorial Gifts Reports ►Listing and Exports ►Memorial Gifts Used Listing or Custom Listing and Export

These reports detail information pertaining to how the Memorial Gifts given have been used.

Memorial Gifts Given vs. Used

►Reports ►Memorial Gifts Reports ►Listings and Exports ►Gifts Given vs. Used

Gifts Given vs. Used

Memorial Gifts Given vs. Used
First Church
123 Main Street
Big City, KY 40123
606/555-1234

May 1 2022 to May 31 2022; Selected Gift Designees

Designee	Given	Used	Balance
Mary Disney	0.00	0.00	0.00
Myrna Jones	100.00	0.00	100.00
Report Total:	100.00	0.00	100.00

