# **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.

٠	• •			Contribution R	ecords				
	SHOW	Contribution Date ~	Total Contribution Amount	Giving Unit Code	Giving Unit Last Name	Giving Unit	Mailing Name	Source	
*	All	Mar 31 2023	300.00	HERM39	Herman	Mr. and Mrs.	Douglas	Engage	
T.	0	Mar 26 2023	30.00	JONE83	Jones	Mrs. Jones		Engage	
0	None	Mar 19 2023	30.00	JONE83	Jones	Mrs. Jones		Engage	
Q	Find	Mar 19 2023	300.00	HERM39	Herman	Mr. and Mrs.	Douglas	CDM+	
1		Mar 19 2023	100.00	HATM93	Hatmaker	Terry		Engage	
Q	Searches	Mar 16 2023	90.00	HATM93	Hatmaker	Terry		Engage (Guest	)
	Grid	Mar 12 2023		JONE83	Jones	Mrs. Jones		Engage	
-	Reports	Mar 8 2023	325.00	120	Hunter	Mr. & Mrs. N	lark	Engage	
		the contribution of DJ a	and Mary Jo Herman (HERM3	39) on Mar 19 2023	for 300.00				717 Results
	DO	Contributions ;	, , , , , , , , , , , , , , , , , , , ,	,					
+	Add	•							
œ	Multi-Add	Reference 303							
~	Change	Deposit Date: Mar 20 2023	Contribution Date: Mar 19	9 2023 📅 Event:		🗸 Asset: 💷	Batch:		
1	Change	Giving Unit	Detail						
Π.	Delete	Enter code or name	List	Giving	Fund	Amount	•	Memorial/Note	
6	Transfer	(HERM39) Mr. and Mrs. Dour	alas Herman 🔀 Tithes			× 300.00			
6		3035 Courtside Dr.	<u> </u>						
	Enable Check Scanner	Big City, KY 40123							
	GO	0							
	Address	Payment							
A	Giving Unit	Type: Check	~						
-	onning onit	Number: 4194							
		Nulliver. 4104							
			Add Line I	tem	Tot	al: 300.00	*Not Tax D	eductible Total:	0.00
			Memo				Le	dger	
								Do Not Post To Led	
									ger
							P	osted to Ledger: No	
÷	Configure	Total							
-		Amount: 300.00							
0	Collapse	300.00							

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

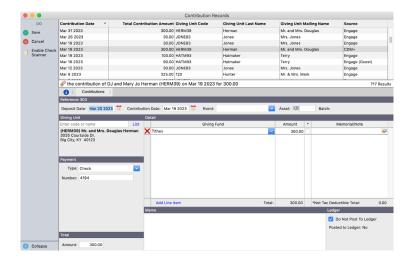
This window allows you to transfer Contributions shown on the Contributions window to another Giving Unit. Transfer all Contributions Only Destination Giving Unit Enter code or name List (MIKED Michael Dianey Big City, KY 40123-2318 Delete source Giving Units after transfer Results 1 Contribution will be transferred.
Transfer Selected Contributions Only  Destination Giving Unit  Inter code or name List (MKED) Michael Disney 107 Peachtree Or Apt 2 Big City, KY 40123-2318  Delete source Giving Units after transfer Results
Destination Giving Unit Enter code or name List (MKED) Michael Disney 107 Peachtree Dr. Apt 2 Big City, KY. 40123-2318 Delete source Giving Units after transfer Results
Enter code or name List (MIKED) Michael Disney 107 Peachtree Dr Apt 2 Big City, KY 40123-2318 Delete source Giving Units after transfer Results
(MIKED) Michael Disney 107 Peachtree Dr Apt 2 Big City, KY 40123-2318 Delete source Giving Units after transfer Results
i07 Peachtree Dr Apt 2 Big City, KY 40128-2318 Delete source Giving Units after transfer Results
Results
1 Contribution will be transforred
r contribution will be traffisierred.
0 Giving Unit will be deleted.
Cancel OK

- 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 <u>DO</u> make a corresponding change in Memorial Gifts

••				Batch Contri	bution Entry						
Code ^	Giving Unit	Amou	unt	Cur	rently showing C	Contributio	ons for				
108	Charles & Ruby Cook	750.		Bat	ch Code 7 - May	30 2022	👻 Add	Find	Show All		
120 BALL52	Mr. & Mrs. Mark Hunter Derek and Lucy Balling	850. 400.		Con	ribution Date: N						
ELVE462	Elves	1500.			Asset: Default Event: S	(0 account Sundav Mo		/orshi	p		
GAMB49 GAMB49	Patrick and Nancy Gambet Patrick and Nancy Gambet	850. 925.	00			Target	Proces	sed	Remaining	_	
CDANI22	Michael and Jackie Crant ustomize List Display		16 contributions	с	Amount: ontrol Number:	0.00 0	12240 0	.00	-12240.00 0		
Giving Uni	it	Detail - R	eference 686								
Enter code	e or name Li	st		Giving Fund			Amount	•		Memorial/Note	
123 Neigh Big City, K		X Tithes	5				850.				<i>\$</i>
Payment											
Type:	Online Gift	/ Add	d Line Item			Total:	850.	00	*Not Tax De	ductible Total:	0.00
Details:		Memo							Eve	nt	
									Su	nday Morning 11:00	Worship 🗸
									Led	ger	
Total										Do Not Post To Le	dger
Amount:	850.00								Po	sted to Ledger: Yes	
Ndd State	・見 着 Multi-Add Change	X Delete	🕅 Modify Batches	Ledger Prin	t Prefs	🈕 Load	Enable C	heck∶	Scanne	× Cancel	Handreich Save

 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.

Find Records When	e					
Giving Unit Code	✓ equal to	~	F	ind Advar	ced Find	Show All
Last Name	Mailing Name	Salutation	Current Code	Pending Code	No Statement	Inactive
Disney	Michael	Mike	MIKED	MIKED		
Disney	Robin	Robin	ROBIND	ROBIND		
Allen	William & Lucille	William & Lucille	ALLE2			
Cook	Charles & Ruby	Charles & Ruby	108		Ň	
Hunter	Mr. & Mrs. Mark	Mr. & Mrs. Mark	120			
Lucas	Mr. & Mrs. Ralph	Mr. & Mrs. Ralph	118			
Ross	Mr. Jim Miller and Mrs. J	Jim Miller & Joy	130			
Smith	Hugh & Marcia	Hugh	SMIT15			
Offering	Loose	Loose	ZLOOSE			
gift	Visitor/Non-Mbr	Visitor/Non-Mbr	ZVISITOR			
McAllister	Mrs. Osa	Mrs. Osa	MCAL19			
Maslowski	Stewart & Nancy	Nancy	MASL20			
Delvecchio	Albert & Camille	Albert & Camille	DELV21			
Ullom	Mr. and Mrs. Lee	Lee and Tracee	ULLO29			
James	Mr. and Mrs. Matthew	Matt and Ashley	JAME30	JAME30	Ō	
Strickland	Mr. and Mrs. Don	Don & Melissa	STRI31			
Grant	Mr. and Mrs. Michael	Michael and Jackie	GRAN32			
Wright	Mr. and Mrs. Charles	Chuck and Allison	WRIG33			
McLaughlin	Mr. and Mrs. Michael	Mike and Dana	MCLA34			

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!

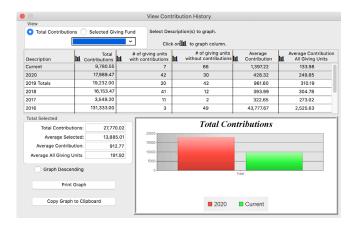
## **History File and Updating**

#### Viewing Contribution History of a Single Giving Unit ▶Program ▶Contributions ▶Giving Unit ▶History tab

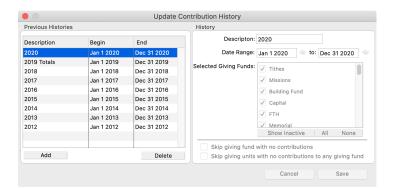
View a single Giving Unit's summary record of contributions here. Click on history description to see detail by fund. Ctrl-click (Windows) or Shift-Click (macOS) to select multiple years to view—great for comparison.

Viewing Contribution History of all Giving Units (in Total)

► Program ► Contributions ► View Contribution History



### Creating/Updating Contributions History File ▶Program ▶Contributions ▶Update History



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.

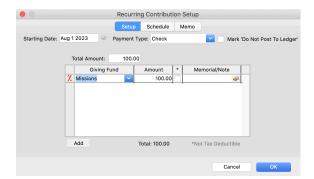
#### **Setting Up Recurring Gifts:**

#### ▶ Program ▶ Contributions ▶ Giving Unit Records

Giv	ing Unit Code ^	Giving Unit Last Name	Giving Unit Salutat	ion Name	Primary Phone
мс	LA34	McLaughlin	Mike and Dana		606.555.4176
ME	RR97	Smith	John and Veronica		
MIH	ED	Disney	Mike		606.555.1739
MIL	L81	Miller	See Ross		
OD	LE113	Odle	Joshua		606.555.6170
PEF	RE54	Perez	Jose & Anita		606.555.2811
Å	Mike Disney (MIKED)				73 Results Filte
(	1 : Information : Ple	edge ; Groups ; Comment	s : History : Notices	: Recurring Giving :	Email Statement
X	100.00 Starting on Aug 1 2	017 and scheduled Monthly			
· ·	ş ş	•			
	General Fund 2017 100.00				V
χ	150.00 Starting on Aug 15	2017 and scheduled Month	y ending Dec 15 2017		
	Building Fund 2017 75.00, Camps	75.00			V
χ	300.00 Starting on Sep 1 2	019 and scheduled Weekly	ending Dec 29 2019		
	Missions 300.00				9
Y		19 and scheduled every we	ek of Oct. Nov. and Dec.	on Sun ending Dec 29	2019
1					
	General Fund 2019 50.00				
χ	50.00 Starting on Jan 1 20	23 and scheduled Monthly	ending Dec 31 2023		
<b>.</b>	, C		•		
	General Fund 2023 50.00				
1					
		MCLA34         MER897         MIKED         MISSION STATING on Aug 12         General Fund 2017 75.00, Camps 3         MISSION 300.00         X         50.00 Starting on Oct 6 20         General Fund 2019 50.00         X         50.00 Starting on Jan 1 20	MCLA34     McLaughlin       MER897     Smith       MIKED     Disney       MILL81     Miller       ODLE113     Odle       PERE54     Perez       ▲     Mike Disney (MIKED) <ul> <li>Information :: Pledge :: Groups :: Comment</li> </ul> ✓     100.00 Starting on Aug 1 2017 and scheduled Monthly       Øeneral Fund 2017 100.00     ✓       ✓     150.00 Starting on Aug 15 2017 and scheduled Monthly       Building Fund 2017 75.00, Camps 75.00     ✓       ✓     300.00 Starting on Oct 6 2019 and scheduled Weekly       Missions 300.00     ✓       ✓     50.00 Starting on Oct 6 2019 and scheduled weekly       Missions 300.00     ✓       ✓     50.00 Starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Jan 1 2023 and scheduled Monthly of the starting on Ja	MCLA34     McLaughlin     Mike and Dana       MER897     Smith     John and Veronica       MIKED     Disney     Mike       MILL81     Miller     See Ross       ODLE113     Odle     Joshua       PERE54     Perez     Jose & Anita       Information ;     Pledge ;     Groups ;     Comments ;       History ;     Notices       I 100.00 Starting on Aug 1 2017 and scheduled Monthly       General Fund 2017 100.00       I 150.00 Starting on Aug 15 2017 and scheduled Monthly ending Dec 15 2017       Building Fund 2017 75.00, Camps 75.00       I 00.00 Starting on Oct 6 2019 and scheduled Weekly ending Dec 29 2019       Missions 300.00       I 00.00 Starting on Oct 6 2019 and scheduled every week of Oct, Nov, and Dec I General Fund 2019 50.00       I 00.00 Starting on Jan 1 2023 and scheduled Monthly ending Dec 31 2023	MCLA34     McLaughlin     Mike and Dana       MER897     Smith     John and Veronica       MIKED     Disney     Mike       MILL81     Miller     See Ross       ODLET13     Odle     Joshua       PERE54     Perez     Jose & Anita       Information ;     Pledge ;     Groups ;     Comments ;       History ;     Notices ;     Recurring Giving ;       Information ;     Pledge ;     Groups ;     Comments ;       History ;     Notices ;     Recurring Giving ;       Information ;     Pledge ;     Groups ;     Comments ;       History ;     Notices ;     Recurring Giving ;       I 00.00 Starting on Aug 1 2017 and scheduled Monthly     General Fund 2017 100.00       I 105.00 Starting on Aug 15 2017 and scheduled Weekly ending Dec 15 2017       Building Fund 2017 75.00, Camps 75.00       I 300.00 Starting on Oct 6 2019 and scheduled Weekly ending Dec 29 2019       Missions 300.00       I So.00 Starting on Oct 6 2019 and scheduled every week of Oct, Nov, and Dec on Sun ending Dec 29       General Fund 2019 50.00       I So.00 Starting on Jan 1 2023 and scheduled Monthly ending Dec 31 2023

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.

						Rec	curring Contri	bution Setup				Nev	<b>er</b> – does not repeat.
						Se	etup Sched	ule Memo				Dail	<b>y</b> – repeats each day
Nev		Daily		Weekly	y E	Bi-Week	Monthly	Bi-Monthly	Quarterly	Annually	Advanced	Wee	<b>kly</b> – repeats once each week
Previ -	iew an Mon	Aug	ust 20 Wed		Fri 4	► Sat	т	his Recurring C	Contibution	vill occur eve	ery		<b>/eekly</b> – repeats every 2 weeks
6 13 20	7 14 21	8 15	9 16 23	17	11 18 25	12 19 26							<b>ithly</b> – repeats once each month
27	28 Lick a		30	31									<b>lonthly</b> – repeats every 2 months
d	lay to ange it	6	3 Ado 3 Ski	ded	Res	set	Ending Neve	er 💽 On t	his date: [	Dec 31 2023			<b>rterly</b> – repeats once every three months
									С	ancel	ОК		<b>ually</b> – 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.

						Recu	rring	Contribu	tion Setup		
						Set	qu	Schedule	Memo		
Nev	er	Daily	.   .	Weekl	у	Bi-Weekly	N	Ionthly E	Bi-Monthly	Quarterly Annua	ally Advanced
Previ	ew an	d Exce	eption	S			Adv	anced Setu	р		
-		Aug	just 20	023				Sur 🗌 Mo	on 🗌 Tue 🗌	Wed Thu	🛛 Fri 📃 Sat
Sun	Mon	<b>Tue</b> 1	Wed 2	Thu 3	Fri 4	Sat 5		First 🗸	Second 🗸	🛛 Third 🛛 🗸 Four	th 🔽 Last
6 13	7 14	8 15	9 16	10 17	11 18	12 19	_	January	May	September	
20 27	21 28	22 29	23 30	24 31	25	26		February March	June July	<ul> <li>October</li> <li>November</li> </ul>	All Months
d	lick a ay to inge it	6	) Def Adc Skip		Re	set	End	April ing Never	On th	December is date: Dec 31 20	No Months
										Cancel	ОК

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.

	Recurrin	g Contributi	on Setup
	Setup	Schedule	Memo
Here, you can keep notes. About impo	rtant stuff.	:)	

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.

• • •			Giving Unit Re	cords		
SHOW	Giv	ing Unit Code ^	Giving Unit Last Name	<b>Giving Unit Salutation</b>	Name	Primary Phone
\star All	мс	LA34	McLaughlin	Mike and Dana		606.555.4176
-		RR97	Smith	John and Veronica		
Ø None	MIK		Disney	Mike		606.555.1739
🔎 Find		L81	Miller	See Ross		
📕 Searches		LE113	Odle	Joshua		606.555.6170
1	PEF	RE54	Perez	Jose & Anita		606.555.2811
Grid	Å	Mike Disney (MIKED)				73 Results Filtered
Reports	(	Information : Ple	dge : Groups : Comments	: History : Notices :	Recurring Giving	Email Statement
DO	A	100.00 Starting on Aug 12	017 and scheduled Monthly			
🕂 Add		General Fund 2017 100.00				9
🕀 Multi-Add	χ	150.00 Starting on Aug 15	2017 and scheduled Monthl	v endina Dec 15 2017		
🧪 Change	I	,		,		
Delete	L .	Building Fund 2017 75.00, Camps 7	75.00			~
GO	χ	300.00 Starting on Sep 1 2	019 and scheduled Weekly	ending Dec 29 2019		
Address	L .	Missions 300.00				7
🔤 Individual	χ	50.00 Starting on Oct 6 20	19 and scheduled every we	ek of Oct, Nov, and Dec on	Sun ending Dec 29	2019
6 Contributions	L .	General Fund 2019 50.00				× .
	χ	50.00 Starting on Jan 1 20	23 and scheduled Monthly e	ending Dec 31 2023		1
		General Fund 2023 50.00				<i>v</i>
	χ	100.00 Starting on Aug 1 2	023 and scheduled Monthly	ending Dec 31 2023		
🔅 Configure	1	Missions 100.00				7
Collapse		Add Recurring				

#### **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

•••		Recurring C	Contributions Listing						
Print Page PDF 1	Text File Clipboard Numbers Excel Screen						Refresh		
Expand	Standard Search Date Range	Advanced Search		Recurring Contribu	utions Listing By Giving Unit				
Search	From: May 15 2020	Include Indefinite 20		12 12 Big 0	First Church 123 Main Street Big City, KY 40123 606/555-1234				
Report	Giving Funds All Selected	Sources All Selected	Startin	II Sources					
Format	Tithes Missions	All sources will be used	Giver Mr. and Mrs. Doug	Giving Fund	Note	Amount			
Page Setup	Building Fund     Capital			100.00 Starting on May 15 202 Building Fund	20 and scheduled Monthly ending Aug 15 2020	100.00			
Logo	FTH Memorial			50.00 Starting on May 15 2020 Needy Families	0 and scheduled Quarterly ending Nov 15 2020 To	50.00			
Text	A/C Fund Recreation Teams				Mr. and Mrs. Douglas Herman - HERM39 Tol				
SETUP	Camps Missionaries Organ Fund					150.00			
Defaults	Blanket Sunday Off. Christmas Offering								
	Easter Offering Needy Families								
Collapse	All None Load Set ▼ Show inactive (*)		P			Q Zoom to de	efault Q		

•	e Recurr	ing Contributions Forecast				Print Page F	DF Text File	Clipboard		X Excel	Screen	Refresh
~7	Expand	Standard Search	Advanced Search									
/	Search	Date Range From: Jul 1 2023 To: Dec 31 2023 Sources	Giving Funds		Rec	First Church First Church 123 Main Street Big City, KY 40123 606/555-1234	orecast					
-	Report	All Selected	• All Selected All giving funds will be used		Jul 1 2023 -	to Dec 31 2023; All Giving F	unds; All Sources					
-	Format	Text Giving		Giver	Giving Fund	Recurring Date	Note		Amount	_		
Ā	Page Setup			Mr. and Mrs. Ale	camps	Jul 16 2023 Aug 1 2023 Aug 16 2023			25.00 25.00 25.00			
	Logo					Sep 1 2023 Sep 16 2023 Oct 1 2023 Oct 16 2023			25.00 25.00 25.00 25.00			
TXT	SETUP					Nov 1 2023 Nov 16 2023 Dec 1 2023 Dec 16 2023			25.00 25.00 25.00 25.00			
	Load/Save						т	otal Camps:	275.00			
	Defaults			Tricia Sallee - S	ALL96	Mr. and Mrs	. Alexander Adams	- 200 Total:	275.00	_		
					Operating Fund	Jul 20 2023 Aug 3 2023 Aug 17 2023			29.00 29.00 29.00			
	Collapse	All None		₽ 🗉						Q	Zoom to de	fault Q

#### ▶ Reports ▶ Contribution Reports ▶ Recurring Contributions ▶ Recurring Contributions Forecast

#### **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.

From: Aug	g 5 2019 🔍 To: Sep 29					efres
	g 0 2010 0 0 20	2019 🔍			No gift selected	
ode ^ N	lame	Pay Type	Amount Date	Last Gift		
02 M	like & Susan Disney	ACH	100.00 Sep 1 2019	Sep 29 2019		
	like & Susan Disney	Cash	300.00 Sep 1 2019	Sep 29 2019		
02 M	like & Susan Disney	Cash	300.00 Sep 8 2019	Sep 29 2019		
	like & Susan Disney	Cash	300.00 Sep 15 2019	Sep 29 2019		
	like & Susan Disney	Cash	300.00 Sep 22 2019	Sep 29 2019		
	like & Susan Disney	Cash	300.00 Sep 29 2019	Sep 29 2019		
VAKE57 R	loger Wakefield	Check	100.00 Sep 1 2019	Jan 7 2018		

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:

<b>Batch Offering Date</b>	<b>Recurring Begin</b>	<b>Recurring End</b>
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.

Create	N 🕰 \iint		Recurring Gifts			Refresh
From:	Aug 5 2019 🔍 To: Sep 2	9 2019 🛷 Pay Type	Amount Date	Last Gift	Can't display information for	
102 102	Mike & Susan Disney Mike & Susan Disney	ACH	100.00 Sep 1 2019 300.00 Sep 1 2019	Sep 29 2019 Sep 29 2019	multiple gifts.	
102 102 102 102	Mike & Susan Disney Mike & Susan Disney Mike & Susan Disney	Cash Cash Cash	300.00 Sep 8 2019	Sep 29 2019 Sep 29 2019		

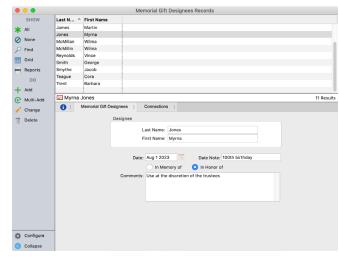
Select each recurring gift you wish to load. Use Control-click, Shift Click, Control-A, or Edit | Select All to mark each desired line. Once you've identified each desired line, click the Create button on the toolbar. This will create the contributions in the selected batch, which can viewed and modified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

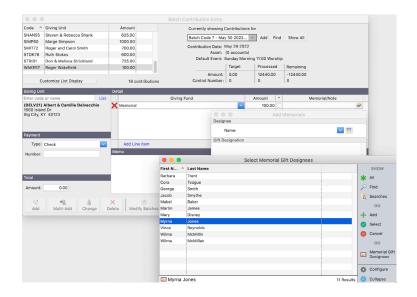
There are two methods that can be used to enter Memorial Gifts given. Contributions can be linked to Memorial Gifts. This will allow you to automatically create a Memorial Gift record during Contribution Batch Entry. If you don't activate this, you may still use Memorial Gifts, but will need to manually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

			lemorial Gifts				
SHOW	Amount Date Ad	ck. Sent Date Given	^ Designation	Given By Last Name	Given By Mailing Name	Zip	First Na
All	50.00	Oct 6 2021		Grant	Michael and Jackie	40123	Myrna
	35.00	Oct 6 2021		Flintston	Fred	40123	Myrna
) None	50.00	Oct 6 2021		Harvey	Rhett and Margaret	40123	Myrna
Find	100.00	May 29 2022		Delvecchio	Albert & Camille	40123	Myrna
0	25.00	Jul 16 2022		Disney	Mike	40123-2318	Mary
Searches	30.00	Jul 16 2022		Delvecchio	Albert & Camille	40123	Mary
Grid	50.00	Jul 31 2022		Disney	Mike & Susan	40123-2318	George
Reports		1	1	1	1	1	
DO	👙 Myrna Jones -	100.00					29 Result
	Memorial	Gifts Given : Notices	:				
Add	Designee				Gift		
Multi-Add	Designee	In Memory of	In Honor	of		022	
Change		· ·	_		Date: May 29 20		
Change	Name: My	rna Jones	~ =			00.00	
Delete	Given By				Designated For:		
	Last Name:	Delvecchio		✓ Link To Address Rec.	Por:		
	Mailing Name:	Albert & Camille		Select Address			
	Address:	1660 Island Dr					
	City:	Big City	State: KY	Zip: 40123	Date Acknowledgement	Sent:	
		606.555.4576					
				MapQuest			
		mrdelvecchio@email.con	1	····			

- 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.

•			Managerial Office Used Descende			<b>A*</b>
			Memorial Gifts Used Records			$\frown$ A Memorial
SHOW	Amount ^	Aug 5 2021	Used For Added to the Parlor Fund in Myrna's honor	First Name Myrna	Last Name Jones	🗾 🛛 💆 Used report co
All		Jul 1 2017	New sound system for sanctuary	Wilma	McMillin	
) None	2000.00					printed and give
Find						the family to in
Searches						them of how the
Grid						
Reports						monies were u
DO	🦱 Myrna Jone	i s - 200.00			2	Results
Add	-	orial Gifts Used				in to suit s
Multi-Add		Desi	gnee			
Change						
Delete			Name: Myrna Jones			
		Gift				
			Date: Aug 5 2021			
			Amount: 200.00			
			Used For: Added to the Parlor Fund in Myrna's ho	nor		
Configure						
-						
Collapse						

## **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.

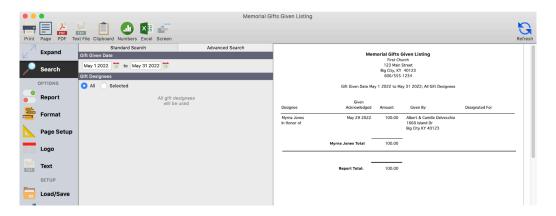
#### **Memorial Gifts Given**

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 Gif	ts Given Composite	
	Fi	rst Church	
	123	Main Street	
	Big Ci	ty, KY 40123	
	606	6/555-1234	
Gift Giv	ven Date May 1 20	22 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 Giv	en Given By	/ Last Name	Amount	In Memory/Honor Of	First Name				
May 29 2	022 Delvecch	io	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.

Search Bod	Olfs Oven Emails  It Thank You Select/Add It Thank You For Your Memoria Orit  Y	
OPTIONS	Burk yw fel 😑 😑 🕒 Gifts Given Emails - Thank You	Formatting Palette
ETUP CondySave	Name of Section 1     Section 1       Name of Section 2     Section 2       Name of Section 2 <th>Post     Font       Beach     Seen 16.       Decument     Decument       Decument     Decument       Beaches     Fridds       Decument     Decument       Beaches     Fridds       Decument     Seen 16.       Decument     Seen 16.       Beaches     Seen 16.</th>	Post     Font       Beach     Seen 16.       Decument     Decument       Decument     Decument       Beaches     Fridds       Decument     Decument       Beaches     Fridds       Decument     Seen 16.       Decument     Seen 16.       Beaches     Seen 16.

#### **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

