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.

	Address Records
DO	Would you like to add Giving Units to this Address record?
🚫 Cancel	Cancel No Yes
	Saving
	Saving Č

•	• •				Address	Records				
	SHOW	Last Name	Salutation Name	Primary Phone						
*	All	Adams	Alex and Abby							
1.1		Allen	William & Lucille	606.555.8381						
0	None	Andrews	Robert & Elizabeth	828.626.3535						
\mathcal{P}	Find	Balling	Derek and Lucy	606.555.3039						
5	Searches	Bandy Bates	Matt and Ashley							
	Grid	Alex and Abby Ada								107 Results
_	Reports	1 ; Address ;	Phones ; Email	; Giving Units ;	Connections	Photos ;	Groups ; User Fields	; Visitation ; Pi	astoral ; Notices	:
	DO	Code Ma	iling Name S	alutation	Last Name			Individuals		
+	Add	200 Mr. and	Mrs. Alexander Alex and	Abby Ada	ms	Alex Adams, Abby A	dams, Ava Adams, Greta Ada	ims		~
œ	Multi-Add									
1	Change									
Π.	Delete									
	GO									
•	Individual									
_	Giving Unit									
	Visitation									
~	visitation									
		Add Giving Unit								
Ф	Configure									
0	Collapse									

NOTE: If you choose to hide the Giving Units tab on Address records, you will NOT be prompted to add a giving unit when adding an address record.

Giving Unit Records

▶ Program ▶ Contributions ▶ Giving Unit Records

•	•		Giving Unit Records		
	SHOW	Giving Unit Code	Giving Unit Last Name ^	Giving Unit Salutation Name	Primary Phone
*	All	JOHN106	Johnson	Mary and James	
-		JONE83	Jones	Judy	
Ø	None	JONE82		Sam	
\mathcal{P}	Find	JONE286	Jones	Jim and Dora	
o	Searches	LAWR380 LIME125		Cacao Terrell	(859) 123-4578
		LIME 125	Lines		1
=		🔒 Cacao Lawrence (LAWR380)			74 Results Filtered
	Reports	د 👔 : Information : Ple	edge : Groups : Comments : H	story : Notices : Recurring Giving : I	Email Statement :
	DO				
+	Add				
Æ	Multi-Add	Giving Uni	t Name	Address Information	
E		Last	Name: Lawrence	Cacao Lawrence Select	
1	Change	Mailing	Name: Cacao	1235 Cookie Street Address Big City, KY 40123	
T	Delete	Salutation	Name: Cacao	USA MapQues	st
	GO	Does	Not Receive Statement 📃 Inactive		
P		Email	Statement	Phone Number: (859) 123-4578	
	Address	Giving Uni	t Codes	Attached Individuals	
-	Individual	Current:	LAWR380 Pending	Cacao Lawrence (LAWR380)	
		Last St	atement Email:		
0	Configure				
«	Collapse				

							A	ddress I	Records
	SHOW	Find records wh	ere Date I	ast Modified	ł	~	equal to		~
*	All	Last Name			^	Salut	ation Name		
\oslash	None	Lawrence				Caca	D		
\sim	Find								
Q	Searches								
	Grid								
-	Reports	💾 Cacao Law	rence						
	DO	< 🚹 : A	ddress :	Phones	: Ei	mail	: User Fi	elds :	Photos :
+	Add	Code	Mailin	g Name		Salut	ation	La	st Name
Ð	Multi-Add	X LAWR380	Cacao		Cacao			Lawren	се
	Change								
Т	Delete								
	GO								
•	Individual								
a	Giving Unit								

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

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.

Current Giving Unit Code will be auto-filled by CDM+ and defaults to first four characters of last name plus number. You may edit it—alphabetic or numeric or combination. If you reassign Giving Unit Codes for the upcoming year, the new code will display in the Pending field.

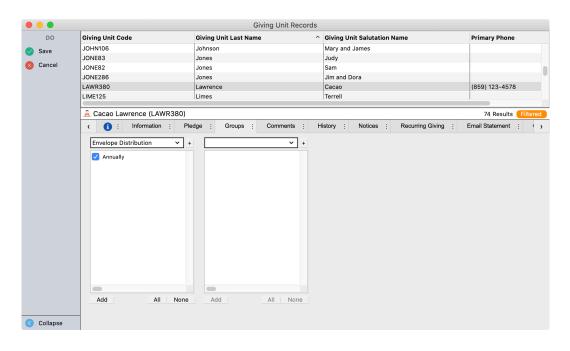
Check the Email Statement box to select this giving unit to receive a Giving Statement via email; selecting to receive an Email Statement means the giver by default will not receive a printed (paper) statement. However, an override of this default may allow a paper statement to be printed.

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.

•	• •				Giving Unit Records				
	SHOW	Giving Unit Code	Giving Unit Last Name	Giving Unit Salutation Name	Address Line 1	City			
*	All	200	Adams	Alex and Abby	823 Carrick Lane	Big City			
		ALLE2	Allen	William & Lucille	1674 Stevens Lane	Big City			
0	None	BALL52	Balling	Derek and Lucy	3030 Mount Tabor Road	Big City			
P	Find	1088	Bryant	Bill and Patty	1312 E Allen St	Lancaster			
	Searches	CALD258	Caldwell	Joseph	4930 Volunteer Landing	Big City			
		CASS40	Cassidy	Ryan and Adrienne	601 E. Richmond St.	Big City			
	Grid	108	Cook	Charles & Ruby	218 Walnut St	Big City			
-		DAVI90	Davis	Marvin	123 Box Street	Big City			
		STEPHDEL	Delvecchio	Stephanie	1660 Island Dr	Big City			
	DO	Alex and Abby Adams	200)						73 Results Filtered
+	Add	Information :	Pledge ; Groups ;	Comments ; History ;	Notices ; Recurring (Sking : Email Statement : Conne	ections ; Us	or Fields ; Engage ;	
œ	Multi-Add	•							
	Change								
Π.	Delete								
	GO								
P	Address								
	Individual			Giving Unit Name		Address Information			
				Last Name: Adams		Mr. and Mrs. Alexander Adams	Select		
8	Contributions			Mailing Name: Mr. and Mr	s. Alexander	823 Carrick Lane Big City, KY 40123	Address		
				Salutation Name: Alex and A	bbv		MapQuest		
				Does Not Receive Statem	ent Inactive				
				Finail Statement		Phone Number:			
				Giving Unit Codes		Attached Individuals			
				Current: 200	Pending	Alex Adams (200)	N		
				Last Statement Email:		Abby Adams (200)			
				Lesi oraitément Email:		Ava Adams (200)			
1									
							/		

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.

c 🕦 ; Inf	formation ; Pledge	e ; Groups ; Comments	: History :	Notices :	Recurring C	Biving :	Email Statement	1	1
Summary		Detail							
Description	Total Giving	Giving Fund	Current						
Current	0.00	General Fund 2023	0.00						1
		Tithes	0.00						
2022	1300.00	Missions	0.00						
2021	600.00	Building Fund	0.00						
2020	400.00	Capital	0.00						
2019	1198.00	FTH	0.00						
2016	0.00	Memorial	0.00						
		A/C Fund	0.00						
		Recreation Teams	0.00						
		Camps	0.00						
		Missionaries	0.00						
		Organ Fund	0.00						1
		Blanket Sunday Off.	0.00						
		Christmas Offering	0.00						
		Easter Offering	0.00						
		Needy Families	0.00						
		Thanksgiving Offering	0.00						
		D 0 04	0.00						ι.

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

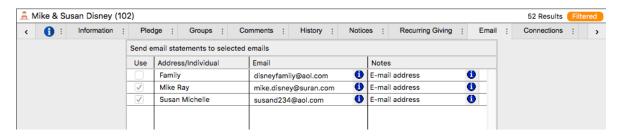
🔓 Cacao Lawrence (LA	WR380))										74 Results	Filter
< 1 Enformation	ו :	Pledge : C	Groups :	Comments	:	History	: 1	Notices :	Recurring G	iving	E	mail Statement	: (
	Send e	mail statements	to selected	emails									
	Use	Address/Indivi	dual	Email				Notes					
	 Image: A second s	Family		dean@sura	n.com		0			0			
	\checkmark	Family		cacaolcrk@	email.	.com	0			0			

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



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

۲		0	: Information	: Pledge : Groups : Co	mments : History :	Notices : Recur	ring Giving : Email Statement :	(
			Туре	Description	Date Sent	Name	Email	
•	*	χ	Email	Contribution Notice	Sep 8 2023 3:29 PM	Mike Disney	noreply@suran.com	
>	*	X	Email	Contribution Notice	Sep 8 2023 3:29 PM	Susan Disney	susand234@aol.com	
	*	X	Email	Contribution Notice	Sep 27 2019 5:38 PM	Mike Disney	mike.disney@suran.com	
5	*	χ	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.

e	Mike Disney (MIKED) 74 Results	Filter	ed
	1 : Information ; Pledge ; Groups ; Comments ; History ; Notices ; Recurring Giving ; Email Statement	; (>
٨	100.00 Starting on Aug 1 2017 and scheduled Monthly	1	
	General Fund 2017 100.00		
χ	150.00 Starting on Aug 15 2017 and scheduled Monthly ending Dec 15 2017		
	Building Fund 2017 75.00, Camps 75.00		
χ	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.

着 Mike Disney (N	liked)									74	Results 🕞	ltere	ed
ups : Comr	ments :	History :	Notices :	Recurring Giving	:	Email Statement	:	Connections :	User Fields	:	Engage	:	>
Mike Disney (MIKED)													
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.



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

Description	Not Tax-Deductible	Inactive	Default		Income Account		Fee Account
General Fund 2023			\mathbf{O}	Z 4000	Sunday Worship Offering - 3000.400	135 🗾	Credit Card Processing - 3000.5135
Tithes			0	Z 4000	Sunday Worship Offering - 3000.400	5135	Credit Card Processing - 3000.5135
Missions			0	110	Missions Fund Offering - 3110.4110.T	135	Credit Card Processing - 3000.5135
6 Building Fund			Ō	Z 4100	Building Fund Income - 3100.4100.T	135	Credit Card Processing - 3000.5135
🕻 Capital			Ō	Z 4100	Building Fund Income - 3100.4100.T	2 5135	Credit Card Processing - 3000.5135
χ гтн			Ô	Z 4200	Special Fund Income - 3200.4200.T	135	Credit Card Processing - 3000.5135
(Memorial			0	110	Missions Fund Offering - 3110.4110.T	135 🗾	Credit Card Processing - 3000.5135
A/C Fund			Ō	Z 4200	Special Fund Income - 3200.4200.T	135	Credit Card Processing - 3000.5135
Kecreation Teams			Ō	Z 4200	Special Fund Income - 3200.4200.T	135	Credit Card Processing - 3000.5135
(Camps			0	Z 4200	Special Fund Income - 3200.4200.T	135 🗾	Credit Card Processing - 3000.5135
🕻 Missionaries			0	110	Missions Fund Offering - 3110.4110.T	135 🗾	Credit Card Processing - 3000.5135
🗶 Organ Fund			0	1200	Special Fund Income - 3200.4200.T	2 5135	Credit Card Processing - 3000.5135
X Blanket Sunday Off.			Ô	Z 4200	Special Fund Income - 3200.4200.T	135	Credit Card Processing - 3000.5135
Christmas Offering			0	Z 4200	Special Fund Income - 3200.4200.T	135 🗾	Credit Card Processing - 3000.5135
X Easter Offering			0	1200	Special Fund Income - 3200.4200.T	135 🗾	Credit Card Processing - 3000.5135
X Needy Families			Ō	Z 4200	Special Fund Income - 3200.4200.T	135	Credit Card Processing - 3000.5135
X Thanksgiving Offering			0	Z 4200	Special Fund Income - 3200.4200.T	135 🗾	Credit Card Processing - 3000.5135
X Pregnancy Center Offering			0	Z 4000	Sunday Worship Offering - 3000.400	5135	Credit Card Processing - 3000.5135
Ceneral 2005			Ō	2 4000	Sunday Worship Offering - 3000.400	135 🗾	Credit Card Processing - 3000.5135
Y Building 2005		\cap	\cap	1100	Building Fund Income - 3100.4100.T	36136	Cradit Card Drocaccing - 3000 5135

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.

	Assigned Giving Fund Missions Missionaries Needy Families	is (* is default)
	Missionaries	
	Needy Families	
ected	Mark Default	Clear Selected
	ected	

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. The Giving Fund Sets, Control Totals, or Control Methods cannot be utilized with this method.

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.

Code ^	Giving Unit	Amount	Currently showing C	Contributions 1	for				
120	Mr. & Mrs. Mark Hunter	300.00	Batch Code 1 - Jul 1	Batch Code 1 - Jul 18 2022 Add Find Show All Contribution Date: Jul 17 2022 Asset: (0 accounts)		Show All			
MERR97	John and Veronica Smith	250.00							
MIKED	Mike Disney	50.00							
MIKED	Mike Disney	50.00	Default Event:	(o accounta)					
				Target	Processe		Remaining		
				0.00	650.00				
0	ustomize List Display	4 contributions	Amount: Control Number:		0		-650.00 0		
C	ustomize List Display	4 contributions	; Control Number.	0	10	1	0		
Giving Uni		Detail - Reference 795							
Enter code	e or name	List	Giving Fund		Amount	•	Memo	orial/Note	
	Michael Disney	Tithes		~	50.00				49.
	tree Dr Apt 2 (Y 40123-2318	and the second s							
big City, KT 40123-2318		Batch Contribution Preferences Override							
			Datch contribution Freierent	ses overnue					
				Jes Override					
Payment		Default Payment Type:	neck v	Jes Override					
	Check	Default Payment Type:	reck 🗸	Jes Overnue				Total:	0.00
	Check		Do Not Load	Jes Overnue				Total:	0.00
			Do Not Load With Breakdown					Total:	
Type:			Do Not Load					Total:	
Type:			Do Not Load With Breakdown	mounts		for the	e selected batch	Total:	
Type: Number:		Auto Load Pledge Records:	Do Not Load With Breakdown Giving Funds only no breakdown a Automatically load a detail line for	mounts each default (for the	e selected batch		
Type: Number: Total	4526	Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Load Pledge Records: Auto Records: A	Neck v Do Not Load With Breakdown Giving Funds only no breakdown a Automatically load a detail line for Its for this session only. To change the references? (Auto Load) or "CDM+	mounts each default (he		for the	e selected batch OK	Post To Led	v
Type: Number:		Auto Load Pledge Records:	Neck v Do Not Load With Breakdown Giving Funds only no breakdown a Automatically load a detail line for Its for this session only. To change the references? (Auto Load) or "CDM+	mounts each default (he	Giving Fund 1	for the			v
Type: Number: Total Amount:	4526	Auto Load Pledge Records: •	ndck v Do Not Load With Breakdown Giving Funds only no breakdown a Automatically load a detail line for Its for this session only. To change the "Perferences" (Auto Lead) or "CDM+ Type).	mounts each default (he User	Giving Fund 1	for the		Post To Led	ger
Type: Number: Total	4526	Auto Load Pledge Records:	Do Not Load With Breakdown Giving Funds only no breakdown a Automatically load a detail line for Is for this assission only. To change the Preferences' (Auto Load) or "CDM+ Type).	mounts each default (he	Giving Fund 1		ОК	Post To Led	v

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

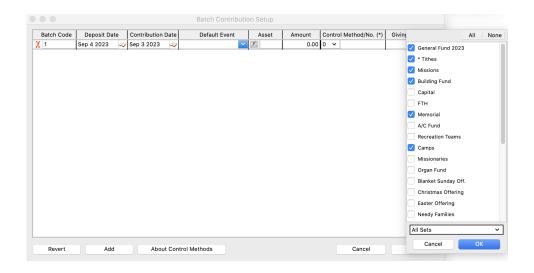
▶ Program ▶ Contributions ▶ Batch Contribution Entry ▶ Add

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, control method if desired, which asset [checking account, savings account] to post to, a predetermined total of all contributions if known, and choice of a Giving Fund Set.



•••		Batch Contribution Entry					
Code ^ Giving Unit	Amount	Currently showing C	ontributions fo	r			
			~	Add Fine	d Show	All	
		Contribution Date: Asset: Default Event:					
			Target	Processed	Remai	ning	
Customize List Display	i i	Amount: Control Number:	0.00 0	0.00	0.00 0		
	0 contributions	Control Number:	0	10	10		
Giving Unit	Detail						
Enter code or name Lis	it	Giving Fund		Amount *	•	Memorial/Note	
Payment							
Туре:	Add Line Item		Total:	0.00	*Not Ta:	Deductible Total:	0.00
	Memo					Event	
							\sim
						Ledger	
Total						Do Not Post To Ledg	er
Amount: 0.00						Posted to Ledger: No	
・見 首 Add Multi-Add		edger Print Prefs	boad D I	Enable Check	Scanne	× Cancel	à Save



Entering a Batch ▶Program ▶Contributions ▶Batch Contribution Entry

•••	Ba	tch Contribution Entry						
Code ^ Giving Unit	Amount Currently showing Contributions for					Flag this		
LAWR380 Cacao Lawrence	100.00	Batch Code 1 - Sep	4 2023	 Add Find 	Show All			
		Contribution Date: S					section or	
		Asset: Default Event:	(0 accounts	\$)			copy these	
			Target	Processed	Remaining		instructions to use	
i		Amount:	0.00	100.00	-100.00			
Customize List Display	1 contribution	Control Number:	0	0	0		as reference when	
Giving Unit	Detail						entering Batch	
Enter code or name List		iving Fund		Amount *	Memorial/Note		3	
(DELV21) Albert & Camille Delvecchio 1660 Island Dr	K General Fund 2023		 Z 	50.00			Contributions.	
Big City, KY 40123	Missions		 ✓ 	100.00		-	These are also a	
	X Building Fund		 Z 	25.00				
							helpful starting	
Payment							point for training a	
Type: Check 🗸	Add Line Item		Total:	175.00	*Not Tax Deductible Total:	0.00	1 5	
Number: 1379	Memo				Event		new person to	
					Sunday Morning 9:15	Worship 🔽	enter	
					Ledger			
Total					Do Not Post To Le	edger	contributions.	
Amount: 175.00					Posted to Ledger: No			
・< ・ ・ Add Multi-Add Change ば	X Modify Batches Ledg		b Load	Enable Check	Scanne X Finish	Nave Save		

- 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

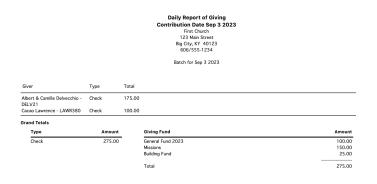
▶ Reports ▶ Contribution Reports ▶ Daily Reports ▶ Daily Report of Contributions

OR

▶ Program ▶ Contributions ▶ Batch Contributions Entry ▶ Print

Daily Report of Contributions

Run 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.



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, or Giver's Bank Account Number.

	eport 0 2022 23		
	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 - STOK 78	00 003		

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

• • •		Post	Contributions		
	Post Options	Report Preview	Report Options	Un-Post Contributions	
		Select dep Mar 21 20 Jun 6 203 Jul 4 202 Jul 25 20 All None	osit dates to post		
	Pos	t with a transactior	n date of: Mar 21 20)22 *	
Print Post	ing Report Preview			Close	Post

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.

	Dent Ontines	Descert Description	Demost Ostions	Un-Post Contributions	
	Post Options	Report Preview	Report Options	UN-Post Contributions	
Print rep	port after posting	(Reference numbe	rs will be included ir	n the final report)	Refr
		Contributi	on Posting Report		
	C	ontributions that were po	sted for deposit date M	ar 21 2022	
				Posting Ref.: Preliminary	
Referenc	e # Account Number	Giving Fund			Amount
	ions posted to :				
n/a	3000.4000.F 3110.4110.T	Tithes Missions			100.00 50.00
			Total	contributions posted to :	150.00
			locard	contributions posted to .	150.00
				Total Posted:	150.00
				lotal Posted:	150.00
_				-	to default

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.

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

4:15 PM Fri Sep 8		000			奈 100% 🔳	
Groups Adult Choir		Disney, Susan				
Q		Giving Fund	Contribution Date	Amount	Check Number	
		Tithes	Feb 22 2023	200.00	9856	
A Andrews, Elizabeth	A	General Fund 2018	Feb 21 2023	55.55	0	
	•	Missions	Feb 9 2023	100.00	0	
D	•	Tithes	Oct 26 2022	25.00	0	
Deweese, Nathan	F	Needy Families	Oct 8 2022	25.00	0	
Disney, Susan	н I	Missionaries	Oct 8 2022	25.00	0	
	•	General Fund 2018	Oct 8 2022	75.00	0	
E	J	Tithes	Sep 26 2022	25.00	0	
Emerson, David	L	General Fund 2010	Sep 25 2022	25.00	5260	
Emerson, Glenda	•	Missions	Sep 25 2022	300.00	0	
F	• Q					
Fitzpatrick, Jack	s					
Н	U •					
Harvey, Margaret	×					
Herman, DJ	z					
Ś	Û	Personal Attendance	e 🚺 Visitation Pastor	ral 🔨 Contr	ributions	

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.