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2024 CDM+ Users Conference Classes

Accounting General Ledger

This class takes the next step in CDM+ Accounting and delves deeper into ledger entries, budget, bank reconciliation, period closing procedures, and Advanced Fund Accounting. Learn how to save time by using Ledger recurring transactions for month-end transactions and check-writing. Emphasis is also given to troubleshooting issues such as finding and correcting ledger mistakes, and understanding the relationship between Contributions, Accounts Payable, and Payroll.

The General Ledger class is one class spread over two class periods repeated two times. Participants should plan to take the same Part A & Part B together.

Accounting, Getting Started

In just one session, we cover the basics of CDM+ Accounting beginning with the Accounting setup window and moving through the Chart of Accounts to the General Ledger. Participants receive a solid "how-to" introduction to Accounting Beginning Balances and Ledger entries, including Deposits and Journal entries, are explained. This class also covers an introduction to double-entry accounting including Account Types, Debits and Credits, Funds, and Fund Accounting, and the relationship of Ledger Entries to Income/Expense and the Balance Sheet reports. (Payroll is covered in separate classes.)

Accounting Reports

This class will go over all of the Accounting reports in CDM+, the different features found in ledger daily/week work reports, budget reports, and month-end reports. This class offers an in-depth review of ledger reports, including Monthly Comparison, Monthly Summary, Range Summary, Ledger by Accounts, Accounting Balances-Balance Sheet, Trial Balance, and Fund Activity using reports as troubleshooting tools is also demonstrated.

Accounts Payable

This session covers the Accounts Payable process. Vendor setup and reports, including 1099 vendors, is presented. Creating recurring and non-recurring invoices, the use of Mobile Receipts and the use of invoice reports is demonstrated. We help you understand the purpose and function of accrual accounting and how easy it is in CDM+. This class also covers how to select invoices for printing, check printing, and re-printing, if necessary. The Post to Ledger option and posting reports is detailed.

Accounts Receivable

The Accounts Receivable area of CDM+ Accounting is a valuable tool for any type of invoice/billing needs; i.e., churches with a school or day care center. This class reviews all aspects of Accounts Receivable. See how easy it is to keep track of money owed to your organization and to present professional invoices/statements. We will also cover Engage Billing, which allows customers to see their balance and make online payments.

Administering CDM+

Get familiar with the essential CDM+ administrative features. We'll discuss best practices for managing users permissions and review systems and user preferences to get the most of CDM+. Using the Audit log to review detailed record changes will also be covered.

Archiving & Data Cleanup

Confused about archiving? Learn the purpose and benefits of archiving and tips and techniques for cleaning up your data. This class teaches not only how to archive CDM+ data, but when and what data to archive. Tools to make bulk updates and corrections are also covered, as are best practices for standardizing your data to improve reporting and data analysis.

Attendance, Getting Started

Learn how to enter event, class, and list attendance for worship services, Sunday School, small groups, and even board meetings! Putting individuals in classes or groups, as well as preparing attendance worksheets (barcoded and not), is taught. See how easy it is to take live attendance with the CDM+ Mobile app, easily accomplish Class promotion, and create Attendance Histories.

Attendance Analysis & Reports

Attendance tracking accomplishes little without attendance analysis! Vital individual and group analysis is demonstrated by using the Missing Analysis report and the Attendance by Date report. Learn how to view a full year's attendance summary for an individual. Exporting attendance records and event statistics are examined. Master accessing and analyzing the significant individual and group attendance data tracked in CDM+.

CDM+ Mobile

This class introduces the CDM+ Mobile app for iPad®, iPhone®, and Android™ phones and tablets. We cover how to connect a device to your database and control which features each device you can use. Using the CDM+ Mobile sub-apps (Individuals—including Visitation and Pastoral, Attendance, Mobile Receipts, Check-In, Check-Out, and Churches) is covered in the relevant classes.

Check-In/Check-Out

CDM+ Check-In/Check-Out is a versatile addition to the CDM+ suite that tracks everything from childcare, to youth groups, adult classes, and more. This class covers every main window in the Check-In/Check-Out program including setup, performing check-ins and check-outs, and running reports. We also discuss how to configure Check-In/Check-Out for a broad range of events, from security-conscience childcare to automatic attendance entry using self-check-in, including using the CDM+ Mobile app.

COG Regional

This class is specific to staff of the State Offices of the Church of God (Cleveland, TN). We will examine importing and processing Treasurer, Minister, Girls Club, and Women's Reports. The online Women's Reporting tool will be covered along with specific items related to church tracking, minister tracking, and all of the special reports that the state office receives from local congregations.

COG Reporting For Churches

This class is specific to Church of God (Cleveland, TN) users only. It focuses on how to configure CDM+ to automate the creation of the Treasurer Report and submit it to State/Regional and International Offices. A must-have class for all Treasurers of COG churches and State Office staff who receive the reports!

Contact Management

Looking for an effective way to stay in contact with people related to your church or organization? In this class, we demonstrate how to set up a custom follow-up contact process with reminders for when action should be taken and by whom. Learn how to enter contacts and actions completed for individuals or families, using both the CDM+ Membership desktop software and using the CDM+ Mobile app. We also cover how to control who has access to contact history. If your organization needs a custom solution for recording contacts and scheduling follow up, come to this class.

Contributions Comparison Reports

In this session, we review many of the reports within Contributions. Comparative reports and exports are investigated. Learn how to create Contributions letters to givers that include their Year-to-Date giving totals right in the text of the letter! Listing reports, including Giving Detail by fund(s) and Giving by Date, are effective evaluation tools for stewardship committees. Analysis of giving by dollar ranges and increase/decrease in giving by individuals or giving to specific Giving Funds is taught.

Contributions, Getting Started

Here, we cover everything you need to begin entering contributions, including setting up Giving Codes and Giving Funds, viewing individual Giving History (both in CDM+ Contributions and CDM+ Mobile), and the Groups field on Giving Unit records. Basic Batch Contributions setup and entry is explained. Everything you need to know about linking to Accounting and Posting to Accounting is explained. Learn to verify your contributions entry through the use of Daily reports.

Contributions Pledging

Churches often use the pledging process as a financial forecasting tool. Learn how to enter annual pledges and use the Multi-Year Pledge function. Learn what "projected" pledges are and how they are integrated into the reporting process. Pledge comparison reports are reviewed and the process of creating a Letter Notice with a member's actual Pledge Amount included is demonstrated in this class.

Contributions Procedures

Go beyond the basic Contributions Entry and the Daily Report of Giving. Maintaining the integrity of the Contributions History file is covered, as well as demonstrating its printing capabilities. The use and set up of "Special" and "Visitor" giving codes to track loose cash and visitor gifts are explained. If you receive regular checks or electronic fund transfers that are generated by givers' banks, you'll also learn how to streamline entering those in your contributions records. Information about handling special offerings, gifts-in-kind, and non-deductible gifts is given. Tracking and reporting of Memorial Gifts is also covered.

Contributions Statements

Accurate and timely Giving Statements promote good stewardship by members and donors. This class reviews the Contribution Statement report options built into CDM+ so you can decide which is best for your church. This one class covers the creation of, paper, e-mailed, and online Giving Statement reports. Using contribution Receipts is also covered. If you have the responsibility to prepare Giving Statements, don't miss this class!

DOC Search and Call

This course will walk through the DOC Search and Call process in order to demonstrate how CDM+ programs and tools work at each step along the way. Some topics we will cover include: creating a ministry position, building a congregational profile, searching minister profiles, flagging profiles for a ministry position, generating profile documents, using minister and ministry position notices, and creating CDM+ records for the called minister.

DOC Minister Reporting

This course will cover the processes DOC regions use to report minister information to the minister directory database at Disciples Home Missions. The topics we will cover include: overview of DOC Minister and Church tabs, recording and reporting church of call, reporting functions, when and how to submit a regional directive, annual renewal of standing, using Engage and CDM+ Mobile for minister data.

DOC Regional with DHM/OCV

This is an intentional time for connection and conversation with DHM Office of Christian Vocations (OCV). Lorna Hernandez, Anne Marie Moyars, and Kelly Harris will share helpful updates and information and offer a Q & A session. During this time, the OCV Team and DOC regional staff will learn and share about the differences/similarities between the DOC and Regional CDM+ products, the ways in which they communicate with each other, and the opportunities for mutual support and collaboration. Bring your questions, comments, feedback,

Engage Administration

Bring fresh, enriching content to your organization's website, and know that any information you publish there is is updated whenever you make changes in CDM+. This class walks you through setting up CDM+ Engage, managing Engage user accounts, and publishing Engage to your members, supporters, and visitors. How to work with Web Ministry Tools (WMTs) is included, as is granting access to staff to manage just the right areas of Engage. If you administer Online Giving, Directories, Payroll, Events, and so in, this class is strongly recommended for you!

Engage Giving and Online Payment Processing

Online giving and payment options are plentiful, but only one solution—Engage Giving with Payment Processing—automatically enters donations and payments into CDM+ Contributions and CDM+ Fund Accounting! Learn how to set up Engage Giving to allow easy, secure one-time and recurring online giving via debit card, credit card, or ACH bank account transaction. Find out how to organize funds using giving sets, and how to handle gift notifications, confirmation e-mails, processing fees, and more. Plus we will discuss how to track these online gifts, event registrations, and payments from receipt to posting to the ledger. Our unique Deposit Processing tool automatically reconciles electronic deposits made into your bank account and creates ledger entries that track the income and fees associated with these transactions. Learn how to track the status of payments, including failures and returns, and how to issue refunds.

Event Registration A - Event Setup

This class covers the powerful CDM+ Event Registration program. We will walk through the steps to create an event record, structure custom activities, setup confirmation emails, create an online registration option through Web Ministry Tools, and record manual registrations. We will also highlight how to tie event payments and fees to CDM+ Fund Accounting and how you can see historical event registrations for members in CDM+ Membership. CDM+ Event Registration tool is an ideal solution for camps, Vacation Bible Schools, mission trips, retreats, fundraiser, dinners, community service, and many more events. Come create an event with us!

The Event Registration class is one class spread over two class periods repeated two times. Participants should plan to take the same Part A & Part B together.

Event Registration B - Event Management

CDM+ Event Registration provides you with multiple tools to help make your event a success. This class will focus on what to do with all of your online and manually entered registrations. From our robust reporting system to creating name badges to sending out follow-up emails and letters we will walk through these features that will help you manage your event like a pro.

The Event Registration class is one class spread over two class periods repeated two times. Participants should plan to take the same Part A & Part B together.

Membership Data Management

Learn to customize CDM+ Membership with an in-depth look at the Master Coding System and how to best set up Membership to support the ministries of your church. Learn how to use List Maintenance, Field Maintenance, and list transfer to manage groups and personal data. Discover the expansive possibilities the User Fields offer you to track a wide variety of family and personal information. This class will focus on cleaning up Membership records and maintaining them on an ongoing basis.

Membership, Getting Started

We begin with an in-depth review of the Address and Individual Records, including the membership records screens and fields, their features, and toolbars. The relationship between Address Records, Individual Records, and Giving Unit records is explained. Adding Address Records and Individual Records is demonstrated. Using Online Directories in Engage and working with Individuals in CDM+ Mobile is covered. This class is an effective introduction to Membership, providing the beginning user everything needed to get started.

Membership Reports

Discover the many membership reports you can create using CDM+ and its multiple configurations. Learn how to create Yearbook Directories and Name Badges for your members or staff to use. Discover the strengths of the Custom Listing reports and how they enhance your capacity to view your data. We will review how to export data from CDM+ to other programs and how to manage simple and complex queries. Join us as we look at how CDM+ Membership Reports can enrich your effectiveness and your productivity.

Notices

Want to save yourself the extra steps of exporting email addresses or creating merged letters? This class covers how to use the word-processor-like features of Notices in CDM+ to create eye-catching, personalized cards, letters, and emails from within CDM+. We also cover organizing notices by category and set access to saved notices. Put the power of CDM+ to work in your communications!

Payroll, Getting Started

Proper payroll setup and payroll procedures are the goals of this class. You will learn time saving steps to assist with adding new employees. Participants also receive an in-depth understanding of exactly how CDM+ calculates payroll, writes checks, posts to the ledger and can be viewed in Engage Payroll. The relationship of CDM+ Payroll with Accounts Payable and the General Ledger is presented. This class is for both the new or experienced user of CDM+ Payroll.

Payroll Procedures & Reports

You have just run this quarter's 941 and it shows you owe money! How could this be? This class features a review of the basic Payroll reports including explanations with particular attention to the impact of correcting errors. Considerations on how to assure that 941, W-2, and W-3 printing will run correctly are covered. Direct Deposit payroll setup and processing is explained. If you are responsible for payroll, fit this class into your training schedule.

Regional

The CDM+ Regional program tracks data needed by judicatory bodies or multi-level organizations to manage data for multiple organizations, such as a regional office overseeing a group of local churches. The course will cover the Church Records window and data. It will also cover differences in Engage and CDM+ Mobile as well as Address, Individual, and Giving Unit Records when Regional is installed.

Roommate Facilities Manager

Roommate is your solution for facilities scheduling. Here we present in detail how to use CDM+ Roommate to track your events, rooms, and equipment, whether on campus or off. Discover other uses of this powerful tool in scheduling staff, categorizing events by Department, and keeping an up-to-date inventory of your organization's assets. Creating effective reports for staff and members is taught. Looking to use the Calendar Web Ministry Tool on your website? Take this class also!

Searches/Custom Listings

At its core, CDM+ is a powerful database engine, and learning how to master searching and reporting will transform CDM+ into an invaluable tool for your mission. This class covers using simple and advanced find features in CDM+ to locate the exact information you need, including searching across programs. We'll review how to build custom listings and exports with formatting, subtotals, and more. Learn how to save searches and custom listing setups for maximum efficiency. This class is applicable to all areas of CDM+ and is a great way to level up your CDM+ game!

Tips & Tricks

Whether you're a seasoned pro or brand new to CDM+, this general session has something for you! Our trainers will take turns sharing invaluable time-saving tips, tricks, and strategies for getting the most of out of CDM+. From keyboard shortcuts to customizing your workspace, this session will cover all areas of CDM+ and turn you into a CDM+ guru, ready to wow your co-workers when you return home!

Visitor Tracking

Growing churches know who's visiting and follow a process to minister to and assimilate visitors into their fellowship. This class demonstrates a process and presents you with the tools through the Membership/Attendance and Contributions programs to implement an effective procedure for ministering to visitors and prospects.