

Administering CDM+

CDM+ Structure

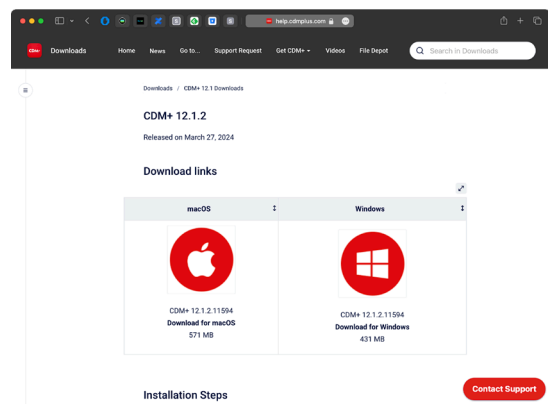
- **CDM+ Desktop**
 - Primary platform for managing CDM+ data
 - Download from get.cdmpius.com
 - Contains windows, reports, program logic
- **CDM+ Engage and WMT**
 - Web-based access to your data
 - Member's portal
 - Online giving
 - Registrations
- **CDM+ Mobile**
 - Data access from a mobile device
 - Download from the App Store/Google Play/Amazon
- **CDM+ Hosting**
 - Service managed and provided by Suran
 - Hosted in data centers around the US and internationally
 - Manages backups, including separate off-site backups
 - Communicates between CDM+ Desktop, Engage, WMT, Mobile, and your data
 - Also contains certain server-based functions for CDM+
- **Database**
 - Main Database or Archive
 - Contains all your information

Maintenance

- **CDM+**
 - Consistent data entry (see Archiving & Data Cleanup Manual)
 - Security

Installing CDM+

CDM+ installers are available at get.cdmpius.com. This page will always show the current published version. If your organization uses a different version, such as an Early Adopter Beta, CDM+ will update to that version when you connect to your account.



Download and install the version for your computer, either macOS or Windows. You can find step-by-step installation instructions at: <https://help.cdmpplus.com/ucd/installing-cdm>

Please note that you will need to authenticate as an administrator on your computer to install CDM+.

Connecting to your account

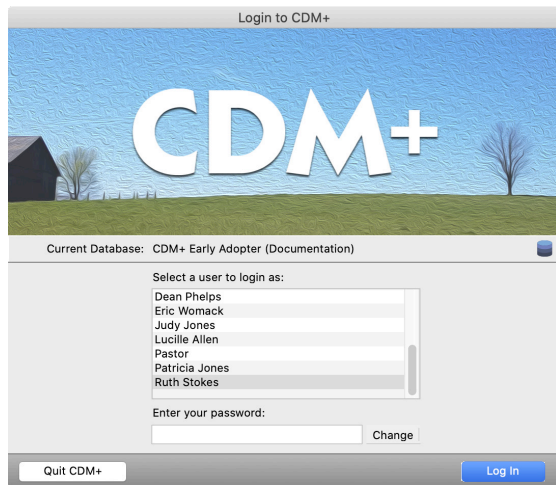
When you open CDM+ for the first time on a computer, you will see the setup assistant. Complete the setup by providing your hosting ID and password.

If you don't have your hosting ID and password, please contact CDM+ support. If you are a named contact with Suran, we will provide the hosting ID and password. If you are not yet added to our contact database, we will ask for documentation from your organization authorizing you to access your CDM+ account.

You can find step-by-step setup instructions here: <https://help.cdmpplus.com/ucd/client-setup>

Logging in to CDM+

The Login window will open each time you launch the CDM+ desktop application, and it will display a list of users and the name of the database CDM+ is currently accessing.



At the very least, the username for the Administrator you defined during the initial program setup will appear in the user list on the Login window.

If additional people will use CDM+, the Administrator must log in first and set up the other users on the Users pane of the Administration window.



TIP: Create a User-for Each Person Who Uses CDM+

We strongly recommend that the Administrator create a user for each individual who uses CDM+. Besides limiting access to particular areas of CDM+, users retain their own specific settings.

Most preferences, report setups, and even how you arrange the CDM+ windows on your desktop are user-specific. Logging into CDM+ with your own user lets you create your own work environment within CDM+.

Finally, unique users allows the program administrator to see a log of who was using the program, actions each user took, and when each user was logged into the program.

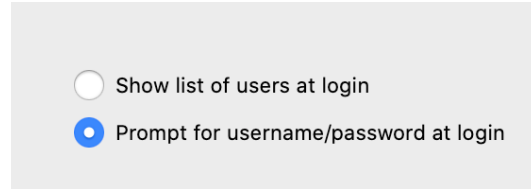
Any user with administrative access can open Administration under the File menu and view, create, and edit user profiles on the Users pane.

Alternate Log In Method

The CDM+ administrator may choose to require all users to enter their usernames and passwords each time they log in. With this method, a user cannot see a list of all users or who is already logged into CDM+.

The CDM+ Administrator can change the log in method under System Preferences.

► CDM+ (macOS)/File (Windows) ► Preferences ► CDM+ System ► General tab ► Login icon



Any user logging into CDM+ will now need to enter both a username and its related password to access the program.

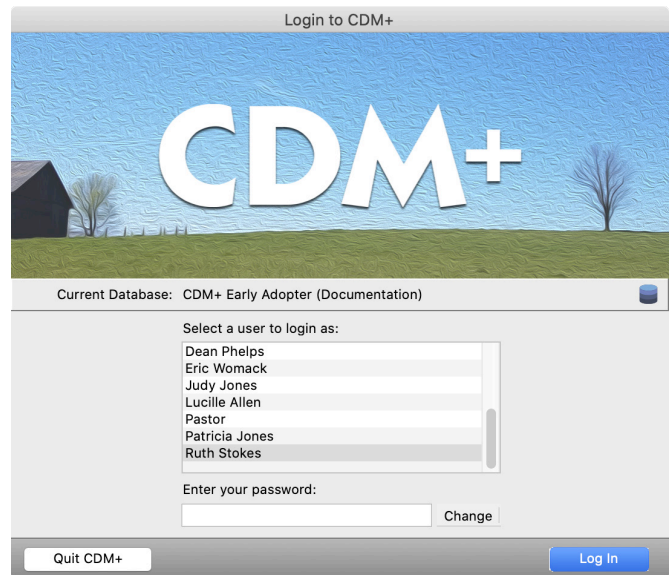
User Login

You must log into CDM+ each time you launch the program.

To log into CDM+, click once to select your name from the user list, enter your password, and click Log In.

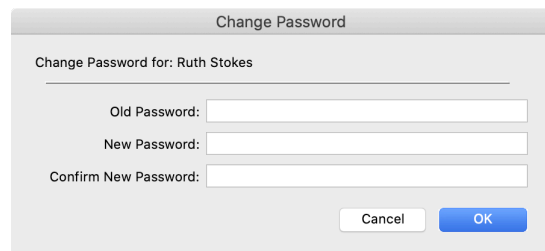
NOTE: Users who are already logged in will appear in gray, and you will not be able to select one of those usernames from the list.

Note that both usernames and passwords are case-sensitive (*make sure your caps lock is not on*).



Passwords

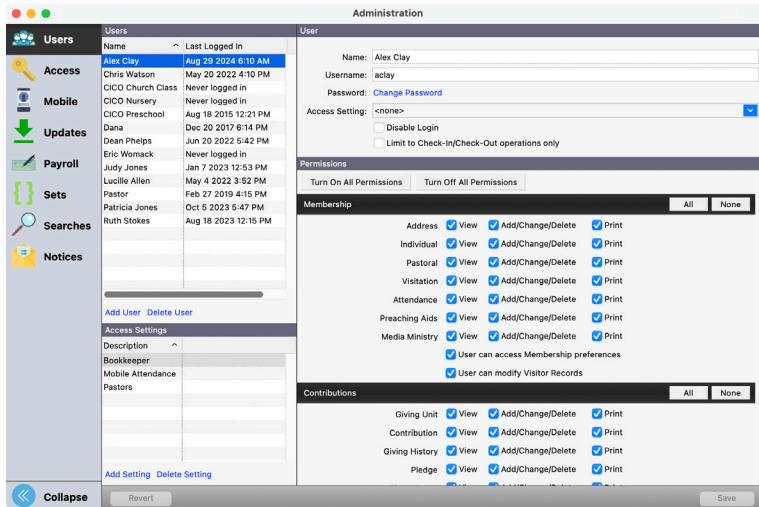
Each CDM+ user can change their own password on the Login window, regardless of what program access permission the user has. Click Change next to the password field.



Enter your current password, the new password you wish to use (confirming that password by re-entering), and click **OK**.

If you have lost your password, ask your CDM+ system administrator to give you a new one. If you are the system administrator and have lost your password, contact CDM+ Technical Support for help resetting your password.

Administration



Go to File -> Administration to manage users, permissions, and more. Anyone with access to this window is considered an administrator.

Users allows you to create users and manage their permissions. It is strongly recommended to create accounts for each person using CDM+ and not roles, such as "Bookkeeper". CDM+ licenses are enforced by concurrent logins, not the number of users added, and the user name is used to track audit log activity.

For new people or positions, try starting with fewer permissions, then gradually add permissions as you discover what that user will need.

When a user leaves your organization, we recommend you:

- Disable their login
- Re-assign or delete saved searches
- Re-assign or delete saved sets
- Review pastoral records, visitation records, and notices

You can use the **Access**, **Updates**, and **Payroll** sections on this window to view log activity. **Mobile** is used to provision CDM+ Mobile devices, which is covered in the CDM+ Mobile class.

Sets, **Searches**, and **Notices** allow you to reassign ownership of saved sets, searches, and notices. You can also delete unused entries from this area, even if you don't own that entry.

Audit Log

CDM+ tracks nearly every change to every record using a system called the Audit Log. This is an invaluable tool to track down data issues and find out how and when changes occurred.

The audit log tracks complete information, and there is a limited interface in CDM+ Desktop to view these changes. Every record window has an Info tab that shows changes to the primary record. Click a change to see its details.

Only changes to the primary record are displayed here. Changes to connected records, like email addresses or groups, will not be displayed. The audit log tracks these changes, so if you need information on a specific change, contact CDM+ Support and our Data Services team can extract a report of changes from the backend. You can even request (within reason and not always possible) that Data Services use the audit log to undo changes, including deleting records.

SHOW	Last Name	Salutation Name	Zip Code	Mailing Code	Care Group	Primary Phone
All	Adams	Alex and Abby	40124	Local church members who receive mail	Care Group 1 - Alex Adams	(859) 456-3214
None	Allen	William & Lucille	40124	Local church members who receive mail	Care Group 2 - Margaret Har...	606.555.8381
Find	Andrews	Robert & Elizabeth	27389-8914	Local church members who receive mail		828.626.3535
Searches	Balling	Denik and Lucy	40124	Local church members who receive mail	Care Group 4 - Jose Perez, Sr.	606.555.3039
Grid	Bates	Matt and Ashley	43130-3276	Local church members who receive mail		
Reports	Big City Gazette		40124	News release addresses		606.555.8826
DD	Bowlen	Bill and Patty	43130-2739	Local church members who receive mail		
+	Brown	Melvin & Dorothy	94306	Local church members who receive mail		415.555.0889
Multi-Add	Cassidy	Ryan and Adrienne	40124	Local church members who receive mail	Care Group 2 - Margaret Har...	606.555.4425
Change	Church	Pastor Brown	40124	Local church members who receive mail		606.555.9811
Delete	Church	Pastor Williams	40124	Local church members who receive mail		606.555.8633
Individual	+	Alex and Abby Adams				61 Results Filtered

Preferences

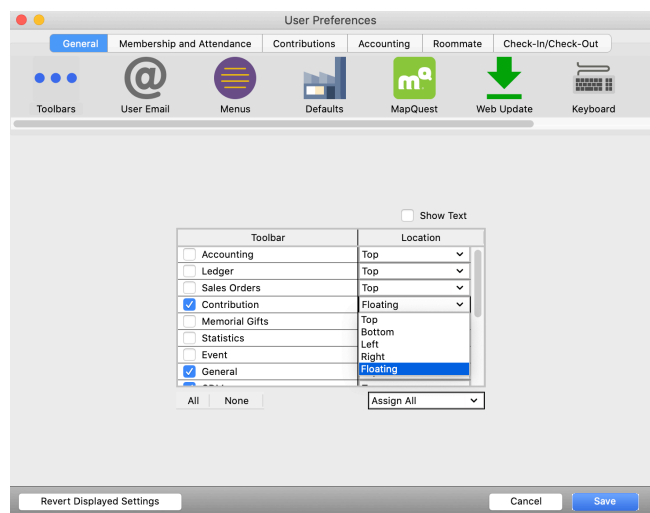
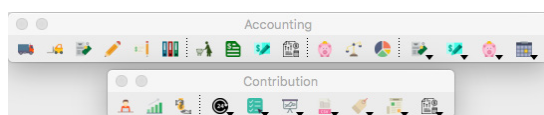
CDM+ allows for both User Preferences and System Preferences to be setup, which determine how selected features work within the programs. System Preferences affect all users; User Preferences are chosen by the individual user and affect only that user. To access Preferences, select CDM+ (macOS) or File (Windows) on the menu.

User Preferences

In addition to accessing the CDM+ programs through the menus, you can choose to display toolbars. The Program toolbar will display at the top by default.

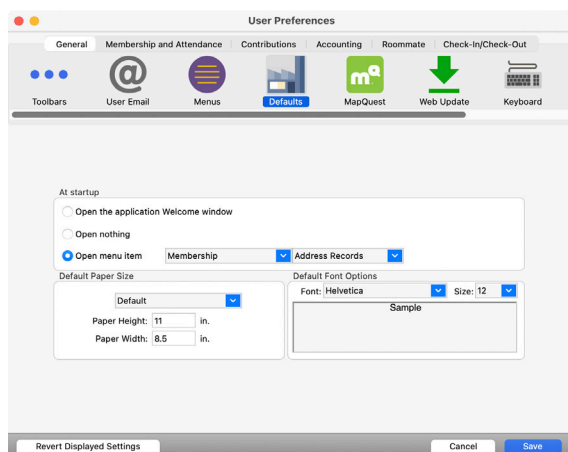
Toolbars

- ▶ CDM+ (macOS) or File (Windows)
- ▶ Preferences ▶ CDM+ User ▶ General
- ▶ Toolbars



Defaults

Use these preferences to customize your CDM+ experience. The At Startup setting controls what window opens when you first log into CDM+. You can change your default paper size and preferred font for all reports.

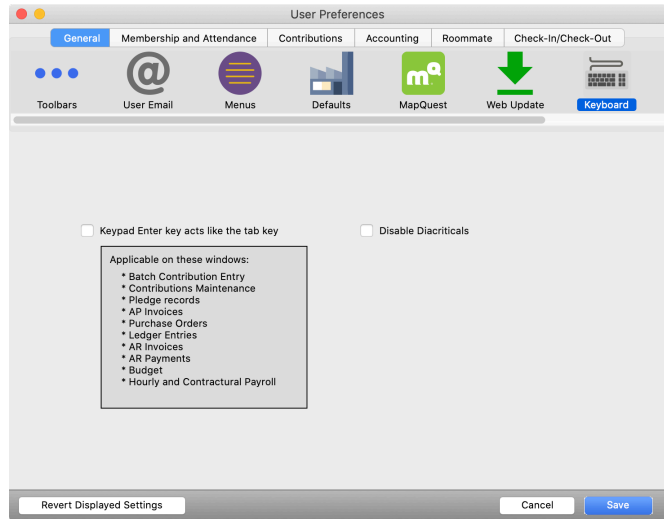


User Email

All users of CDM+ should click the User Email icon on the General tab and enter their individual work email information. SMTP setup is done on the CDM+ System Preferences window.

Enter Key functions like Tab Key

On selected data entry windows, the numeric Enter key may be set to function as the Tab key to facilitate easy entry. To activate this function, go to User's Preference window, click on the General tab, click the Keyboard icon, and check the box.

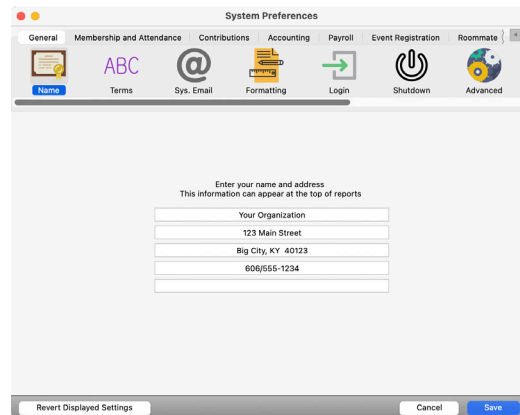


System Preferences

► CDM+ (macOS) or File (Windows) ► Preferences ► CDM+ System

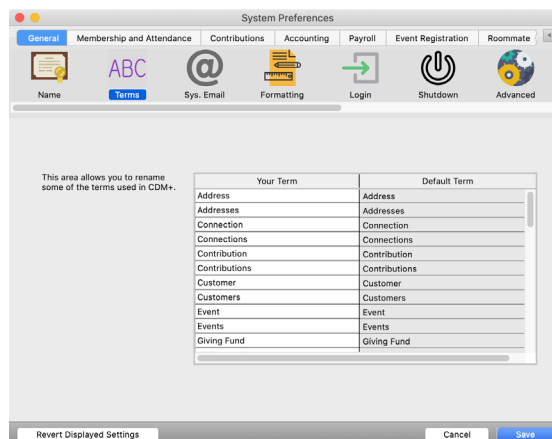
Name

Enter the name and address of your church or organization as you want it to appear on the top of CDM+ reports.



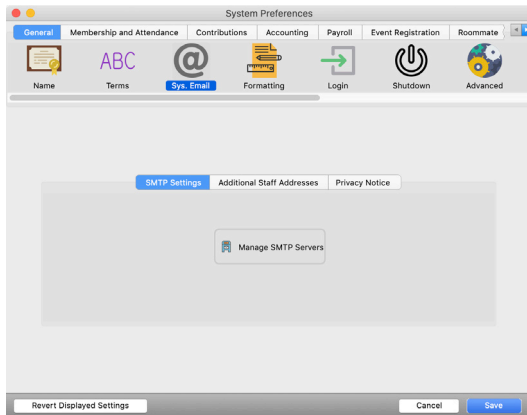
Terms

CDM+ allows for the user to rename some of the terms used in the software. **Terminology changes made here affect all users.**



System Email

Complete the system SMTP settings for sending email from CDM+.



On the Additional Staff Addresses tab, enter the email addresses of staff members; by default, outgoing emails will be sent to these addresses. You can edit the list at the time you send the email.

A privacy notice may be added under the Privacy Notice tab that will append to the end of outgoing emails. You can edit this notice at the time you send the email.

Suran Support

Open a ticket directly

Whether you use the Help Center, email, or call, you'll create a ticket in our support queue. The most direct path to our support team is using the Help Center.

1. Click Contact Support in the lower right-hand corner of this page
2. Fill out the form
3. Submit

You'll get an email reply letting you know the ticket was created.

TIP: You can use this form to indicate your need is urgent. This will put your ticket towards the top of the queue.

You can also open a ticket by emailing us at support@cdmplus.com with the following information:

- Your name
- Your organization's name
- Your callback number
- Your availability

Share some details

If you have a screenshot, PDF report, or other example, you can include those in the Contact Support form or your email. The more details you provide, the faster we can help you get a solution.

Skip the line, even if you want a call

We're happy to work with you via phone, email, or both. If you would prefer a phone call, the fastest way to get on our call back queue is to open a ticket and let us know you prefer a callback.

NOTE: Please know we endeavor to respond to requests within 8 business hours, which are 8:30 a.m. to 5:00 p.m. Monday - Friday. If you request help within the last 8 business hours of the day, please let us know the next day and time you will be available as well.

We are always happy to speak with you if you call us at 800-633-9581. When you call, a receptionist will take your information and open a ticket for you. This ticket goes into the same queue that receives emails, so clicking Contact Support or emailing us to request a callback will skip the line to have a receptionist enter a ticket on your behalf.

Our support team will respond as soon as possible, following the order in which tickets were opened, regardless of if the ticket came from an the Help Center, email, or was created by a receptionist.

Schedule calls in advance

If you prefer a phone call and have limited availability or need special personnel present for your call, such as an IT person or CPA, try scheduling a callback. Calls are prioritized based on when they are received, so emailing us on a Tuesday to schedule a callback on a Thursday will prioritize your call ahead of any call requests that come in the day of the callback.

To schedule a callback, simply open a ticket with your name, organization name, phone number, and requested callback time. While we can't guarantee the exact minute we'll call you back, a scheduled call is much more predictable and can often arrive within a 30-minute window.

Leave complete voicemails

If you prefer to have a receptionist create a callback ticket for you but are unable to reach a receptionist, please be sure to include ALL this information in your voicemail:

- Your church or organization's mailing zip code
- Your church or organization's name
- Your church or organization's city
- Your name
- Your callback number
- Your email address
- Your availability
- A brief description of what you need help with

You can always email support@cdmplus.com to request a callback as well.