

Engage Administration

What is CDM+ Engage?

- A web-based service from Suran Systems
- Allows accessing information from CDM+ online
- Lets you set up forms to collect giving and event registrations, and more from your website
- A companion product to CDM+ Desktop and CDM+ Mobile

What can you do with CDM+ Engage?

- Accept online gifts (either one-time or recurring)
- Allow your members to view giving history securely online
- Publish a church directory online
- Set up registration forms for camps and events (with or without online fee payment)
- Give your staff a simple directory search without teaching them CDM+
- Share a monthly calendar of events that is automatically updated
- Accept online payment for customers in Accounts Receivable
- Give employees access to view their payroll history and print pay stubs

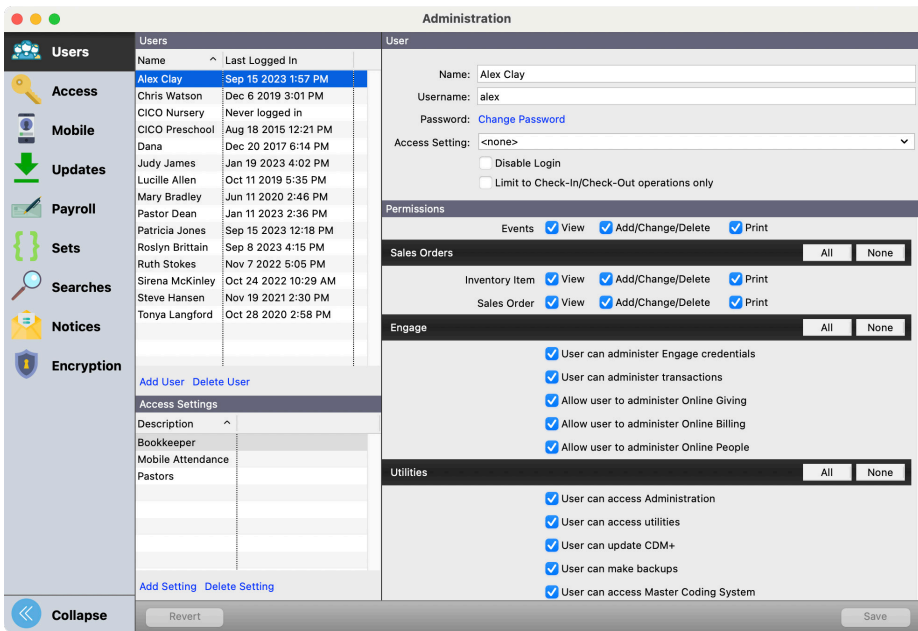
Getting Started with CDM+ Engage

CDM+ Engage is available at no additional cost with any SAAS or Cloud plan. Contact CDM+ Sales to request Engage be activated on your account. You can optionally add a merchant account to accept online payments. The merchant account is available at no charge, though each electronic transaction has a fee. See the manual for Engage Giving and Online Payment Processing for more information on merchant accounts.

Your organization will be assigned a unique URL for CDM+ Engage which will be provided once Engage is setup. The next step is for you to configure CDM+ Engage. This can be done either directly from within CDM+ Desktop or through the Engage website. Using CDM+ Desktop is the recommended method.

User Permissions

There are several permissions in CDM+ Desktop that control access to Engage features. Go to **File ► Administration** and select a user who need access to CDM+ Engage Administration.



Under the Engage Header you can choose from the following options:

User can administer Engage credentials allow managing the usernames and passwords members use to access their Engage account.

User can administer transactions allows viewing and refunding online payments.

Allow user to administer Online Giving allows viewing Engage on behalf of a giver.

Allow user to administer Online Billing allows viewing Engage on behalf of a customer.

Allow user to administer Online People allows viewing Engage on behalf of an individual.

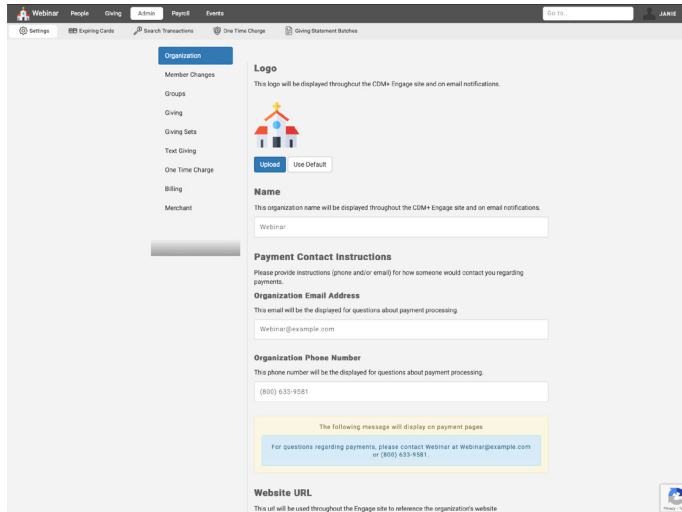
Engage Settings

Program ► CDM+ Engage ► Settings

Click each section on the left to configure those options.

Organization

The Organization settings configure accessing and branding Engage for your organization.



Logo

Engage can display a custom logo for your organization. This logo will appear:

- On the Organization Directory
- On your Engage login page
- When using Engage
- On email notifications from Engage

You can upload virtually any type of image file. Recommended settings are:

- PNG, JPG, or GIF
- Square dimensions
- 512px by 512px or smaller (at least 196 x 196, then it will resize as needed)

To upload a logo:

- Click Upload
- Choose your image
- Click Select or OK

To clear your custom logo click Use Default.

Name

Enter your organization's name. This will appear:

- On the Organization Directory
- On your Engage login page
- When using Engage
- On email notifications from Engage

Payment Contact Instructions

The payment contact Organization Email Address and Organization Phone number lets your givers know who to contact if they have a question about their payment. At least one of these fields must be filled out before saving your changes as this is a requirement from our payment processor.

Website URL

Enter the URL of your organization's website. This is different from your organization's Engage website and when clicked it will take website users back to your website.

CDM+ Engage URL

The CDM+ Engage URL determines how visitors will access your Engage account. A URL should:

- Contain letters, numbers, and dashes
- Be brief and easy to remember
- Uniquely identify your church or organization
- Be unique across all CDM+ clients who use Engage.

Simply enter a URL to set it.

NOTE: Existing bookmarks and links will break if you change the URL. If you have already published your Engage URL be prepared to communicate the new URL to anyone who might have your previous URL saved.

You can also use the following buttons:

- **Copy** to copy the URL so you can paste it into your web page so when clicked it will take the web user to the Engage Giving page.
- **Embed HTML** to copy a URL so you can embed the Engage Giving page into your existing web page.
- **QR Code** to download a QR code that will open your Engage account.

Email Sender Name

Enter the email sender name that will be displayed on all email notifications.

Reply-To Email Address

Enter the email that will be the reply-to for all email notifications.

Publish

By default your organization will appear in the Organization Directory, and can be searched for by name. If you do not want your organization published, check Do not publish my organization.

Publish

List your organization in the directory at engage.suran.com. Publishing will help visitors locate your CDM+ Engage site.

Publish my organization

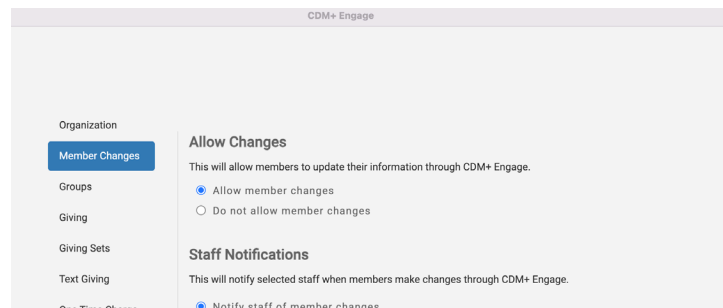
Do not publish my organization

Save

Be sure to save your changes when you are ready. Click Discard Changes to revert to the previously-saved changes.

Member Changes

Click on the Member Changes tab. These settings affect changes members can make to their Engage profile



The screenshot shows the 'Member Changes' settings page in the CDM+ Engage interface. On the left is a navigation menu with 'Member Changes' selected. The main content area is divided into two sections: 'Allow Changes' and 'Staff Notifications'. Under 'Allow Changes', the 'Allow member changes' radio button is selected. Under 'Staff Notifications', the 'Notify staff of member changes' radio button is selected.

Allow Changes

Check Allow members to change their information to allow individuals to update their own:

- Phone numbers
- Email addresses
- Physical address
- Photo

This can be helpful for maintaining current contact information in your database.

Staff Notifications

If you want one or more staff people to be notified when an individual changes their information, check the box for Notify staff for member changes.

If you do not want staff to be notified, check the box for Do not notify staff for member changes. Underneath the check boxes is a section for email addresses that will receive the notifications. To add an email address, type the address in the provided box and click Add. To delete an email address, click the little x next to their email address in the list.

Save

Be sure to save your changes when you are ready. Click Discard Changes to revert to the previously-saved changes.

Groups

See the Membership manual for information about configuring Engage Groups.

Giving/Giving Sets/Text Giving

See the Engage Giving and Online Payments Processing manual for information about configuring Engage Giving.

One Time Charge

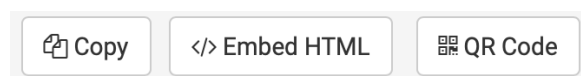
See the Engage Giving and Online Payment Processing manual for information about using One Time Charges.

Billing

See the Accounts Receivable manual for information about Online Billing.

Publishing Engage

There are several ways to publish Engage, and you can use multiple techniques to meet different needs.



Direct Link: You can copy the URL for any page in your Engage site and link to it. If the page requires a login, the user will be required to login and then will be redirected to the page you linked.

This is a great option to share a link to your Online Directory Group or a page to make a payment for an invoice.

QR Code: Download a QR code print a scannable link to your Engage Account. This makes it easy to promote Engage when you launch it to your organization or to promote online giving for a specific cause. Look for the QR Code button in Engage settings to download a QR code.

Embed: You can copy a code snippet to embed Engage within your website. This works especially well for giving set and one-time payment designations to add your own branding. Look for the Embed link in Engage Settings to copy this code.

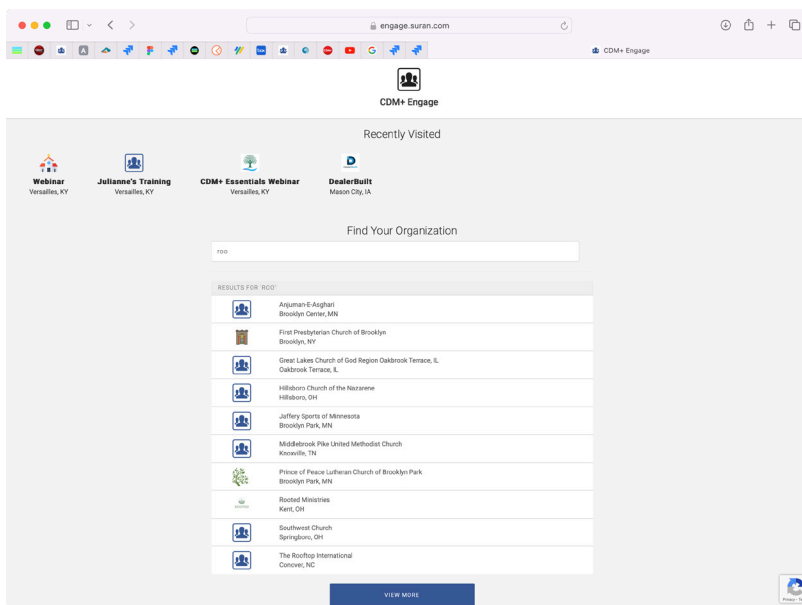
Mobile “App”: When visiting your Engage Site on a mobile device, visitors can create a pseudo-app to allow easily accessing Engage.

Visit the Suran Help Center for downloadable flyers and videos you can share to promote CDM+ Engage: <https://help.suran.com/engage/latest/publishing-and-promoting-engage>

Organization Directory

Go to <https://engage.suran.com>. You will see:

- Recently visited organizations
- A search feature to find your organization



Recently Visited

Engage accounts you've recently visited appear at the top. This will help visitors locate your Engage account if they've previously visited it but have lost the direct link.

NOTE: Upload a logo on your Organization settings to help visitors locate your organization's Engage account.

Find Your Organization

You can search for organizations by name, city, state, or URL.

Hiding Your Organization

If you do not want your organization to appear in the search results, access your Organization settings and disable the setting List my organization when searching for organizations on engage.suran.com.

NOTE: If a visitor has accessed your engage account it will still appear under Recently Visited even if the organization is not listed in search results.

Logging Into Engage and Creating Your Account

Logging In

To log into Engage, visit your Engage URL, enter your username and password, and click Sign in. If you do not have an Engage account, click the Create account link to create one.

Creating an Account

To create a new Engage account, start by selecting Create Account from the Engage login page. Engage will then ask for an email address. Engage uses the email address to reference the CDM+ database to see if there is an individual record with a matching email address. Enter your email address, and click Check Email Address.

A screenshot of a web form titled "Sign up for CDM+ Engage." It contains a text input field labeled "EMAIL ADDRESS" with a placeholder "Email Address". Below the field is a blue button labeled "CHECK EMAIL ADDRESS" and a link labeled "< BACK".

Matching Email Address

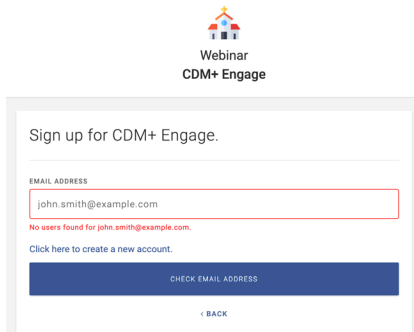
If there are one or more names linked to the email address, Engage will ask the user to select the correct name for this Engage account. When the user selects a name, Engage will associate this account with that individual record in the CDM+ database, and the user will be asked to create a user name.

The user can also tap or click Not you? to connect this email address and create an Engage account for a new individual. Tapping this link will follow the same path as if the email address had not been found in the CDM+ database, asking the user to enter name and address information.

A screenshot of a web form titled "Please click your name." It displays the text "The following names link to @suran.com. Not you?". Below this are two selectable options: "Janie Austin (janie.austin)" and "Mr. Mike Ray Disney (mdisney)". At the bottom is a link labeled "< BACK".

Email Address Not Found

If the entered email address does not match an email address attached to an individual record in the CDM+ database, the user will receive a message that no users were found for the email address. The user will have the opportunity either to enter a different email address and click Check Email Address, or to use the **Click here to create a new account** link. If the user chooses to create a new account, Engage will create new Address, Individual, and Giving Unit records for that user.



Webinar
CDM+ Engage

Sign up for CDM+ Engage.

EMAIL ADDRESS

john.smith@example.com

No users found for john.smith@example.com.

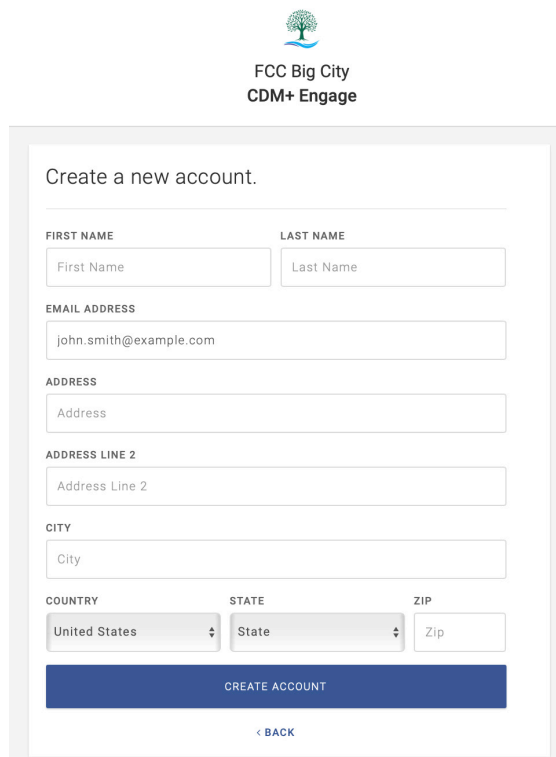
Click here to create a new account.

CHECK EMAIL ADDRESS

< BACK

Enter Name and Address

If Engage needs to create a new individual with related address and giving unit records in the CDM+ database, it will ask the user to enter name and address information. Once this information is entered, the user clicks the Create Account button. Engage will then prompt them to create a username.



FCC Big City
CDM+ Engage

Create a new account.

FIRST NAME LAST NAME

First Name Last Name

EMAIL ADDRESS

john.smith@example.com

ADDRESS

Address

ADDRESS LINE 2

Address Line 2

CITY

City

COUNTRY STATE ZIP

United States State Zip

CREATE ACCOUNT

< BACK

Create a Username

Enter a username, and click the Create Username button. This name must be unique among individuals in the CDM+ database. Engage does not enforce a character restriction on the username, but it should be easily remembered.



FCC Big City
CDM+ Engage

Once the user name is created, Engage will send the user instructions for creating or resetting a password for their Engage account

Create a username.

Please enter a username for **John Smith**. Further instructions will then be sent to **john.smith@example.com**.

USERNAME

Username

CREATE USERNAME

< BACK

Setting the Password

When a user needs to create or reset the password to their Engage account, Engage sends an email that contains the username and instructions for resetting the password. The user can reset their password by clicking the Reset Password link in the email.

Thank you for registering for CDM+ Engage owned by First Church. The next step in the registration process is to create a password.

Username **xanderc**
Create Password Link [Click Here](#)
Create Password Code **7bd93000-3714-013c-3eec-288e24a483d7**

If you need help, please contact Webinar.



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



Powered by CDM+ Engage from Suran Systems, Inc.

Alternatively, the user can copy the password code in the email, paste it into the Password Code field, and click the Check Code button.



FCC Big City
CDM+ Engage

Enter password reset code.

A password reset code has been sent to your email. This email will be sent from noreply@suran.com. Please make sure any spam or junk email filters you have will allow this message through.

PASSWORD RESET CODE

CHECK CODE

Log In

After creating or resetting the password, the user will be returned to the Engage login screen where they can log into Engage with their username and password.



FCC Big City
Engage

USERNAME

PASSWORD

SIGN IN

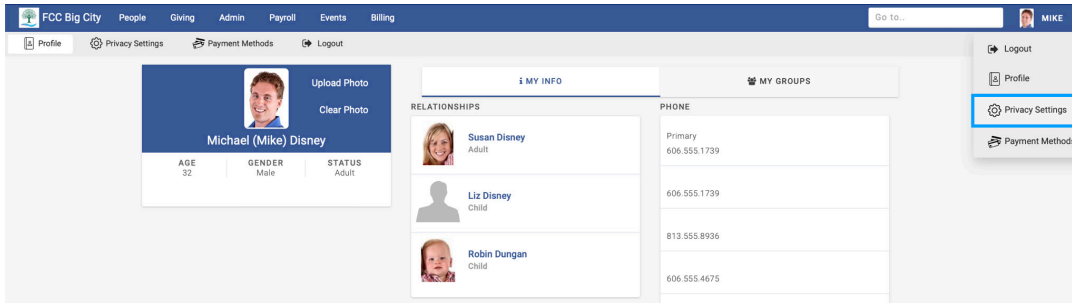
[Create account](#) | [Forgot password](#)

Want to give?

CREATE A GIFT

Engage Privacy Settings

After signing into Engage, open the menu in the top right corner and click Privacy Settings.



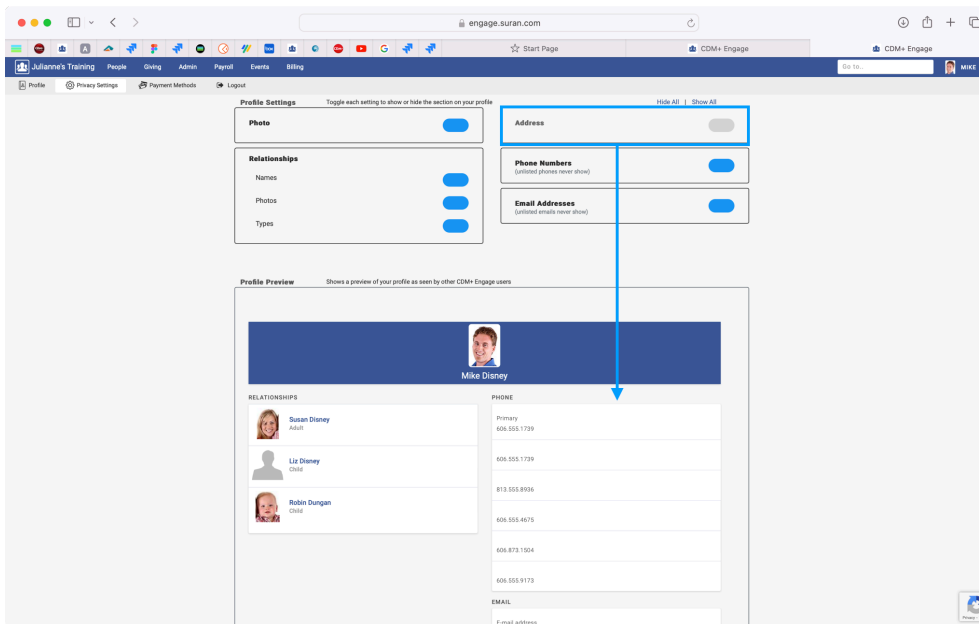
The Privacy Settings page has two sections:

- Profile Settings
- Profile Preview

The Profile Settings section lets you edit what is visible on your public profile.

The Profile Preview section shows what the public profile will look like as you make the changes.

To change what is visible on the public profile, toggle the options under Profile Settings. In this example, Address is toggled off, which causes it to not be visible on the public profile.

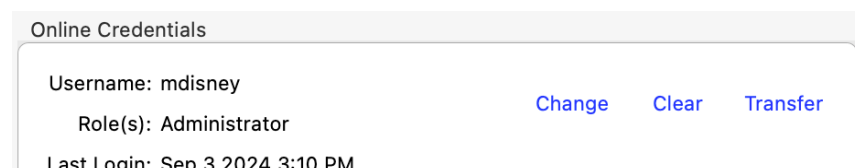


At the top right of the Privacy Settings window, you have the option to Hide All or Show All in the public profile. Show All will make everything visible on the public profile. Hide All will hide everything except the name.

Managing Engage Credentials

All logins into CDM+ Engage are based on individuals in CDM+. Use Individual Records in CDM+ Desktop to manage credentials for users. This requires the **User can administer Engage credentials permission**.

When this permission is granted, the CDM+ user can view the individual's Engage username on the Name tab of the Individual Record. CDM+ displays the Engage username in a panel labelled Online Credentials, located under the Address Information.



Along with the Engage username, the CDM+ user has three actions to use for administering the individual's Engage account.

- **Change** - changes the individual's Engage username and role
- **Clear** - clears the Engage username and has the effect of deleting the individual's Engage account.
- **Transfer** - moves the individual's Engage account to a different individual record. This can be helpful in the case where duplicate individual records may have been created.

NOTE: The password for the Engage account cannot be changed. The individual has to change their password from the Engage login screen.

Engage Roles

There are two roles available to individuals:

- Standard
- Administrator

When an individual creates an Engage account they are assigned the **Standard** role by default. This allows the individual full access to their information in Engage.

The **Administrator** role allows authorized staff access to additional features in Engage, such as:

- Engage Setup
- Searching for and refunding transactions
- Initiating one-type payments
- Viewing expiring credit/debit cards
- Create and send online statements.

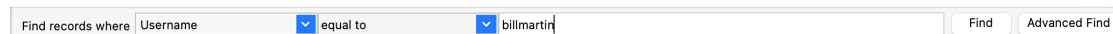
To modify an individual's Engage role:

1. Find the individual in Individual Records
2. Click **Change** in the Online Credentials box
3. Change the individual's role
4. Click **OK**

The next time the individual logs into Engage or refreshes their browser the new role's access will be in effect.

Searching Usernames

When a user has permission to administer Engage credentials, they can also build simple and advanced finds with the Username field.

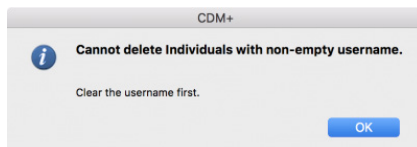


Find records where Username equal to billmartin Find Advanced Find

Deleting Individuals With Credentials

When an individual creates an account with Engage, their account credentials--username and password--are stored as part of their individual record in CDM+. Deleting an individual record with an Engage username would also cause removal of the individual's Engage account, and so CDM+ prevents this.

Attempting to delete an individual record that has an Engage username will result in this error: Cannot delete individuals with non-empty username.



Processing New Accounts and Merging Duplicates in CDM+

When a giver creates a new account through Engage they produce new individual, address, and giving unit records in CDM+. If the giver is new to your organization, you do not need to do anything and can use the new records as if you entered them directly into CDM+.

A new individual was created through CDM+ Engage.

Individual
First Name Mary Jo
Last Name Herman
Giving Unit Code HERM385

However, if there are existing address, giving unit, or individual records for this giver, you may now have duplicate records in CDM+.

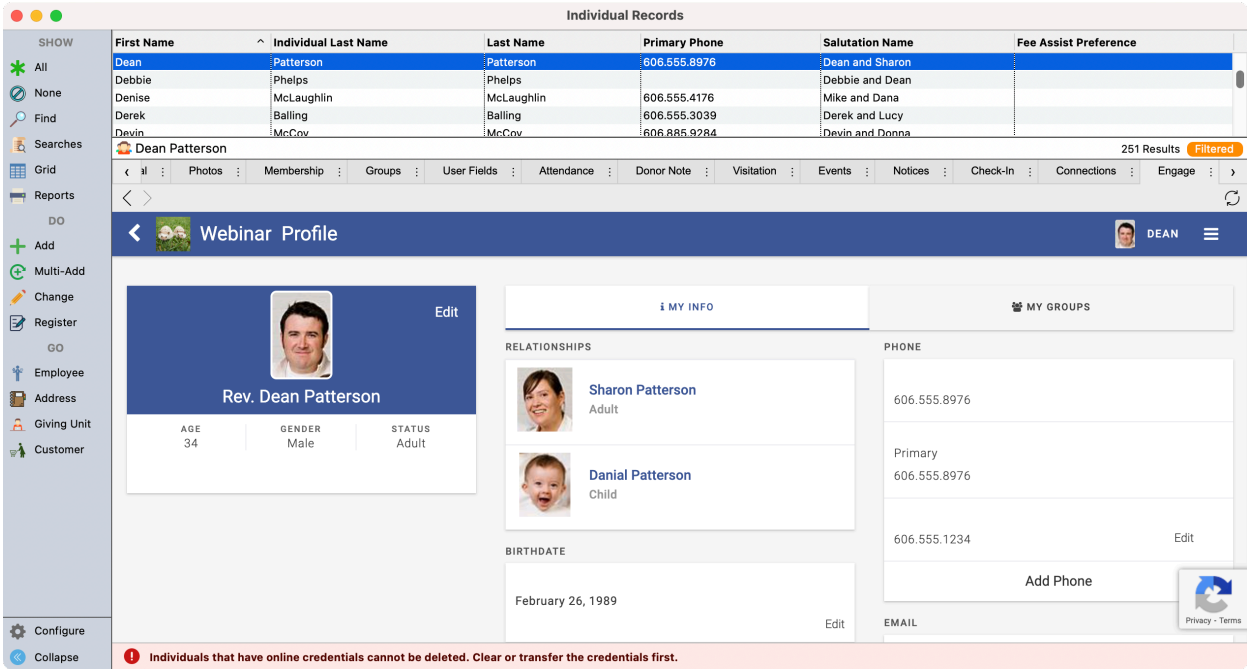
To see instructions and tips when Processing new accounts in CDM+ please visit <https://help.cdmplus.com/ea/processing-new-accounts-in-cdm> in our Help Center or scan the QR code below.



Accessing Engage on a User’s Behalf

CDM+ allows administrators to access Engage for individuals, givers, and customers as if they were that entity. This is called impersonation and requires the related CDM+ user permission to access Engage People, Engage Giving, or Engage Billing.

With this permission enabled, locate an Individual Record, Giving Unit record, or Customer Record. Use the Engage tab to access that record’s Engage tab. From that tab you will be limited to access the related areas of Engage only. You can interact with Engage just as the user would, though changes to any records will be recorded as being done by your CDM+ user record.



First Name	Individual Last Name	Last Name	Primary Phone	Salutation Name	Fee Assist Preference
Dean	Patterson	Patterson	606.555.8976	Dean and Sharon	
Debbie	Phelps	Phelps		Debbie and Dean	
Denise	McLaughlin	McLaughlin	606.555.4176	Mike and Dana	
Derek	Balling	Balling	606.555.3039	Derek and Lucy	
Devin	McCov	McCov	606.885.9284	Devin and Donna	

Webinar Profile | DEAN

Rev. Dean Patterson | Edit

AGE: 34 | GENDER: Male | STATUS: Adult

RELATIONSHIPS

- Sharon Patterson (Adult)
- Danial Patterson (Child)

BIRTHDATE: February 26, 1989 | Edit

PHONE

- 606.555.8976
- Primary: 606.555.8976
- 606.555.1234 | Edit

EMAIL

Add Phone

Privacy - Terms

Individuals that have online credentials cannot be deleted. Clear or transfer the credentials first.

Getting Started with Web Ministry Tools

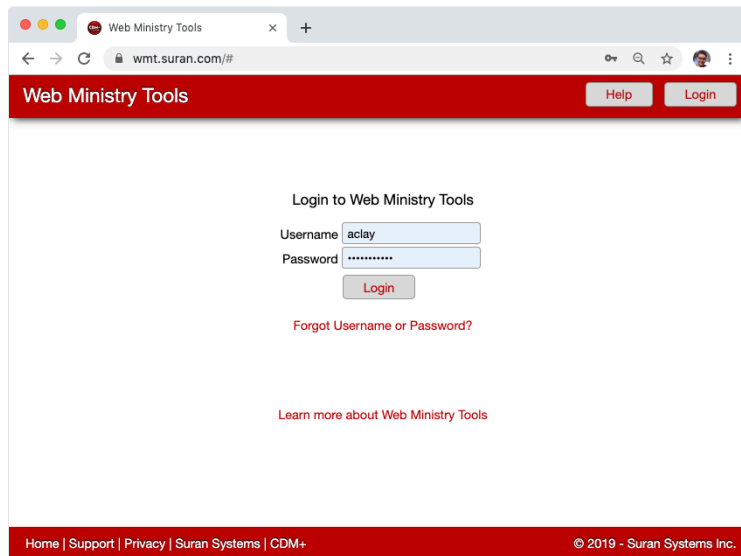
Web Ministry Tools (WMT) is Suran's legacy online product. Features in WMT have been moving to Engage over time. As of this writing, WMT is still used for 4 functions:

- Online Registration
- Online Calendar (Roommate)
- COG Women's Reports (Church of God Regional feature)
- Congregational Profile (Disciples of Christ Regional feature)

Anyone with an Engage account can request a WMT account at no extra charge. Contact CDM+ Support to request access.

WMT Website: <https://wmt.suran.com>

Login Page



The screenshot shows a web browser window with the address bar displaying "wmt.suran.com/#". The page has a red header with the text "Web Ministry Tools" and two buttons: "Help" and "Login". The main content area is white and contains the following text and form elements:

Login to Web Ministry Tools

Username

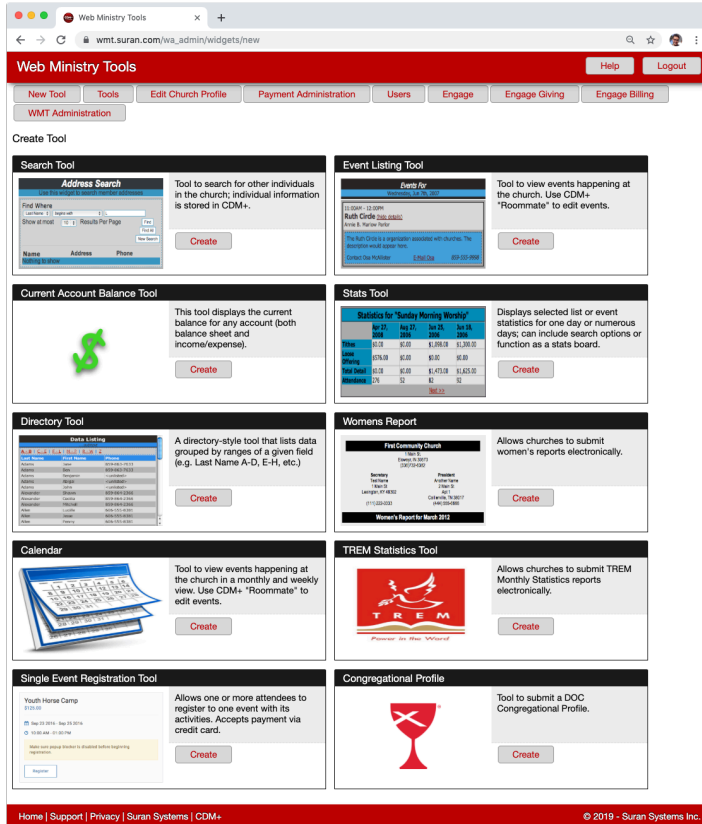
Password

[Forgot Username or Password?](#)

[Learn more about Web Ministry Tools](#)

The footer is a red bar with the text "Home | Support | Privacy | Suran Systems | CDM+" on the left and "© 2019 - Suran Systems Inc." on the right.

Create Tools



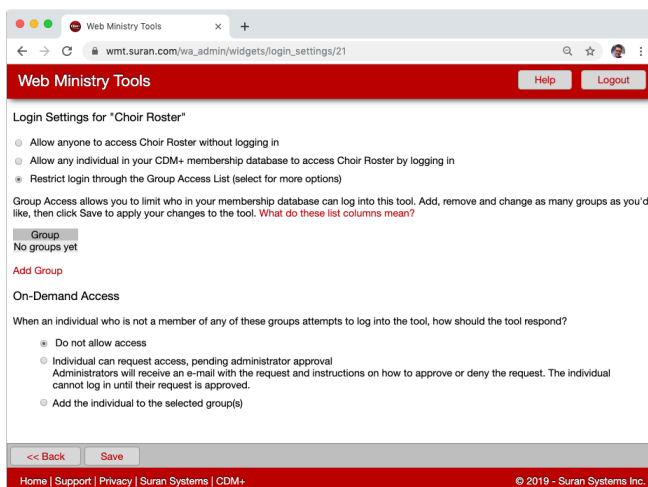
Click **New Tool** button at top of webpage, then click **Create** on the type of tool you want. Name the tool (name can be changed later under Options) and click **Create**.

Options

Available Options will vary according to the type of tool you are creating; this can be changed later.

Choose from 3 levels of access security:

Login Settings



1 – ANYONE can access the tool - useful for tools that publish non-sensitive information, such as event listings or registration for an event open to the public.

2 – Only individuals in your CDM+ Membership database (log in required). The tool verifies that a person is in your CDM+ database using their email address. If a person's email address is not on either her or his Individual or Address record, the tool will prompt him/her to contact the organization office.

3 – Only individuals belonging to a specific group in CDM+ (log in required). Useful for restricting access to a tool with sensitive information to a select group of people.

Publish

When you are ready to publish your tool on your website, click Publish to the right of the tool. You can publish your tool in any of three ways:

Web Ministry Tools Help Logout

Publish this tool using these options:

Embedded HTML
Copy and paste this HTML tag into your website. This will embed the tool directly onto your website.

```
<script type="text/javascript" src="https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915">
</script>
```

Example HTML Link
Copy and paste this HTML tag into your website. This will provide a simple html link that will open your tool in a new window or tab.

```
<a target="_blank" href="https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915">New Single
Event Registration Tool</a>
```

Direct Link
This is an absolute link to your tool that can be copied and used to attach to a button or image on your site. This can be useful for Content Management Systems.

```
https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915
```

Preview Link
Note: that this link will be displayed from inside the Web Ministry Tools Website.

```
https://wmt.suran.com/main/preview/8121
```

Publish to Engage
 Publish this tool to Engage. Members will be able to register for this event through Engage.

1. Embedded HTML – Copy the code and paste it in an email to your webmaster. He/she will paste it into the appropriate place on your website so that either the tool itself or the tool's Launcher will load directly into the web page.
2. Example HTML Link – this is some example HTML code that creates a link using the direct link.
- 3a. Direct Link – for tools with a Launcher, this bypasses the Launcher and may be used if your website builder, such as Clover, that does not allow pasting HTML code since you are creating a link to a new webpage.
- 3b. QR Code - Click the QR Code icon to download a QR code. When scanned, this code will open the direct link to the tool.
4. Preview Link – Copy the link and send it to people who need to see the tool. The tool does not even need to reside on your website to be used via this method. We recommend using the Preview Link to test tools in various browsers, if possible.
5. Publish to Engage (Single Event Registration Tool only) - Check this box to allow members to sign up for this event through Engage.

Activate (Deactivate) Tools

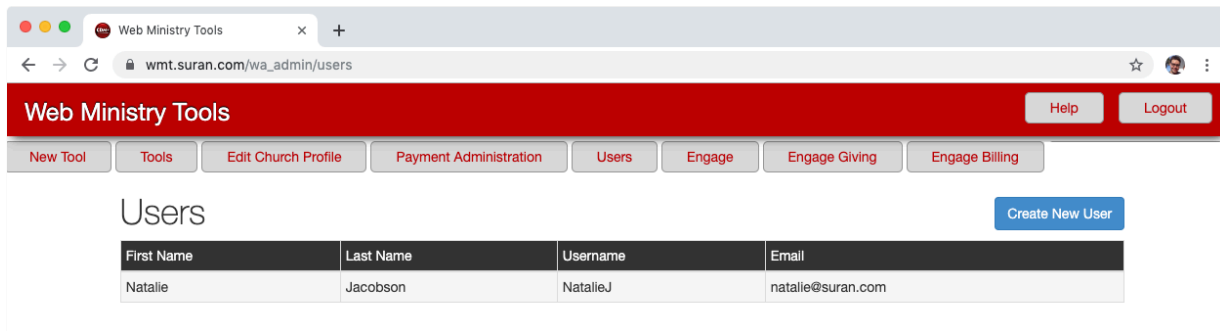
Clicking this button toggles between activating and deactivating the tool. It does NOT remove it from your website. When you deactivate a published tool, it will no longer appear on your website. Instead, a message saying, "This tool is currently inactive" will appear in its place.

Church Profile

Click Edit Church Profile button on main Tools window. You can change the user name and password to log into WMT website here.

WMT User Accounts

The WMT Users Accounts tab gives you the ability to create other WMT Users to access your Web Ministry Tools account without having to share the username and password provided to you. Additionally, you have the ability to set which tools a user may access.



To get started, click the **Users** tab at the top. This will allow you to see all the user accounts you have created:

To create a new user, click the blue **Create New User** button. 

This will open a new web page where you will input information for the user account you are creating. Simply type in a username, email, first and last name, and click which parts of WMT this person is allowed to see. When you are satisfied with the account details, click **Submit**.

