CDM+ Mobile

This class introduces the CDM+ Mobile app for iPad®, iPhone®, and Android™, and covers how to connect your device to your database and control what features each device can use. CDM+ Mobile Basics will review the Individuals app, sending emails, and sending SMS messages from CDM+ Mobile. We will also explore Notifications in CDM+ Mobile and demonstrate how to enable this feature. Use of specific features in CDM+ Mobile is also covered in the class relevant to that feature. For example, the Check-In/Check-Out class covers using both CDM+ and CDM+ Mobile versions for check-in and check-out.

Overview

CDM+ Mobile is a companion app to CDM+ Church Management Software. With CDM+ Mobile, you can connect to your data in meaningful and useful ways wherever you are from your Apple® iPad, iPhone, or Android device (running Android 5.1 or later). It can be used with any CDM+ database running the current version of CDM+. You must be on CDM+ Data Hosting to use the CDM+ Mobile app.

CDM+ Mobile use multiple "apps-within-the-app" to access various areas of your CDM+ database. You only need to install and keep one app updated to access people, attendance, reminders, and more.

Each mobile device's access to your CDM+ data is controlled from within CDM+. CDM+ administrators control the level of access to data on each device.

Availability

The CDM+ Mobile app is free to download from the Apple App Store, Google Play, and the Amazon Appstore for Android.

You can install CDM+ Mobile on an unlimited number of devices, and any number of devices can connect concurrently. Devices connected through CDM+ Mobile do not count as concurrent users for your CDM+ Desktop license.

The CDM+ suite must be licensed for the particular program the app is accessing, e.g., CDM+ Membership.

CDM+ Mobile Apps

There are currently eight available apps within CDM+ Mobile: Individuals, Attendance, Barcode Attendance, Check-In, Check-Out, Reminders, Receipts, and Churches (for CDM+ Regional users).

Membership/Attendance – Individuals, Attendance, and Barcode Attendance apps
The Individuals app accesses information on the Phones, Email, Personal, Photos, Groups, Attendance, Pastoral, and Visitation tabs of the Individual records. Through this app, the user has the ability to add or change photos, phone numbers, email addresses, and addresses. The Individuals app can be used to add and remove group assignments. The Individuals app can also view, add, edit, and delete Visitation/Pastoral notes on the Visitation and Pastoral tabs respectively (CDM+ access settings apply). Finally, the Individuals app can also send group emails and SMS messages. The Attendance app accesses Attendance records. The Barcode Attendance app scans individual barcodes to mark individuals for attendance.

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Use of the Visitation and Pastoral apps are covered in the Contact Management class and the Attendance app in the Getting Started in Attendance class.

Contributions - Individuals app

From the Individuals app, CDM+ Mobile can access the giving history for individuals.

Check-In/Check-Out – Check-In and Check-Out apps
The Check-In and Check-Out apps work with the Check-In/Check-Out program. The Check-In app works as a kiosk to allow users to check themselves and family members into their respective classes. A staff member can also check in individuals or families using Check-In. Check-Out is used by staff members or volunteers to scan Check-In barcodes to check out individuals.

Use of the Check-In and Check-Out apps are covered in the Check-In/Check-Out class.

Reminders - Reminders app
The Reminders app gives the user quick access to birthdays, anniversaries, and reminders that are setup in Visitation Records. CDM+ Regional users can also see ordination anniversaries for clergy in the Reminders app. With push notifications enabled, reminders will automatically push to your phone. Reminders can be used in numerous ways to help improve communication and aid in closing the "cracks" that individuals fall through.

CDM+ Mobile App Launcher

Use of the Reminders app is covered in the Contact Management class.

Accounting - Receipts app
The Receipts app allows users to track expenses and save receipts. This makes it easier to balance and reconcile expenses charged to credit cards or other corporate accounts.

Use of the Receipts app is covered in the Accounts Payable class.

Regional – Churches app
The Churches app provides access to information about churches and their members. The Churches app also allows mass emailing to the Churches from within the app.

Use of the Churches app is covered in the CDM+ Regional class.
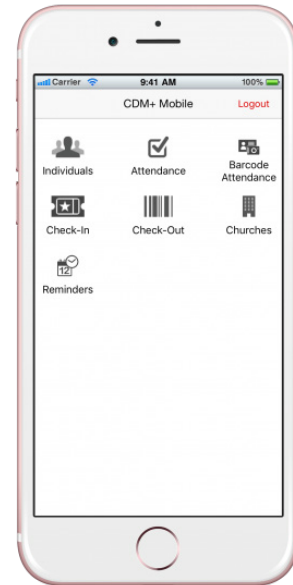
Launching CDM+ Mobile

Whether using CDM+ Mobile on your iPad, iPhone, or Android device, you begin using it the same way—tap the CDM+ Mobile icon. Enter your four-digit PIN and tap GO. This will open the app launcher screen. Tap the icon for the app you wish to use.

On the app launcher, you will only see those apps for which you have the corresponding CDM+ program and for which a CDM+ administrator has granted access through the provisioning process.

Individuals App

When you select the Individuals app, CDM+ Mobile will display the list of Groups available to the user. The available groups are set up on the provision in CDM+ Administration. On this screen, you can search groups, and you can also select All Individuals or Search for Individuals if the device has access to all individuals. The CDM+ administrator may limit the device's access to only specific groups.
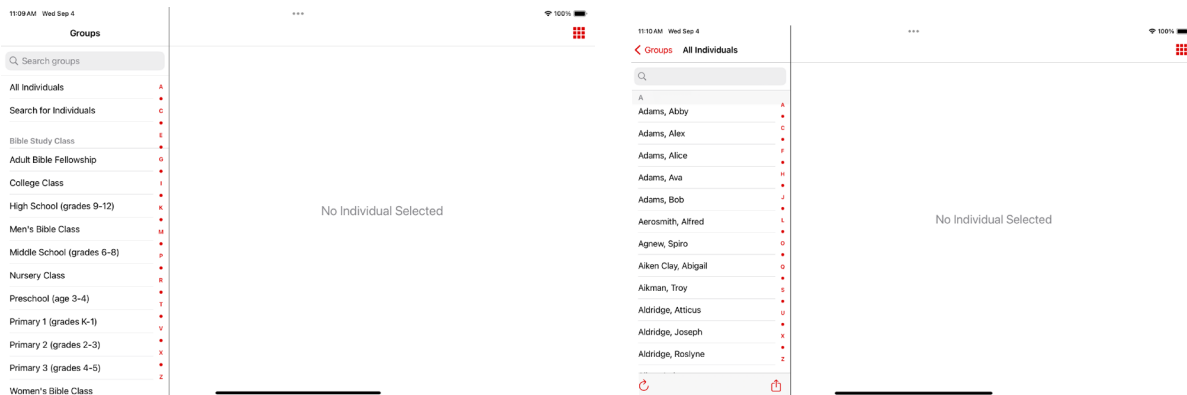
Tap the All Individuals group and the menu changes from a list of church groups to a list of all individuals in your CDM+ Membership database, listed alphabetically. When you select Search for Individuals, CDM+ Mobile opens a search window that lets you search for individuals by first or last name.

Scroll to find the person you wish to view and tap on their name.

Individuals ▶ Personal tab – tablet app

When you tap on an Individual, the initial view will default to the Personal Tab (or tap the **Personal** icon at the bottom), which displays the following information from the Individual Record in CDM+ Membership:
— Family Members
— Phones/Email Addresses
— Street Address and Map
— Personal History (birth, school, work, marital status, death)
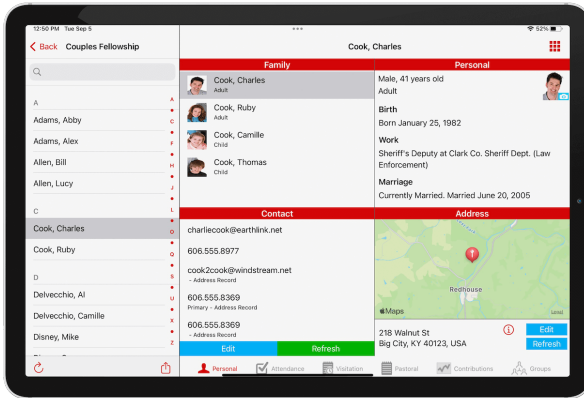
To jump to another family member's Personal tab, tap on their name in the Family section.

Tap the red **i** icon to show a street address in your tablet's mapping app.

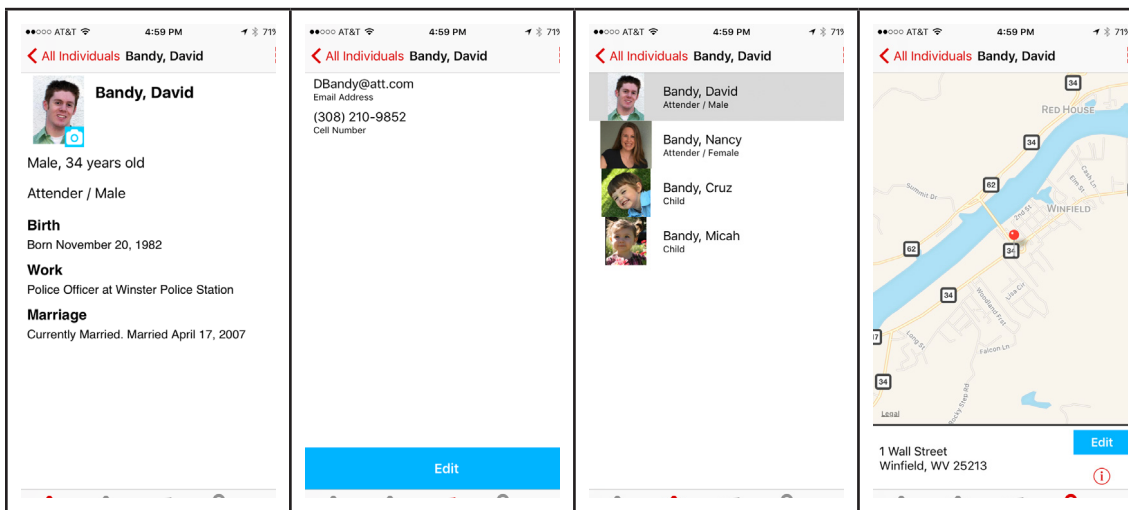Tap an email address to send an email. **NOTE:** *The email will be sent using the device's default email application and will not appear on the Sent Notices tab in CDM+.*

Tap the blue **Edit** to add or edit phone numbers, email addresses, or addresses.

It's possible that another user could be updating contact information for an individual. To have CDM+ Mobile retrieve the latest contact information for this individual from the database, tap the green Refresh button.

Individuals ▶ Personal tab – phone app

To accommodate the smaller screen, the personal information found on the tablet app's Personal tab is broken into multiple tabs in the phone app. The **Personal** tab contains the individual's personal history, the **Family** tab displays family members, the **Contact** tab contains email addresses and phone numbers, and the **Address** tab shows the person's street address and map.

On the Contacts tab, tap an email address to send an email from your phone's email app. **Note:** This email is not saved in Sent Notices in CDM+.

If the device can make outgoing calls and text messages, tap a phone number to dial that number or send a text message to that number.

One the Personal tab, the blue camera icon can be tapped, allowing the user to take a photo or select a photo saved in their device. **This photo will be uploaded to the individual record in CDM+.**
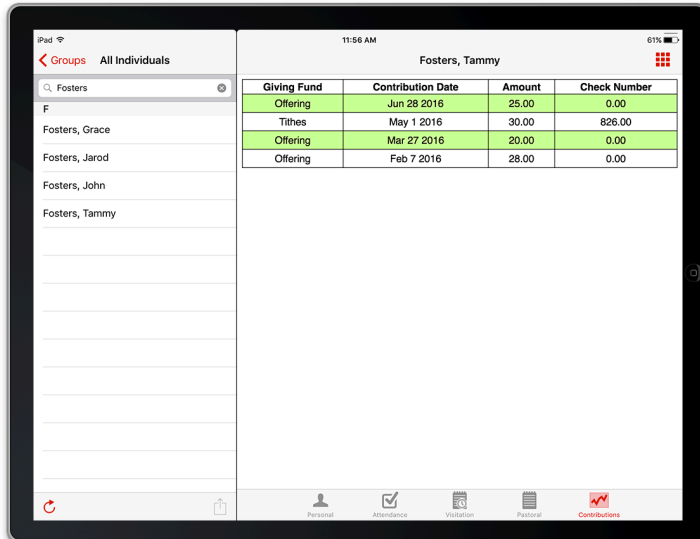
Individuals ▶Attendance tab (tablet app shown)

Tap the **Attendance** icon at the bottom of the window to view this person's attendance history.

Note: The phone app differs in that the Attendance icon may be found under the **More** tab and the list of Individuals will not appear.
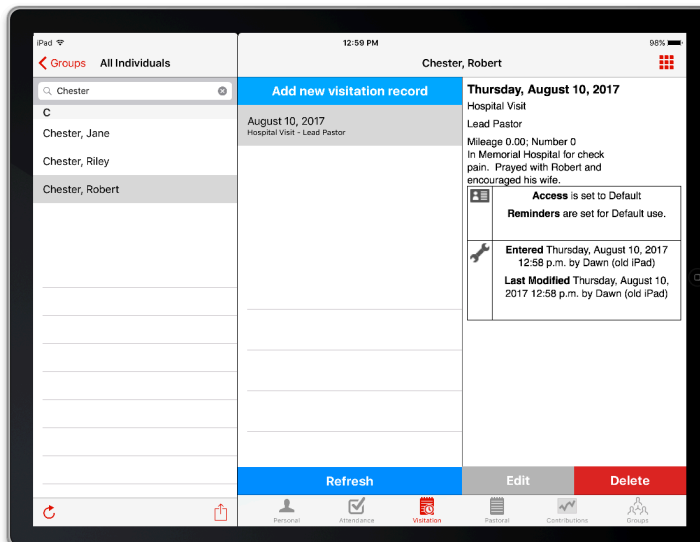
Individuals ▶Contributions tab (tablet app shown)

Tap the **Contributions** icon at the bottom of the window to view contributions for that individual over the past year.

Note: The phone app differs in that the Contributions icon may be found under the **More** tab and the list of Individuals will not appear.

Individuals ▶Visitation and Pastoral tabs – tablet app

Tap the **Visitation** or **Pastoral** icon at the bottom of the window (may be under the **More** tab) to view, add, edit, or delete Visitation and Pastoral records.

For more information about using the Visitation and Pastoral apps, take the Contact Management class or see that section of this manual.

Individuals ▶ Groups tab – tablet app
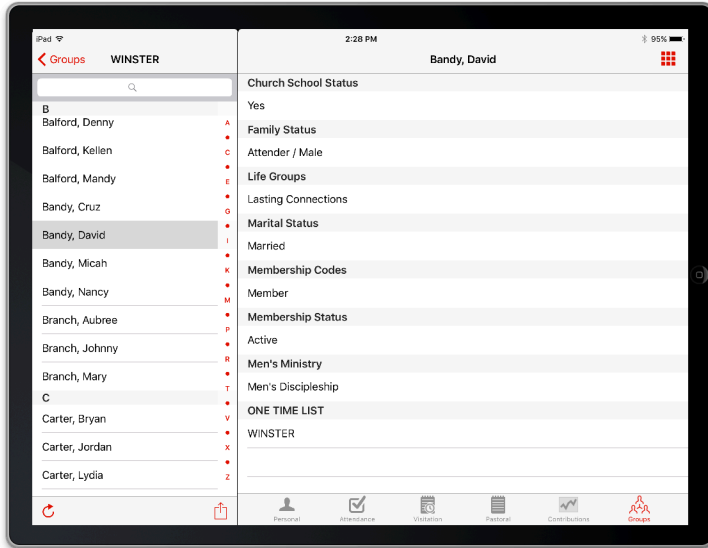
Tap the **Groups** icon at the bottom of the window to see a list of all groups in which the individual is enrolled.

You can use the Groups tab in CDM+ Mobile to change group membership for individuals. Tap the blue Edit button to add or remove group assignments.

It is possible that another Mobile or Desktop user may be updating group assignments. Tap the green Refresh button to have CDM+ Mobile retrieve the latest group assignments for this individual from the database.

Individuals ▶ Visitation and Pastoral tabs – phone app
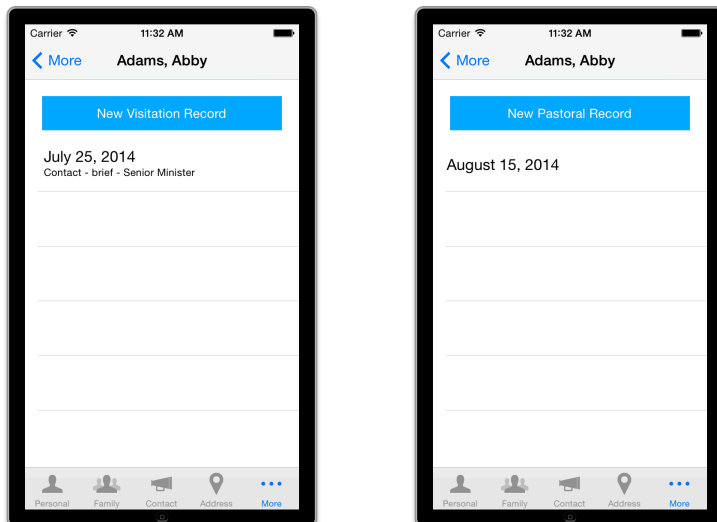
Tap the **Visitation** or **Pastoral** icon at the bottom of the window (may be under the **More** tab) to view, add, edit, or delete Visitation and Pastoral records.

Unlike on a tablet, in the phone app, you will need to tap the entry to view details in a new window.

For more information about using the Visitation and Pastoral apps, take the Contact Management class or see that section of this manual.

Sending Group Emails

After selecting a group, you will notice a **Share** icon in the bottom iOS ⬆ toolbar or the Android ⬱ option menu. Tap the **Share** icon and then choose **Email** from an option list. When selecting Email, you will have the option to **Email All** or **Email Selected**. If **Email All** is chosen, a window will open to enter the subject and body of the email to send. If **Email Selected** is chosen, a list will appear allowing the sender to select the individuals to receive the email.

If a person has an email address on their Individual Record in CDM+ Membership, it will be displayed under the name and the individual can be selected to receive an email.

If an individual does not have an email address, a red warning mark will be displayed and that individual will not be able to be selected.

You can select multiple individuals with email addresses, or you can tap **Select All** to select every individual with an email address in the list.

After you have selected the individuals you want to email, click the **Compose** email icon ✉₊ or ✎ to open the email composition screen. Type a subject and body for your email, click **Send** to queue the emails in your database.

You can view the emails you sent using the Individual Sent Notices or the Notices tab of the Individual Records window in CDM+ Membership.

Sending email through CDM+ Mobile works the same whether you are using the tablet or phone app.

Sending Group SMS Messages

Follow the directions above except choose the SMS option. Once SMS is selected, a list will appear allowing the sender to choose the individuals and phones numbers to send the message to.
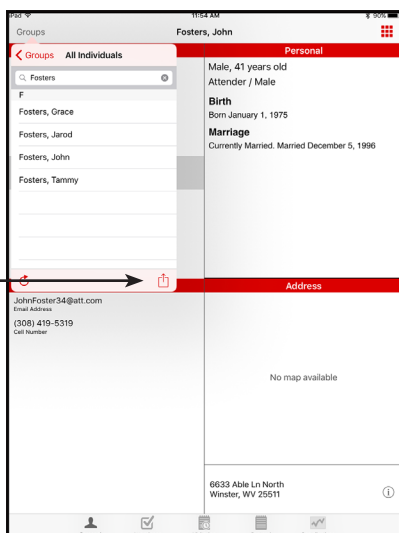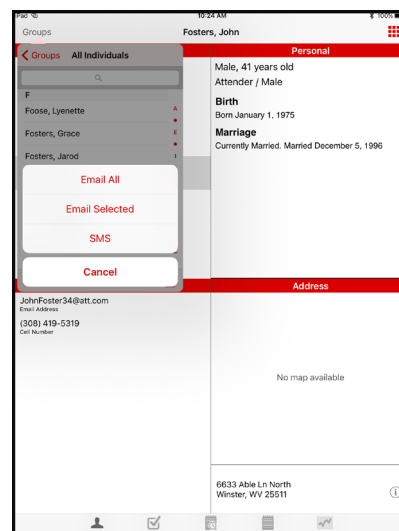
Reminders App

Tap the **Reminders** icon to open the Reminders app. Birthdays, Anniversaries, Ordination Anniversaries (for Regional users), and Reminders added to Visitation Records can be displayed under tabs for Today, This Week, This Month, and Overdue.

With push notifications enabled in **Administration ▶ Mobile** and enabled in Settings on the device, Reminders will pop up and "remind" the user of various things. Some examples of Reminders could be hospital visits, phone calls to make, homes to visit, or appointments to keep. This use of the Reminders app will be covered in the Contact Management" class.
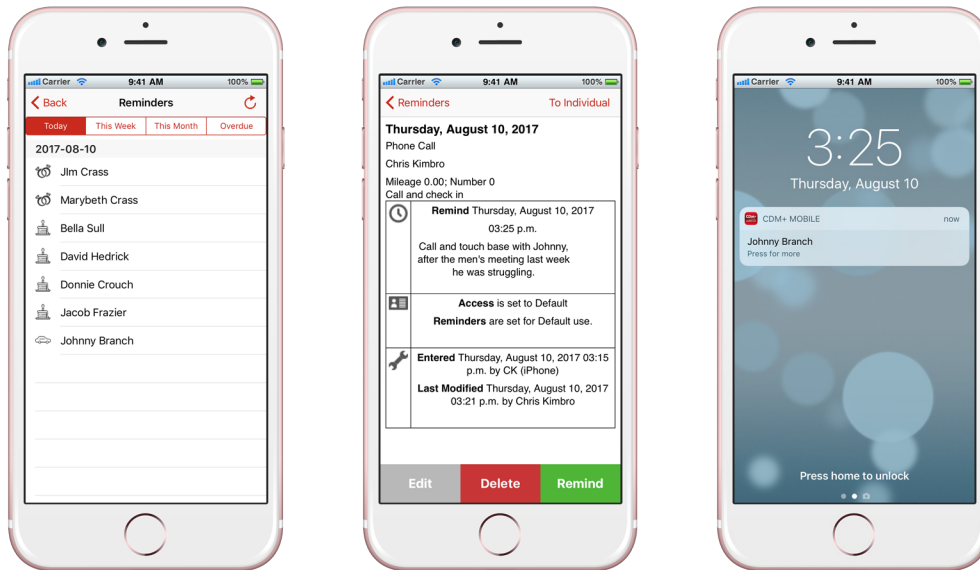
Attendance App

Tap the **Attendance** icon to open the Attendance app, or, if you are in the Individuals app, tap the Home icon or in the top right corner, then tap the **Attendance** icon.

Set Up Attendance Taking – tablet app

Begin by selecting the **Date** (note that it will default to today's date), then tap to select the group from the list. This can be a group, class, or event. CDM+ Mobile will display any that you specified in CDM+ can track attendance.
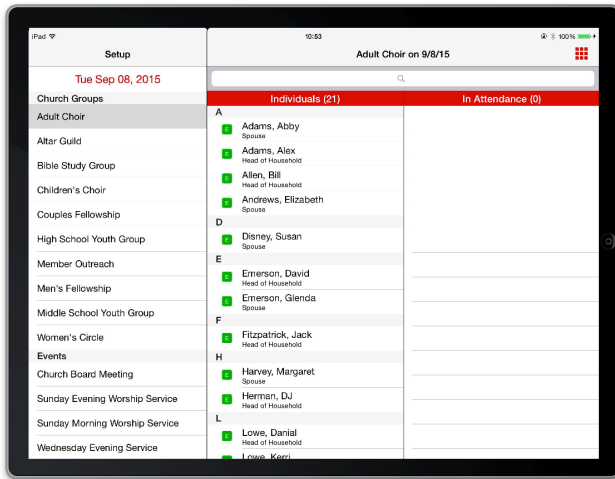
If you tap on a **class or group**, only the persons who are members of that group will appear in the list of Individuals.

If you tap an **event**, such as Sunday Morning Worship, the list will display all Individuals in your CDM+ Membership database.

## Set Up Attendance Taking – phone app

To accommodate the smaller screen, Attendance setup requires a second window in the Attendance phone app. Select the **Date**, then tap the **Group** button to open the **Select Group** screen, and select the group.
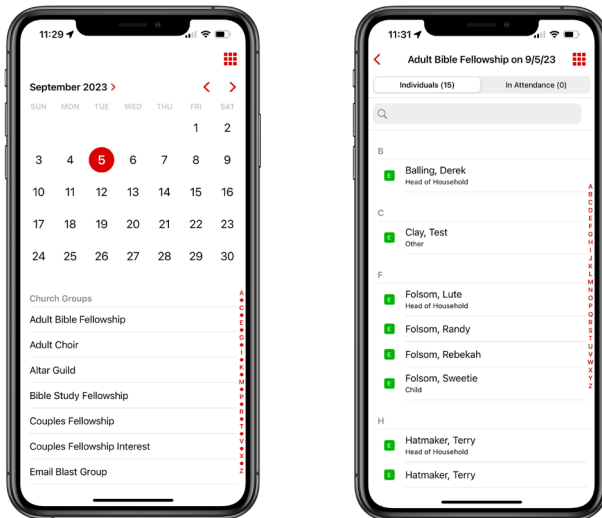
Once you have selected a group, the app will return to the Setup screen with the group selected. Tap **Mark Attendance** to begin taking attendance.

Entering Attendance

To take attendance, tap a name in the **Individuals** list to move it to the **In Attendance** list. If you make a mistake, simply tap the name in the **In Attendance** list to move it back to the **Individuals** list.
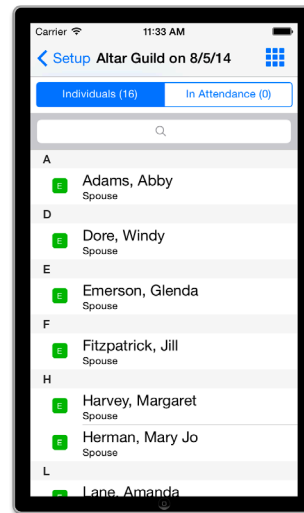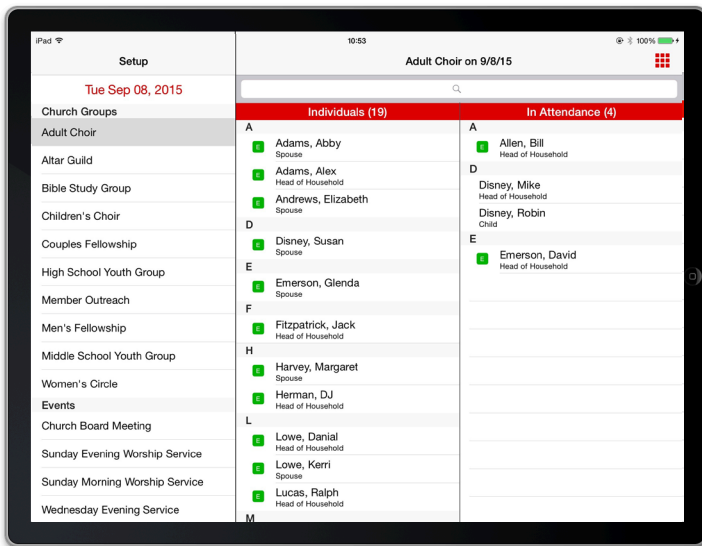
You may also search for an Individual by name by using the search bar. Simply tap the search bar, enter a name, and the device will display all Individuals that match that search. This is how you would mark individuals, who are not listed as members of a group, as attending that group or mark visitors for attendance in groups.

Those individuals that are part of a group will be marked with a green 'E', and visitors will have a blue 'V' next to their name.

Note: Unlike in the tablet app that displays the Individuals and In Attendance lists side-by-side, you must tap buttons to switch your view of the lists when using the phone app.

NOTE: Attendance that is marked on one device will not immediately update the screen for any other device taking attendance for the same event on the same day. However, the attendance is still saved live to the database, and reloading the attendance list on other devices will show a current list of those marked for attendance and those not in attendance.
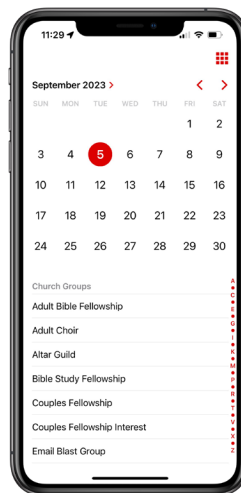
Barcode Attendance app

Note: This app is not available on devices that do not have a camera.

Tap the Barcode Attendance icon on the launcher page to open the Barcode Attendance app. The setup page will open and allow you to change the attendance date by tapping the **Change** button.

Select a group to start the scanner. The scanner will scan for Individual barcode. You can print name tags that include Attendance Barcodes using the Individual Name Badges report in CDM+ Membership. If CDM+ Mobile finds a valid barcode, it will mark that individual for attendance. Otherwise, it will display an error.

If your device has both front & back cameras, you can tap the **Flip** button in the bottom right corner to switch between the cameras.

You can set the barcode attendance scanner to **Kiosk** mode on the Barcode Attendance setup page. Kiosk mode will require you to enter your PIN to exit the Barcode Attendance app or to Flip the camera.

Barcode Attendance in CDM+ Mobile scans the same barcodes as Check-In (individuals only; not address) and the Barcode Attendance Worksheet.

Logging In/Out of CDM+ Mobile

Tap on the CDM+ Mobile app icon on your device. The Log In screen will appear. Enter your four-digit PIN to log in.

CDM+ Mobile will connect after you enter your PIN. If you switch out of CDM+ Mobile or let your device go to sleep, CDM+ Mobile will disconnect after 10 minutes. CDM+ Mobile will try to reconnect when you switch back.

Provisioning Provides Security and Customization

– Pairs a device with your CDM+ database
– Ensures the device has access to to the right data and only to the right data
– Allows you to customize a device for only certain features
    • Attendance entry for specific classes
    • Viewing visitation and pastoral notes
    • View contact details for specific groups
    • Tablets set up as Self Check-In or Barcode Attendance kiosks
– Allows you to remotely disable CDM+ Mobile access from a device

### Setting Up a Device to Use CDM+ Mobile with your database

1) Go to ▶**File** ▶**Administration** ▶**Mobile** tab

   Here you enter information to allow a mobile device to access your CDM+ database. The settings can restrict access on a device to certain CDM+ Mobile features and can filter the information displayed.
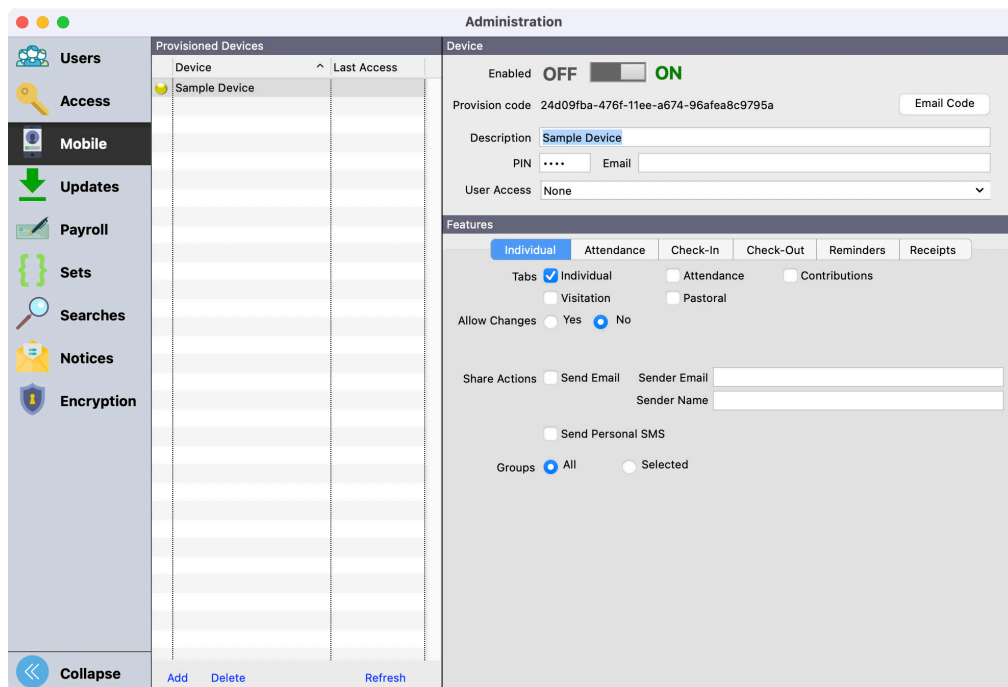

2) Click on the **Add** button in the bottom left corner under **Provisioned Devices** to add a device.

3) Enter a **Description** for the device.

4) Enter a 4-digit **PIN** number and **Email** address (one that can be accessed on the device).

5) Choose the device owner's CDM+ User Name from the **User Access** drop list to ensure he/she can access appropriate Visitation and Pastoral records in CDM+ Mobile. This also records the Mobile user as the person who modified the record in the database.

6) Click the appropriate checkboxes to set access to **Individuals** for this device.
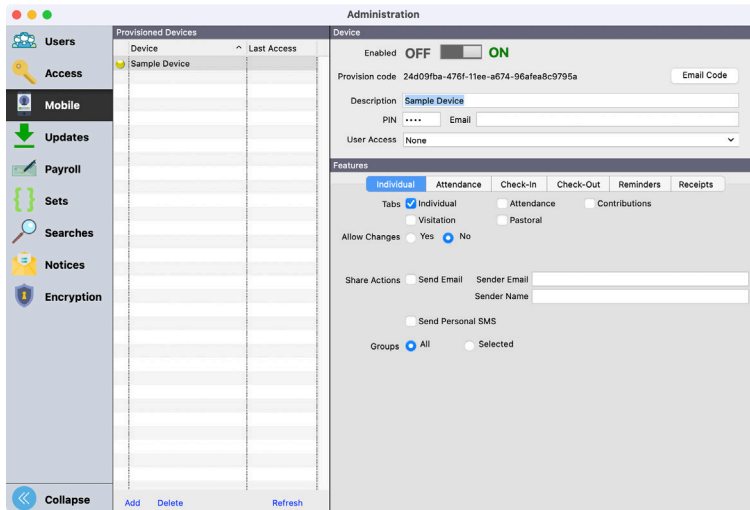
7) If this device will be used to take attendance, click on the **Attendance** tab and make your selections. Note that the device you are provisioning must have a camera to use the Barcode Attendance app.
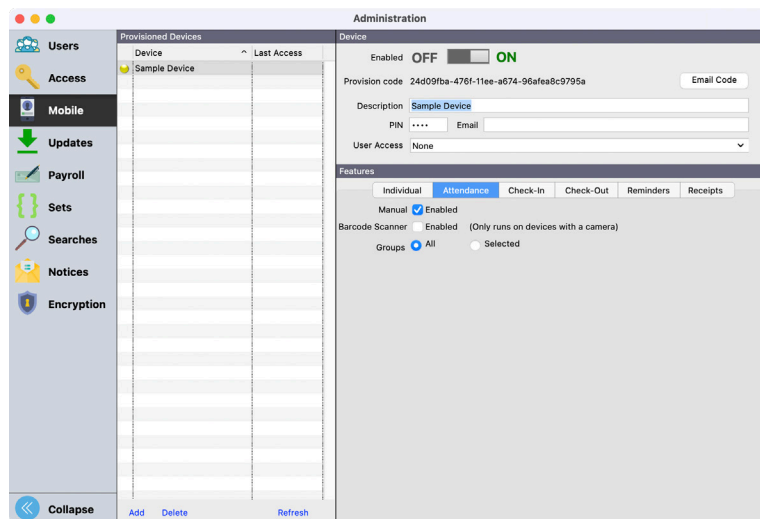
8) If this device will be used for check-in, click on the **Check-In** tab and make your selections.
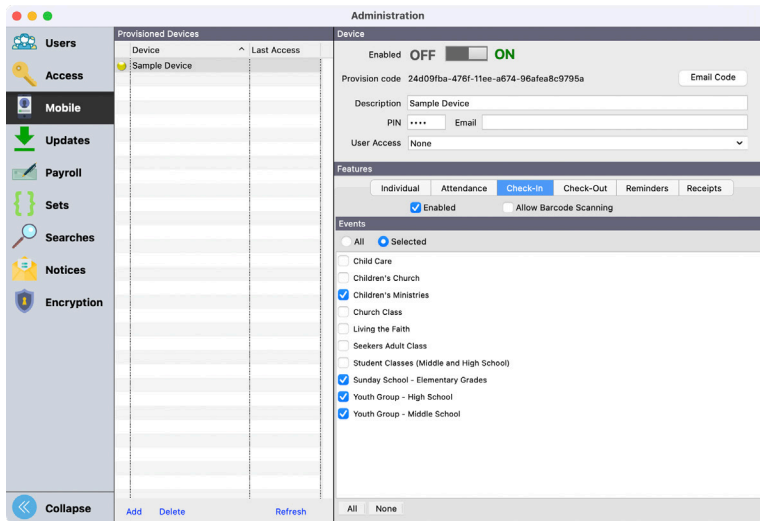
9) If this device will be used for check-out, click on the **Check-Out** tab and make your selections. Note that the device you are provisioning must have a camera to use the CDM+ Mobile Check-Out app.
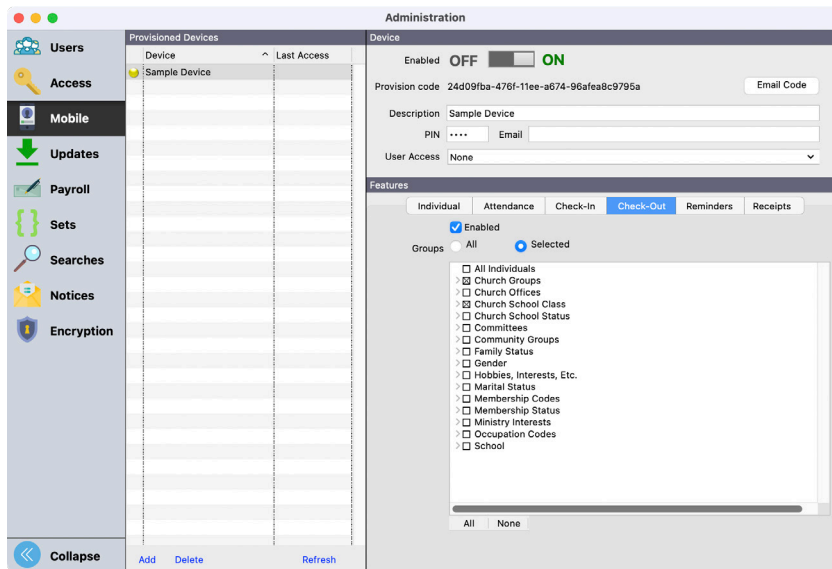

10) If this device will need access to **Reminders** including Birthdays, Anniversaries, and Visitation push notifications, make the appropriate selections under the Reminders tab. Note that Notifications must also be enabled in Settings on the device for push notifications to work.

11) If this device will be used to track expenses and store receipt images for Accounts Payable, make the appropriate selections under the Receipts tab.
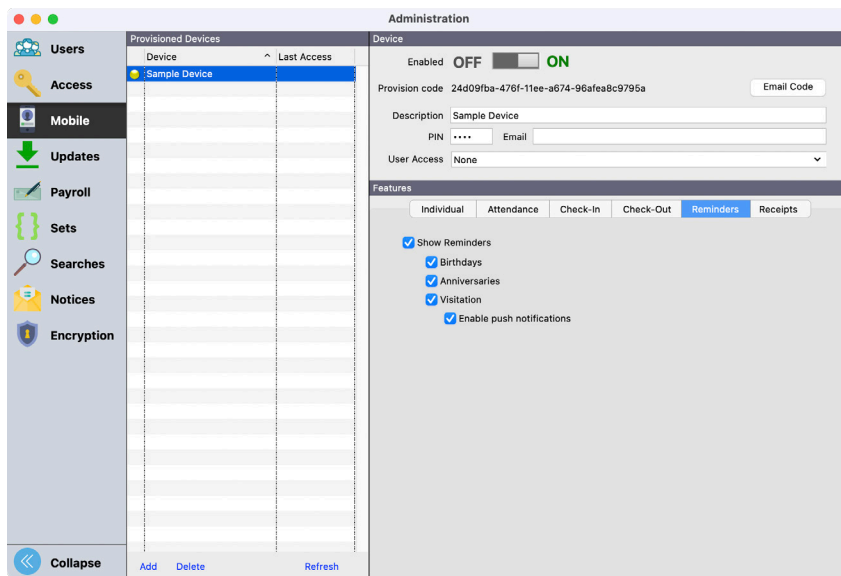
12) The final tab, **Churches**, will only appear if you have the CDM+ Regional program. You must check the **Enabled** box to use the Churches app.
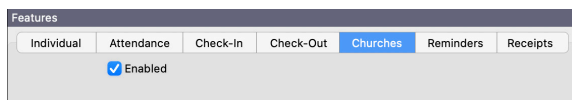
13) When you are finished refining your settings, click on the **Individuals** tab again.
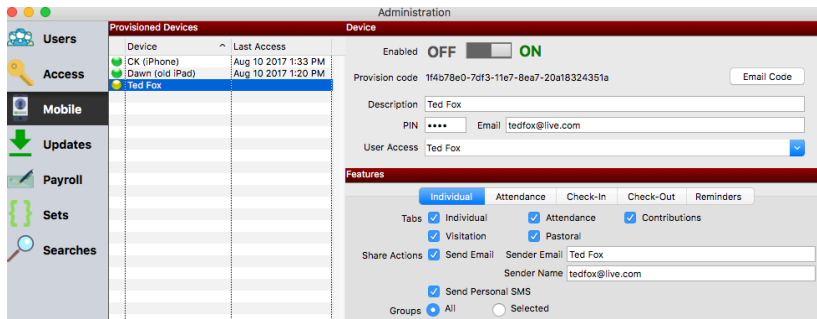
14) In the **Share Actions** section, check **Send Email** and enter the **Sender Email** address and **Name**. (*NOTE: If a Sender Email address is not entered, the user will not be able to send group emails*).
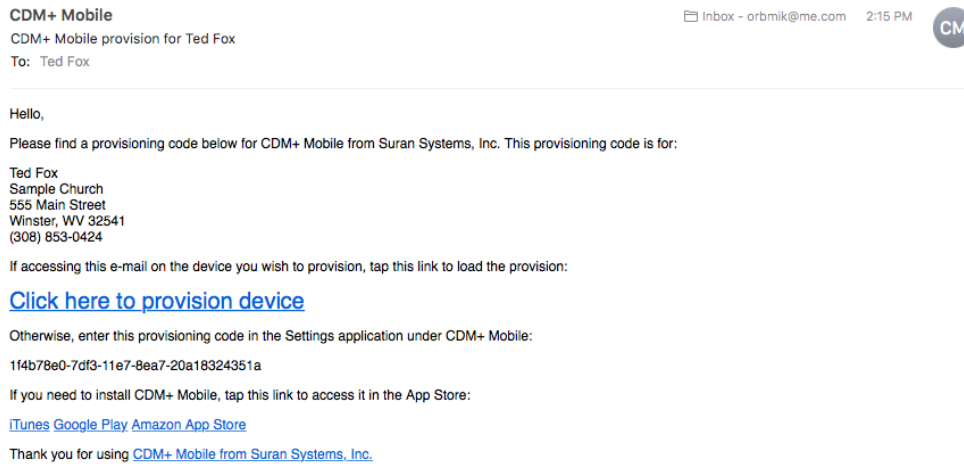
15) If this device should be able to send SMS messages to individuals, check the Send Personal SMS box.

16) Enable the device by sliding the slider from **OFF** to **ON**.

17) Click the **Email Code** button to send an email with the provisioning code.

On the device that you are setting up:

1) Open the CDM+ Mobile provision email.

2) If you need to install CDM+ Mobile on this device, tap a link in the email to install it from either Apple iTunes, Google Play, or the Amazon Appstore.

3) Once you have the CDM+ Mobile app installed, tap the **Click here to provision device** link the body of the provision email to load the provision code.

4) CDM+ Mobile will launch.

5) Enter the 4-digit PIN assigned to this device to log in.

Disabling a Device

If at any time you wish to prevent access to your CDM+ database from a device through CDM+ Mobile, simply highlight the device in the list on the Mobile tab of the Administration window and move the **Enable** slider to the **OFF** position.
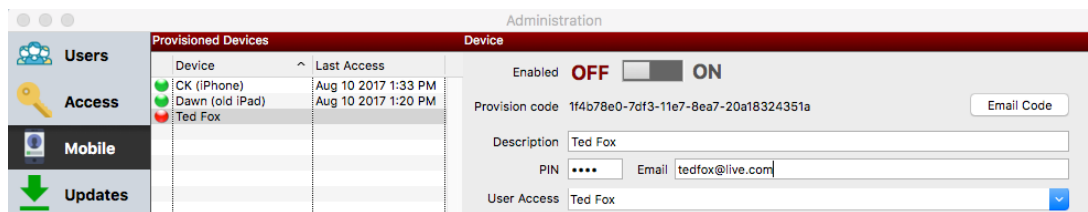
The device will still have the CDM+ Mobile app installed, but the PIN to access your CDM+ database will no longer work.

Changing Settings for a Device

To change a device's access settings for CDM+ Mobile, simply highlight the device in the list on the Mobile tab of the Administration window and make the changes on the tabs under Features. The changes will take effect *the next time* someone logs in to CDM+ Mobile on that device.
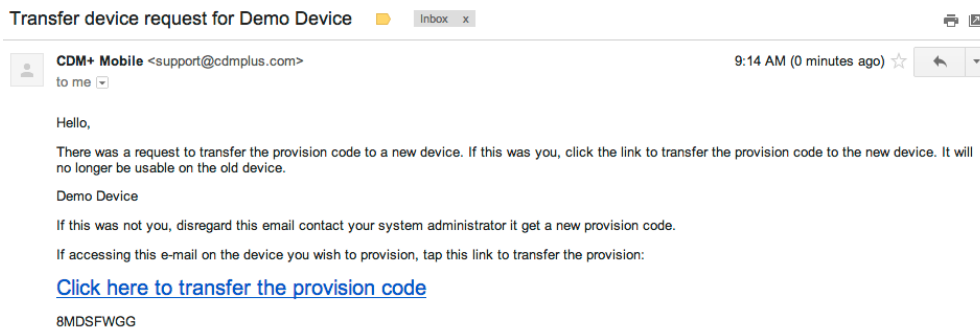
Transferring Provision Codes

On occasion, it may be beneficial to transfer one provision code to another device. Such scenarios would include getting a new device or deleting and re-installing CDM+ Mobile. In these cases, it can be much faster to just transfer a provision code as opposed to getting a new one.

To transfer a provision code, use the email that contained your provision code, and click the link.

If the device is not recognized, a pop-up will appear asking you if you want to transfer your provision code. Tap **Yes,** and an email will be sent to the email address associated with the account (typically the one you used when got your original provision code).
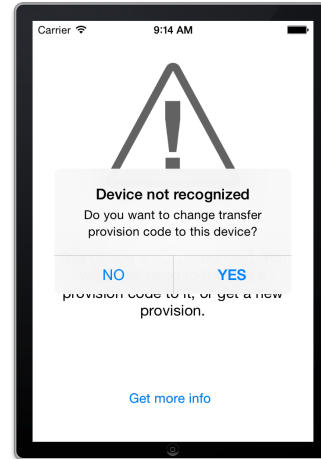
Close out of the CDM+ Mobile app and open your email app to find your transfer device request email.

Tap the **Click here to transfer the provision code** link in the email.

CDM+ Mobile will open and display a message telling you that you have transferred your provision code to this device.

Note 1: The provision will only work on one device at a time, so if you transfer codes from one device to another, the previous device will no longer work until it has its own provision.

Note 2: A provision code can be deleted. If you no longer want a provision to be used, you can delete it and transferring will no longer work.

You can also enter the transfer code manually if you cannot access the transfer email on the device running CDM+ Mobile.

Reordering Information on an iPhone/Android

You have to option to reorder the information display order when viewing individuals on an iPhone or Android. Choose the "More" option inside the window then choose "Edit".