CDM+ Notices

Professional and Personalized Communication *(from within CDM+)*

CDM+ Notices make it easy for you to upgrade the appearance of letter, card, and email communications with your congregation and staff members. A powerful word-processing interface is built directly into **Notices** reports throughout CDM+, so you don't need to open multiple programs to create nice layouts. Since the **Notices** interface also lets you drag and drop database fields right into your text, there's no need for data or mail merges, either. With CDM+ Notices, personalized, professional communication is suddenly simple.

This class deals with creating and formatting notices. Determining who gets a notice is covered in other classes, include Fundamentals of CDM+ (basic searching/report setup window), Advanced Finds and Searches, and program-specific classes, such as Membership Notices and Exports.

Where to Find Notices

Notices with word processing and data merge capabilities are found throughout CDM+, generally on the Reports menu under Notices (with some exceptions noted below):

Membership Notices – Address or Individual Letters, Cards, and Emails

Attendance Notices – Attendance or Missing Letters, Cards, and Emails

Visitor Notices – Visitor Letters (accessed from the Visitor Letter Assignment window on the Attendance program menu)

Contributions Notices – Giving Unit, Contribution, and Pledge Letters, Cards, and Emails; Giving Statement (column and line) Emails and Receipts Letters under Statements/Receipts

Memorial Gifts Notices – Gifts Given Letters, Cards, and Emails

Accounting Notices – Accounts Receivable Email Invoices

Event Registration – Registration or Activity Letters, Cards, and Emails

**Check-In/Check-Out Notices –** Letters and Cards

Church Notices – Letter, Card, and Email (for CDM+ Regional users)

Church Position Notices – Letter, Card, and Email (for CDM+ Regional users)

What's Possible?

Colors, graphics, special fonts, and more! This **Address Letter Notice** illustrates some of the ways CDM+ Notices can change an organization's communications.

A personalized letter is much more likely to be read as the same letter addressed to "Dear Parent." The addition of text formatting and a photo further increases its likelihood of being noticed.
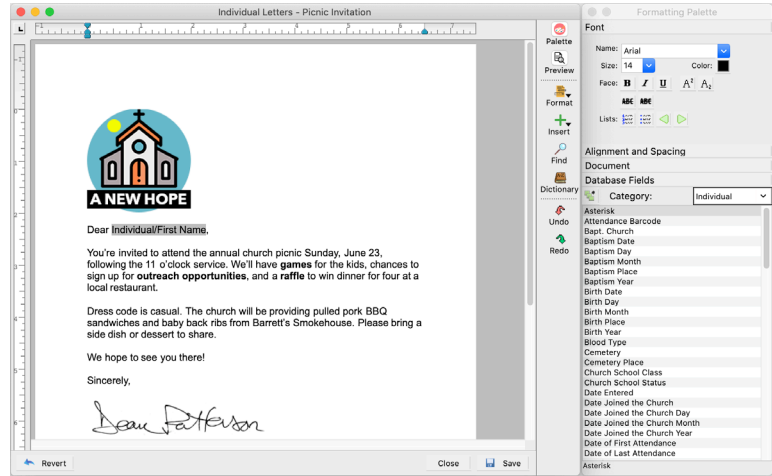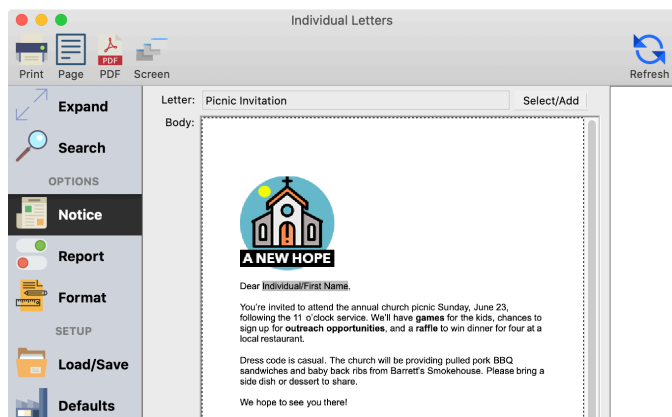

Creating Notices

The example below is an **Individual Letter Notice** from the **Membership Reports** menu, but the steps apply to any notice (letter, card, or email) in CDM+. However, be aware that your control over the final appearance of an email is limited. Recipients' email programs may display your email notice differently than you expect.

Begin by selecting **Individual Letter Notices,** either from the menu or the Welcome to CDM+ Membership window.
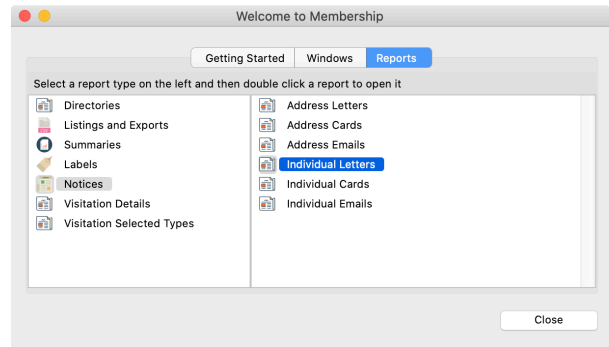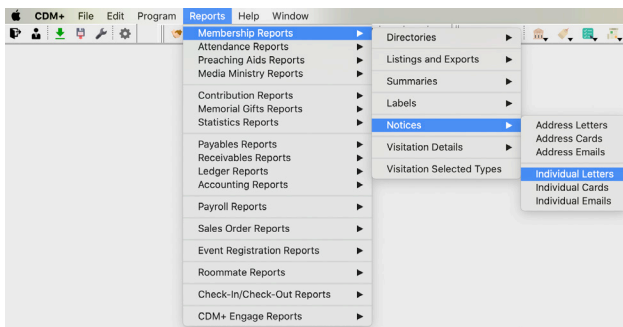
You may choose an existing Letter Notice to edit or duplicate, or you may create a new Letter Notice. In any case, first click the **Select/Add** button next to the name of the last letter notice that was used.

A new window will open in which you'll see any existing notices. On this window you have the option to choose an existing notice, add a new notice, duplicate an existing notice, rename an existing notice, or delete an existing notice.
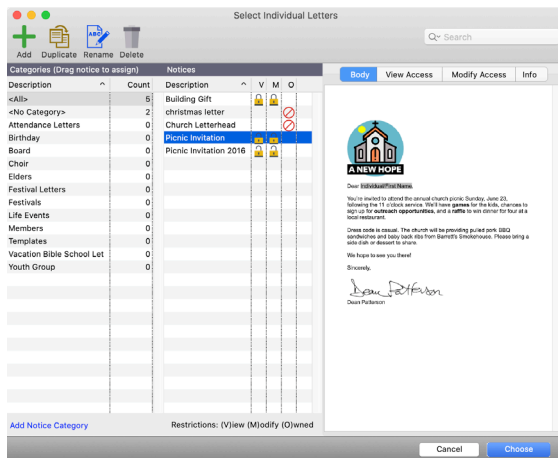
If the letter you want to send already exists or if there is an existing letter you can edit, highlight its name and click **Choose**.

To create a new letter notice, click the **Add** icon at the top left of the window.

If you want make changes to an existing notice, but not lose the original version, highlight it in the list of Notices and click the **Duplicate** icon at the top of the window.
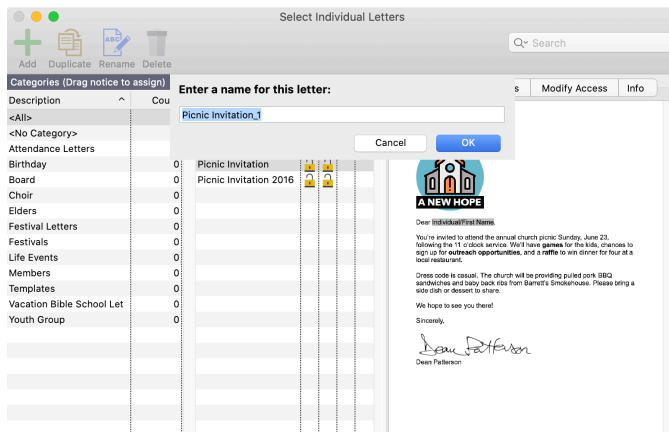
When you choose to Add or Duplicate a notice, you will be prompted to name it.

Give the letter a name that will help you identify it when you wish to use it again. This name does not appear on the notice itself. Click **OK**.

The name of the new notice will be added to the Notices list and highlighted.

Before leaving the select notice window, you may optionally set access to the new notice you have just named and/or assign it to a category.

Setting Access to Notices

Access to a notice in CDM+ can be restricted by the person who creates it. Administrators can change notice ownership and delete notices under File ▶ Administration ▶ Notices.
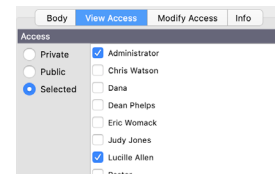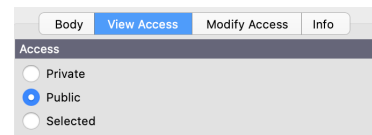
View Access

With your notice selected in the list, click on the **View Access** tab. This setting restricts who can see and use this notice as you created it.

If you leave the View Access set to **Default**, all CDM+ users will see this notice displayed in the Notices list and can use the notice as you created it.

If you wish this notice to be **Private**, to only appear in the Notices list for you when you are logged in, click the radio button next to Private. No other users will even know this notice exists.

If you click on the radio button next to **Selected**, you can then choose specific users you wish to give View Access to for this notice.

Modify Access

With your notice selected in the list, click on the **Modify Access** tab. This setting restricts who can modify a notice you created.

If you leave the Modify Access set to **Default**, all CDM+ users will be able to make changes to the notice.
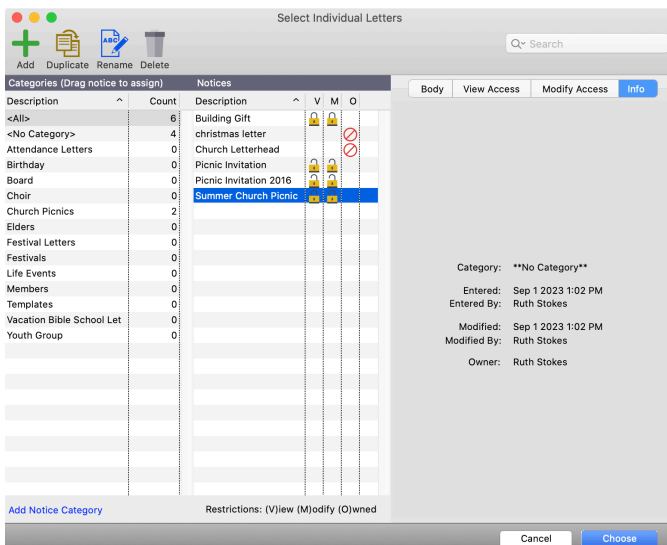
If you don't want anyone else to be able to make changes to this notice, click the radio button next to **Private**.

If you click on the radio button next to **Selected**, you can then choose specific users you wish to give Modify Access to for this notice.
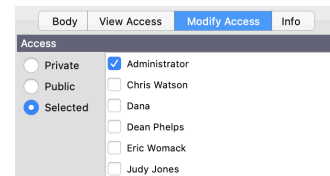
Info

With a notice highlighted, click on the **Info** tab to view more information about this notice.

Notice Categories

- optional
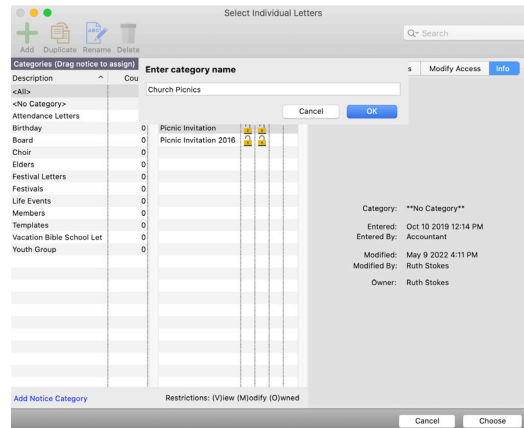- apply to all types of Notices (Letter, Card, and Email) in all CDM+ programs

Creating Notice Categories

- done in two different ways

On-the-Fly

With the Select Notice window open, click Add Notice Category.

Enter the category name, e.g. Children's Dept., and click **OK**.

Master Coding System

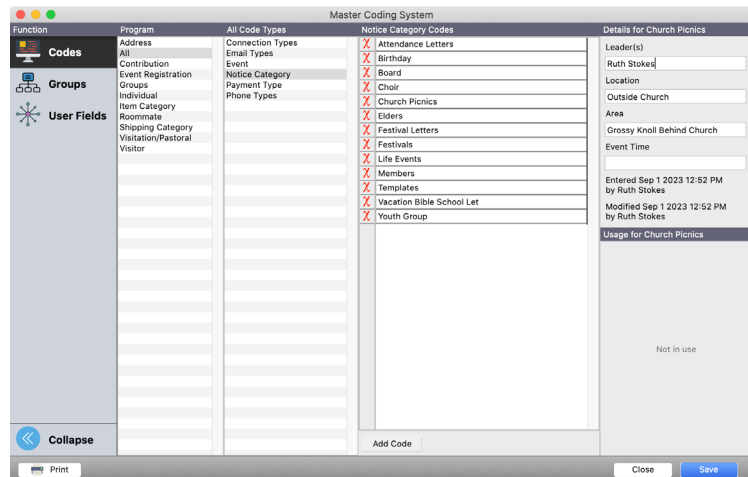▶ **File** ▶ **Master Coding System** ▶**Codes tab**

Highlight **Notice Category** in the list of code types. Click the small **Add** button below the list of code, type the category name under Description, and click **Save**.

You may also **Edit** or **Delete** categories here.

To enter multiple codes, press Tab to move the cursor to the next line between entries. Click **Save** when finished.

Assigning Notice Categories

- Click on **<No Category>** to see which notices have not been assigned.

Existing Notices can be assigned to categories at any time. Click on <No Category> in the Categories list to see all notices that have not been assigned to a category. To assign a notice, simply click it in the Notices list once to highlight and drag it to the appropriate category.
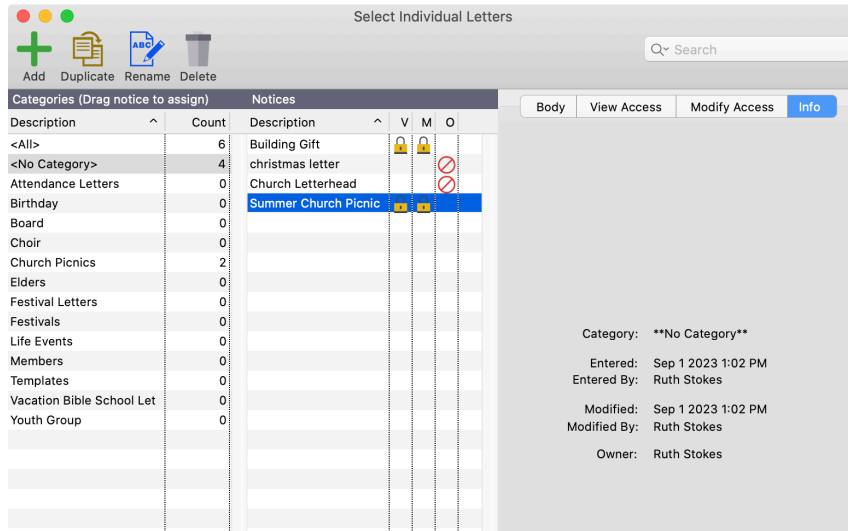
Save time by selecting multiple notices at once and dragging them to a category.

New Notices automatically assign a new notice by highlighting desired the category *before* clicking the **Add** button.

Finding Categorized Notices

Once you have assigned notices to categories, to find a particular type of notice, such as Christian Education, click on the category at left and all assigned notices will display in alphabetical order in the list to the right.

You can always click on **<All>** to see all saved Notices, both assigned and not.

Tracking and Resending Notices

CDM+ provides the ability to track when and to whom notices have been sent. For email notices, under the Body section of the Email notice window, CDM+ shows Last Sent: with the date the selected notice was last sent.
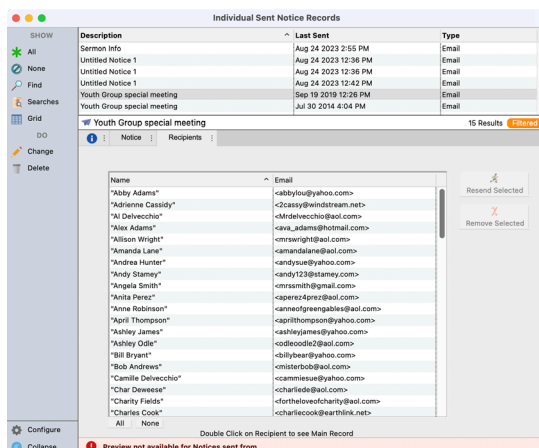
Record windows that relate to people in CDM+ contain a Notices tab. For example, on the Notices tab for an individual, address, or giving unit, CDM+ displays the list of notices sent with the notice type, description, and date sent. For email notices, CDM+ also shows the name and email address of the recipient.

To bypass saving this information for letter or card notices, check the Do Not Save Sent Information box on the Notice window.

Each line of the Notices tab contains buttons to get more information about the notice, resend the notice, or delete that notice line for that particular record.

From the Program menu in CDM+, you can access Sent Notice Records for the various record types. Sent Notice Record windows contain two tabs. The Notice tab shows the description, type, and last sent date and time for the notices. Letter notices show a thumbnail of the notice.

The Recipients tab shows the list of recipients. To resend the notice, select recipients from the list who need to receive the notice again, and click the Resend Selected button. You can also remove the sent notice from recipients by selecting them in the list and clicking Remove Selected.
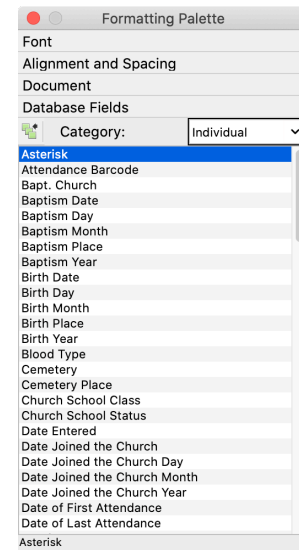
Formatting/Editing in the Notice Editor

Either double-click the name of your notice on the select notice window or highlight it and click the **Choose** button. The notice report window will reopen with your selected notice displaying.

Click the small **Change** button below the Body field to open the editor window. Click inside the window to place your cursor and begin typing.

There are two ways to style the text in the notices editor window:

1. The **Formatting Palette,** which opens to the right of the notice editor window

2. The **Format** button (3rd from the top in the series of buttons at the top right of the editor window)

Clicking the **Format** button brings up windows with options to style the Font, Paragraph, Document, and more.

The Formatting Palette:

– opens automatically with the **Notice Editor Window** and maintains its position to the right edge of the notice editor when you move or re-size the editor window.

– contains sections that will be familiar to all who have used a word processing program: **Font, Alignment and Spacing,** and **Document**.

– also has a **Database Fields** section, which allows the quick insertion of information from CDM+ into a letter or other notice. The Database Fields function eliminates the need for data merges or mail merges.

– styles existing text when text is highlighted or sets defaults for text yet to be entered.

The following topics describe each section of the Formatting Palette. Remember that most of these styling options are also available by clicking the Format button and choosing a menu item. Clicking a menu item after clicking the Format button opens a new window with formatting options.
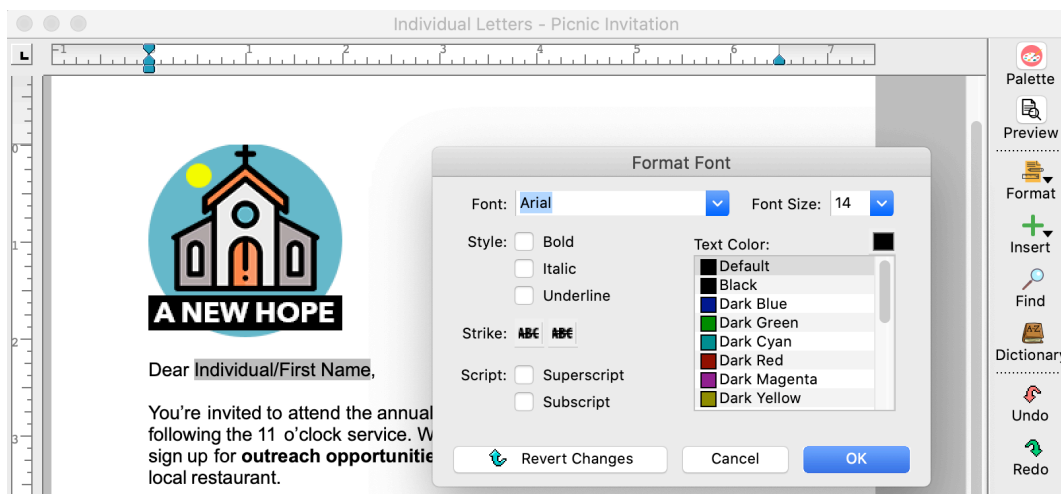
Font

Choose your **Fonts** and **Point Sizes** from the drop list. All fonts installed on your computer are available for use in CDM+ Letter Notices.

NOTE: Be aware that "special" fonts used in an Email Notice will be replaced with another font if recipients do not have access to that same font on the computers or mobile devices where they are viewing the email.

Click on the box next to **Color** to display a color palette. Click the desired color. Then choose to style your text with any of these **Face** options:

– bold
– italicize
– underline
– superscript
– subscript
– strike-through and/or double strike-through

These settings can also be specified by clicking on the **Format** button at the side of the notice editor window and choosing **Font**.

Numbered or Bullet List

Also in the Fonts section of the Formatting Palette are buttons to change text to a **numbered or bullet list**. The left and right arrows next to the list buttons adjust the **indention** of the list. Click on the **Format** button and choose **Bullets and Numbering…** to set the style of a list.
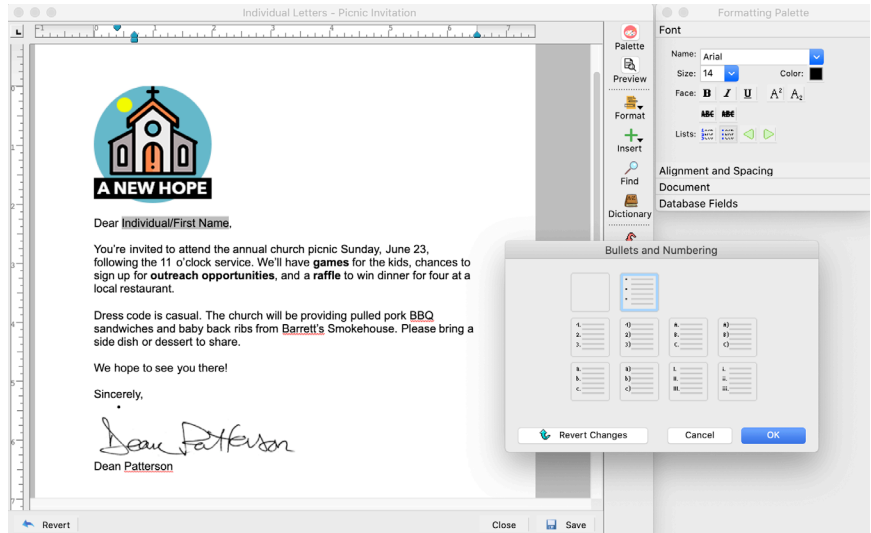
Alignment and Spacing
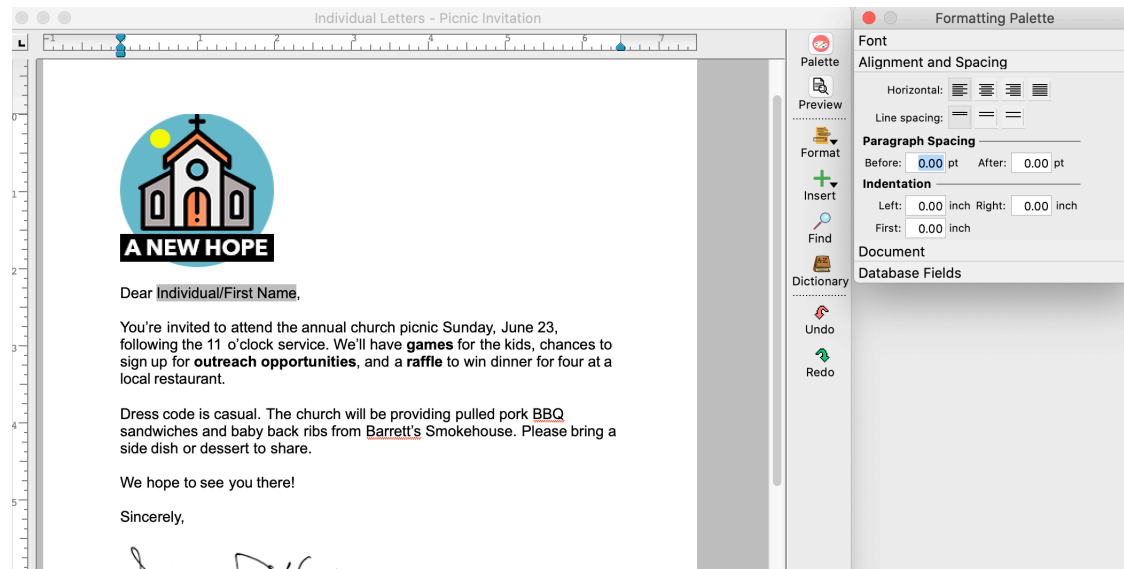
Expand the **Alignment and Spacing** section of the **Formatting Palette** and select options there to:

– **align text** (left-, center-, right-, or full-justified)

– set **line spacing** (single, one-and-a-half, or double)

– set **paragraph spacing** and **indents**

These same **Alignment and Spacing** settings can be set in the **Paragraph Properties** window accessed through the **Format** button. Additionally, you may set tabs in the **Paragraph Properties** window by specifying them numerically. Indents and tabs can be set using a ruler in the **Document** section of the Formatting Palette.

Document
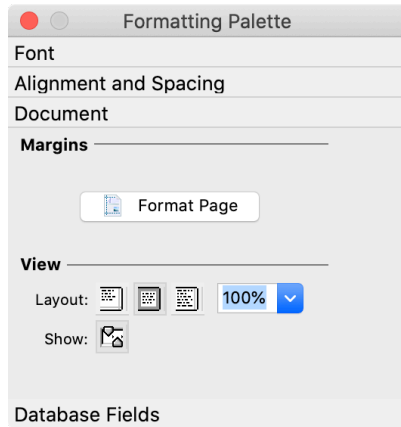
The **Document** section of the Formatting Palette is where you:

- – set **margins**
- – choose a standard **paper size** and **orientation** or a custom paper size
- – control **how the page is displayed** and the **magnification** of the page
- – choose whether or not to show **rulers** (the top ruler is where to set **indents and tabs**)

Click the **Tab icon** to change the type of tab (left-justified, right-justified, centered, decimal).

Database Fields

This section of the **Formatting Palette** contains what really sets CDM+ Notices apart from using a word processor to send letters to your congregation. **Here you select information found in CDM+ to insert in your letter** without the steps of exporting and data merging.

Click on the drop list to see a Category of **database fields**. Select a **Category** to see a list of available fields to insert in your letter. For instance, place your cursor in the letter at the point you want to insert the name of each individual's Sunday School Class in a letter and either double-click "Sunday School Class" in the list of fields or highlight it and click on the **Insert Field Icon**
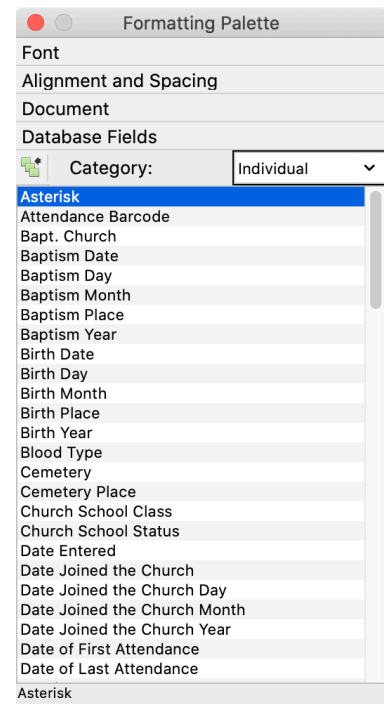
The **selected field** will be added to your letter:

We're asking all members of Adult Sunday School Classes to bring food to share (enough for at least 8-10 people). Please note below what type of food members of the Individual/Sunday School Class are assigned. Also be sure to bring place settings for your family. The church is supplying the meat and beverages, so please call the office or e-mail info@fcc-bigcity.org and let Ruth know how many of you are coming.

If you click the **Preview** button at the side of the notice window, you will see an example of the result:

and potato salad and baked beans. . . you get the idea).

We're asking all members of Adult Sunday School Classes to bring food to share (enough for at least 8-10 people). Please note below what type of food members of the Seekers Class are assigned. Also be sure to bring place settings for your family. The church is supplying the meat and beverages, so please call the office or e-mail info@fcc-bigcity.org and let Ruth know how many of you are coming.

Clicking the **Preview** button again will return you to the notice entry mode.

Inserted **Database Fields** may be formatted just like any other text in a notice. Highlight the field name and choose the font, size, color, etc.

We're asking all members of Adult Sunday School Classes to bring food to share (enough for at least 8-10 people). Please note below what type of food members of the Individual/Sunday School Class are assigned. Also be sure to bring place settings for your family. The church is supplying the meat and beverages, so please call the office or e-mail info@fcc-bigcity.org and let Ruth know how many of you are coming.

Click the **Preview** button again, to see an example of the result of the formatting:

We're asking all members of Adult Sunday School Classes to bring food to share (enough for at least 8-10 people). Please note below what type of food members of the **Seekers Class** are assigned. Also be sure to bring place settings for your family. The church is supplying the meat and beverages, so please call the office or e-mail info@fcc-bigcity.org and let Ruth know how many of you are coming.

To avoid blank lines in addresses, use the Address Block field from the Address database field list, instead of:

> Address Line 1
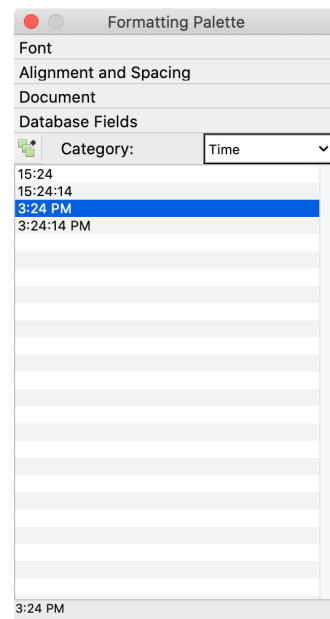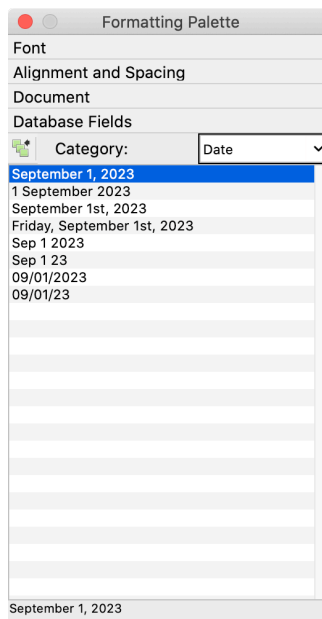> Address Line 2
> Address Line 3
> City, State and Zip

The above format will result in a blank line in the address if any of the Address Line fields is empty.

NOTE: Some fields, such as Full Individual Name, have options that can be controlled from the Format tab on the report window.

Date and Time

Two of the categories available in Database Fields are **Date** and Time. Choose from the formats listed to insert the *current date or time when the notice is printed* (or emailed) into the document.

NOTE: If you want a specific date or time printed on the notice, do not use the Date or Time field, but rather type it in the notice.

Formatting Palette	
Font	
Alignment and Spacing	
Document	
Database Fields	
Category:	Date ⌄

September 1, 2023
1 September 2023
September 1st, 2023
Friday, September 1st, 2023
Sep 1 2023
Sep 1 23
09/01/2023
09/01/23

September 1, 2023

| Formatting Palette	
Font	
Alignment and Spacing	
Document	
Database Fields	
Category:	Time ⌄

15:24
15:24:14
3:24 PM
3:24:14 PM

3:24 PM

Inserting Page Breaks, Files, Text Borders, and Hyperlinks

CDM+ Notices have the ability to insert **Page Breaks, Files (text and graphics),** and **Text Boxes** into the body of the notice.
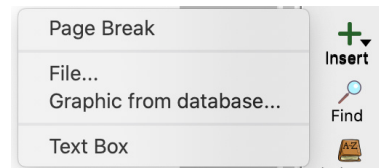
Page Break

Place your cursor where you want to add a page break, click the **Insert** button on the side of the Notice window, and click on **Page Break** in the pop-up window.
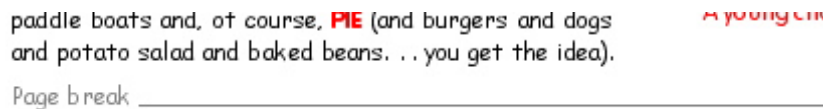

To remove a **Page Break**, highlight it and press **Delete** on your keyboard.

Note: *It is possible to insert Page Breaks into card and email notices, but they have no meaning for those reports. It is recommended you only use Page Breaks in letter notices.*

File

To insert a file:

1. Place your cursor where you want to add either a graphic (.jpg, .png, or .pcx) or text (.txt or .rtf) file.
2. Click the **Insert** button on the side of the Notice window.
3. Click on **File** in the pop-up window and select the type of file you wish to insert from the drop list.
4. Browse to select the file.
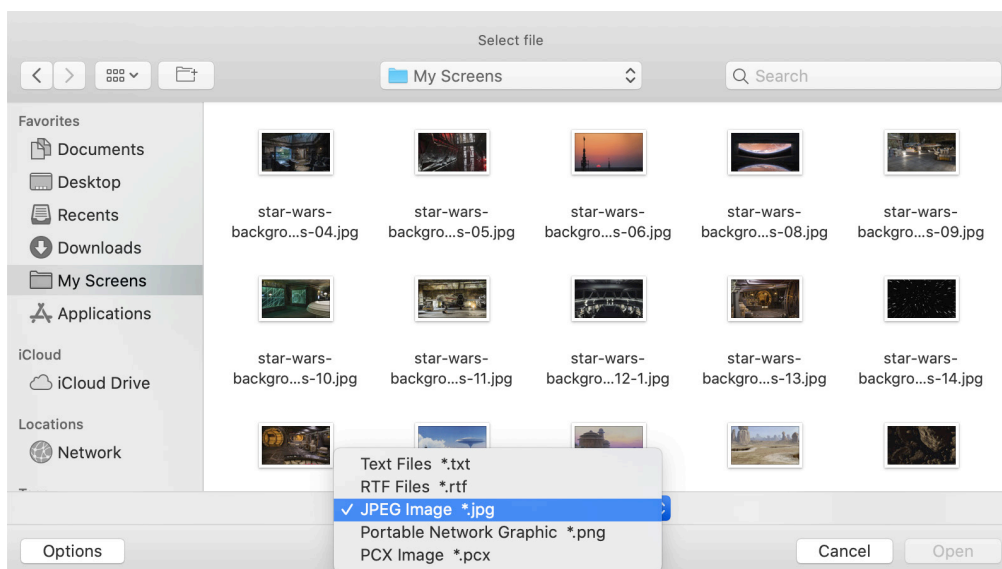
Graphic from Database

Selecting this **Insert** option allows you to insert a graphic from the **CDM+ Graphic Browser**. You can import as many graphic files in the Graphic Browser as you like so that they are always readily at hand for use in CDM+. Examples of graphics you might want to import include:

- a scan of the pastor's signature
- a graphic of your church's logo

The **Graphic Browser** is also used in name badges, checks, and the yearbook directory, so images added to the graphic browser here are available in all these locations.


To insert a graphic from your CDM+ database:

1. Place your cursor where you want to add the graphic.

2. Click the **Insert** button on the side of the Notice window.

3. Click on **Graphic from database . . .** in the pop-up window. The **Graphic Browser** will open.

4. Choose an existing graphic from the **Thumbnails** on the left side of the **Graphic Browser**
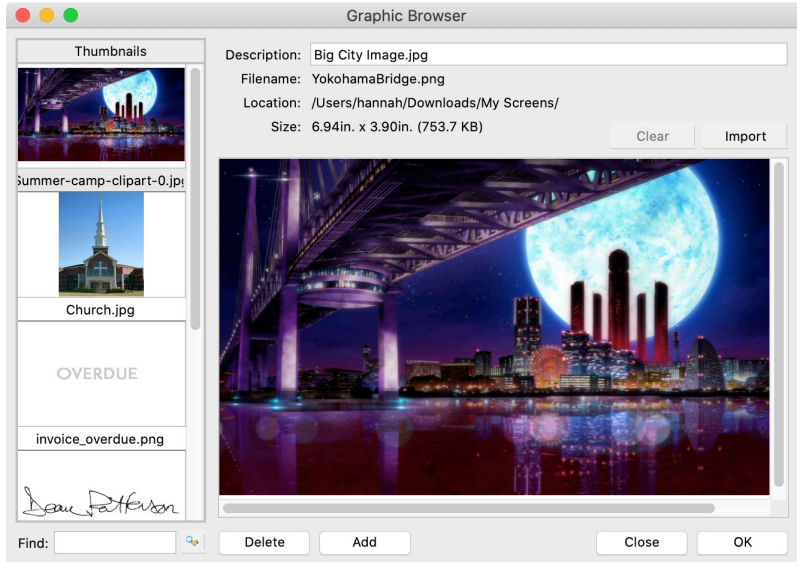
5. Click **OK.**
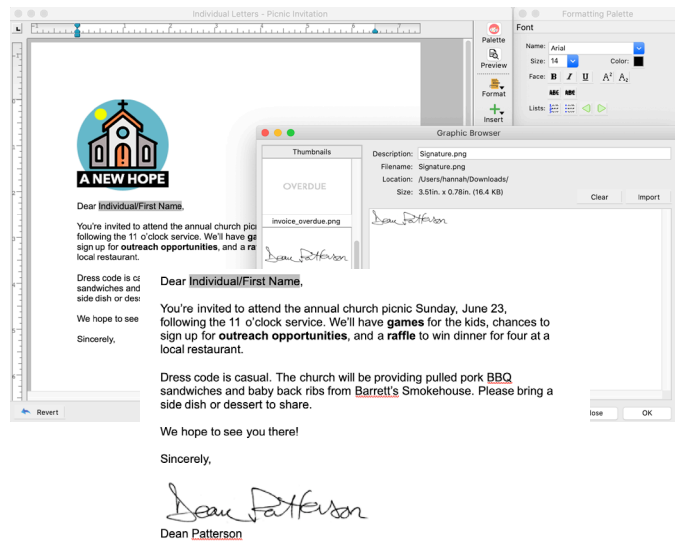
To **add** a graphic file to the CDM+ Graphic Browser:

1. Click the **Add** button on the bottom of the Graphic Browser window **or** the **Import** button at the top right of the Graphic Browser window.

2. Browse to find the graphic file, select it, and click **Open**.
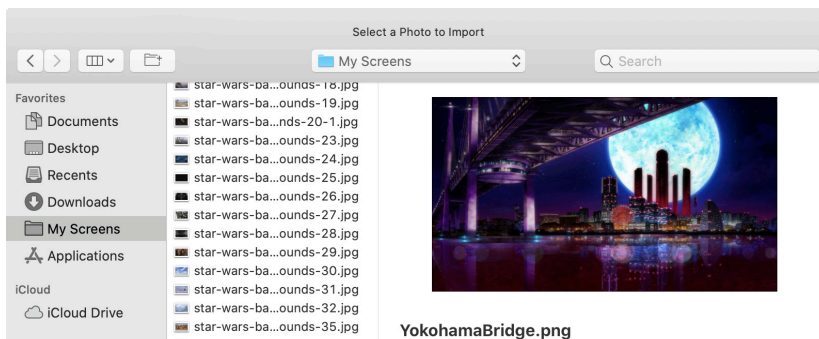
The graphic appears in the Graphic Browser window.

3. Type a **Description** of the graphic.

4. Click **OK**. The new graphic will appear in your notice wherever you last placed the cursor.

NOTE: CDM+ will import all graphics at 96 dpi. If your original graphic was at a higher resolution, such as 300 dpi, you will notice the Size indicated on the Graphic Browser window after importing will be larger than the original. Re-sizing the graphic back to the original size once you have placed it in the notice will return it to a print-quality resolution of 300 dpi.

If you plan to use a graphic in Email Notices ONLY, you may wish to save it at the size you want at 96 dpi resolution to avoid having to re-size it and ensure it will appear in email messages as you desire. However, be aware that a 96 dpi graphic, when used full size, will NOT print well.

To remove a graphic from the Graphic Browser, select the thumbnail on the left and click the **Delete** button at the bottom of the window.

Formatting Inserted Graphics

Once you have inserted a graphic in the notice, either from a file or the database, you may format that graphic.

Click the graphic once to highlight it. Click the **Format** button on the side of the notice window and choose **Picture** from the drop list. This opens the **Format Picture** window. You can also double-click the graphic to open this window.
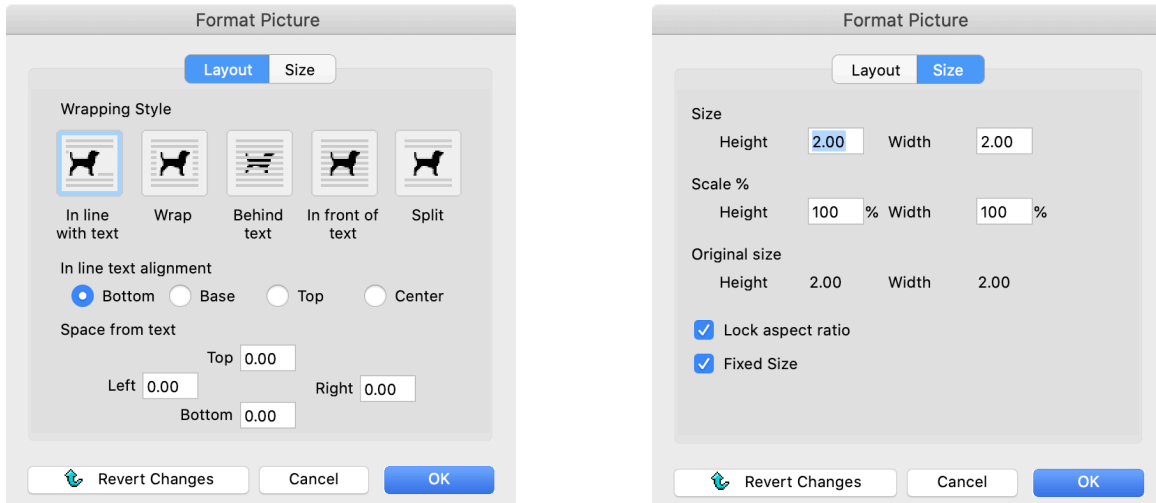
Layout tab – Choose the **Wrapping Style** for your graphic by clicking on the appropriate icon. If you choose to keep the graphic in line with the text of your notice, click a radio button to choose in line alignment of the graphic.

The 4 fields under **Space from text** allow you to set a margin between your graphic and the surrounding text.

Size tab – Click the **Size** tab to adjust the sizing of the inserted graphic. You may either type a **Height** and **Width** (in inches) or type a percentage to reduce or enlarge the graphic.

Warning! Enlarging a graphic may result in poor quality, depending on the resolution (dpi) of the original graphic file. 300 dpi is the ideal resolution for printing graphics, though slightly lower resolution graphics may be acceptable. A resolution of 72 to 96 dpi provides acceptable quality for on-screen viewing (such as in an email) ONLY. Since you are viewing the graphic on screen in CDM+, we recommend you print a test copy of your letter or card to check it.

Clicking the checkbox next to **Lock aspect ratio** will prevent you from changing the proportions of the graphic when you re-size it. If you check this box, type a number in the Height or Width fields, and press tab, CDM+ will automatically enter the other proportionate dimension. This is a good way to make sure you don't stretch photos and end up with distorted faces!

If the graphic is set to "In line with text" wrapping, you cannot drag it. Instead, cut and paste the graphic as if it were a piece of text. For all other wrapping options, you can drag the graphic using the (left) mouse button.

Data tab - In email notices, click the Data tab to add Alt Text to the images in the email notice. Alt text should describe the image or its purpose in a few words. The alt text is displayed when the recipient hovers over the image in the email.
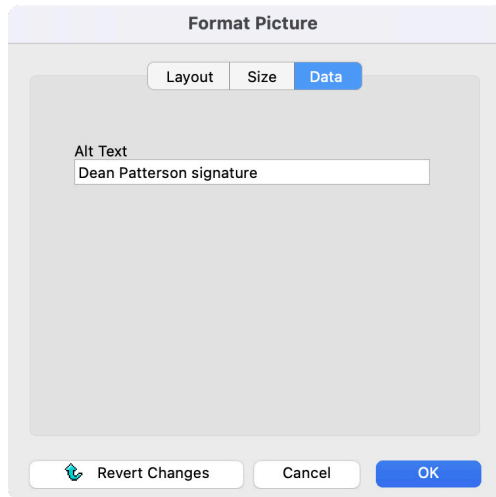

Alt text with images is important for accessibility and understanding. Recipients who are visually impaired may use a text reader to read email content to them. The text reader will read the alt text so that the recipient knows about and understands the image. Also, if for some reason the image does not load for the recipient, the email client can display the alt text.

Helpful hint: Providing alt text with your images not only helps visually impaired readers, but it also reduces the risk of the email notice going to their spam or junk folder.

Text Box

To insert a **Text Box** in your notice, place the cursor in the desired location, click the **Insert** button on the right of the notice editor window and select **Text Box**.
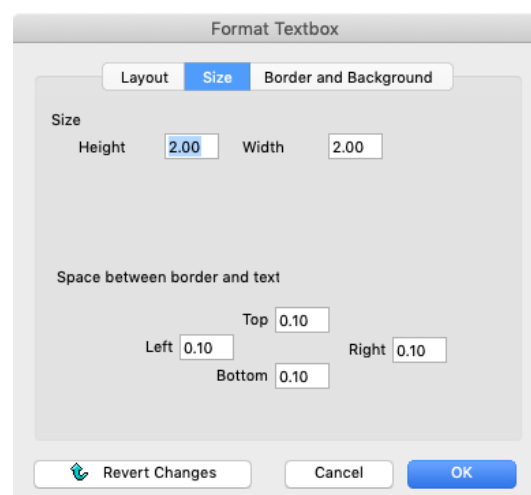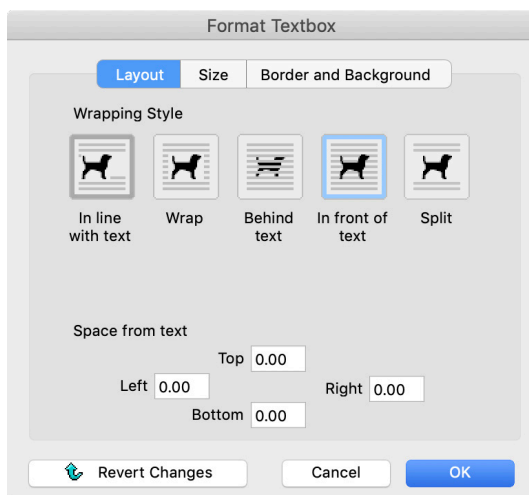
Layout tab − Functions the same as the **Layout** tab of the **Format Picture** window (see above).

Size tab – Set the **size** of the text box in the top section of this window. You can also manually change the size of a text box in the notice editor window by placing your cursor on the edges or corners, holding down the (left) mouse button, and dragging.

The remaining 4 fields on this window set the amount the text is inset from the edges of a text box.

Border and Background tab – Use the radio buttons to select a Border Style and Line Style. If you wish to create a text box with no border, for instance to place a caption under a photo, leave the Border Style as None. With no Border Style chosen, the Line Style selected is immaterial.

Choose a color for the lines in the border by highlighting one of the color swatches in the **Line Color list**. The **Line Size** sets the width of the lines in the border.

Highlight a color swatch and name in the **Fill Color** list to set the color of the **text box fill** (background).

Adding Hyperlinks

In email notices, you can set text in the email body to be a hyperlink to a web URL. In the Notice Editor, select the text that should serve as the hyperlink. Click the Insert button, and choose Hyperlink from the list. This will open the Insert Web Link window. You can modify the text in the notice by changing the Display Text value. Enter the target URL for the hyperlink, being sure to include the http:// or https:// prefix. Add Tooltip text. This text will display when the recipient hovers their cursor over the hyperlink text in the email.

When done, click the Insert button.

Helpful hint: Providing tooltip text helps reduce the risk that your email notice will go to the recipient's spam or junk folder.

Find and Replace Function
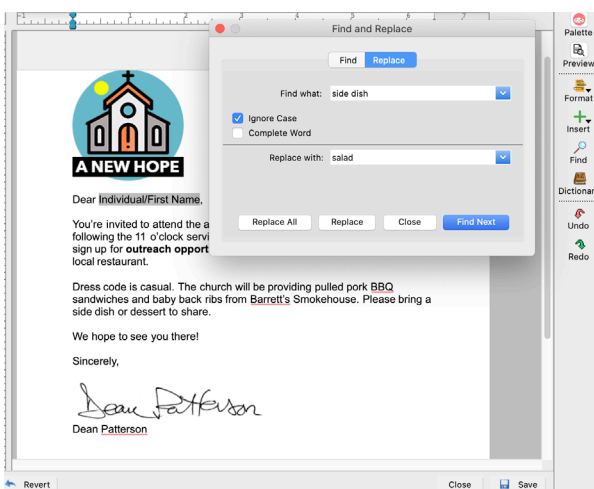
CDM+ Notices include a **find and replace** function. You can search (and optionally replace) the text in a Notice based on a particular word or phrase.

Dictionary and Spell Check

CDM+ Notices include an automatic **Spell Check** feature that works while you type so you'll never forget to use it.

The spell check system includes a **Custom Dictionary** to which you can add words, which the spell check function "learns" so they won't be marked in all notices.

Words that are not in the spell check dictionary are marked with a red squiggle underline. Right-clicking (or control-clicking on a Mac) on the suspect word brings up alternative suggestions, as well as options to **Ignore** this instance of the word, **Ignore All** instances of the word, or **Add** the word to the Custom Dictionary.

. The church will be providing pulled pork BBQ
y back ribs from Barrett's Smokehouse. Please bring a
o share.

Barrett''s
Barrett's's
Barre's'
Bartlet''s
Barrel''
Barrie''
Barred''
Barren''
Barratr''s
Barest''
Barer's'?
Barrels's
Barrier's

Ignore
Ignore all
Add

here!