# Navigating CDM+

CDM+ gives you options in how you move around in and access different areas of the software. Programs and sub-programs can be selected using buttons on welcome windows, toolbars, and traditional drop down menus. You can also set shortcut keys to open menu items.

Welcome to CDM+ Window

After logging into CDM+, you will be presented with the Welcome to CDM+ window. This window has a button for each program and sub-program of CDM+ on it. Move your cursor over each button to see a description of that program or sub-program. If a button is grayed out, you either do not own a license to that CDM+ program, or you don't have permission to access it set on the Users pane of the Administration window.
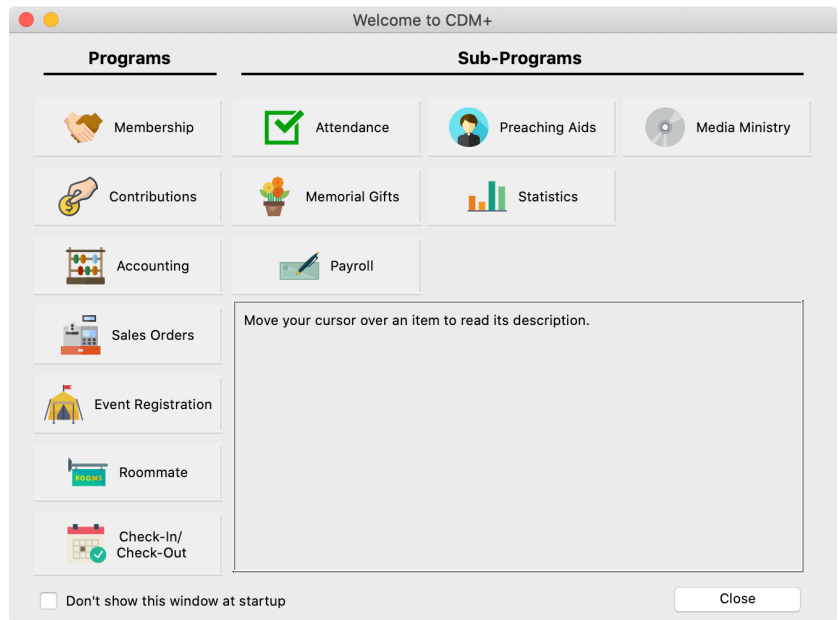
NOTE: Payroll is an optional sub-program of the Accounting program. Payroll may be unavailable even if you have a license for and access to the Accounting program.

You may check the box at the bottom next to Don't Show This Window at Startup to avoid seeing it again.

To re-enable the automatic opening of this window at any time, choose Open the application Welcome window from the Startup options of the General User Preferences window.

To view this welcome window at any time, select Welcome to CDM+ Window from the Help menu.

Program Welcome Windows

Click on one of the buttons to open a new Welcome to [Program or Sub/Program] window. The Getting Started tab lists steps to begin using that program or sub-program. Click on a numbered button to open the relevant CDM+ data entry window.
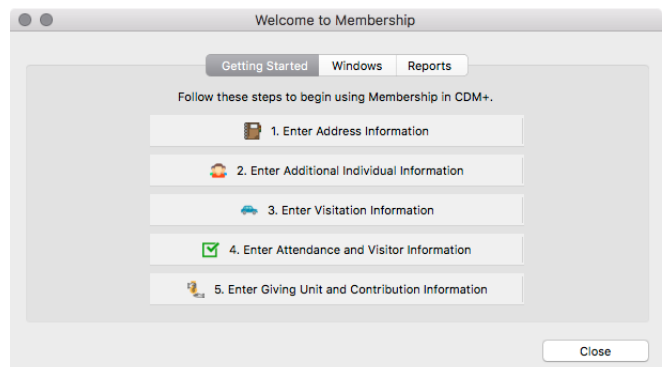
Click on the Windows tab to open a new pane. Click on one of the buttons found here to open that record window.
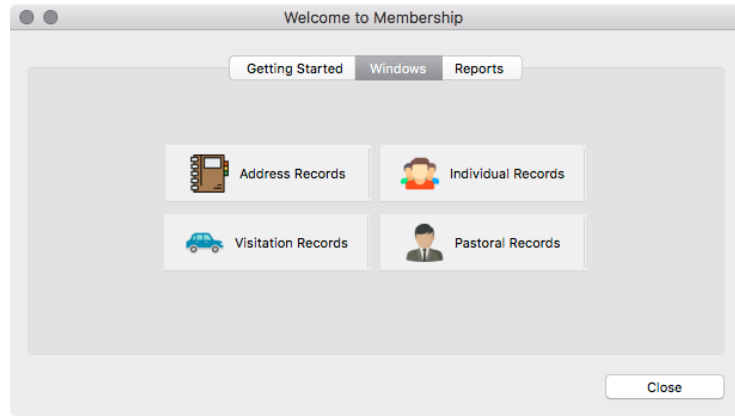
Click on the Reports tab to open another pane, listing the reports within this particular program or sub-program. Click on a report type to see a list of reports. Double-click on the desired report name to open the report setup window.

NOTE: Depending on the CDM+ programs in your suite and/or your user access settings, these windows may appear slightly differently from those shown above. Those programs or sub-programs for which you do not have a license or have not been given access to will be grayed out. Users' program access is set by the CDM+ administrative user on the Users pane of the Administration window.

Menus

The menus in CDM+ are perhaps the easiest way to see all available record windows and reports at a glance

Program Menu

Click on **Program** in the menu bar to display a drop list of CDM+ programs and sub-programs. Move your mouse to highlight a menu item and a secondary menu will display. Click an item on that menu to open that record window.
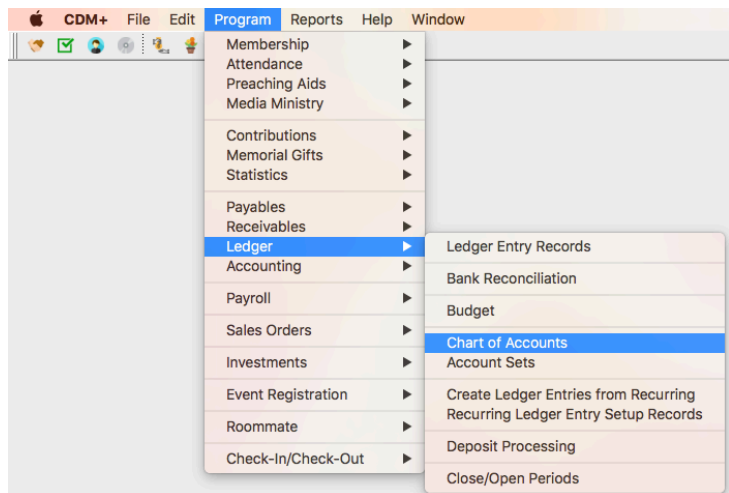
NOTE: Those programs and sub-programs for which you do not have a license or user access to will appear on the menus but will be grayed out and not selectable.

Reports Menu

Click on Reports in the menu bar to display a drop list of CDM+ program and sub-program reports. Move your mouse to highlight a menu item and a secondary menu of the available reports or report types for that program or sub-program will display. Many report types, such as Notices, will have a third menu of the reports within that type.
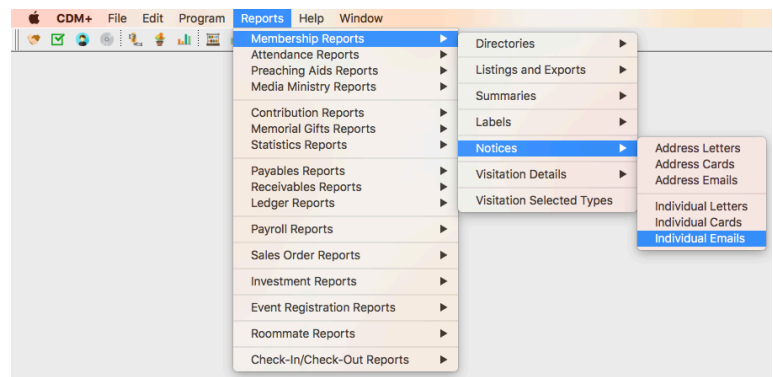
Help Menu

The Help menu provides access to user support for CDM+, including the electronic manual, links to the Tech Support email address, CDM+ website, a screen-sharing website optionally used during a tech support call, and a form for providing feedback on the program.
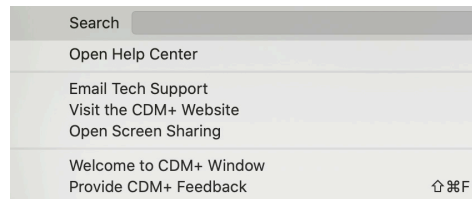
Open Help Center – Click to open your web browser to the online CDM+ help manuals. You may enter a keyword and click the Search button to bring up a list of relevant entries.

NOTE: On the Suran Help Center website, you do not need to login to access CDM+ Manuals or Videos.

Email Tech Support – Click to open your email program to send an email to the CDM+ Tech Support Department. Be as specific as possible when asking your questions about using CDM+. Also, please include your name and the name and location of your church or organization in the email message so we can identify you. All instances of CDM+ Tech Support are logged with a CDM+ User Record in our database so it helps to connect your email to the correct church or organization.

NOTE: 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 at help.suran.com. Click Contact Support in the lower right-hand corner of help center website or use the Support Requests link at the top of the page. Fill out the form and include screenshots if available. If you have an urgent need please feel free to call CDM+ Tech Support (Monday-Friday 8:30 AM - 5:00 PM Eastern time at 800-633-9581).

Visit the CDM+ Website – Click to open the CDM+ website with your web browser.

Open Screen Sharing – When prompted by a Suran support technician or while waiting for a callback, click to open a screen-sharing website with your web browser to facilitate assistance.

Provide CDM+ Feedback – Select to report a bug, make a suggestion, or provide any other type of feedback (other than requesting tech support).

To use the Provide CDM+ Feedback feature, just type a detailed description of your feedback on the **Comments** pane. You may also include pertinent screenshots of open windows by checking them in the Include these screenshots list. Choose the type of Feedback from the drop down list.
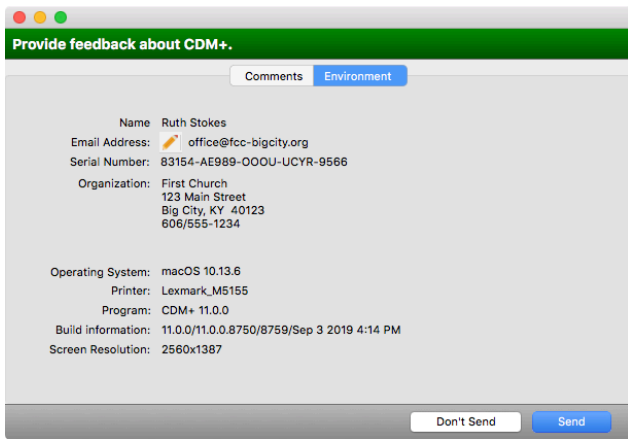
Click on the **Environment** tab and make sure the information there is correct. Particularly be sure to include your correct email address in case our development team has any questions. Click Send.

NOTE: The Provide CDM+ Feedback function does NOT take the place of contacting CDM+ Tech Support. You will not get a response from the CDM+ software developer working on the issue unless they have a question. For timely help with a problem, please call (800-633-9581) or email (support@cdmplus.com) CDM+ Tech Support.

Toolbars

In addition to accessing the CDM+ programs through the welcome windows and menus, you can use toolbars.
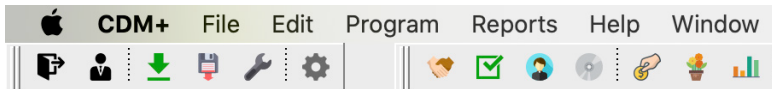

Default Toolbar - macOS

The Program toolbar will display at the top of your screen by default. Hover your mouse over an icon to see its description.

▶**CDM+ (macOS)/File (Windows)** ▶**Preferences** ▶**CDM+ User** ▶**General** ▶**Toolbars**

Use User Preferences to customize your CDM+ workspace. You can: select other toolbars, change their location, or choose to show text. Each time you log into CDM+ your toolbars will display as you set them.

For example, the Financial Administrator who only works in the Contributions program may choose to set his CDM+ User Preferences to display only the Contributions toolbar. In order to have the maximum amount of space top to bottom on his screen, he chooses to display the toolbar on the left side. He also wants a reminder of what each icon opens, so he clicks the Show Text checkbox.

If you choose Floating as the Location of a toolbar, it will display as a movable, re-sizable palette.
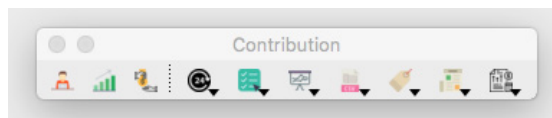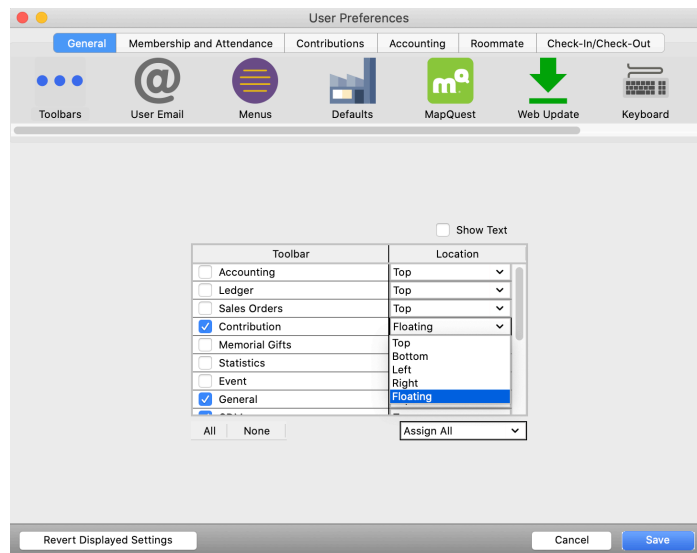
To re-size a floating toolbar palette, hover your mouse over a corner until the cursor changes to a line with arrows, then drag to re-size the palette. Floating toolbar palettes can be dragged to any location on your desktop. Toolbars with all other Location options selected are anchored to the edges of your screen.
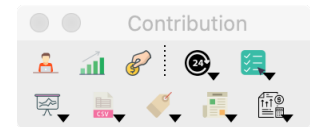
NOTE: Toolbars are not automatically displayed just because you have added a program to your CDM+ suite or your administrator has given you access to a new program area. You must set your User Preferences to display them.