

Guide for CDM+ Essentials Users

Welcome to the 2023 Annual User Conference. We are glad that you are here! This is a great time for you to get to know your CDM+ platform and see all that CDM+ has to offer. You'll be able to connect with other users, speak with the experts, and even share your feedback so we can continue to enhance the CDM+ platform.

We want to help you get the most out of this experience so we have put together a few tips and tricks to get you started.

Different Terms throughout CDM+

One of the great things about CDM+ is that you can customize this tool to fit the needs of your organization. When we created the Essentials platform we created it with non-profits in mind. This is why you may see different terms in the manual and presentations that are different from your experience. Please note that the functions in CDM+ are the same. You just may see a different term used. Some examples of these term differences are below.

Constituents = Individuals

Designations = Funds

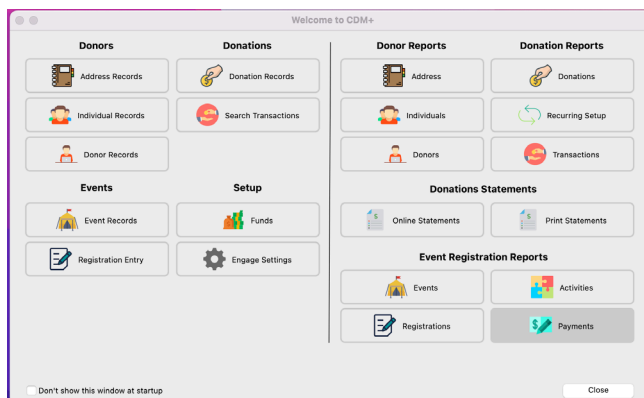
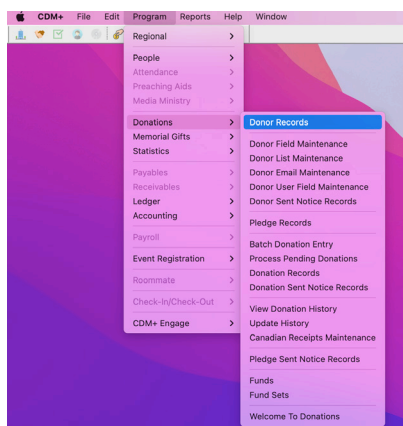
Giving Units = Donors

Contributions = Donations

Navigating through CDM+

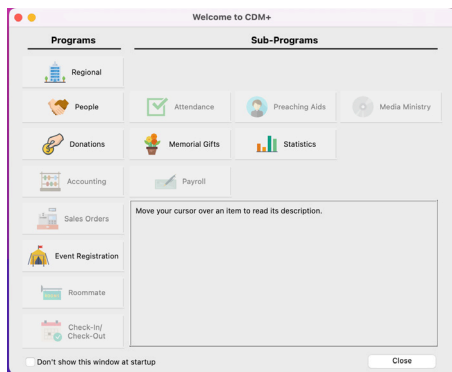
There are multiple ways to navigate through the CDM+ platform.

For the Essentials package, we enhanced the "Welcome to CDM+" window to make navigation quick and easy. However, as you look into the different upgrades, you'll notice this window looks a little different.



Another popular way to navigate in CDM+ is through the menus at the top. You can hover over the different menu titles to get to the window you are looking for.

Menus are available in all editions of CDM+ and will be the most common way trainers demonstrate how to navigate the program.



If you are upgraded to our Core platform and beyond, your Welcome to CDM+ window will look different. You still will be able to navigate to the windows you are used to seeing.

Essential Features

Essentials was designed to provide you with the basics that you need to receive and track online donations. Because of this, not all the features available in CDM+ are available in the Essentials package. The conference is a great time to explore more of the features available through CDM+. Some of these features include:

- Custom Notification Emails
- Forecasting Reports
- Advance Search Options.
- In-Depth Statistical Reporting
- Individual Tracking and Note options
- Memorial Gifts
- Pledge Tracking
- Fund Accounting

Try Out the FULL CDM+ Platform for FREE!

As an exclusive offer for coming to this year's conference, you can upgrade your platform to any CDM+ platform at no charge for 6 months!!! Just stop by the Help Desk and we'll get you updated.

Suggested Conference Tracks

We have put together a list of potential tracks to follow during the conference. You can always pick out the different classes you wish to attend but the tracks make it easy to learn as you go. A few of the suggested tracks to follow are below.

- Basic
- Membership
- Administrative

Suggested Classes to Take

You can always start to follow a track and then jump around and take different classes that sound interesting to you. Some classes we would suggest that you take are below.

- Administering CDM+
- Contributions Procedures
- Fundamentals of CDM+
- Engage Giving
- Event Registration

Visit the conference website at cdmplus.com/auc2023 to download suggested tracks and classes PDF's.