

# CDM+ Regional

The Regional version of CDM+ provides hierarchal offices, such as judicatory offices responsible for multiple congregations, help in managing information about the churches/organizations to which they relate and the various leaders and key personnel within those churches/organizations. There is a separate Church Records window that tracks this information, and additional tabs and fields are available on the Address and Individual records in CDM+ Membership.

Suran Systems, Inc. has customized versions of its Regional program for several denominations. These customized versions provide specific statistical and reporting functions. In addition, there are a number of System Preferences that allow for different tracking of information for all users of the Regional version. This feature, plus the use of the Group and User Fields tabs, provides powerful tools for anyone to customize CDM+ Regional for their particular needs.

## Church Records

### ►Program ►Regional ►Church Records

The Church Records window is similar to windows in the CDM+ Membership program in that there are List, Field, Phone, and Email maintenance functions, as well as use of the Notices features in CDM+. Instructions on how to use those features and functions can be found in the Membership sections of this manual or by attending the relevant classes during the Users Conference.

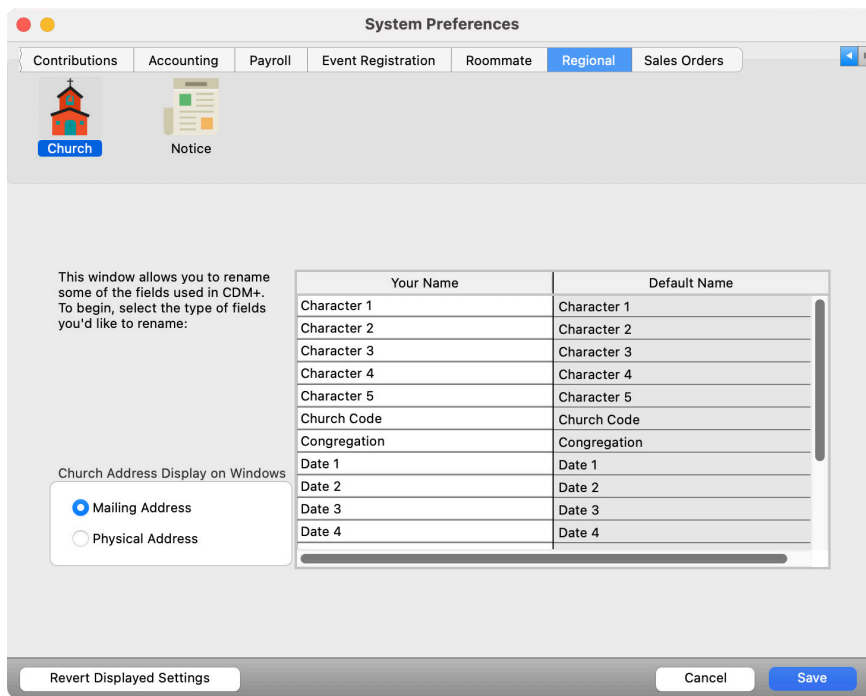
The Church Records window functions and operates just like all other areas of CDM+. The tabs presented on the Church Records window will vary depending on which customized version you are using.

The Address tab of the Church Records window provides a place to enter both a Mailing and Physical address for a church. The Physical sub-tab has a checkbox to indicate that the Physical address is the same as the Mailing address.

A CDM+ System Preference setting indicates whether the city of the mailing or physical address is used throughout CDM+ on lists where a church or organization can be selected. These church lists can be found on the Address Record, as well as on the Church tab of the Individual Record. This list of churches or organizations is also shown to the user in Event Registration Web Ministry Tool if "Show church select list?" is enabled when creating the tool for an event.

## Mailing Code and Section/District/Area

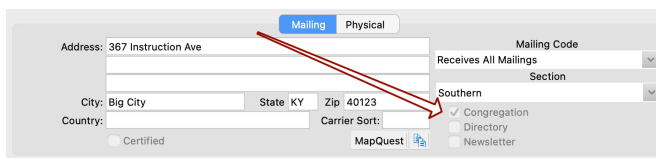
The Address tab contains two additional important fields for judicatory offices: Mailing Code and Section. Mailing Code can be used to select records for purposes like mailings, directories, or archiving. This field can also be used to identify churches/organizations for other purposes.



Many judicatory offices group churches geographically into districts or areas. Section can be used to assign a code to the Church Record for grouping purposes. A CDM+ System Preference (►**CDM+(macOS)/File(Windows) ►Preferences ►CDM+ System ►Regional ►Church**) can be used to change the title of the field to fit the way the office assigns churches to groups or clusters.

Each state or regional office determines the content and use of these fields using the Master Coding System (►**File ►Master Coding System**).

## Congregation Checkbox



A checkbox on the Mailing sub-tab of the Address tab indicates whether this record is for a "Congregation." Many reports and queries use the Congregation checkbox as a default to show only those records that have it checked. In other words, when the Congregation box is unchecked, CDM+ will regard this Church Record as inactive.

It is a good practice to use this checkbox to indicate active and affiliated congregations. This is an easy way to keep in CDM+ churches that are no longer active or affiliated with the denomination, but yet need to know that at one time they were and to maintain historical information about the church.

## Record Filtering

By default, the records displayed in the Church Records window will be filtered based on the Congregation check box. If a church record has the Congregation box unchecked, that record will not be displayed in simple find results or when showing all records. The orange **Filtered** icon will indicate that the results have been filtered. To show the filtered records, click the filtered icon. The records will be displayed and the icon will change to the green **Unfiltered** icon to indicate that no records are being filtered. The result count will be updated accordingly.

## Phones and Emails

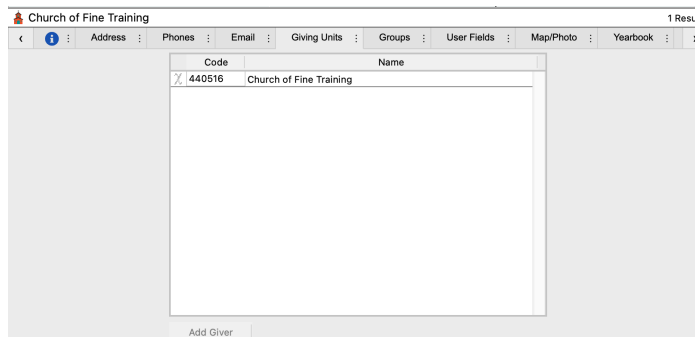
The Phones and Email tabs store contact information that applies to the entire church or organization. For example, a church fax number or a general church email address, such as office@versailleschurch.org. On the Phone tab, a phone number can be marked as Primary. This will appear as the primary phone on directories and reports. Individual phone numbers and email addresses should be kept on the Individual record.

## Church Giving Units

The Giving Unit tab provides a way for different organizations to support ministries of the judicatory office. The use of Giving Units tied to the organization directly means you do not have to create an Address Record and Giving Unit Record for each church or group within the church that supports the denomination's ministry. These giving units can simply be defined on the Church tab.

**NOTE:** It is a good practice to set the Giving Unit Code for a church to match a church PIN or code.

In the regional version of CDM+, contributions by individuals are tracked back to the church with which the individual's Address Record is associated.



## Maps and Photos

A map to the church or a photo of the church may be imported into CDM+ by importing an image file or pasting an image from the clipboard. Check the Scale box to reduce the photo proportionately.

**NOTE:** The photo saved here will display in the Churches CDM+ Mobile app. This photo is very helpful to bring up on your phone when trying to find that church you've never visited before.

## Church Positions

Probably the most powerful feature of the CDM+ regional version is the ability to record key positions within the local church/organization to which the office staff relate.

Name	Position
Dean Patterson	Pastor
Elizabeth Andrews	Board Chair
Allie Thompson	
April Thompson	
Bob Andrews	
Carla Shank	

The Members tab of the Church Records window displays a quick list of all Individuals in the database who are related to this church/organization. If a person has a leadership role, it is displayed next to their name. This list can be sorted by Name or Position by clicking on the appropriate header. Double-click on a name and CDM+ will jump to that person's Individual Record, or click on the Individual jump button in the GO section of the sidebar to bring up all Individual Records on this list.

CDM+ keeps track of past members/positions held in the church. By simply entering an End Date on the Individual Record, the judicatory office has a history of pastoral and lay leadership changes within the life of the church. This feature also allows you to see on Individual Records where pastors or other leaders served over the years they've been within the judicatory office's territory.

Name	Position	Begin	End
Matt Thompson	Board Chair	Jan 1 2021	Dec 31 2022
Rebecca Shank	Treasurer	Jan 1 2021	Dec 31 2022

On both the Members and Past Members tabs, you can right-click (Windows) or control-click (macOS) and print the contents of the tab.

**NOTE:** Church positions are defined in the Code section of the Master Coding System and are recorded on the Church tab of the Individual Record. They function just like other groups and can be used anywhere that groups are used, such as printing individual directories, sending notices, and searching for individuals in CDM+ Mobile.

## Connecting Addresses and Individuals to Churches

Address Records in the Regional version of CDM+ have a Church field. The information in this field relates to all members within the family (or Individuals tied to this Address Record) and is used to populate a church position line on the associated Individual Records.

The screenshot shows the 'Address Records' window with a list of records. A red arrow points from the 'Church' field in the detailed view to the 'Church' dropdown menu in the list view.

Last Name	Primary Phone	Salutation Name
Andrews	828.626.3535	Robert & Elizabeth
Patterson	606.555.8976	Dean & Sharon
Shank	606.555.9864	Steven & Rebecca
Thompson	606.558.6472	Matt and April

**Steven & Rebecca Shank** 4 Results

Family Name Information

Order	First Name	Last Name	Family Status
1	Steven	Shank	Adult
2	Rebecca	Shank	Adult
3	Carla	Shank	Child

Label Name: Mr. and Mrs. Steven Shank

Church: Big City, Church of Fine Training

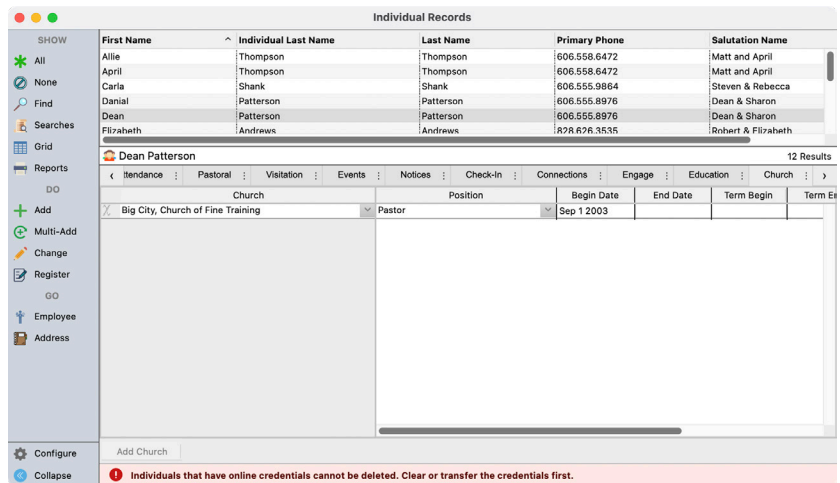
Address: 2728 Lake Vista Dr. Mailing Code: Local church members who receive mail

City: Big City State: KY Zip: 40123 Care Group: Care Group 3 - Camille Delvecchio

Country: Carrier Sort: Certified MapQuest Directory Newsletter

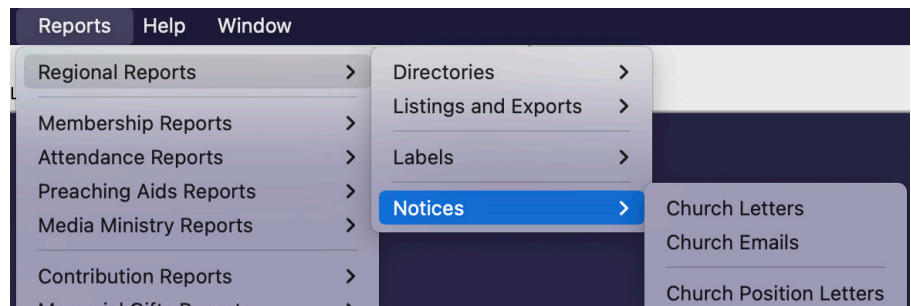
The Church field on the Address Records window is also used to give credit to the church for all giving by any Giving Unit associated with this Address Record.

Church position information is also maintained on the Church tab of the Individual Record. An individual can have multiple church records displaying. The active church relationship is identified by the lack of an End Date (Date De-enrolled). Once an End Date is entered, CDM+ lists the Individual on the Past Members tab of the Church Record and does not include the person as holding an active church position for reporting purposes.



Queries and reports can be generated from the End Date/Date De-enrolled information if needed.

For reporting on church Positions, you will find throughout the Membership reports menus a sub-section that begins with Church Position. This is useful to properly report on the active church positions a person is holding.

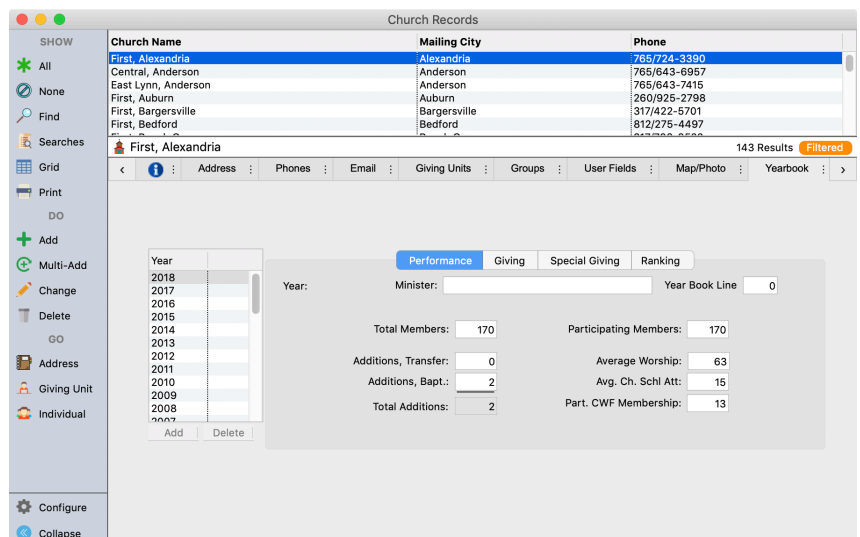


Church positions can be accessed on any Membership report by using an Advanced Find with related records selected.

## Special Versions of Regional

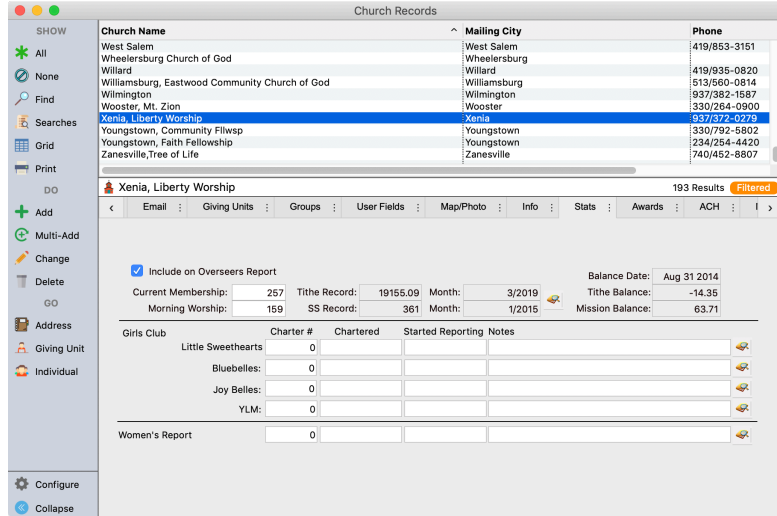
### Christian Church (Disciples of Christ)

In the Disciples Regional version, **Yearbook Statistics** can be imported so that you can access this information quickly and easily. The Office of Yearbook and Statistics annually provides Suran Systems, Inc. with a file for import to update each regional office's database. There are a number of statistical reports available in the Regional program that pull from this information. A ranking of key areas, such as membership and giving, is also a part of the Yearbook functions.

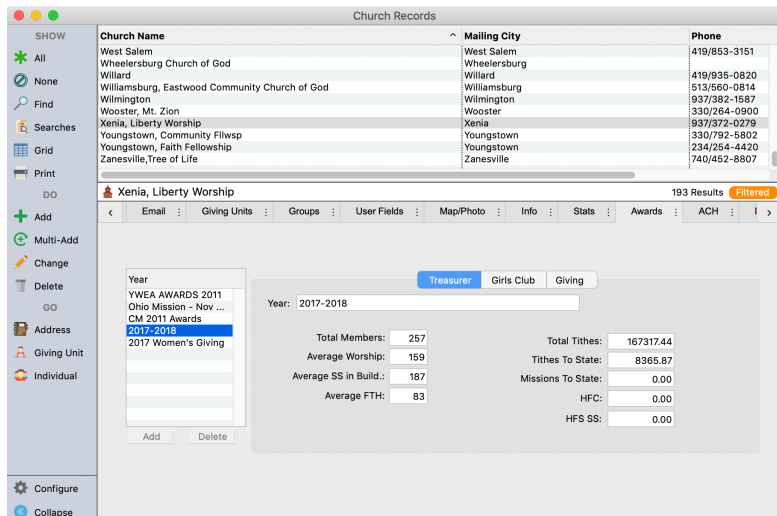


## Church of God

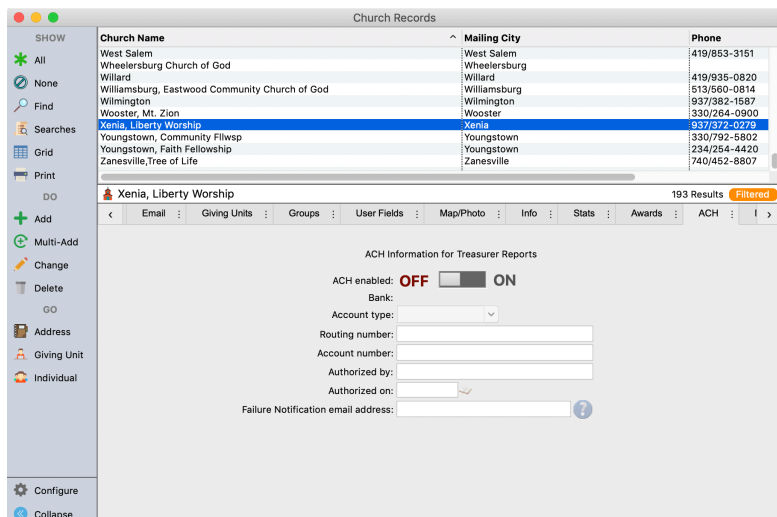
In the Church of God (Cleveland, TN) version, the Church Records window has several tabs that relate to the Statistical reporting of Churches, Women, and Girls Clubs. Clicking the magnifying glass icon on this window will jump to those reporting areas of CDM+ and display all of the reports on file for that church/organization.



The Church of God version has a very powerful award calculation feature, and a history of those awards can be viewed on the Church Records window.



For the COG churches that submit their monthly reports online, CDM+ can automatically draft their tithes due the State Office. ACH information for the bank draft is entered on this tab and, when enabled, an ACH request will be generated to transfer the funds from the church's bank account to the State Office's bank account.



## Church Reports

The regional version of CDM+ has a number of reports available specific to churches and church positions.

### Church Minister Directory

►Reports ►Regional Reports ►Directories ►Church Ministers

The Church Minister Directory lists the church contact information and the name and position information for individuals connected with the church through their Church tab with a position listed. The church positions displayed on the report can be selected in the Positions box on the Report tab.

### Church Position Export / Custom Listing

The Church Position Export or Custom Listing allows you to export and list information from Individual, Address, and Church Records, as well as group data. You can export data to a text file or print information in a custom report, all based on Church Position. Select the Church Positions to include in the export in the Standard Search area of the report window's Search tab.

### Church Address Listing

The Church Address Listing displays the address information for households associated with a church from the Address tab of their Address record. The report comes from a time when some regions had subscriptions to the regional newspaper, and so the report also includes instructions to churches on how to provide updated information back to the region.

### Church Individual Listing

The Church Individual Listing produces a list, organized by church, of all the individuals related to that church via the Church tab of their Individual Record. Ministers connected to the congregation—that is, individuals that are connected to the congregation and that have the Minister box checked on the Name tab of their Individual Record—are listed first. Note that this list is not necessarily a list of the ministry staff, but a list of ministers related to the congregation.

A list of all other individuals related to the church follows the list of ministers.

## Notices

### Church Letters / Emails

The notices feature of CDM+ can be used to send email and snail mail communications to churches.

### Church Position Letters / Emails

Likewise, the notices feature of CDM+ can be used to send email and snail mail communications to individuals based on church position. This provides a quick and easy way to send communications to clergy and ministers that are serving churches in various capacities.

## Christian Church (Disciples of Christ) Yearbook Reports

►Reports ►Regional Reports ►Yearbook Reports

### Congregational Record

The Congregational Record report prints a history of Year Book statistics for one or more congregations.

### DMF Congregational History

The DMF Congregational History displays a five-year history of congregational giving to Disciples Mission Fund. Congregations on the report are grouped by the District or Area specified on the Address tab of the Church Record.



## CDM+ Mobile for Regional - Churches app

When CDM+ Mobile is connected to a database with CDM+ Regional, the Churches app is available. The Churches app provides access to information about churches and their members. The Churches app can also send group emails to churches.

Open the Churches app by tapping the Churches icon on the home screen. Tap Churches in the upper right corner to open the list of churches.

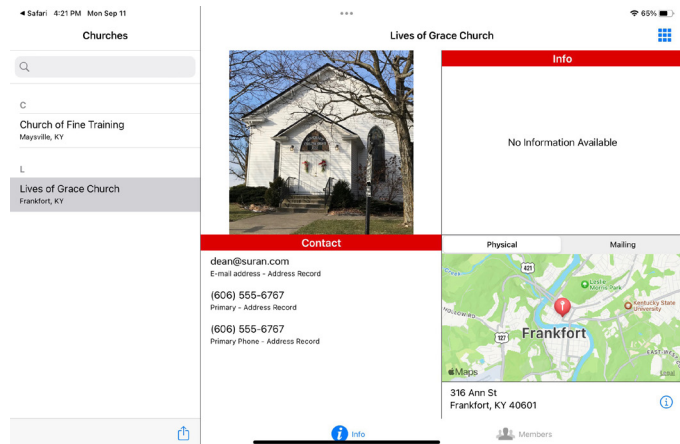
NOTE: CDM+ Mobile will only display the churches where the Congregation box is checked on the Church Record. That is, the Mobile Churches app will only display active congregations.

### Church Information - Tablet

Tap on a church name to open the information page for the church.

The information page shows the church photo from the Map/Photo of the Church Record. The Contact section shows email addresses and phone numbers for the church. Tap on the email address to send an email. On a device that can place calls, tap a phone number to place a call.

The Address section shows a map of the church location. Tap the information icon to open the location in the device's mapping app and get driving directions to the church.



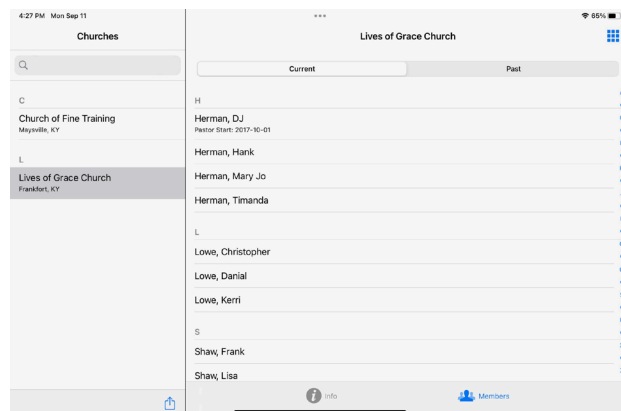
### Church Information - Phone

To accommodate smaller phone screens, Photo, Address, and Contact sections are shown on multiple pages.

### Church Members

The Members section displays the individuals connected to the church record with any current position they hold. Individuals are connected to a church using the Church tab of the Individual Record.

People that have current connections—that is, the church line does not have an end date—will show on the Current section. Individual records that have an end date on the church line will show on the Past section.



Note: The Past section provides historical information. For example, the Past section for a Church can show all the past ministers that served the congregation or past officers of the congregation.

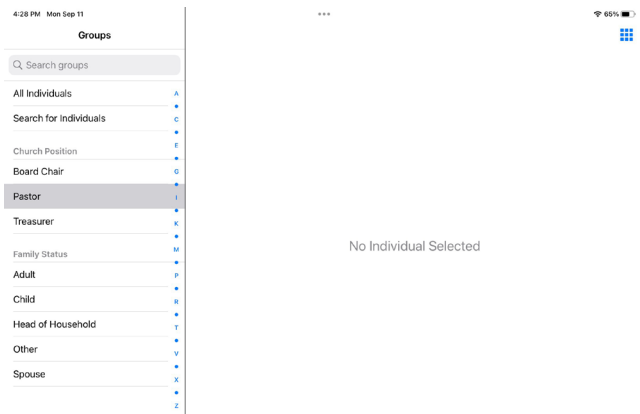


## Church Positions

CDM+ Regional adds the group Church Positions to the Individuals app. Church Positions are coded using the Position field on each line of the Church tab of the Individual Record window.

Using Church Positions, CDM+ Mobile can display, for example, the list of board chairs or other offices in the congregations of the judicatory. From that list, CDM+ Mobile can send a mass email or SMS message to those officers.

With the Church Positions group, CDM+ Mobile can also send mass email or SMS text message to individuals in various ministry positions.



## Send Mass Email to Churches

At the bottom of the church list, you will see a Share icon on iOS devices or the Android option menu. Tap the Share icon and choose Email All or Email Selected.

Choosing Email Selected will display a list of churches, allowing the sender to choose the churches to receive the email. Tap the address to choose the church as a recipient.

If the church does not have an email address on the Church Record, a red warning icon will appear, and the church cannot be selected.

Type a subject and body for your email, then tap Send. The email will be queued in your database. You can view the emails sent on the Church Sent Notice Records window in the CDM+ desktop.

