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CDM+ Contributions

The church depends upon the stewardship of its people. The people depend on and expect the church to be a good steward of its resources. The CDM+ Contributions program is a great help in the week-to-week task of recording giving. After contributions are recorded into the system, a variety of reports giving powerful analysis of the financial support to the church is immediately available. An unlimited number of different designations of contributions can be recorded in CDM+. These different designations are printed directly on the giving statements and are available on a variety of reports that show exactly how much was given to a particular project over a period of time. Giving statements can be printed at any time and reflect to a church’s contributors an accurate account of the receipt of their gifts.

CDM+ can maintain an unlimited history of giving for each giving unit in the church. This information can be printed and averages of gifts per giving unit will automatically be calculated. What kind of stewardship program is needed for your congregation? CDM+ Contributions will give you helpful information about the past and current support to the church, so that just the right program can be implemented to help challenge the people of faith to be good stewards.

Giving Unit Information

Before contributions can be entered in CDM+, a Giving Unit record must be created for each giver under the Giving Unit Information window. Giving Units are assigned a Giver’s Code, which can be used during contributions entry. Givers codes are completely customizable and, if your church uses number envelopes, are the preferred place to track envelope numbers.

In addition to the establishment of the Giver’s Code and giver’s name, the Giving Unit Information file also contains summary information. The current year’s giving, the date of last gift and amount of the last gift are automatically updated from the contributions entry. The previous year giving is set as a part of the Update History function under the Contributions Utilities menu.

Once you have entered Family Records, you may begin entering Giving Unit information as the first step in entering contributions. You may access CDM+ Contributions in several ways. From the Welcome to CDM+ Pro window, click on the Contributions button. This will open the Welcome to Contributions window.

Pro version

Standard version

The Getting Started pane of this window shows the steps to begin using the Contributions program. If you have not entered Address Records, see the Membership section of the manual. Assuming you have completed step 1, click on 2. Enter Giving Unit Information.
Or, select the **Windows** tab of the **Welcome to Contributions** window and click on **Giving Units**.

**Pro version**

**Standard version**

Or, select **Giving Unit Information** from the **Contributions** menu.

**Multiple Window Mode**

*(Pro version shown)*

**Single Window Mode**

*(Standard version shown)*

**Contributions w/o Membership**

*(Pro version shown)*

Or, if you have specified under **User Preferences-Toolbar** to have the Contributions toolbar active, select the **Giving Unit Information** icon.

**Adding Giving Unit Records**

If, when adding **Address Records** (in CDM+ Membership), you always chose to add a **Giving Unit** for the new family, there will be a Giving Unit Record for every family in the system. Click on **Show All** to see all Giving Units in the Find results list window or use the Find feature to shorten the list.
NOTE: When CDM+ creates Giving Unit Records, an alpha-numeric code consisting of the first 4 letters of the last name and some digits will be used as the Giver’s Code. This can be replaced with an envelope number as it is created or codes can be changed to envelope numbers later.

The Giver’s Code is an alpha-numeric field. You may use either letters, numbers or a combination of both when creating a Giver’s Code. Each code must be unique. CDM+ will prevent you from assigning the same code to more than one record.

You have two options when adding new Giving Units, whether it is the first Giving Unit or an additional one for a family.

**Option 1**

Giving Unit Records can be quickly added from the Address Record window.

**Adding from the Address Record:**

Select Address Records from the Membership menu. If you don’t own the CDM+ Membership program, select Address Records from the Contributions menu.

Enter the necessary search criteria to find the desired Address Record. Click the Find button. Click on the desired record in the Find results list.

Once you are viewing the desired Address Record, click on the Giving Units tab. If a Giving Unit Record has already been established for this address, it will appear in this pane. If not, click first the Change button, then the Add Giver button, and add one.

If a Giving Unit Record does already exists, then you can change it or add additional Giving Unit Records.

For example, there is one Giving Unit Record for both the husband and wife and the couple wish to give separately.

If you have CDM+ Membership and have entered Individuals for this Address Record, they will be listed in the Individuals column. Click on the down arrow below Individuals.
Click on **Change**. Click off one of the checkboxes next to the Individuals names and click **OK**. Change the Mailing Name and Salutation to the person whose name is listed under Individuals.

If you do not own CDM+ Membership, just click on **Change** and change the **Mailing Name** and **Salutation** to the person whose name is listed under Individuals.

Now click on the small **Add Giver** button at the bottom of the pane and enter a second Giving Unit Record for the other member of the couple.

<table>
<thead>
<tr>
<th>Code</th>
<th>Mailing Name</th>
<th>Salutation</th>
<th>Last Name</th>
<th>Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>WITH45</td>
<td>Elijah</td>
<td>Witner</td>
<td>Elijah</td>
<td></td>
</tr>
<tr>
<td>WITH46</td>
<td>Carolee</td>
<td>Witner</td>
<td>Carolee</td>
<td></td>
</tr>
</tbody>
</table>

If there are additional people at this address who need their own Giving Unit, repeat the process, assigning each unit a unique Giver's Code.

**Option 2**

**Adding Giving Unit Records from the Giving Unit Information window:**

Select **Giving Unit Information** from the Contributions menu.

Click on the **Add** or **Multi-Add** button at the bottom of the window.

**Note:** If you are viewing a Giving Unit when you click **Add**, the previous giving unit's address record is assumed for the new giving unit. Click Select Address to choose a different address record. On the Select Address window, enter the search criteria and click **Find** to locate the desired address. Double-click on a line or highlight the address and click **OK**.

If the address for the Giving Unit you want to add is not listed, click on the **Add Address** button at the bottom of the Select Address window.
Once you have the correct **Address Information** in the Giving Unit Information window, make any changes you desire to the **Giver’s Name** and **Giver’s Code**.

For example, Jose and Victoria Martinez give separately to the church. Change the Mailing and Salutation name fields to just one of the couple. Click **Save**. Click **Add** and change the Mailing and Salutation name fields to the other member of the couple. Click **Save**. You now have two giving units tied to the same address.

**Giving Codes for Loose Offering and Non-Member or Visitor Gifts**

Giving codes may be created to account for loose offering and for contributions made by non-members or visitors who do not have a Giver’s Code. **LOOSE** may be used as the code for loose offering. **NONMEMBER** or **VISITOR** may be used as the Giver’s Code for a non-member/visitor gift.

**Loose Offering:**

Select **Giving Unit Information** from the **Contributions** menu.

Click the **Add** button.

Type “Loose Offering” in the **Last Name** field in the Giver’s Name section, leaving the Mailing and Salutation fields blank.

Check the **Does Not Receive Statement** checkbox.

Type **LOOSE** in the **Current** field in the Giver’s Codes section.
Click on **Select Address** and **Add** an address, typing “Loose Offering” in the **Last Name** field. Assign a **Mailing Code** which would not be included in regular mailings or directory printings. Leave all other fields blank. Click **OK**.

Press Return/Enter or click **Save**.

**Non-Member or Visitor Offering:**

Repeat the above instructions, except type “Non-Member Offering” or “Visitor Offering” in the **Last Name** field and either **NONMEMBER** or **VISITOR** (whichever you prefer) in the **Current** field in the **Giver's Codes** section.

Add an Address Record with “Non-Member Offering” or “Visitor Offering” in the **Last Name** field and assigning a Mailing Code which would not be included in regular mailings or directory printings, such as “Does Not Print”.

Press Return/Enter or click **Save**.

**NOTE:** These special Giver's Codes may both be connected to a single Address Record with “Misc. Codes” entered in the **Last Name** field. Assign a **Mailing Code** which would not be included in regular mailings or directory printings.

When using the Non-Member/Visitor code during contributions entry, type the giver’s name and address in the **Entry Memo** field on the Batch Contributions Entry screen. Later, if the giver continues to attend and contribute, her or she can be given a regular Giver’s Code and these Non-member/Visitor contribution records can be selected and transferred to the new Giver’s Code and his or her contribution record will be complete.
Giving Funds and Fund Sets

Before contribution records can be entered, giving funds must be established. There is no limit to the number of giving funds in CDM+ Contributions. For ease of contribution entry, giving funds can be grouped into sets.

Creating Giving Funds

Select Contribution Setup from the Contributions menu and click on the Giving Funds button.

**NOTE:** To link contributions to CDM+ Accounting or Memorial Gifts you must click on the appropriate radio button(s) in this window. Also indicate whether you would like to be able to print Contribution Receipts (For more information see the section in this chapter on Contribution Receipts.).

If your church is Canadian, choose to enable Canadian Tax Receipts. This will add a special report that creates contributions statements that comply with government standards for reporting contributions to non-profit organizations.

Click on Add and type the name of a Giving Fund (e.g.—General 2010).

**NOTE:** If you are entering pledged funds with annual or repetitive pledges (not simply multi-year pledges), create a separate giving fund for each pledge period. For example, if people have made pledges for 2004 to the general and mission funds of the church, you might create General 2010 fund and a Missions 2010 fund. Likewise, if there is a building campaign that people pledged to give over a three year period, you might have a Building 2010-2012 fund. In this way, you are sure to credit donations against the pledge made.

**NOTE:** The Not Tax-Deductible and Inactive checkboxes can be overridden at the time a donation is entered.

Turn the radio button under Default on for the giving fund you wish to have as the default for all giving. This would usually be your current general fund.

If you have enabled on linking to Accounting, click on the pencil icon to select the Income Account Number you wish to assign to each Giving Fund.
Continue the process, entering Giving Fund names and (if you have turned on linking to Accounting) selecting Income Accounts Number's until all the Giving Funds you need are created.

When all needed Giving Funds are established, press Return/Enter or click Save.

Close the Giving Funds window and, unless you want to set up Giving Fund Sets at this time, close the Contributions Setup window.

If you do want to set up Giving Fund Sets, click on the Giving Funds Sets button on the Contributions Setup window and follow the directions below.

Creating Fund Sets

Select Contribution Setup from the Contributions menu and click on the Giving Funds Sets button.

Click on the small Add button. CDM+ will create an Untitled Set and the Rename Set window will open. Type a descriptive name for the set of Giving Funds and click OK.

Double-click on each Giving Fund in the left-hand Available Giving Funds list that you wish to include in this set. Or select one or more funds and click the Transfer Selected button.

If you wish to mark a Giving Fund as the default fund, select it and click on the Mark Default button.

NOTE: Creating a Giving Fund Set does not mean you will be unable to access Giving Funds outside the set if you have specified the set during Batch Setup of Batch Contributions Entry. A Giving Fund Set consists of the Giving Funds to which you are most likely to have donations.
Pledges

NOTE: Select the Contributions Tab in the System Preferences window and click on Terms. Here you can specify the title for this area of the program. You may call it Pledges, Faith Commitments, etc. CDM+ will display your title throughout the Contributions program. In this manual, the word Pledges will be used to describe the functions of this area of the program.

The Pledges window allows you to enter a specific pledge for a giving unit record. Pledges can be entered in the system prior to them going into effect. For example, most annual pledges are collected in the Fall for the coming year.

Adding Pledges

Select Pledges from the Contributions menu.

Click on the Modify button at the top right of the window to open the Pledge Setup window. You will see a list of the Giving Funds that you have already created. You may choose to view only the Giving Funds in a particular Giving Fund Set by selecting it from the Show Set drop list at the bottom of the window.

The Pledge Description will auto-fill (you may change it), enter the Start and End Dates, and (optional) Goal Amount for those Giving Funds to which people will be pledging.

![Pledge Setup Window]

If necessary, you may add a Giving Fund from this window. Click on the Add Fund button at the bottom of the window. Type in a name for the fund and click OK. The new fund will appear in the Giving Fund column of the Pledge Setup window. Enter the pledge information for this fund also.

NOTE: If you add a Giving Fund through the Pledge Setup window, be sure to later select Contributions Setup, click on Giving Funds and complete the information for the new Giving Fund.

When you are finished setting up pledged funds, click the Save button to return to the Pledges window.

Click on the ‘Currently displaying pledges for:’ drop-down list at the top of the window to view previously set up pledged funds. Pledges are entered one Giving Fund at a time; select one of the funds to begin entering pledges.
NOTE: Data entry options are controlled by the contributions entry default preferences. Select Contributions on the CDM+ User Preferences window. Choose either Giver’s Code or Giver’s Name for the Default Entry Field. The cursor will appear in the chosen field when you add new pledges or enter contributions.

Click on the Add or Multi-Add button at the bottom of the window. Enter the Giver’s Code or Giver’s Name and tab to the Total amount. Enter in the total amount of the pledge. In the initial amt field enter an amount only if the giver is planning on giving an initial amount before the periodic pledges begin.

For example, if a three-year total pledge is for $4,000 and the giver is planning to give $500 initially and then the remainder over the next 36 months, enter $4,000 in the Total box and $400 in the initial amt field. CDM+ will calculate the Period Amount on the remaining $3,600 when you select a frequency. Since dividing the remaining balance by the frequency results in an unequal amount, you see a breakdown line showing the amount and a line showing the final amount to accommodate the rounding difference.

Click on the down arrow to select from the drop list how often a person is going to give to this particular giving fund. Or, alternatively, you may type in the Frequency abbreviation: W=Weekly, B=Bimonthly, Q=Quarterly, S=Semi-Annually, A=Annually, O=One Time, and N=Never. CDM+ uses this information to calculate the YTD pledge amounts on reports.
CDM+ enters the **Start Date** and **End Date** that was specified in the Pledge Setup window for this Giving Fund. You may edit it for a particular Giving Unit’s pledge if necessary.

When entering Monthly, Semi-annually and Annual pledges, the user can specify if the year-to-date calculation should occur at the beginning of the period or at the end. Then, when running pledge comparison reports or giving statements the YTD figure will only occur if the start or ending date is in the date range of the report.

If pledges need to be entered by a periodic amount, leave the total amount 0.00 and enter the frequency and periodic amount. CDM+ Pro will calculate the total amount of the pledge.

Additional pledge breakdowns can be entered to accurately reflect the anticipated giving. If someone needs to change his or her pledge before the end of the pledge period, change the ending date on the last line and then add a new pledge breakdown that shows the anticipated change. CDM+ will start the new line with the day following the ending date of the line above it. For example if someone pledges $100 a month and then indicates that for six months they will not be able to meet his or her initial pledge, an entry can be made for that six months with a zero amount and an additional line which shows when the pledge will resume and the amount and duration of the remaining pledge commitment.

The date the pledge was received will default to today’s date; you may change it. Pledge reports can be printed from either date received, date entered, or date started.

The **Projected** checkbox is used to indicate an estimate for those who do not provide an actual pledge but faithfully support the church. Pledge reports will separate the actual pledges from those projected. This helps in identifying the upcoming support of the church in the new year. Only actual pledges are included on Giving Statements.

If you wish to enter pledges to another Giving Fund, select it from the drop list at the top of the window and repeat the process of entering pledges.

**NOTE:** To remove a breakdown line, but not the pledge entry, click on the red X. Click on **Delete** to remove the selected pledge entry. Clicking on **Cancel** will revert the entry to the last saved state.

The **Pledge Detail** tab shows the year-to-date calculations that CDM+ will use in reporting.

The **Giving** tab shows each gift given to the pledged fund and a summary of pledge-to-giving totals.
Clicking on the **View Giving** button will open the Contributions Maintenance window. There you may view the details of a contribution. For more information, see the Contributions Maintenance section of this document.

A **Filter** option on all panes of the Pledges window allows you to find specific pledge entries without scrolling a list. Type a portion of a giver’s name and the list will change dynamically. To view all records, remove any filter information that has been entered.
Batch Contributions Entry

The Batch Contributions Entry window is the quickest and easiest way to enter contributions in CDM+. A batch is a group of contributions defined in any number of ways. In a small- to medium-sized church, all the offerings may be entered as a single batch. In a larger church, contributions may be grouped in smaller quantities which makes it easier to check accuracy of data entry and allows the work to be shared among several persons. Reports for contributions entered this way can be generated by batch entry. Information common to batches include offering and deposit date. You may create an optional Batch Code to help differentiate multiple batches for one date.

Control methods provide additional assurance of accuracy of data entry. Default funds can be specified for a batch, which is a great time saver if all contributions to be entered are to the same funds. However, all funds are available during entry, even if this option is used.

Several preferences options (CDM+ System Preferences > Contributions) control additional actions affecting Batch Contributions Entry.

Click on the Entry icon to specify settings during entry—how giver’s names appear, default payment type, whether to automatically load pledges, etc.

Click on the Batches icon to specify how batches appear—including how many batches to show on the entry window and whether to show or hide control methods and batch codes.
Creating a New Batch

Select **Batch Contributions Entry** from the **Contributions** menu. You may choose to view previous batches by clicking on one of the buttons at the top of the window. To create a new batch, click on the small **Add** button at the top of the window; the **Batch Contributions Setup** window will open.

CDM+ will automatically show the previous Monday as the **Deposit Date** and the previous Sunday as the **Offering Date**. If necessary, change the Deposit and Offering Dates. (The same date may be used for Deposit and Offering dates if you wish.) Next, click on the down arrow to choose a **Default Event**, such Sunday Morning Worship Service. The Default Event may be overridden during contributions entry.

If you also own CDM+ Accounting and have chosen in Contributions Setup to link Contributions to Accounting, you will see an **Asset** column with a pencil icon next to the blank field. Click on the pencil icon to open a window which lists the Asset accounts that have been setup in CDM+ Accounting.

Double-click the account number for the asset into which this offering is to be deposited.

**NOTE:** If you are linking CDM+ Contributions to CDM+ Accounting, all contributions in a batch must all be deposited to the same asset. If an offering is to be deposited to different assets, split it into batches accordingly.

If the total amount of a this batch (or of the total offering if you are not putting in multiple batches) is known, it can be entered in the **Amount** field. While entering contributions in the Batch Contributions Entry window, CDM+ will display a running total of processed contributions and the remaining amount to be entered.

**NOTE:** Entering an **Amount** is not required for contributions entry.
Click on the down arrow in the *Funds* column to open a list of the Giving Funds you have created. You may specify default funds for this batch. If you have checked the option to “Automatically load a detail line for each default fund for the selected batch” in Contributions Preferences (Batches), each of the checked funds will appear on the Batch Contributions Entry window. Note that by specifying default giving funds for a batch, contributions to these funds are not required and contributions to additional funds are possible.

Check the boxes of the giving funds for which you wish to enter contributions or select a *Giving Fund Set* from the pull-down list at the bottom of the pop-up window. For more information on Giving Fund Sets, see that section of this manual.

Press Return/Enter or click **OK** to return the Batch Contributions Entry window.

In the top right corner of the window you will see the results of your entries in the Batch Setup window.

![Batch Contributions Entry Window](image)

## Entering Contributions

Click on **Add** or **Multi-Add**. Depending on which you selected as the Default Entry Field on the Contributions Entry Preferences window, the cursor will either be in the *Giver’s Code* or *Giver’s Name* field. Whatever you specified as the Default Payment Type on the Contributions Entry Preferences window, will appear in the *Payment Type* field. If you specified default Giving Funds in the Batch Setup window and have enabled the preference to automatically load these funds, a line for each of those funds will be showing. If you have enabled linking to CDM+ Memorial Gifts on the Contributions Setup window, you will see a field Memorial/Note with a magnified document icon (*Pro version only*). If you did not choose to link Contributions and Memorial Gifts, this field will be simply notes with no icon. You will also note that the Default Event you specified on the Batch Setup window is displayed.

Begin entering this batch of contributions.

If you are entering contributions from a list or giving envelopes that provide the Giver’s Code, you may wish to simply type the code in the *Giver’s Code* field. Or you may type any portion of a person’s name in the *Giver’s Name* field and press Tab. If there is more than one match to what you typed, click on the down arrow to select a different Giving Unit from the drop list.

**NOTE:** How the *Giver’s Name* appears in the field is set on the Contributions Entry Preferences window. You may choose to show *Mailing Names* or *Salutations*.

**TIP:** If you use numeric giver’s codes, try setting your default entry field to Giver’s name. When you enter a number into the name field, CDM+ will first search giver’s codes for one matching that number. If you need to enter a contribution for someone with an envelope, just type their name.
Or, you can click on the small **List** button to open a new window which lists the names and codes for all Giving Units. Click on a column header to sort the list by the field. Double-click on a line to enter that unit’s information.

The cursor will now be in the **Payment Type** field with the Default Payment Type highlighted. Click on the down arrow to select another payment type from the drop list. The Payment Type chosen will determine what data entry fields are shown. Selecting **Check** will show a **Check Number** field and selecting **Credit Card** will open fields for the card number, expiration date and card name. No other data entry fields are necessary if **Cash** is selected.

If you select **Cash** as the **Payment Type**, press Tab to move the cursor to the **Total Amount** field.

If you select **Check** as the **Payment Type**, press Tab and enter the **Check Number**. Press Tab again to move the cursor to the **Total Amount** field.

If you select **Credit Card** as the **Payment Type**, tab through the fields entering the card **Number, the date it Expires**, and the **Name** on the card.

**NOTE:** Once you click **Save**, all but the last 4 digits of the credit card number will be hidden. CDM+ will save credit card information so that it does not have to be re-entered each time the card is used.

To create a new **Payment Type**, simply type the description in the **Payment Type** field. CDM+ will ask you if you wish to add the type, click **OK** and the new type is available from the drop list.

**NOTE:** Payment Type is a required field. If you do not wish to track payment types, create a payment type of “Unknown” and set it to be the default under preferences.

Press Tab again to move the cursor to the **Total Amount** field.

You may enter **Total Amount** of the donation in this field. Although this is not required, it does serve to ensure the accuracy of your data entry. If you enter an amount here, you will see a running total of the donation as you enter amounts given to the various Giving Funds. As long as the **Total** does not agree with the **Total Amount**, it will display in red. Once the two amounts are in agreement, the **Total** will display in black.

If you selected default funds when creating the batch and set your System Preferences to “Automatically load a detail line for each default fund for the selected batch”, those funds will display. Press Tab and enter the breakdown of the donation. Click on the down arrow to select a different one of the default Giving Funds from a drop list. To replace one of the displayed default funds with a different Giving Fund, click on the hand icon and select a fund. To add another Giving Fund to the list, tab through the list until a new line appears, click on the hand icon and select a fund. This fund will now be available from the drop list.

If you did not select default funds when creating the batch and did not set your System Preferences to “Automatically load a detail line for each default fund for the selected batch”, the first Giving Fund in your fund list will display. To choose a different fund, click on the down arrow and select it from the drop list. To add another Giving Fund to the list, tab through the list until a new line appears, click on the down arrow and select a fund.

If a donation is **Not Tax Deductible**, click the checkbox below the asterisk. (If, when setting up Giving Funds, you specified a fund as Not Tax Deductible this box will already be checked. If this particular donation is tax deductible, uncheck the box.)

You may type any note particular to this donation in the Note field. If you have enabled linking to CDM+ Memorial Gifts on the Contributions Setup window (Pro version only), this field will be named Memorial/Note and you’ll see a magnified document icon. See the Memorial Gifts section of this manual for more information on entering memorial gifts.
If you wish to add any comments related to this entry, place your cursor in the **Entry Memo** box and type.

Click **Save** to save this contribution entry. If you are in **Multi-Add** mode, you will be ready to enter the next contribution. When you are finished entering contributions, click on **Finish**.

As you enter each contribution in the batch, it will be added to a list in the top left corner of the Batch Contributions window. To change the type of information shown here, click on the **Customize List Display** button just below the list.

Choose the columns to display in the list of contributions by clicking on or off the various checkboxes. Click **OK** when you are finished. Click on Revert to Defaults to return to displaying only the Giving Unit and Amount.

The list of contributions may be sorted by clicking on any of the column headings.

**NOTE:** Anytime you are entering contributions through Batch Contributions Entry, you may stop (Be sure to Save or click Finish in Multi-Add mode.) and return to finish entering gifts later. Just select the batch and click Add or Multi-Add and resume entering donations.

To edit existing contributions entries, click on **Change**. To delete an existing entry, highlight it in the Giving Unit list and click on **Delete**. Click on the **Print** button to open the **Report Setup** window for the **Daily Report of Giving**.

## Batch Contributions Entry Control Methods

Batch Contributions offers three control methods to help ensure the accuracy of your contributions entry. They are especially helpful if your offering is very large and must be processed in several batches by different people. You should also use it if you have many givers who give to more than one Giving Fund each week.

Select the Batches pane of the Contributions System Preferences and make sure the checkbox next to **Hide Control Methods** is **not** checked.

Select **Batch Contributions Entry** from the **Contributions** menu and click on the small **Add** button at the top right.

Click the **About Control Methods** button at the bottom of the window to see an explanation of the Batch Contribution Entry Control Methods.

You have four options when entering contributions in CDM+. In order of simplest to most complicated they are Control Method 0, Control Method 3, Control Method 2, and Control Method 1. In order of most effective to least effective in ensuring accuracy of contribution entry they are: Control Method 1, Control Method 2, Control Method 3, and Control Method 0.

### Control Method 0 (No Control Method)

**Control Method 0** is using no control method during contributions entry as described previously. You may check **Hide Control Methods** on the Batches pane of the Contributions System Preferences if you choose this option. If not, make sure **Control Method 0** is selected and leave the **Control No.** field blank on the Batch Setup window.
Control Method 3

Using Control Method 3, you simply choose Control Method 3 and enter the total number of contributions you have to enter as the Control No. on the Batch Setup window. The number will decrease as you enter contributions. If it is not zero after you have entered the last contribution, you have made an error somewhere—either in data entry or counting the number of contributions.

NOTE: The remaining two control methods require numeric Giver's Codes, rather than the default alpha-numeric Giver's Code assigned by CDM+. These can be offering envelope numbers or, for those who do not use offering envelopes, numbers you have assigned as Giver's Codes. They do not have to be sequential numbers.

To easily change Giver's Codes select Giving Unit Field Maintenance from the Contributions menu. Enter the new numeric Giver's Codes/envelope numbers in the Pending Code column (you can sort the list by clicking on a column heading) and Save when you are finished. This can be done at any time. When you are ready to change the Giver's Codes, click Copy and Save.

Control Method 2

Control Method 2 is the middle ground—not the simplest, but not the least effective in ensuring accuracy either. Using Control Method 2, you add all the numeric Giver's Codes/envelope numbers and multiple that total by the total number of contributions. The resulting number is your control number which is entered in the Batch Contributions Setup window.

For example, you have 3 gifts from 3 Giving Units whose Giver's Codes are 100, 101, and 102. First you add the numeric Giver's Codes 100+101+102 = 303. Then you multiple that total time the total number of gifts, 303 x 3 = 909. On the Batch Setup window you would select Control Method 2 and enter 909 in the Control No. field.

This control method ensures that you do not credit contributions to the wrong Giving Unit. For example, if you mistakenly typed a Giver's Code of 110 instead of 101, the calculation would be 100+110+102= 312 and 312x3=936. As you enter contributions, CDM+ performs the same calculations you did before you started and the result would not agree with the number you entered in the Batch Setup window, alerting you to an error—not just that you missed a contribution or miscounted, but that you may have misdirected a gift.

Control Method 1

The final choice is Control Method 1—the most complicated, but also the most accurate method. Using this method you need to know the number of Giving Funds included in each giver's contribution, which you will multiple times the numeric Giver's Code/envelope number. The resulting products from all givers is totaled to make the control number. For example, if our 3 gifts from 3 Giving Units were as follows:

Giver's Code 100 gave to 2 Giving Funds: 100x2=200
Giver's Code 101 gave to 3 Giving Funds: 101x3=303
Giver's Code 102 gave to 1 Giving Fund: 102x1=102
The total of 200+303+102=605 is the Control Number. So, on the Batch Setup window you would select **Control Method 1** and enter 605 in the **Control No.** field.

Control Method 1 not only ensures that your have credited contributions to the right Giving Unit, but that you have broken the gift down properly.

Obviously, all this calculating can become unwieldy if you have a large number of gifts to enter. This is where dividing the offering into batches becomes so helpful.

### Using Batch Codes in Contribution Entry

In order to make the process more manageable, large offerings should be divided into batches. A batch is an arbitrary group of contributions. You may decide to put all offerings that were in offering envelopes in one batch and all loose checks in another batch. Or, if you are working off the CDM+ Contributions worksheet, you might decide to make a certain number of pages a batch. You can even use the Advanced Find feature of the Worksheet to print separate Worksheets for each batch. Batches can be distributed to several people in the church office in order to enter the contributions more quickly.

Select the Batches pane of the Contributions Preferences and make sure the checkbox next to **Hide Batch Code** is not checked.

Divide your contributions information into as many batches as you wish. Total the offering **Amount** of each batch. Choose which **Control Method** you are going to use and make the necessary calculations to arrive at the **Control Number** for each batch separately.

Once the total offering Amount and the Control Method and Control Number have been calculated as described above for each batch (if you are putting in several batches) or for the entire offering, select **Batch Contributions Entry** from the **Contributions** menu. Click on the small **Add** button and enter the batch(es).

You can name batch codes in whatever manner as makes most sense for your situation. In the example above, the Batch Code name includes the name of the person entering that batch.

**NOTE:** Not all batches need to have the same Control Method. For example, if you were to make the Loose Offering a batch by itself, it would not need a Control Method.
Contributions Maintenance

The Contributions Maintenance window closely resembles the data entry windows of the other CDM+ programs. Here you can perform Standard and Advanced Finds to select just the contribution record(s) you need. For example, this window is the best place to see all the donations made by a certain Giving Unit over a specific date range. And once you have the data, you can click on the Print button to quickly generate a report based on the results of the search. Click on Window Options to specify which fields of information are shown in the Find Results window.

Transferring Contribution Records

The Transfer button allow you to quickly transfer one or more contribution records from one Giving Unit to another. After the transfer you have the option to delete the first Giving Unit.

Select one or more contribution records on the Contributions Maintenance window. Click the Transfer button at the bottom of the Contributions Maintenance window.

Choose whether to Transfer all contributions or Transfer selected contributions only. Next, select the destination giver, which is the giving unit to which these contributions will be transferred. If you desire, check the box next to Delete source giver(s) after transfer. Click OK.
Update History *(Pro version only)*

The Giving History feature of CDM+ Contributions is a valuable tool in analyzing the financial stewardship of a congregation. Using the **Update Giving History** function found on the Contributions menu, you can save a history of giving for any period of time for which you’ve been entering donations in CDM+.

To save a giving history, click on the small Add button at the bottom of the list of **Previous Histories**. Type the **History Description** and enter the date range, either by typing or clicking on the calendar icon and double-clicking on the correct date. Check the **Giving Fund(s)** you wish to include in the history and click **Save**.

You will see a window showing the progress of the update. This may take awhile depending on the number of contributions you are processing.

It is most common to save a year’s worth of giving, but you can enter any date range you would like. You also control which Giving Funds are included in the history period. So you could, for example, create a history named Building Campaign which includes only the Building 2003-2006 fund and has the date range of January 1, 2003 to December 31, 2006.

Or if you would like to be able to view a comparison of first quarter giving to Missions over the last 4 years, you could create giving histories that included only the relevant funds and date range of January 1 to March 31. The flexibility of the Giving History feature becomes even more valuable through the available reports and the View Giving History menu item.

**NOTE:** If you make changes to Contributions Records that are included in a **Previous History**, CDM+ will automatically update that history. This applies to new contributions and deleted contributions in addition to changed contributions.

View Giving History *(Pro version only)*

CDM+ Contributions allows you to keep an unlimited history of giving. The **View Giving History** item on the Contributions menu opens a window that shows you this history both numerically and graphically.

You may choose to view **Total Giving** or a **Selected Giving Fund** chosen from a droplist.
The View Giving History window provides you with a variety of useful information as you analyze the giving to your church—totals and averages of giving, givers, non-givers, and average amount of gifts for any period you have in your giving history. In addition you may select several periods in the giving history and see total giving, average giving, and average amount of gifts over a longer time frame.

The totals of giving, givers, non-givers, and average amount of gifts for one or more of the periods you have in your giving history can be viewed as a bar graph. This graph may be printed by clicking on the **Print Graph** button.

Click **Copy Graph to Clipboard** if you would like to paste the graph portion only of the window in a word processing, spreadsheet, desktop publishing or presentation (such as PowerPoint®) program as shown below. This is a very handy feature for making presentations to a committee, board or the congregation.
Post Contributions

If you also own CDM+ Accounting and have linked Contributions to Accounting on the Contributions Setup window, the Post Contributions menu item will appear on the Contributions menu.

When you have finished entering contributions, select Post Contributions from the Contributions menu.

Turn on the checkbox next to the deposit dates of contributions that you wish to post to the ledger. Enter the transaction date either by typing or by clicking on the calendar icon and double-clicking a date.

**NOTE:** Checked dates will post together on one ledger entry.

You may preview the posting report by clicking on the Report Preview tab or by clicking on the Print Posting Report Preview button at the bottom of the window. Both of these options will allow you to check the posting report on your screen before printing the report. Clicking the button also gives you the option to send the preview report to your printer. If you see an error in the report, correct it before posting the deposit.

Click on the Report Options tab and specify the header, alignment, footer, font and date format options for the posting report.

After checking the Report Preview for accuracy, click the Post button to execute the posting of the batch totals to the Accounting Ledger.

Print the final posting report after the posting is complete.
## Contributions Reports

<table>
<thead>
<tr>
<th>Daily</th>
<th>Listings</th>
<th>Comparative</th>
<th>Exports*</th>
<th>Labels</th>
<th>Notices</th>
<th>Statements/Receipts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Report of Giving</td>
<td>Giving Unit Listing</td>
<td>Composite by Giver</td>
<td>Giving Unit Export*</td>
<td>Giving Unit Labels &amp; Env.</td>
<td>Giving Unit Letter</td>
<td>Giving Statements - Column</td>
</tr>
<tr>
<td>Check Deposit Report</td>
<td>Giving Unit Directory</td>
<td>Composite by Date</td>
<td>Giving Export*</td>
<td>Giving Labels &amp; Envelopes</td>
<td>Giving Unit Card</td>
<td>Giving Statements - Line</td>
</tr>
<tr>
<td>Report of Giving</td>
<td>Available Giving Codes</td>
<td>Actual vs Pledged*</td>
<td>Pledge Export*</td>
<td>Pledge Labels &amp; Envelopes*</td>
<td>Giving Unit Email</td>
<td>Receipts*</td>
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<td></td>
<td>Giving Unit Custom List*</td>
<td>Totals by Month*</td>
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<td>Giving Detail</td>
<td>Giving Range</td>
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<td></td>
<td>Totals By Date</td>
<td>History Comparison</td>
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<td>Giving Email</td>
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<td>Contribution Memos</td>
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<td></td>
<td>Giving PhoneTree**</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Pledge Letter*</td>
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<tr>
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<td>Giving Funds</td>
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<td></td>
<td>Pledge Card*</td>
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<td>Giving Fund Sets*</td>
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<td>Pledge Email*</td>
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<td>Pledge PhoneTree**</td>
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<td></td>
<td>Giving Unit Check</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

*This report is available in the Pro version of CDM+ Contributions only.*
Daily Reports

Daily Report of Giving

Run after each entry session and file. Acts as a check on the accuracy of your input. If inaccuracies are found during review, go back to the batch, correct the entry or entries, and reprint the report. Lists all contributions by Giver, Type, Total gift and Giving Fund. Select report by either deposit date, entry date, or batch code. Sort by Giver’s Code, Giver’s Name or Entry Order. Totals by Payment Type and Giving Fund.

<table>
<thead>
<tr>
<th>Giver</th>
<th>Type</th>
<th>General 2004</th>
<th>Purpose 2004</th>
<th>Building 2005</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>William &amp; Lucy Aiken</td>
<td>Check</td>
<td>75.00</td>
<td></td>
<td></td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>Albert &amp; Carolina Del Vecchi</td>
<td>Check</td>
<td>20.00</td>
<td></td>
<td></td>
<td>20.00</td>
<td>20.00</td>
</tr>
<tr>
<td>Mr. and Mrs. Nance Hahn</td>
<td>Cash</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20.00</td>
</tr>
<tr>
<td>105</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mr. Robert Jones</td>
<td>Check</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Mrs. Rose Miller</td>
<td>Check</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Jim Miller &amp; Gay Ross</td>
<td>Check</td>
<td>100.00</td>
<td></td>
<td></td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Susan and Lettie Miller</td>
<td>Check</td>
<td>25.00</td>
<td></td>
<td></td>
<td>25.00</td>
<td>25.00</td>
</tr>
<tr>
<td>Ms. Elizabeth Ryan - 121</td>
<td>Check</td>
<td>50.00</td>
<td></td>
<td></td>
<td>50.00</td>
<td>50.00</td>
</tr>
<tr>
<td>Ms. Elizabeth Ryan - 121</td>
<td>Credit Card</td>
<td>50.00</td>
<td></td>
<td></td>
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<td>50.00</td>
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Grand Totals

<table>
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<tr>
<th>Fund</th>
<th>Amount</th>
<th>Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>General 2004</td>
<td>425.00</td>
<td>Check</td>
<td>535.00</td>
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<tr>
<td>Camps</td>
<td>25.00</td>
<td>Cash</td>
<td>40.00</td>
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<tr>
<td>Miscellaneous</td>
<td>355.00</td>
<td>Check Card</td>
<td>50.00</td>
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<tr>
<td>Building 2005-2006</td>
<td>20.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 825.00

Check Deposit Report

Lists contributions made by check or by cash and can be used as detail list with a check deposit ticket. Report created by deposit date, entry date or batch code. Sort by Giver’s Code, Giver’s Name, Pending Code, Check Number or Giver’s Bank Account Number.

Report of Giving

Lists contributions for a selected deposit date, entry date or batch code. Lists all gifts by Name/Code, Total amount, Type (check or cash), and Giving Fund. Totals by Payment Type and Giving Fund.

Listing Reports

There are a number of different listing reports including Custom Listing reports for giving units, giving and pledge. As with other listing reports, generally provides only identification information.

Available Giving Codes

Use to quickly identify unused numeric giving codes. Ideal for use when entering new giving units.

Totals by Date

Select date range and funds to report. Lists totals by date or by fund.

Lagging Givers (Pro version only)

Identifies giving units who have not contributed over a period of time. User inputs time criteria and fund selections.
Comparative Reports
These reports add specific contribution information to the general identification information that is printed.

Composite by Giver
Provides total giving by giving unit. User selects funds to detail. User can also configure ranges.

Composite by Date
Similar to above, but provides total giving by date (either offering or deposit). User selects funds to detail. User can also configure ranges. Great for analysis of seasonal giving trends.

Actual vs Pledged (Pro version only)
Provides detailed look at specific pledge FUND. Shows total pledge, giving todate, pledge todate, and status (over/under). User may elect to include pledgers only, non-pledgers only, or both. NOTE: report option to “Page by Frequency” applies to “Those with pledge” only.

Totals by Month (Pro version only)
Provides totals, either money given or count of gifts, by month. User can select starting month – great for fiscal years other than calendar. User can select funds to report on. This report also computes a monthly average.

Giving Range
Ideal for showing how many give between $1 and $52, $53 and $104, and so on – but note, this report is based on total giving. User selects date range to base report on, selects fund(s) to include, and sets up the giving ranges.

History Comparison
Based upon Giving History files. User selects which History years to compare. Can print totals only or detail by giving unit. User also selects which funds to include.

Export Reports (Pro version only)
This set of reports create export files to be used in other programs, such as Microsoft Excel® or Word®. You select data elements to be included in the export file. Multiple export formats can be saved.

Giving Unit Export
Can be used to provide an envelope service with file.

Giving Export
You select date period and funds to include. Data elements include detail giving and/or total giving. Use “configure ranges” to limit to non-givers, givers only or to a range. NOTE: pledge elements are not available.

Pledge Export
You select pledge FUND to report on and date period. Data elements include the various pledge elements, giving unit elements and address elements. To date giving IS available from pledge elements.

Labels/Envelopes Reports
Contributions labels and envelopes reports are very similar to all other label output in CDM+. You can choose from a wide variety of preset Avery® label formats or you may edit an existing format or add a new one to create a custom format. Giving
**Labels** allow the user to configure ranges to select givers, non-givers or by range of giving. **Pledge Labels (Pro version only)** allow user to select which pledge fund to include as well as whether to include non-pledgers and projected pledges as well.

**Notices**

Notice reports are mini-word processors, providing the same options as the three export reports. Output can be letter format, note card format, e-mail format, or **(Pro version only)** PhoneTree® format. Multiple notice formats can be saved. Giving Unit Notices can be saved and reprinted if need be.

![Giving Unit Letter Notice](image)

**Note:** When entering the body of the notice and want to insert a paragraph break, ensure that you use the Return key not the Enter key. On some keyboards the return key is labeled enter as is the enter key. The return key is the [enter] key in the alphabetic area of the keyboard which is different from the enter key on the keypad.

**Notices (Pro version only)**

The Pro version of CDM+ Contributions includes additional options for Notices.

**Embedded Fields in Letter and Card Notices** – The first Pro feature is the ability to add embedded fields to the body of Letter and Card Notices. This allows you to personalize notices beyond just including the recipient's name and address.
The embedded field will appear in the body of the notice bookended by double percentage signs. Click on the Show Preview button or print the report to the screen to see the effect of the formatting on the notice.

**Tag-based formatting within Letter and Card Notices** – Also available in the Pro version is the ability to add formatting to the text in Letter and Card Notices. This allows you to highlight a single word, phrase, sentence or paragraph of a notice by making the letters bold, italicized, underlined, etc. You can even choose to make selected text a different color if you are printing the notices on a color printer. To use this feature, after selecting one of the Card or Letter Notices, click on the Format/Add Fields button to the right of the Body field on the Notice tab. This will open a new window. Click on the Formatting tab at the top of the new window. To add formatting to text in the body of your notice, highlight the text and click the Insert button next to the desired Text Style.

To change the color of text in the body of your notice, highlight the text, click on the small color box to open a color palette, choose the color and click the Insert button next to the color box.

In both cases, changing the format of text in a letter or card notice will appear in the body of the notice as tags, such as `<b>` or
Click on the Show Preview button or print the report to the screen to see the effect of the formatting on the notice.

A letter or card notice can contain both embedded fields and formatting tags. For your convenience you can choose to leave the fields/formatting window open after adding embedded fields formatting tags.

## Giving Statements

### Giving Statement - Column

**Report tab** – determines who and what will be printed on the giving statement.

The basic configuration of giving statements is to produce a statement for only those giving units that have contributed within the date selected.

In the **Date Selection** section, **Current Year** is defined as from the point the last giving history was created. For example, if you haven’t yet created a 2005 giving history as yet, make sure you select **Date Range** when you print 2006 giving statements (or you will include 2005 gifts).

If you enter contributions by **Events**, ensure that you select the appropriate Event Code(s). If you don’t use Events, select either **All** or **N/A**.

You can use **Giving Fund Sets** to select which funds to report on.

Use **Giving Unit Selection** to print a single statement or to print a range of statements.
Format tab – Your choices on this tab determine how the information will be presented on the giving statement.

Select which Giving Unit Name format to use and an Address Option – Primary, Alternative, Current or None.

Under Total Options, select whether you want Quarterly Totals to print.

If you wish to print statements for all giving units, whether they have given or not, check “Use Ranges” in the Contribution Ranges selection. Then click Configure and check range, entering 0.00 and 999999.99 or something that exceeds your top giver’s total. This will result in statements printing for basically all giving units.

If you wish to print statements for all giving units that pledge or give, run the report once to print for those who have given, whether pledged or not. Run the report a second time, selecting “Print only Giving Units with a Pledge” AND check “Use Ranges” in the Contribution Ranges section. Then click Configure and check Non-Givers. This will result in statements printing for those few people that have a pledge but who haven’t contributed.

Configure Ranges – when you select “Range” and enter the low and high end of the range you wish to print statements for, you have 3 options to select from.

1) Calculate range on any single breakdown item – this bases the range selection on any single entry line (giving fund).

2) Calculate range on total contribution – bases the range selection on total of any single contribution, regardless of fund split.

3) Calculate range on report date selection – bases the range selection on total of giving within date selection.

For example, Robert Jones gives $400 total and you enter one entry splitting the gift as $200 to General and $200 to Building. Robert Jones also has previously given $50 on 1/1 and $100 on 3/31.

If you configure your range selection to include $250 - $999,999.99, option 1 would not include this gift nor any other gift – he would not have a statement produced. Option 2 would include this gift, but would not include the other two gifts. Option 3 would include this gift, and would include the other two gifts since the grand total ($550) was within the range.

Using Double Window Envelopes – In the Print Options section of the Format tab, select Dbl Window Envelope if you will be mailing Giving Statements in double window envelopes. If you check this option, verify the amount under “Space between Giver and Church Addresses”; then, on the General tab, select to print church information; and verify the top margin setting on the Page Setup tab. Common settings for a #9 double window envelope are top margin = .70” and space between Giver and Church Addresses = 1.8”. For a diagram of how spacing is defined on giving statements, click the icon.

Message tab – This Report Setup window tab, unique to Giving Statements, is where you enter any message you wish to have appear on all giving statements.
Mike & Susan Disney
117 Peachtree Dr Apt 2
Big City, KY  40123-2318

January 1, 2004 To March 31, 2004

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Check #</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
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<td>258</td>
<td>100.00</td>
</tr>
<tr>
<td>01/11/04</td>
<td>Check</td>
<td>269</td>
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</tr>
<tr>
<td>01/18/04</td>
<td>Check</td>
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<tr>
<td>03/14/04</td>
<td>Check</td>
<td>248</td>
<td>150.00</td>
</tr>
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</table>

* Includes NonDeductible Amounts

Fund Report Total:
- General: 1,050.00
- Missions: 250.00
- Building: 125.00
- Capital: 75.00
- OGHS: 75.00
- Memorial: 50.00
- A/C Fund: 50.00
- Organ Fund: 25.00
- Blanket Sunday Off.: 25.00
- Easter Offering: 10.00

Total Tax Deductible Giving: 1,725.00
Total Non Deductible: 10.00

Total: 1,735.00

Giving Statement - Line

The Line format of Giving Statements is set up just as the Column format, except that on the Format tab you do not choose columns to include on the report.
Giving Statement – E-mail Column/Line *(Pro version only)*

**Email Statement Setup**

E-mail Giving Statements provide the accuracy of all CDM+ statements with the efficiency and convenience of e-mail. The ability to send Giving Statements by e-mail is a function available in CDM+ Contributions Pro version with CDM+ Enhanced Notices. If you do not own CDM+ Enhanced Notices, you may purchase CDM+ Enhanced Notices, please call CDM+ Sales at 877-891-4236. Both formats of Giving Statements – Column or Line – are available with the e-mail option.

In order to use E-mail Giving Statements setup in CDM+ System Preferences must be completed. Follow this path to verify these settings are complete for your database:

►File (or CDM+) ►Preferences ►CDM+ System ►General tab ►Sys E-mail icon

Click on the *Sys E-mail* icon to open the System E-mail window. On the SMTP Settings tab click on the Manage SMTP Server button to add server settings. These settings are required for all use of e-mail via CDM+. Multiple servers settings may be entered.

**Giving Unit Information**

►Contributions ►Giving Unit Information

Two steps must be completed to identify the Giving Units that will receive E-mail Statements. First, on the Giving Unit Information record check the E-mail Statement box in the Giver’s Name section. This marks the record to receive an E-mail statement and NOT print a paper copy of the Giving Statement (a paper copy can still be printed by overriding this default).
Second, on the E-mail tab of the Giving Unit Information record select the e-mail(s) address that should receive an E-mail Statement. Multiple e-mails may be selected for each Giving Unit.

**Giving Unit E-mail Maintenance**

Use to quickly identify multiple Giving Unit records to receive E-mail Statements. Check the Send box and then select the e-mail address(s) that should receive an E-mail Statement.
Printing E-mail Statements

Select either E-mail statement format – Column or Line – to print from the Reports menu.

Reports Contributions Reports Statements/Receipts Giving Statement – Column E-mail OR Giving Statement – Line E-mail

E-mail Statements will be created for all Giving Units marked to receive Email Statements. The report setup for E-mail statements is the same as for the printed statements with the addition of two tabs: Notice tab and the PDF tab.

Click the small Add button to create a new Giving Statement notice e-mail; enter a name when prompted; click OK and the Enhanced Notice editor window opens for you to create your custom e-mail notice.

Please refer to the Enhanced Notices section of the CDM+ manual for more information on creating the e-mail notice.

After making the appropriate setup selections on the other Giving Statement – Line E-mail tabs, select the PDF tab to complete the setup process. Selecting the PDF tab reveals seven additional tabs dealing with the PDF file. The Security tab allows for password protection to be set for the PDF attached Giving Statement being created during the printing process.

Set the Owner Password to prevent changes to the PDF file by anyone (recommended). Set the User Password to require the recipient to enter this password in order to view the giving statement (optional). If a User Password is utilized some means of sharing this password with the recipients must be made; a separate e-mail from CDM+ containing the User Password is a possibility.
When all the setup on the tabs has been completed a preview of the E-mail and a list of the recipients may be seen by clicking on the More Options button on the Notice tab.

Receipts (Pro version only)

If you have the Pro version of CDM+ Contributions and have enabled Contributions Receipts on the Contributions Setup window, a third option, Receipts, appears under Giving Statements on the Contributions Reports menu.

The Notice tab of the Receipts report setup window allows you to add a personalized note, including formatted fields and a signature graphic.
The **Report** tab gives the option to print different types of receipts—with a return stub for additional gifts or without a stub.

![](image1.png)

### First Church

**123 Main Street, Big City, KY 40123 | 606/555-1234**

**MAR 30 2006**

Dear Bill and Lucille,

Thank you so much for your very generous gift towards the new Christian Life Center we are building at First Community Church. Your support will help make possible the construction of a wonderful facility that will not only enhance the life of our congregation, but allow FCC to reach out to the larger community. This is only made possible through generous givers, such as yourself, who understand the value of nourishing the body in addition to feeding the soul. On behalf of the entire congregation, thank you for supporting this important ministry.

In His service,

Sincerely,

Pastor Dean Patterson

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### Canadian Giving Receipts

If you have enabled **Canadian Receipts** on the **Contributions Setup** window, an additional option, **Canadian Giving Receipts**, appears under Giving Statements on the Contributions Reports menu.

This variation of CDM+ Giving Statements provides a place to enter the **Charity Registration Number** and **Authorized Signature** required by Canadian law for charitable receipts.
Memorial Gifts

Memorial giving is a separate function in the CDM+ Contributions program and is available only in the Pro version. It tracks memorial gifts given as well as how these gifts are used. It also tracks gifts by Memorial Designee. Memorial Gifts can be linked to regular contributions for ease of entry.

Adding Memorial Designees

Select Gift Designees from the Memorial Gifts menu and click the Add or Multi-Add button at the bottom of the window. Type the person’s name in the Last Name and First Name fields. Enter the Date and optional Date Note. Click either the In Memory of or In Honor of radio button. Type any optional Comments you wish to add. Click the Save button.

Entering Memorial Gifts Given

There are two methods that can be used to enter Memorial Gifts given—through Batch Contributions Entry or the Memorial Gifts Given window. The first method requires that the CDM+ Contributions program is linked to the Memorial Gifts program. This will allow you to automatically create a Memorial Gift record at the time a contribution entry is made. If you don’t enable this link, you may still use Memorial Gifts, but will need to manually enter each Memorial Gift received (on the Memorial Gifts Given window) AS WELL AS make a contribution entry if you wish to credit the gift to a giving unit.

Activating the Memorial Gifts to Contributions Link

Select Contributions Setup from the Contributions menu. Click the radio button next to Enabled, under “Link to Memorial Gifts...” Click the Close button.
Entering Memorial Gifts from Batch Contributions Entry

Once you link CDM+ Memorial Gifts on the Contributions Setup window, the Notes field on the Batch Contributions Entry window changes to **Memorial/Note** and displays a magnified document icon.

In the process of entering contributions, click on the magnified document icon if the gift is a memorial. The **Add Memorials** window will open.

Click on the small **List** button to see a list of **Memorial Gifts Designees** already entered in CDM+. You may double-click on a person’s name to select him/her. If you need to add a person to the list of Designees, you can do it one of two ways.

1) Type the person’s name in the **Designee** field on the **Add Memorials** window and press Tab. You will be asked if you wish to create a designee. Click **Yes**. The **Memorial Gift Designee** window will open. Type the person’s name in the **Last Name** and **First Name** fields. Enter the **Date** and optional **Date Note**. Click either the **In Memory of** or **In Honor of** radio button. Type any optional **Comments** you wish to add. **NOTE:** You may enter only the person’s name at this time and add more information later by selecting **Gift Designees** from the **Memorial Gifts** menu.

2) Click on the small **Add** button. The **Memorial Gift Designee** window will open. Add information as described above.

Select the correct person from the drop list on the Add Memorials window, press Tab and type the Gift Description and press Return/Enter or Click OK. This donation is now linked to Memorial Gifts and the name of the designee appears on the Batch Contributions Entry window in the donation breakdown list.
Entering Memorial Gifts not as Contributions

Select Gifts Given from the Memorial Gifts menu.

Click on the Add or Multi-Add button. Enter the Designee information: click on either radio button to mark this gift as given “In Memory of” or “In Honor of”.

Click on the small List button to see a list of Memorial Gifts Designees already entered in CDM+. Click on a person’s name to select him/her. If you need to add a person to the list of Designees, you can do it one of two ways.

1) Type the person’s name in the Designee Name field on the Memorial Gifts Given window and press Tab. You will asked if you wish to create a designee. Click Yes. The Memorial Gift Designee window will open. Type the person’s name in the Last Name and First Name fields. Enter the Date and optional Date Note. Click either the In Memory of or In Honor of radio button. Type any optional Comments you wish to add. NOTE: You may enter only the person’s name at this time and add more information later by selecting Gift Designees from the Memorial Gifts menu.

2) Click on the small Add button. The Memorial Gift Designee window will open. Add information as described above.

If the giver has an existing address record in CDM+, click the Select Address button. Find and select the appropriate address record from the pop-up window. Click OK. The name and address fields in the Given By section of the Memorial Gifts Given window will auto-fill. A check will also appear in the box next to “Link To Address Rec.” This will ensure that as the address record address changes, it will also be updated in the Memorial Giving. If you do not want to have the address automatically updated, you may uncheck the box.

Tab to the fields in the Gift section of the window, typing the Date the gift was given, the Amount and for what, if anything, the gift is designated. Click Save.

Memorial gifts entered in this manner do NOT create contribution entries. If you wish for these gifts to be displayed on a member’s giving statement, you will need to also enter these as contributions. Therefore, this method is best used for gifts given by persons who are not regular givers or do not want their gift recorded as a contribution.
Using Memorial Gifts

In recording memorial gifts, it is often necessary to track how much has been received towards a specific designee and how much has been used for a specified purpose. As memorial gift money is used, it can be entered and tracked.

Select Gifts Used from the Memorial Gifts menu.

Click on the Add or Multi-Add button to begin recording the use of memorial funds. Click on the small List button and choose a Memorial Designee to display in the Designee Name field.

Tab to the Gift section of the window and type the Date, Amount and description of the item for which the funds were used. Click Save.

Memorial Gifts Reports

Various reporting options are available:

Gifts Used – a listing of memorial fund expenditure; may be sorted by date or designee

Gifts Given List – a listing of memorial gifts given; may be sorted by date or designee; option to show or not the giver’s address, for what the gift was designated, and/or the gift detail.

Gifts Given Composite – a simple listing of the total amount of memorial funds given per designee

Gifts Given Custom Listing – extremely flexible report for memorial gifts given (see Appendix D: Custom Listings for more information on Custom Listing reports)

Gifts Given Labels – print labels or envelopes with names/addresses of memorial gift givers

Gifts Given Export – export information about memorial gifts given (giver, giver’s address, designee, amount, date, etc.); can be used with a word merge to print acknowledgments.

Gifts Given vs. Used – listing of memorial funds given for a designee and used and resulting balance