2007 Annual Users Conference Classes

Categories of classes during the 2007 Annual Users Conference are color-coded on the conference schedule and below. Please note that some classes fall into more than one category, as shown by multi-colored blocks on the schedule. Classes are a mix of lecture and Q&A, with attendees viewing the program projected on a large screen.

General Sessions

General sessions apply to all conference participants, whether you are a CDM+ user or a DonorWorks user.
Please note! Tickets for Monday evening's "Old Kentucky Night" at the Kentucky Horse Park MUST be purchased in advance. Call 800-577-8726 to buy tickets for yourself and family members. More information is available at www.suran.com/conf2007. Tuesday afternoon's reception is included in your conference registration fee. Family members are welcome to join us for some birthday cake!

Computer Lab

A computer lab is open throughout each day of the conference. The lab has computers set up for both CDM+ and DonorWorks users to practice what they have learned in class. If you want to bring your data and work with it during the conference, you may bring it on a thumb drive, CD or Zip disk for transfer to a lab computer. You are also welcome to bring your laptop computer. The computer lab is staffed with Suran Systems personnel to answer your specific questions. A limited number of computers are also available for you to check your e-mail.

CDM+ Classes

Basic

Basic classes are structured to provide an introduction into all areas of the program. The classes assume that the user has little or no experience with the most current version of CDM+. The goal of each of these classes is to provide detailed instructions on how to enter, find, change and delete data. Shortcuts to aid in the use of each area of CDM+ are provided. A review of basic reports is also discussed.

Advanced

Advanced classes assume that the user has a basic familiarity of each area through use or attending a basic class. The focus of these seminars is to explain in detail the function of each area and how it relates to other areas of CDM+. More time spent on reporting features and how to access special functions within CDM+.

Administrative

Administrative classes deal with a wide range of topics. These sessions are for those involved in overseeing the use of CDM+ with other staff members. Some classes are designed to introduce certain elements of the program that may not be used on a regular basis. Other classes are designed to help you utilize all the functions offered by CDM+.

Ministry

Ministry classes assume basic knowledge of CDM+ then apply that knowledge to specific ministry situations. Each class takes a specific ministry need and presents how to unlock the full power of CDM+ to meet the data management needs of that ministry area.

CDM+ Class Descriptions

Accounting 1
In just one session, we cover the basics of all three components of CDM+ Accounting. Beginning with the Accounting setup window and moving through the Chart of Accounts to Accounts Payable and the General Ledger, participants receive a solid "how to" introduction to Accounting. Payroll is covered in separate classes. Beginning Balances and Ledger entries, including Deposits and Journal entries, are explained.

Accounting 2
This advanced session looks in depth at budgeting, bank reconciliation, and period closing procedures. Learn how to use recurring transactions for month-end transactions and check writing to save time. Understand the power of accrual accounting and how easy it is in CDM+. Creating and using Account Sets and basic reports, such as the Balance Sheet and Income and Expense, will be reviewed. Emphasis is given to finding and correcting mistakes and understanding the relationship between contributions, accounts payable and payroll.

Accounting Introduction
Are you new to CDM+ Accounting? Do you have little or no accounting experience? Desire to learn the basics? We designed this class just for you. It covers an introduction to double-entry accounting including Account Types, Debits and Credits, Funds and Fund Accounting, and the relationship of Ledger Entries to Income/Expense and the Balance Sheet reports. This class is great place to start your CDM+ Accounting training!

Accounting Reports 1
This session reviews the Accounting Reports often used in the daily/weekly work in CDM+ Accounting. The use of Selected Accounts, Account Sets and the Account Browser is demonstrated. Some of the reports reviewed are: Daily Reports, Deposit Listing, Budget, Budget Comparison, Ledger by Accounts, Ledger to Budget, Income and Expense, Current Balance Sheet, Account Balances-Check Register, and Fund Activity.

Accounting Reports 2
A continuation of Accounting Reports 1, we review primarily of the YTD reports including: Monthly Comparison, Monthly Summary, Range Summary, Ledger by Accounts, Accounting Balances-Balance Sheet, Trial Balance, and Fund Activity. The use of Selected Accounts, Account Sets and the Account Browser is demonstrated. Use of reports as trouble-shooting tools will be demonstrated. Participation in the Accounting Reports 1 class is not required, but may be helpful.

Accounts Receivable
The Accounts Receivable module of our accounting program is ideal for a daycare centers and organizations running a school. It can also be a valuable tool for any type of invoice/billing needs. This class reviews all aspects of Accounts Receivable. Come and see how easy it is to keep track of money owed and present a professional invoice to those needing your services.

Administering CDM+
Everyone needs this! Bring into focus the essential CDM+ administrative features of User Management, System Information and Preferences, CDM+ Updates and the Backup and Restore features. An explanation of the use of the OpenBase® SQL server with CDM+ is given. Remote access to CDM+ via the Internet and Suran Systems' data hosting service will also be covered. Save time for this class in your schedule.

Advanced Finds/Searches
You need the skills taught in this class to fully Envision the Possibilities of CDM+! Here you will learn how to construct basic advanced finds, how to mix comparisons (and/or) within a single advanced find, how to pull together finds from multiple programs into a single find, how to use saved searches, and how to master the advanced find window. After taking this class, you'll see clearly how to get just the information you're searching for!

Advanced Fund Accounting
Advanced Fund Accounting is an optional feature of CDM+. This session is not for those who are just starting out in accounting; a good understanding of fund accounting and balance sheets is helpful. A thorough review of the advanced fund accounting structure in CDM+ is presented. Suggested standards for accounting for nonprofit organizations can be met with the CDM+ advanced fund accounting feature. Balance sheets by funds are as easy as a click of the mouse in CDM+. If you need to produce a balance sheet for each of your funds, or you are concerned about fulfilling all the regulations—this is the class for you.

Attendance 1
Learn how to input multiple event, class, and list attendance for worship services, Sunday School classes, small groups, board meetings, and the optional use of the Bar Code Wand reader. Entering individuals in classes and groups, as well as the preparation of attendance worksheets for classes and groups is taught.

Attendance 2

Class promotions and Attendance analysis are made easy in this course. Missing Analysis reports, the Attendance by Date report, and even how to see a full year's attendance summary for an individual are all covered. Tracking overall attendance averages and trends is also discussed. Exporting attendance records and the connection between attendance and shepherding groups are examined. Be sure you're marked present in this class!

Check In/Check Out System

This class will cover the forthcoming Check-In/Check-Out system. We'll begin with a thorough demonstration of how to setup the program, check individuals in and check them back out. Next, we'll explore the various optional hardware devices that can be used with the program. Finally, we'll open the floor for your comments and suggestions for this powerful new program in the CDM+ suite.

COG Treasurer's Report

This class is specific to Church of God (Cleveland, TN) users. It focuses on how to configure CDM+ to automate the creation of the Treasurer's Report and submit it to State/Regional and International Offices. A must-have class for COG Treasurers!

Contributions 1

This class covers everything you need to begin entering contributions, including setting up the giving codes, giving funds, viewing individual Giving History and the Groups field on giving unit records. The Batch Contributions screen is explained, as well as how to use a Check Reader for contributions entry. Everything you need to know about linking to Accounting and Posting to Accounting is explained. Learn to verify your contributions entry through the use of Daily reports in this class.

Contributions 2

Go beyond the basic Contributions Entry and the Daily Report of Giving. Maintaining the integrity of the Contributions History file is covered, as well demonstrating its printing and graphing capabilities. Setup "Special" and "Visitor" giving codes to track loose cash and visitor gifts. Information about handling special offerings, gifts-in-kind, and nondeductible gifts is also available. Tracking and reporting of Memorial Gifts and Giving Statements reports is covered.

Contributions Reports

In this session, we review many of the reports within Contributions. Comparative reports and Exports are investigated. Learn how to create Contribution letters to givers that include their Year-to-Date giving totals right in the text of the letter! Listing reports, including Giving Detail by fund(s) and Giving by Date, are effective evaluation tools for Stewardship committees. Giving Receipts and Statements are examined as well.

E-mail Ministry

Communicating with individuals and families via e-mail is essential in these days. This class presents how the multiple e-mail features of CDM+ are effective tools for communicating. System and User setup for e-mail is detailed as well as e-mailing to groups and classes, even Vendors! Adding e-mail addresses to Yearbooks, Directories and Lists, Custom Listings and Exports are taught. The class also discusses privacy issues in e-mailing. We also look at how to identify those persons who do not have e-mail addresses so you can make sure they're not left in the dark.

Event Registration

This class covers the powerful CDM+ Event Registration program, in which you can track fees and payments, send confirmation letters, print name badges (with graphics even!) and much more. This program can be used for Vacation Bible School, youth events, community services, mission outreach, and church dinners, to name a few possibilities.

Fundamentals of CDM+

All CDM+ users who have not previously taken this class are encouraged to attend one of these classes on Monday morning. A key element of using CDM+ is the common features between all programs. This session provides the foundation needed to effectively use CDM+. The class reviews the dynamic find features, windows setup, user management, grid options, preferences and basic report generation.

Membership 1

During this class, as you become familiar with the membership screens and tool bars, the relationship between Address records, Individual records, and Giving Unit records are explained. Adding Address records and Individual records is covered. This class provides an in-depth review of the Address and Individual records options. You are introduced to Pastoral and Visitation records and the Report Menu options. This class is a good introduction to Membership, providing the new or beginning user everything needed to get started. It's also a good refresher for the experienced user.

Membership 2
Included in this session is an in-depth look at the Master Coding System and how to best organize your membership database to support the ministries of your church. Learn how to use the Address and Individual List Maintenance, Field Maintenance and List transfer, along with the expanded screens used to manage lists. Discover the expansive possibilities that the Other Information fields offer you to track a wide variety Address and Individual information. This is your opportunity to further investigate the multiple features of the Membership program.

Membership 3
A continuation of Membership 2, this advanced class looks at basic Directory and Lists report functions and covers those special situations that arise in Address and Individual database management. Become comfortable with preparing records for Archiving from the Membership program. Enhance your ministry through the use of Visitation and tickler files. Explore how your ministerial staff can use confidential, password-protected Pastoral Records. This class is your opportunity to address your more advanced Membership questions.

Membership Reports 1
Discover the many reports and their multiple configurations that CDM+ offers. Learn how to create Yearbook Directories for your members or staff use. The custom setup for Name Badges and Custom Membership Lists is presented. Join us as we shine a light on these reports that will enrich your effectiveness and productivity.

Membership Reports 2
Further discover the reporting capabilities of CDM+ including Mail Merge and Exports. Need to send letters to all the families of your active members? Discover how easy it is to Mail Merge (Letter Notices) to families or individuals. Learn to create Individual or Address exports, PDA exports and use of the Clipboard "cut and paste".

Other CDM+ Menu Items
Have you ever wondered what those "other" items on the menu do? There is more to Statistics and Preaching Aids than meet the eye. This class uncovers some of the often under-utilized features of CDM+. Learn how to create labels for electronic media such as CD/DVDs and audio/video cassettes.

Payroll 1
When the Payroll module is set up properly, it may be the most satisfying feature of CDM+. In the Payroll class, you discover timesaving steps to assist with adding new employees. Participants also receive an in-depth understanding of exactly how CDM+ calculates payroll, writes checks and posts to the Ledger. The relationship of CDM+ Payroll with the Accounts Payable and General Ledger modules is also demonstrated.

Payroll 2
You have just run this quarter's 941 and it shows you owe money! How could this be? This class features a review of the basic Payroll reports including explanations with particular attention to the impact of correcting errors. Considerations on how to assure that 941, W-2, W-3 and 1099 printing will run correctly are covered. If you have responsibility for payroll then fit this class into your training schedule.

PhoneTree® and Other CDM+ Peripheral Devices
This session goes into detail about the PhoneTree® automated messaging system, which interacts with CDM+ Membership programs. Learn how you can quickly and easily notify people of upcoming events, changes in schedule or prayer needs. PhoneTree can be an invaluable tool in communicating with your church members. We also demonstrate using a barcode wand reader and a check reader with CDM+.

Pledging
Churches often use the Pledging process as a financial forecasting tool. Learn how to enter annual pledges and use the Multi-Year Pledge function. CDM+ has new tools to make the process easier and more visual while increasing the accuracy of your financial forecasting reports. Learn what "projected" pledges are and how they are integrated into the reporting process. Pledge comparison reports are reviewed and the process of creating a Letter Notice with a member's actual Pledge Amount included is demonstrated in this class.

Roommate
Roommate is your solution for facilities scheduling. This class presents in detail how to utilize CDM+ Roommate to track your events, rooms, equipment, whether on campus or off. Discover other uses of this powerful tool in scheduling staff, categorizing events by Department, and keeping an up-to-date inventory listing of your church property.

Training Skills

You may have come to the CDM+ Users Conference with the expectation of going home to train others on what you have learned. But do you know that not all people learn the same way? And that all training has some common methods? This class introduces training techniques for different "styles" of learners while demonstrating methods of training for each style. You'll take away practical training helps for you to use back home.

USPS Discount Mailing

Does the recent postage rate increase have you wondering if automation rate mailing is for you? Come to this class to see how the CDM+ USPS Mailing feature will sort and process your lists according to postal guidelines to get the best rates and services from the USPS. Postal documentation, tray and sack tags can be generated from the Mailing program. CASS certification options for CDM+ users will be discussed. We will briefly discuss the May 15, 2007 change to "shape-based" postage rates and point you to USPS resources to help you learn about the change and how it affects your mailing.

Visitor Ministry

Growing churches know who is visiting their church and follow a process to minister to and assimilate them into their fellowship. This class demonstrates a process and presents you with the tools through the Membership/Attendance and Contributions programs to implement an effective process for ministry to visitors and prospects.

Web Development

Take a complete tour though our technology demonstration of web-based access to your CDM+ database. We'll show you the prototypes we've developed, discuss how you'll (safely) get your CDM+ data on the web and explore the differences between widgets, plug-ins and mini-applications. We're looking for feedback and comments on what will be most beneficial to you, so come offer your thoughts and suggestions directly to our development team.

DonorWorks Classes

There are 3 categories of DonorWorks classes, which are color-coded on the schedule:

Basic

Intermediate

Advanced

DonorWorks Class Descriptions

Dynamic Segmentation – Coding (Breaking Up Is Hard to Do)

Creating a coding scheme that works for you. Learn more about constituent, group and money codes. We will also look at some preference settings that affect the way you enter the data.

Your database should provide you with the means to efficiently capture and manage data about your constituents; their interests and their giving, create reports and provide personalized and meaningful donor correspondence. This course is a good choice for the new user looking at how to begin or an experienced user looking for a more effective coding scheme.

What is Constituent Relationship Management or CRM? (It's not what you know, it's who you know)

The big picture. What should your CRM software do for you? Overview of the program purpose and highlight important features.

Who do you track? Donors, prospects, constituents, media contacts, vendors, staff, volunteers, alumni—hopefully all of the above! We will take an overall look at what a CRM solution should do for your organization. How your data is entered and used and how the program helps you remember tasks and activities. Your CRM software should be used to record information and then to meet needs, inform and inspire additional giving, in short to help you build relationships with your constituents.

Special events and X-athons (Run Forrest, Run!)

Special event and x-athon coding and setup , ticket sales, reports

DonorWorks comes with a full event module that will help you record event planning, who was invited, who attended or bought tickets. You can even create seating charts. The x-athon module help you to organize the data entry for your participants and sponsors for a walk-a-thon or golf-a-thon.

Advanced Queries, Import/Export & Graphing (Mom always taught me to share)

Advanced queries, importing and exporting, graphing results, bulk change

We will show you how to do some more advanced queries, stuff you didn't even know was possible! We will also look at importing data from other sources into DonorWorks and exporting data out for change of address or CASS certification.

Gift Entry, Reports and Receipts (You're In the Money)

Gift entry, EFT and recurring gifts, receipts, giving level "clubs", pledges and gift reports

Learn to enter a broad range of gift types such as straight donations, pledges, recurring gifts, gifts in kind and specify designations for one or more payments from the same donor. Additionally, users can optionally identify soft credits, solicitors, memorial and matching gifts for all gifts. Create different receipts for different kinds of gifts to allow donors to know with certainty that their gift was received and are continuously reminded of its impact.

New in DonorWorks v8 (What's New, Pussycat?)

All the new goodies to make your job easier!

When a new version of DonorWorks comes out do you take the time to read the Changes files that comes with it? Do you use the new features or do you just keep doing what you've been doing? Yeah, that's what we thought.

This class will show you all of the new features that have been added to DonorWorks with your upgrade to v8. There are more than 150 new features! For example, did you know you have remote access capabilities? That you can setup recurring gifts to post each month? Record online giving? Modify canned reports? Graph report results? View your top 10 donors as of this moment? DonorWorks v8 does all this and more!

SQL, OpenBase & Archiving (With great power comes great responsibility)

SQL, OpenBase and archiving

With SQL you can get into the real heart of DonorWorks. You can mine your data for all sorts of information and user that information to server your constituents better and do a better job in accomplishing your mission. We'll also learn how to move old data into a static archived database and how to backup your data.

Constituent Data (People Who Need People)

Entering constituent data in a consistent manner, understanding salutations and mailing names

With each interaction with any one of your constituents, you learn more about their preferences, their families, and their interests. Instead of keeping this information locked inside your head, you capture it and share it with the rest of your organization. Track your constituents' relationship with your organization, other members of their household, as well as other constituents in your database. We will look at individuals, organizations, family members (adding, combining and removing), contacts and heads of household. We will also cover creation of salutations and mailing names and sending 1 piece of mail per household.

DonorWorks Reporting (Campbell's Soup – Just Heat & Serve)

DonorWorks canned reports and assisted queries

Canned reports is the first level of reporting in DonorWorks. Once you have determined your database structure and coding and entered all the details about your donors and constituents you need to be able to use that information to communicate with them in a personalized way that leads to higher response and participation; build relationships! Explore the reports that have been built into DonorWorks and learn how to modify those reports. We will also look at assisted queries. These are fill-in-the-blank queries that are easy to use and allow you to combine tables.

Database Health/Administration (Who loves your data?)

Worker codes, security levels, task management, program updates, finding duplicates, backup and audit trail

Someone has to take responsibility for the data! Someone has to love the data, massage the data, keep it consistent and current, pull the weeds and water it faithfully. Here are some things to help you.

Correspondence (Love Letters in the Sand)

WorksWrite letters, mail merge and bulk e-mail

Once you have created your list of people using a canned report or query you need to be able to communicate with them in a personalized way that leads to higher response and participation: build relationships! In this session we will look at using DonorWorks internal word processor, WorksWrite, to create merged letters and e-mails. These letters can be used as welcome letters, pledge reminders, acknowledgement letters, receipts, invitations or appeal letters. Learn how to track the effectiveness of your mailings, how many letters were sent, to whom were they sent, how much did that letter bring in.

DonorWorks Queries (Query Me This, Batman)

Power queries and assisted queries

Queries are the next level of reporting in DonorWorks after canned reports. You have more options as to which information you can query on that you do in the canned reports. Queries allow you to run your entire database through filters of your own choosing to narrow down your results. Once you have your desired results you can print reports, mailing labels, send bulk e-mail, print merged letters or send the information out to a mailing house. We will look at both power queries and assisted queries in this session.

Additional Modules (All that and a bag of chips)

Additional modules that are available as add-ons to DonorWorks

Client intake module – for organizations who track health histories, referrals and services provided. (Pregnancy centers, Cancer Care Centers, Homeless shelters)

POSWorks – for organizations tracking inventory and sales of books, CDs, T-shirts, etc. Also includes an auction module, subscriptions, time billing and item rentals.

Grants and Foundations – created to track foundations and the details about grants they offer; submissions deadlines, descriptions, funding details etc.

Planned giving – (included with DonorWorks at no charge) designed to track your future gifts and their estimated value as well as the appropriate contact people and account/policy numbers.

CDM+ Fund Accounting – Suran’s fund accounting package is a stand-alone product that is available to DonorWorks users. Check out one of the classes offered this week for more info.

CDM+ Roommate – Schedule your rooms, people and resources on a calendar to prevent double booking!