

# 2021 Duluth CDM+ Training

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Alex Clay and Steve Hansen, Suran Systems, Inc.



**Welcome!**

# About Suran

- Founded in 1987 by Randy and Sue Clay (Sue + Randy = Suran)
- Thousands of clients throughout the US and beyond
- Primarily serve the faith-based and non-profit market
- Privileged to have a relationship with the Diocese of Duluth back to 1994
- We offer a customized version of CDM+ that includes several features specific to the Diocese
- We've held a training similar to this (in-person) every 3 years since at least 2006

# Presenters

## Alex Clay

- Employed at Suran since 1997 (Sue and Randy's son)
- Worked in development from 2001 through 2020
- Moved into the CEO position in 2019
- Presented and trained at countless conferences, with clients, and in regional settings
- Resides in Lexington, KY
- [alex@suran.com](mailto:alex@suran.com)

# Presenters

## Steve Hansen

- Employed at Suran since 2005
- Works in sales and data conversions
- Former experience with his own family business providing Church Management software
- Has attended all Duluth Trainings since 2006
- Based in St. Paul, MN
- [steve@suran.com](mailto:steve@suran.com)

# About This Training

- 2.5 days of concentrated training
- Cover core features in CDM+ Desktop, CDM+ Mobile, and Engage
- Sessions will be recorded
- [duluth.suran.com](http://duluth.suran.com) for schedule and training manuals

# Going Virtual

- Use the Zoom chat to ask questions
- Most sessions are 75 minutes
- Get up, stretch, move during breaks
- Please close your mail, put your phone on silent, etc. to help focus
- Open Q&A at the end of each day - let us know if you want to use that time

# CDM+ Overview



# CDM+ Software Suite

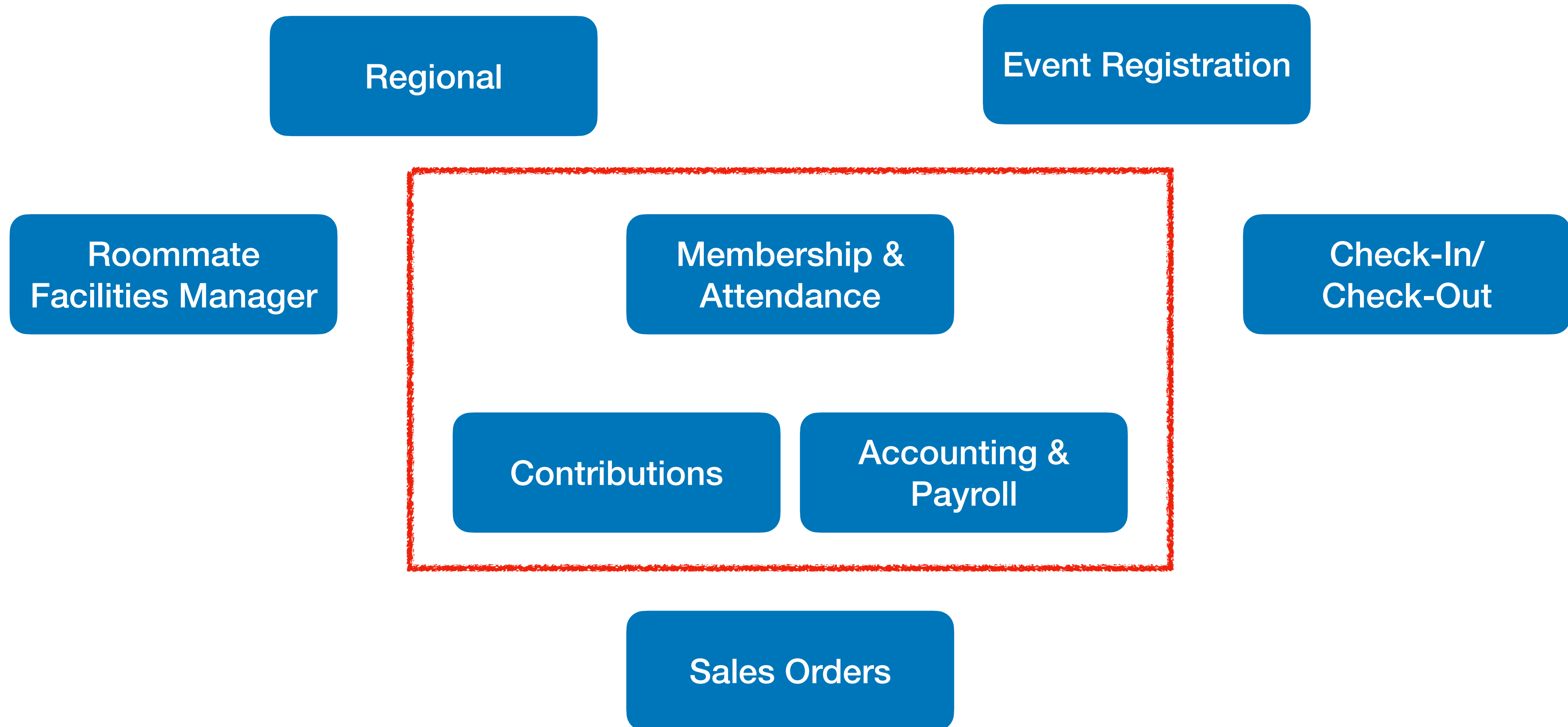


# Right Tool for the Job

- CDM+ is **Cloud Computing**
- **CDM+ Desktop** offers powerful, robust database software (e.g. accounting operations and reporting)
- **CDM+ Mobile** provides fast, purpose-built data access (e.g. attendance entry, check-in, and receipts)
- **Engage** provides a familiar, online experience for members and visitors (e.g. online giving and directories)
- **Hosted** data in our managed cloud connects and integrates everything

**The Key is Integration**

# CDM+ Programs



# Common Features

- All programs manage different, but connected, information
- The tools and features throughout are the same
- Skills working in Membership can apply to Contributions, Check-In/Check-Out, etc.
- Learning common tools (window interfaces, reports, notices, finds) will turn you into a power user
- Use this training to learn how to use the system and discover what's possible to get maximum value

# Getting Help

- [help.suran.com](http://help.suran.com)
- [support@cdmplus.com](mailto:support@cdmplus.com)
- 800-633-9581 for support
- Conferences and colleagues

# Technical Note

- We'll be using a CDM+ 12.0 beta today
- We expect this beta to be generally available next week
- The general release will be before year end
- CDM+ 12.0 will be required for any tax work and payroll in 2022
- Review the system requirements (<https://help.suran.com/cdm/latest/installing-cdm+/cdm+-12-0-system-requirements-fall-2021>)
- Just in case we run into glitches we can jump back to CDM+ 11.2 (the current published version)

**Let's get started in CDM+  
Membership!**