

Startup Notes for CMD 2020.x Setup

The basic 2020 version of the Church Membership Directory (CMD) software system includes two versions of CMD (Classic & FMX), two phone apps (one for staff use and one for member use), the web server software required to power the phone apps, and the Tools program.

The following instructions will guide you through setting up your new or updated CMD 2020 program along with how to import any data from a prior version of CMD. The steps are not difficult, but they must be followed in the correct sequence. The entire process should take no more than a few minutes. It will take longer to explain it than to actually do it! Just follow the steps in order and you should be fine.

Do This First!

Before making any changes to your computer or your current CMD setup, pause now to make a fresh backup of your current data! Once a new backup has been made, proceed with the following instructions:

Step 1: Download Setup Files

Go to this page on our web site:

<https://www.softwareforministry.com/downloads.htm>

Once on this page, download this file:

CMD2020.xSetup.Exe

Note: Do NOT run the CMD 2020.xSetup.Exe program until told to do so in the flow of these instructions!

If you get warning from Windows about the programs being unknown and possibly unsafe just after the download, click the More Info button, and click Run Anyway to ignore the warning. Microsoft just doesn't know about CMD, so they don't realize that CMD is safe for your computer.

Step 2: Stop the Web Server and CMD Remote Database Server Software

If you have been using CMD with the CMD Web Server for use with the phone or tablet apps, or if you are using the CMD Remote Database Server software, you must stop both of these servers before you attempt to run the CMD 2020 setup program. If you don't use either the CMD Web Server or the CMD Remote Database Server software, you can skip the rest of this section and go directly to step 3.

To stop either or both servers, open up the CMD Tools program for the version of CMD you are currently using. You'll need to start it up by right-clicking on its icon on your desktop and select the option to Run as Administrator.

Once the Tools dialog appears on the screen, click the Servers tab. There's a button there to stop the CMDWebServer and one to stop the CMD Remote Database Server. Make sure both are stopped. You do NOT need to uninstall them. Just stop them.

Once they are stopped, close out the Tools program and proceed to the next step.

If you have never used the phone or tablet apps and have never started the web server, you can skip to Step 3, CMD 2020 Setup.

Step 3: Running the CMD 2020 Setup program

When you run the setup program, you will be prompted to enter a password. You will have received this password from Software for Ministry in an e-mail. If you have lost it, contact us and we'll re-send it to you.

To run the setup program: find the **CMD2020.xSetup.Exe** file in your computer's Downloads folder and double-click on it. Enter the password, and then click the buttons to keep continuing through the setup process.

Special Note: Some anti-virus programs will take exception to the CMD Setup programs for either the main program or for the Tools program and attempt to block it (or in the case of Norton or AVAST products) completely delete it. Your anti-virus program doesn't know that CMD and CMD Tools is safe. If your anti-virus software blocks or removes it, you will need to temporarily turn off your anti-virus software and rerun the Tools setup program. In some cases, you may even have to download it again first.

Assuming the setup program is running now, note that CMD does not give you a choice of folders when setting up the program. That's because there are a number of folders CMD must find in specific places, so those are preset for you. Basically you just keep clicking the buttons to continue.

The setup program will place two versions of CMD 2020 on your computer:

- **Classic:** This is the CMD you've known and have been using updated for 2020. All of the features you are used to in CMD are there. You can use it as you always have.
- **FMX:** This is the CMD reboot which is the basis for the Mac version of CMD which is now available for CMD 2020. The FMX version is now almost completely built out, and it contains all the new features added since 2017, which are not included in Classic. We highly recommend that you use FMX as much as possible, reverting to Classic when needed for those very few functions not yet implemented.

Note that you can freely switch back and forth between the Classic and FMX versions as desired since they work with the same data and the same startup information.

Step 4: Run CMD 2020 Tools

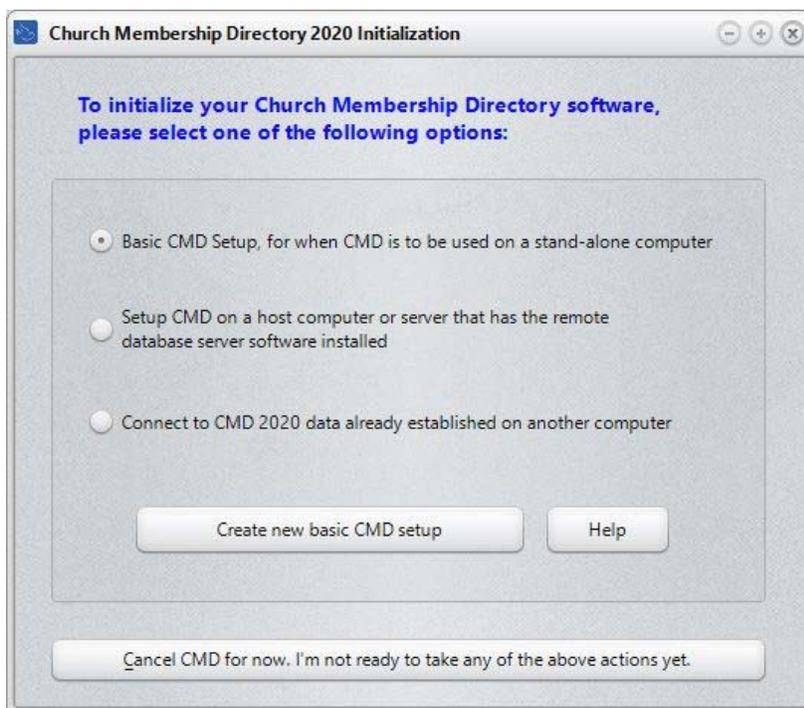
Always open CMD 2020 Tools as an Administrator by right-clicking on the icon and selecting Run As Administrator from the menu that pops up. Once it's running, go to the Servers tab, and restart either or both of the CMDWebServer and CMD Remote Database Server software if you have been using it prior to CMD 2020.

Step 5: Initializing CMD 2020

After clicking Finish on the setup program, you are ready to startup CMD 2020 for the first time. Find and double-click either the CMD 2020 Classic icon or the CMD 2020 FMX icon on your desktop. You may use either version for the startup processes. They work exactly the same, though the screens will vary in minor details. We'll use the new FMX version for our screen grabs so that you can see a little of the refreshed look for CMD right from the start.

Whether you have a prior version of CMD already installed or if you are installing CMD 2020.x as the very first version of CMD going on your computer, the first steps you will take are exactly the same. Either way, CMD 2020 needs to set up its own file space and create the tables that are used in the overall CMD database for 2020.

When you run CMD 2020.x for the first time, you will see this dialog:



You must follow through with the initialization process for CMD 2020 *before* you can enter any new names into CMD 2020 or import data from a prior version. Though there are 3 options for initialization, **you will select the first option**, Basic CMD Setup, and then click the **Create** button on the lower part of the dialog.

Basic CMD Setup

Select the first option, “Basic CMD Setup, for when CMD is to be used on a stand-alone computer.” You will be creating a “local” CMD file – meaning it’s a CMD data file that is meant to be used locally on the same computer on which the software is installed.

That is the *only* appropriate option to select since you cannot network CMD without obtaining the optional remote database server software. Once this selection has been made, click the button that says **Create New Basic CMD Setup**.

When you click the **Create New Basic CMD Setup** button, you’ll see this dialog:

The screenshot shows a dialog box titled "Create New Local CMD File". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The dialog is divided into several sections:

- File Description:** A text input field with the placeholder text "Enter a descriptive phrase for your new data file here". This field is highlighted.
- Database Name:** A text input field containing "Church Data 2020".
- Data File Folder:** A text input field containing "Church Data 2020".
- Default Telephone Area Code:** A small text input field.
- Church Information:** A section with a checkbox labeled "Use this information for phone/tablet apps" which is currently unchecked. Below this are several input fields:
 - Church Name
 - Address
 - City
 - State and Zip (two separate input fields)
 - Phone
 - Fax
 - E-Mail

On the right side of the dialog, there are three buttons: "Create CMD File", "Help", and "Cancel".

When this dialog first appears, **File Description** field will be highlighted. Use this field to type a descriptive name for the CMD file you are creating. Here are some examples:

First Community Church 2020 Data
Grace Church Data 2020
Church Family Data 2020

It is best to include the 2020 year in there somewhere since CMD's configuration file can now recognize CMD files from multiple years. Having the year in there will help keep things straight.

The same is true for both the **Database Name** and **Data Folder** fields. We suggest having 2020 in the name or folder to avoid confusion with prior CMD data files, or data files created in future years.

You are free to use the suggested Database Name and Data Folder Name, or you may substitute your own entries in for either or both of these fields if you wish. If you wish to create additional CMD files for CMD 2020 once you've completed the basic initialization process, bear in mind that each new CMD file that you create will need to have unique names for *both* Database Name and Data Folder Name that differs from other Database Names and Data Folders already defined in your CMD's configuration file.

Church Information

While this information can be entered later, I advise you to do it now if it at all possible. Prior church information is not imported, so it needs to be established again.

Note the checkbox that says **Use This Information for Phone/Tablet Apps**. If you use either the phone or tablet apps, your church's contact information is needed for the login page of the phone and tablet apps. If you check this box during the Create CMD File process, the Church Information you provide here will be written into the special file that is used for the phone and tablet apps.

Creating the File

Click the **Create CMD File** button when all the fields have been filled in as desired. When clicked, CMD will create all the data tables for the CMD file in the data folder that you defined above. You'll see a gauge display the progress of completing the task.

Once it's finished, you'll be taken to CMD's home screen where you can either begin entering information or import data from CMD 2012-2019 using the **Import Prior Data** item on CMD's **Utilities Menu**.

NOTE: If you have data from a CMD version prior to CMD 2012, we will have to do the data import for you. There is a small nominal fee for this service. Please contact me at mic@softwareforministry.com for details.

Phone Apps

There are two phone apps that come free with CMD 2020, along with the web server required to make them work. For a live demonstration of how they work, look here:

<http://www.softwareforministry.com/html/livephoneaccess.html>

One phone app is used for staff only, and the other for general membership. The link above will explain the differences in use and the differences for the login procedures.

To make the phone apps work, you'll need to do the following in this order:

- Reopen the CMD 2020 Tools program **as an Administrator**, and click on the **Servers** page again.
- Open the combo box below the words **Select Default App** in the box where the **Web Server** stuff is located, and select the app that you wish to have pop up if only the IP address or domain name of the host computer is entered in the phone's browser. You may select **None** as an option if you prefer.
- Click **Reset Web Server INI File**.
- If the Web Server Status shows Not Installed, click the button to **Install Web Server**.
- Once the Status line shows Installed but not running, click the button to **Start Web Server**.

If this is your first use of the phone apps, you will need to make sure that your computer/router has been prepared for it. A static IP address or domain name from a DNS service such as Dyn.com that is visible from the outside is required in order for this to work. You will also have to make a few settings changes in your router. Here's a link to a page on our web site that tells you more:

<http://www.softwareforministry.com/html/serverprep.html>

Networking CMD

In order to network CMD, you must use the optional remote database server software, which is available directly from Software for Ministry. Not only does it allow you to connect multiple computers, it also allows you to access CMD's data remotely by a computer running CMD somewhere offsite. If you would like more information about the remote database server, please click <http://www.softwareforministry.com/html/remotearchive.html>.

What's New in CMD 2020?

To see a list of the changes in CMD 2020.x, select the Help Contents option on CMD's Help Menu. Scroll to the very bottom and you'll see a chapter there for New Features in CMD 2020.x. Open that chapter and read over the introduction to the new features.

CMD 2020 FMX Notes

The FMX version of CMD for 2020 starts having nearly all of CMD Classic's features. Only a very few remain. There are a couple of things in Church Directory and a couple of pledge

statements not yet finished. If you notice something missing yet in FMX, just open Classic and you'll find it there in the meantime.

There are a few features that are only in FMX: the texting features added in 2016, and the ability to define specific bar code numbers for use with attendance in case you are using third-party bar codes such as a key fob, Documents, Styles, and much more.

If You Get Stuck

If you have problems with your basic setup, please do not call me first!

First, please either e-mail me for help at mic@softwareforministry.com or text me at: 818.219.1243.

If you text me, please give me your name and your church because I likely won't have your name and number in my phone's contact list.

I request that you contact me via e-mail or text first rather than calling. My work day often finds me in meetings or traveling, and it will most helpful to hear from you in a way other than by phone first. I will get back to you as quickly as I can. If I can't resolve the issue by e-mail, we'll set a phone appointment so that I can speak with you.

My cell also gets so many robocalls these days that I just don't pick up on numbers I don't recognize any more.

Thanks in advance for contacting me by e-mail or text first.