

Startup Notes for CMD 2020.x Setup for Mac

Starting in 2020, CMD now comes as a native version for Mac computers. Note that currently CMD for Mac is a 32-bit app, and a 64-bit version of it will be available in a few weeks.

The following instructions will guide you through setting up your new or updated CMD 2020 for Mac 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 (if you are installing this as an update), 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 the Pkg File

Go to this page on our web site:

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

Once on this page, click the link to download this file:

CMD2020.x.pkg

Actually, what you will get when you download is a password-protected zip file. You will receive the password you need to open the zip file from Software for Ministry when we have received your order. To access the actual pkg to install, you'll need to open the zip file with the password we provide, and then move the enclosed pkg file to your desktop for installation.

Step 2: Running the CMD 2020 pkg setup program

Double-click the CMD2020.xSetup.pkg file that was extracted from the zip file in the above step. 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.

Special Note: Since this app does not come from the App Store, chances are that your Mac's privacy settings will prohibit the setup pkg from running. If that's the case, you will need to visit the Privacy dialog on your Settings menu to tell your Mac it's ok to install this software.

Assuming the setup program is running now, just follow through the brief steps in the pkg setup process. 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.

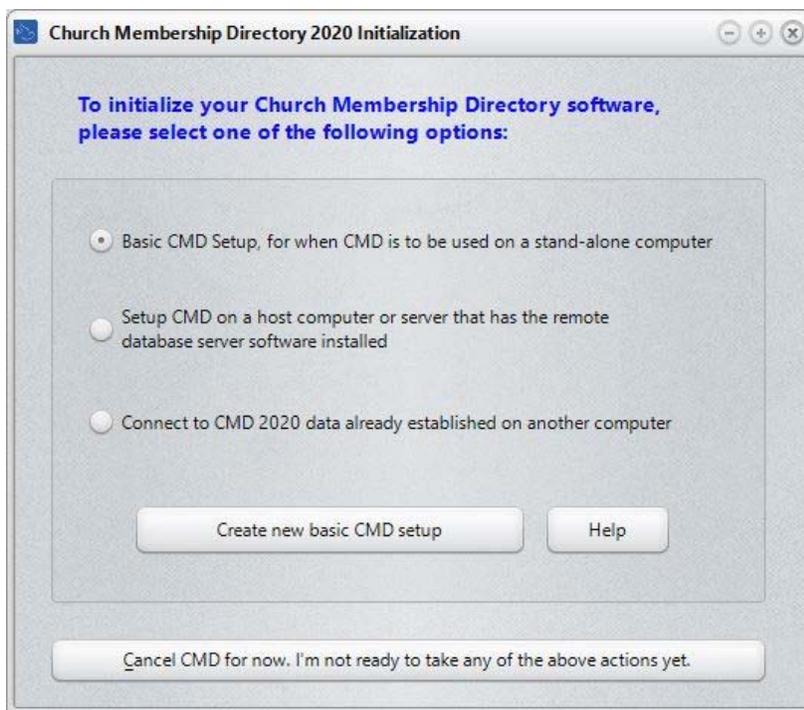
The setup program will place the CMD 2020 app on your computer, which you can find in LaunchPad, or you may want to add it to either your desktop or your Bar

Step 3: Initializing CMD 2020

After the pkg setup program is finished, you are ready to startup CMD 2020 for the first time. Find it on your LaunchPad and click it.

The first task is for CMD 2020 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 (the screen grabs in this document are from the Windows version of CMD, but they are virtually identical to the Mac version except for the fonts and where the dialog's Close icon is located):



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 (and the Mac version of this software server is not yet available). 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 title bar with a blue icon and standard window controls. The dialog is divided into several sections:

- File Description:** A text field with the placeholder text "Enter a descriptive phrase for your new data file here".
- Database Name:** A text field containing "Church Data 2020".
- Data File Folder:** A text field containing "Church Data 2020".
- Default Telephone Area Code:** An empty text field.
- Church Information:** A section with a checkbox labeled "Use this information for phone/tablet apps" which is currently unchecked. Below this are several text fields for:
 - Church Name
 - Address
 - City
 - State
 - Zip
 - 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, you should do it now if it at all possible.

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 the main dialog of CMD, and from there you can begin to use its features. If this is your first experience with CMD, we strongly recommend that you watch at least the first three training videos we have available to get you started using it properly. These have to do with using the main dialog for data entry and modification. They will be well worth your time. Even though they are made using the Windows version of CMD and the layout may be slightly different, it is enough the same that the concepts presented are exactly the same on both platforms. Here's the link to the videos:

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

Also note that there is help available almost everywhere in the app by clicking the Help button on any given dialog, or by clicking the Help Menu up at the header bar at the very top of your Mac's screen.

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>.

However, note that right now the Mac version cannot be networked. Within a few weeks, CMD for Mac will be able to connect to a PC that has the remote database server installed to share the CMD data from that computer. And eventually CMD should be able to be hosted on either a Mac or Windows PC and either platform should be able to connect to the remote database software the other is running. We will keep you informed as this capability is built out in our data engine.

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.