CNM Center for Nonprofit Management

WORDPRESS – CIVICRM

Membership Manual & FAQ

Center for Nonprofit Management
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Nashville, TN 37210

Membership@cnm.org
615-259-0100

CONTENTS

We believe that thriving nonprofits are essential to a strong community. But how can nonprofits thrive when we are stretched thin and lacking time, dollars, and resources?

At CNM, our mission is to equip your organization with the things you need to make a difference. We connect you to expertise, partnerships, and tools that will enable you to focus on your mission, all day, every day.

MISSION:

WE AMPLIFY THE IMPACT OF NONPROFITS AND THEIR PARTNERS

VISION:

A CONNECTED COMMUNITY EQUIPPED TO REALIZE OUR
GREATEST OPPORTUNITIES

CORE VALUES

RESPECT

We celebrate individuals as whole people with diverse perspectives and unique needs. We engage and include each person with unconditional positive regard.

HEALTHY GROWTH

We value intentional, continuous growth and learning. We let go of the things that do not serve us well.

COLLABORATION

We embody the power of working together, as a team, a sector, and a community. We include everyone at the table.
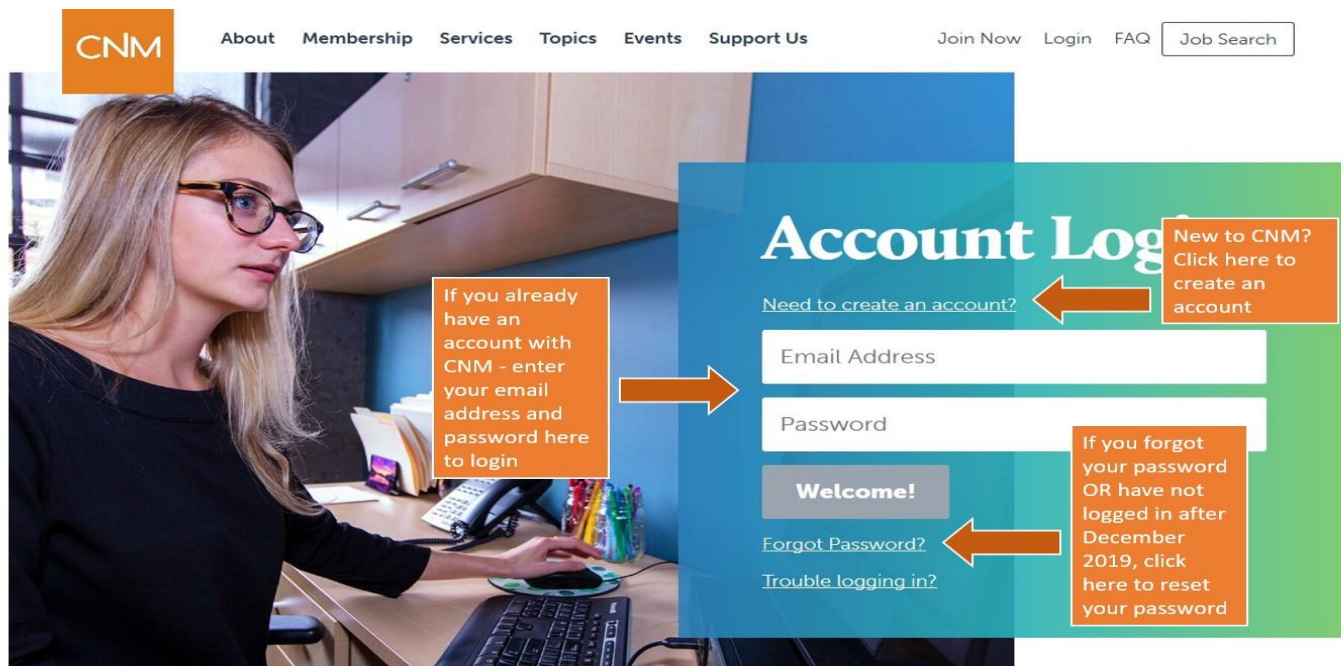
PURPOSE-DRIVEN

We are proactive and responsive. We embrace the hard work that creates positive change and focus on the path to the solution

Have a question?

The CNM staff is here to help! Please email us at membership@cnm.org or call us at

615-259-0100.

The **ABOVE** image showcases:

- Where to click to login
- Where to click if you forgot your password – see detailed instructions on **page 4**
- Where to click if you need to create an account - see detailed instructions on **page 5**
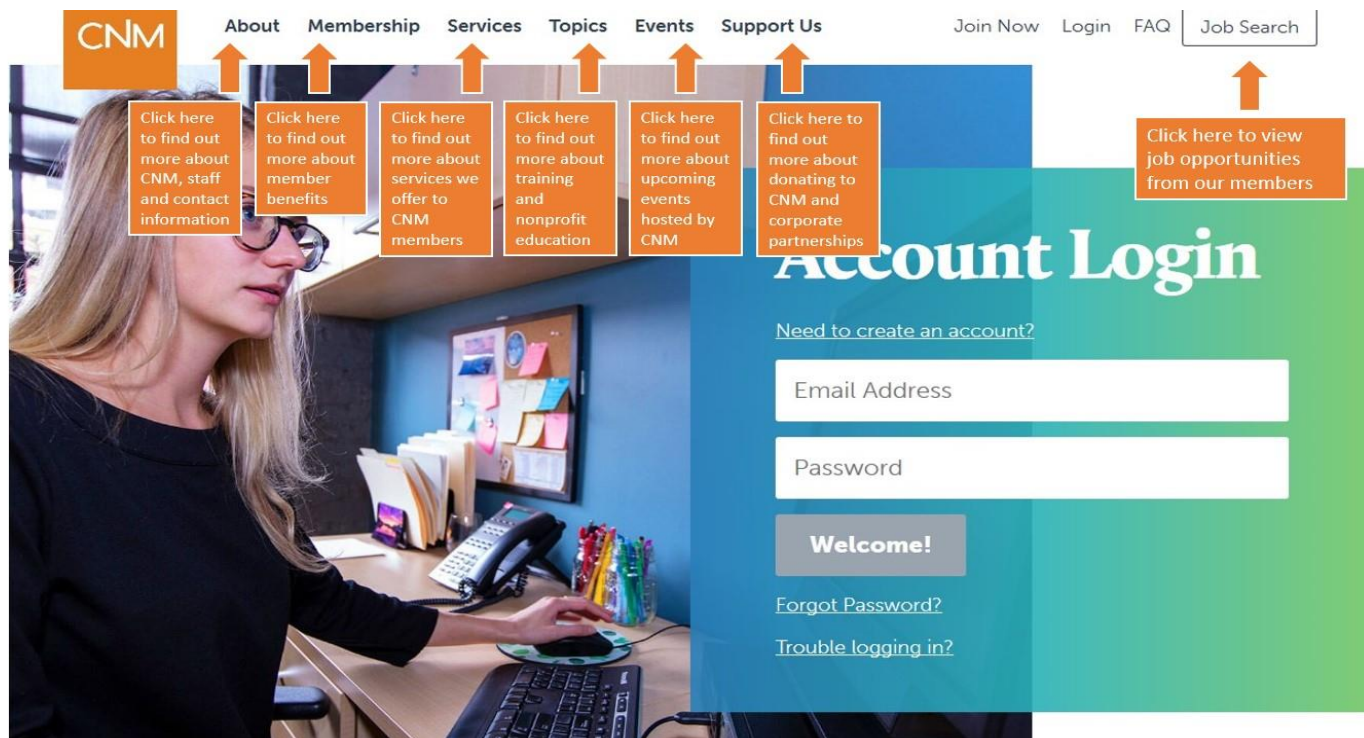
The **ABOVE** image showcases:
- The homepage dashboard layout
- Where to click if you want to view our member job board (Job Search)

CNM launched a new website and database in December 2019. Existing CNM account holders are **required** to reset their passwords to log in to the new website. If you are an existing account holder, please follow the instructions below:

Please enter your username or email address. You will receive a link to create a new password via email.

Username or Email Address

Enter your email address and click the captcha images that apply to reset your password

I'm not a robot
reCAPTCHA
Privacy - Terms

Get New Password

Log in | Register

← Back to CNM

From the homepage, you will click the **Forgot Password** link below the Welcome sign. That link will bring you to this page where you will enter your username OR email address. You will then check the **I am not a robot** box.

To verify you are not a robot, we have installed reCAPTCHA on this page. A pop-up box will appear with either words and numbers for you to type in and match to the given image OR a series of pictures will appear and you must click all the pictures that apply to the image request.

Once you have completed the reCAPTCHA image test, an email will be sent to your email address on file with a link to reset your password. Please click on the link and it will open a new browser for you to enter a new password.

Be sure to check your inbox, junk mail and spam folders and mark our email address as a safe sender. You can also save our email address as a favorite. That way you can be sure to not miss out on future email communications.

HELP!

If you have not received an email from us within 24 hours of your password request OR your email address has changed since you first registered, please email us at membership@cnm.org or call us at 615-259-0100. We would be happy to manually change your password or update your account to reflect your new email address.

Why join?

At CNM, *your* mission is *our* mission. Our goal is to equip your organization with the things you need to make a difference. Being a member of CNM means being connected to a network of over 800 nonprofit organizations in Middle Tennessee. We help your organization grow, develop, save money, and so much more.

Registering as a new user?

Fill out your personal information completely *as it relates to you* (not your organization). The only required portions are username, first and last name, and email address; however, we encourage you to fill out all sections. You can edit and change your profile information at any time. A confirmation email will be sent to you to confirm your new registration. *Be sure to also sign up for newsletters on CNM's homepage to receive all CNM communications.*

Registering as a new organization for a membership?

This portion of the registration process will be about creating your professional profile with CNM. You will be able to create a profile for your organization later when you add affiliations (**page 10**).

Can I use my CNM membership outside of Nashville?

Yes! Members of Alliance for Better Nonprofits; Center for Nonprofit Management; Momentum Nonprofit Partners and Venture Forward now receive discounted access to conferences, e-learning materials, and training opportunities such as single-day offerings; multi-day sessions; as well as online learning communities.

How to find this page:

From the home page – click on the "Dashboard" tab on the top right of the screen. From your dashboard, you will see "Renew Your Membership" which is the fourth tab from the left. This will open to the image you see above. To renew, you **MUST** fill in all areas with an * next to them. The system will **NOT** process your payment unless all fields are complete.

What is required to renew?
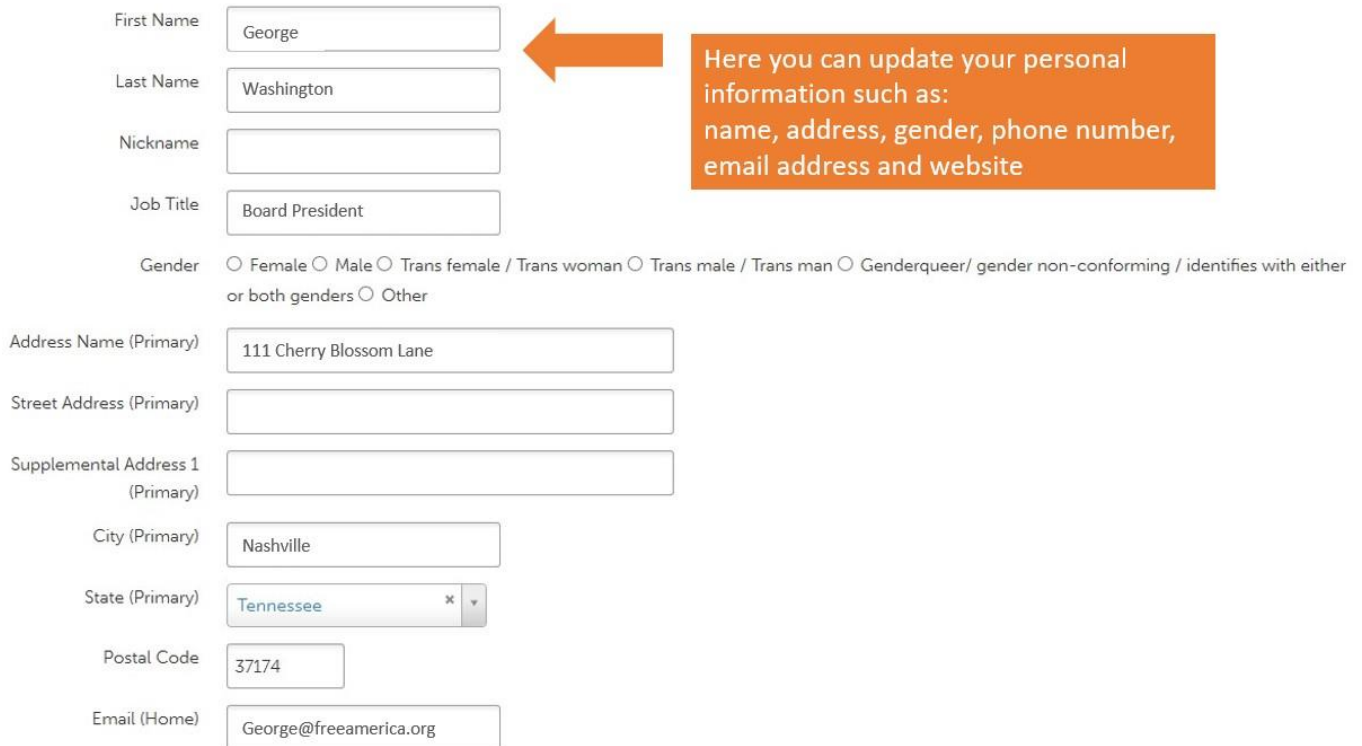
Choose your organizations budget size for 2020: Membership fees are based on budget size, according to line 12 on Form 990 or line 9 on Form 990-EZ for the most recent fiscal year. Memberships run on a calendar year. For government organizations, the membership fee would be based off your current operational budget.

Fill in your email address and your organizations name, address, email, credit card information and the billing name/address for the credit card statement. If your membership is current, you will see an expiration date alert above budget size choice. ***Note: PayPal is not an accepted form of payment. Check or credit card only please.***

Who can use your organizations membership?

Anyone associated with your organization can use the CNM membership including employees, board members, volunteers, interns. We encourage everyone to have their own individual profile and affiliate themselves with your organization.

Contact Information

First Name	George
Last Name	Washington
Nickname	
Job Title	Board President

Gender ○ Female ○ Male ○ Trans female / Trans woman ○ Trans male / Trans man ○ Genderqueer/ gender non-conforming / identifies with either or both genders ○ Other

Address Name (Primary)	111 Cherry Blossom Lane
Street Address (Primary)	
Supplemental Address 1 (Primary)	
City (Primary)	Nashville
State (Primary)	Tennessee
Postal Code	37174
Email (Home)	George@freeamerica.org

Here you can update your personal information such as:
name, address, gender, phone number, email address and website

How to find this page:

From the home page – click on the "Dashboard" tab on the top right of the screen. From your dashboard, you will see "Manage Contact Info" which is the first tab on the left. This will open to the image above. *We recommend reviewing your profile information quarterly.*

What can be updated?

Update your personal information *as it relates to you* (not your organization). The only required portions are username, first and last name, and email address; however, we encourage you to fill out all sections. You can edit your profile information at any time.

Why should your information be updated?

Your profile information is especially important to CNM. We use this information for our communications regarding new CNM member benefits and nonprofit community updates. It will also be important when you register for workshops, consulting services, upload a job posting and access MatchGrant funds.

*We take your privacy seriously and commit to protecting your personal identifiable information. CNM will **never** sell or share your information.*

How to find this page:

When you log into the CNM website you will automatically be directed to your personal dashboard. To view the dashboard of your organization, see more on **page 20**. *Only primary members can edit organization information.*
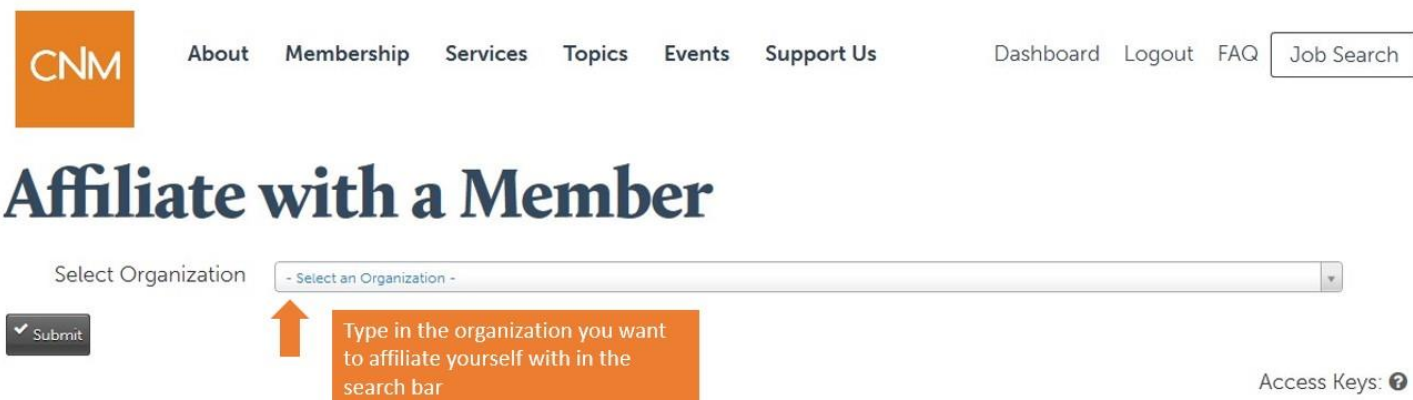
What is the purpose of your dashboard?

Your dashboard contains all **your personal profile information** and shows all activities you have done through CNM in one central location. Even if you have been employed with several organizations over the years, your profile is unique to you and will follow you through each transition. You can view your current role under affiliations.

What information can you find on your dashboard?

- **View / edit your contact info**:
  - Click here to do things like update your email address, job title or name change (see more on **page 7**)
- **Affiliate with an organization:**
  - If you have changed jobs or joined an organization as a volunteer, you can edit that here. Anything to do with the organization can be edited here (see more on **page 9**)
- **Post a job:**
  - Click here to post a new job for your organization (see more on **page 12)**
- **Renew your membership:**
  - Click here to renew your membership or to view if it is current (see more on **page 6**)
- **View all registered past and future events:**
  - Here you can view all CNM events you have attended and are upcoming (see more on **page 11**)
- **View all payments to CNM:**
  - Here you can view all payments you have made to CNM (see more on **page 11**)

How to find this page:

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, you will see "Affiliate with Organization" which is the second tab from the left. This will open to the image above. Please contact CNM at membership@cnm.org or call us at 615-259-0100 with any questions.

Why affiliate with a member organization?

Currently, CNM only offers memberships to 501C3 nonprofit organizations. To have full access to CNM benefits, organizations must have a current membership. To connect your profile with the organization you are with, you must affiliate your profile with their membership.

What if I do not see my organization listed?

There are three possibilities if your organization does not appear in the search bar:

1. You have mistyped the spelling of the organization OR it is registered through CNM using a partial acronym. Ex: Hands on Nashville could be registered as HON. Try a new search to verify.
2. Your organization has been previously registered under a different name and CNM has not been contacted to update the change. Ex. Free America could have been previously registered as America the Free.
3. The organization you are with is new OR has never registered with CNM in the past. Call CNM to register.

What if I am with more than one organization?

There is no limit to how many organizations you can be affiliated with as long as your standing with them is current. You can also add an affiliation if you are a contractor, intern, volunteer or board member.

How long does it take for my affiliation to be approved?

Once you request to be affiliated with an organization – the request will be automatically be emailed to the registered primary member(s) of that organization for approval. Your affiliation is instant once they approve the request. If the primary member is not available or cannot retrieve the email, please contact CNM and we can approve the affiliation on our end.

When would you change your affiliation?

You should update your affiliation with *every* organization change. If you have left one organization and started employment at a new organization, you would remove your affiliation from the first one and add the second one.

What else should I update?

If you have just transitioned into a new role or with a new organization, be sure to review your member profile. Your contact information such as phone number or email address could still be listed from your previous organization. For CNM communications to be effective, we must have current updated information (see more on **page 7**).

HELP! I updated my email address and I cannot login!

If you have updated your email address, you will need to reset your password. Every member needs to have a password associated with their email address (see more on **page 4**).

Can someone change my affiliation for me?

Typically, only members who are listed as an organization's "primary member" can disable other member affiliations associated with their organization. They can search and add a new member to their organizations affiliation without the member requesting the affiliation first. See **page 19** for detailed instructions on how to add a member affiliation. If an organization needs a member profile created immediately, please contact CNM and we can manually enter their information into the database.

How to find this page:

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, you can scroll down and see the "Events" and "Payments" section.

What will I see under the "Events" section?

You will be able to see all events you have attended and registered for at CNM. You will be able to view the title, date, time and length of the events. Past events will be in **black** font and future events will be in **blue** font. To view details for future events, simply click on the event and you will be redirected to the event page on the CNM website.

For in-person events – be sure to check in at the front desk to ensure your attendance is recorded. For virtual events – please review the event information emailed to you for instructions on how to join.

What will I see under the "Payments" section?

You will be able to see all payments YOU have made to CNM. Please note that payment's via check may take up to two weeks to process and be reflected on the database. Currently, we cannot accept PayPal, Venmo, Cash or any other payments platform online.

Where do I find a receipt for a payment I made?

Under affiliations, click on the name of your organization. It will pull up several tabs regarding your history with the organization. Under the "contributions" tab, you can view all payments you have made. To print or save a receipt, click the "view" link associated with the corresponding payment. A pop up will appear which you can then either print out or save as a PDF (see more on **page 21**).

CNM About Membership Services Topics Events Support Us   Dashboard Logout FAQ [Job Search]

Add a Job Posting

Welcome Frederick Douglas. (Not Frederick Douglas, or want to do this for a different)

CNM member organizations get unlimited free job postings as part of their annual membership. If you are a current CNM member and your job posting is prompting you to pay, please make sure that your organization has a renewed membership for 2020. To renew your membership, click here.

Job Post Pricing *   ● Job Post (Member) – $ 0.00
Email Address *   [   ]

Job Board Posting

Title of Job *   [   ]   ← Fill in all required blanks for a well-organized job posting

Organization *   [   ]

Job Summary *   [Source | ✂ ▢ ▢ ▢ ▢ | ↰ ↱ | ABC ▾ |
                          B I U S x₂ x² Iₓ | ≔ ≔ | ⊣ ⊢ | 99 | ⊶ ⊷ | ▶ | ▨ ⊞ ≡ Ω |
                          Styles ▾ | Format ▾ | ⤢ | ?]

How to find this page:

When you log into the [CNM website](#) you will automatically be directed to your personal dashboard. From your dashboard, the "Post a Job" tab is the third from the left below the welcome sign.

How much does it cost to post a job?

As a CNM member, you can post unlimited job postings for FREE. As a non-member, there is a cost of $150 per job posting. If you have an active CNM membership and it still shows a charge to post, please contact CNM and our staff would be happy to review your account and assist with the getting your job posted.

How do I edit, remove or renew a posting?

Currently, the only way to make any edits, updates, remove or renew positions is by a CNM staff member. We are looking at other options moving forward, but in the meantime, please contact CNM to notify us of any changes.

Job posting FAQ's:

- How long is my posting active for? Posts are active for 60 days.
- What fields are mandatory to be completed? Any field with an * is required to be completed.
- How long does it take for my post to be active? Please allow 24-48 hrs. for your job to be reviewed and posted.
- Can applicants apply directly with CNM? No - We do not have a database to store applications. Please direct applicants to your website or email to complete the applications process.
- Can I send my job posting to CNM to post? Yes – we would be happy to post on your behalf.
- Can only HR professionals post roles? No – anyone within your organization can post a job.
- Can members post for volunteers or interns? No – we ask that all positions posted are paid roles.
- Can my position be featured or placed at the top of the list? No – positions are posted in the order that they are received.
- What is the fastest way to renew my membership and have my role posted? We recommend renewing online with a credit card. The transaction is instant, and the posting can be uploaded immediately.

How to find this page:

When you log into the CNM website you will automatically be directed to your personal dashboard. Above the dashboard, you will see several tabs at the top left side of the screen. "Events" is the fifth tab from the left – click on the tab and then click "event calendar" from the drop-down menu. On the left side of the screen, you can filter the events to specify a topic or date. To view all upcoming events, leave the filters open and see all upcoming events.

What types of workshops does CNM offer?

Is increased professional development one of your goals this year? CNM offers a variety of workshops for all nonprofit experiences from introductory courses to advanced levels. On average, CNM offers each workshop 1-2 times a year to accommodate members various schedule needs.

For a deeper more in-depth understanding, CNM certificates are offered in five key areas: board fundamentals, collective impact, volunteer program management, revenue development and nonprofit leadership. Click here to view our certificate FAQ's for more information.

What if I require special accommodations?

CNM welcomes all members of the community. If you require special assistance or have a specific request, please reach out to CNM at training@cnm.org. For full day workshops, we typically offer at catered lunch at no additional cost. Please be sure to *complete dietary preferences or food allergies on your registration form* when you enroll.

Can I register for more than 1 person?

No – currently we do not have a "shopping cart" option to add multiple participants or workshops. Each workshop / participant must be registered individually.

What if I need to cancel?

Notice of cancellations must be received at least *three working days (72 hours)* before the event to receive a refund. No refunds will be given for late cancellations or no-shows. If you cannot attend, you an have the option to transfer your registration to another person if they have an account with CNM. We ask that you not cheat the system and only transfer a workshop registration to another CNM member. Please notify our staff if you would like to utilize this option.

Can I register and pay when I arrive?

No – to keep an accurate log of attending participants, payment is required at the time of registration. Please note, we do not accept payment plans currently.

Does CNM offer customized training?

Yes! We would work with your organization and facilitator to customize the content to meet your organizations specific needs. The facilitator would present at your facility/location and ensure your vision on the materials was implemented. Customized training can be more cost effective than registering multiple staff members for one pre-scheduled workshop depending on how many participants are registered.

Will I receive a copy of the PowerPoint, materials and recording after the event?

It is a standard expectation that the facilitator will share the materials covered but not always the PowerPoint. The content of the presentation belongs to the facilitator as their intelligence and property. We only share recordings for participants who paid but were unable to attend last minute. Recordings expire 14 days after they are sent and are password protected.

Still have questions? Please email our education department at training@cnm.org for more info!

Your Registration Info

First Name *

Last Name *

Email Address *

Null Percent reflects that the organization does not have any match grants available

If you have a discount code, enter it here

Apply

You have a match grant available from Big Brothers Big Sisters of Middle TN for null percent.

Apply this Match Grant

Workshop Price *   ○ Member $130 / Nonmember $260 (Includes automatic member discount of: 50%) - $ 130.00

$ 0.00

Dietary Preferences for Full Day Workshops

What does it cost for a workshop?

Full Day In person: $130 members - $260 non-members ➜ Full Day Virtual: $100 members - $200 non-members

Half Day In Person: $75 members - $150 non-members ➜ Half Day Virtual: $50 members - $100 non-members

Prices for special events may vary. There is no additional cost for materials or meals if applicable. Payments can be made by credit card through our website/phone or by check. Please see the instructions on **page 21** to view and print a receipt of your online payment.

Are there discounts / scholarships for workshops?

Members from eligible organizations may apply MatchGrant Scholarships to help offset the cost of a workshop or certificate program. MatchGrant scholarships are structured to cover up to 75% of a workshop cost at a time, while funds last. To take advantage of your MatchGrant scholarships, visit the CNM workshop calendar and select the courses you would like to attend. If those courses are MatchGrant eligible, you can apply the funds at checkout to reduce your overall payment. For more information about eligibility, view MatchGrant Scholarships FAQs.

What are MatchGrants?

Organizations with a budget under $2 million can receive a discount of 50% off the workshop price for **up to 3** courses. Organizations with a budget under $500,000 receive a discount of 75% off the workshop price for **up to 3** courses. Anyone in your organization can use MatchGrant funds if their individual profile is affiliated with your organization. The limit of 3 courses applies to the organization and not to one member within the organization. *It is up to your organization to decide how to utilize these funds*. Please note that MatchGrant scholarships become available at the beginning of the calendar year, and they do not roll over to the next year. MatchGrant scholarships will no longer be available to any member once the collective fund is fully utilized.

How do I know if my organization is NOT eligible for MatchGrants?

If your organization is NOT eligible or has exhausted their MatchGrant funds for the year, there will be no discount reflected in the workshop price. The notification will say "**you have a MatchGrant available for null percent**" as shown in the image above. There is a MatchGrant cap of $260 which can be applied to CNM workshops.

MatchGrants are NOT eligible for personal, individual or business memberships. You MUST be a registered 501C3 nonprofit OR government organization and meet the requirements listed above to utilize these scholarships.

Your Registration Info

First Name *

Last Name *

Email Address *

You can see who sponsored your match grant

Click here if you want to apply match grant funds towards this registration

If you have a discount code, enter it here

Apply

This is the % discount available based on your 2020 operating budget

You have a match grant available from The Amelia Earhart Fund for 75 percent

Apply this Match Grant

Workshop Price *   ○ Member $75 / Nonmember $150 (Includes automatic member discount of: 50%) - $ 75.00

$ 0.00

✓ Continue

This is member pricing for the course BEFORE your match grant discount is applied

This is the non-member pricing (only CNM members are eligible for match grants)

Since you are logged in as a member, the member discount automatically applies

How do I know if my organization IS eligible for MatchGrants?

If your organization IS eligible for MatchGrants and has scholarship funds available, the discount amount (50% or 75%) will be reflected in the workshop price. Since you are NOT required to use MatchGrant discounts – a button will appear (as shown above) that says, "Apply this Match Grant". If you want to utilize this discount, it MUST be applied when you register for a workshop. CNM cannot offer refunds after the payment has been processed. For more information on Match Grant availability – see **page 23.**

Your Registration Info

First Name *

Last Name *

Email Address *

If you have a discount code, enter it here

Apply

Workshop Price *   ◉ Member $75 / Nonmember $150 (Includes automatic member discount of: 50%) - $ 75.00

$ 18.75

Includes match grant discount of 75 %

This is the TOTAL price for the registration with the member discount AND the match grant discount applied

Payment Options

Payment Method   ◉ Credit Card ○ I will send payment by check.

Fill in all areas with an * that are required for payment

How will I know if a MatchGrant has been applied?

Once you have chosen to apply your MatchGrant, you will see the discounted price listed below the workshop price. It will also show the MatchGrant discount percentage applied. To finalize your registration, please complete all required payment sections marked with an *.

How to find this page?

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on "edit contact information" which listed under affiliations to the right of your name. This will open the pop-up window as shown in the above image. You should review your organizations information quarterly and update it as needed.

What is a Primary Member?

Primary members are designated to be the caretaker and manager of the organizations profile with CNM. They can update organization information, add/remove affiliates and help distribute CNM communications among their staff. A primary member should be an individual who has the time and resources to maintain the profile; often but not always they are the CEO, Human Resource Manager, Executive Assistant or Board President. We recommend each organization has 1-2 primary member contacts.

How to find this page?

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. This will open the pop-up window as shown in the above image. You should review your organizations information quarterly and update it as needed.

How to disable relationships – option 1:

1. Find the member whose affiliation you want to remove
2. Click the "disable" button on the far right of their name
3. If it gives you an error message – try option 2 listed below

How to disable relationships – option 2:

1. Click on the "relationships" tab
2. Click "view current relationships' button at the top
3. Click "edit" (at the far right of the contact you want to change) and then uncheck the box that says "enabled?" at the bottom of their profile. Click "save relationship".
4. Click the "disable" button on the far right of their name
5. If you disable someone in error, you can find them and re-enable them under "inactive relationships" at the bottom by clicking "edit" and checking the "enabled?" box.

Please note that affiliates with your organization can also be affiliated with other organizations at the same time. This typically occurs with board members, volunteers, temporary and contract employees. As a primary member, you can only update affiliations with **your** organization. If a new affiliate has left a previous organization and needs to be removed, please contact CNM and we would be happy to make the change.

How to find this page?

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. Click on the "relationships" tab at the top and then click the grey "add relationship" button on the left. This will open the pop-up window as shown in the above image. You should review your organizations information quarterly and update it as needed.
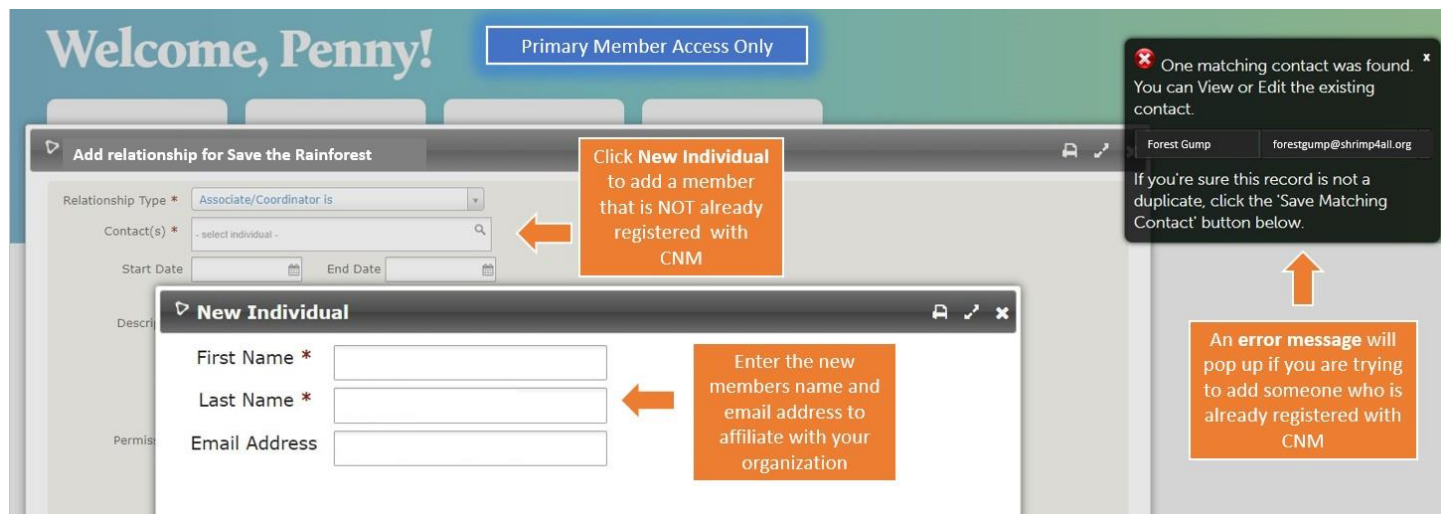
How to search for an existing affiliate?

Choose a relationship type: Our database has 23 job title selections you can choose from and may not be able to accommodate every job title within your organization. Our suggestion is to choose the one that flits the closest with the job title of your new affiliate or choosing "Association member is" as the default.

Search contacts: Start by searching our contact list to see if the affiliate already has an account with CNM. You can search by name or email address. Please note, their account may be under a different last name, preferred name / nickname or former email address. Before adding a new individual – be sure you have made several searches to reduce the chance of adding a duplicate account. An error message will pop up if you are trying to add someone who is already registered with CNM. Note: CNM can always merge accounts if a duplicate is made in error.

Add supplemental information: These options are not required but often can be helpful. You can add their start date, description (exact job title) and a description if desired (ex. contract employee, consultant or interim director).

Add permissions: We recommend that every affiliate (other than primary members) has the permission to "view only" information about the organization. Primary members should be the only members who have permission to "view and update" the organization and member affiliates information.

How to add a new individual?

If you cannot find an existing contact in our database, you can click on the "new individual" button in the contact(s) bar. This will open a pop up as shown above for you to enter their first name, last name and email address. The new affiliate **will not** be notified that they have been affiliated with your organization. Please inform the affiliate that they have been added and instruct them to follow the "reset password" process as described on **page 4.**

VIEW CHANGE LOG

🔹 Women and Girls in Biology

[≡ Actions] [✏ Edit]

| 📇 Summary | ≣ Activities 0 | ⟲ Relationships | Notes 1 | 🏷 Tags 0 | ▦ Codes Assigned 0 |
| 🏁 Codes Redeemed 0 | 🕘 Change Log 5 |

In the **Change Log** tab you can view who has made updates to your CNM profile and when the change was made

Change Log: Women and Girls in Biology

Changed By	Change Date
👤 Eugene Clark	February 11th, 2020 12:09 PM
👤 Ruth Dixon Turner	January 9th, 2020 4:19 PM
🔹 Eugene Clark	December 13th, 2019 3:23 AM
🔹 Ruth Dixon Turner	December 9th, 2019 8:54 PM
🔹 Eugene Clark	December 9th, 2019 7:04 PM

How to find this page?

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. Click on the "change log" tab at the top.

What information can I find on this page?

The change log is designed to help your organization identify when changes to your membership profile have been made and by whom. Currently, the change log is not able to be edited or deleted.

VIEW ACTIVITY LOG

🔹 Flowers for Families

[≡ Actions] [✏ Edit]

Primary Member Access Only

| 📇 Summary | ≣ Activities 0 | roups 0 | 📄 Notes 1 | 🏷 Tags 0 | ▦ Codes Assigned 0 |
| 🏁 Codes Redeemed 0 | 🕘 Cha |

In the **activities tab**, you can view or filter all activities within your organization

[+ New Activity ▾]

▾ Filter by Activity

Include	Exclude	Date	Status
- all activity type(s) - ▾	- no types excluded - ▾	- any - ▾	- any - ▾

Show [25 ▾] entries

First   Previous   Next

Last

How to find this page?

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. Click on the "activities" tab at the top.

What information can I find on this page?

Activities allows your organization to view the history of interactions between your organization and CNM. You can use Activities to track meetings, phone calls, when contributions are made, when people come to events, sign petitions, etc.

Flowers for Friends

In the **Contributions** tab you can view all payments your organization has made to CNM

Actions   Edit   Delete C

🖼 Summary   💳 Contributions 1   📇 Memberships 1   📅 Events 0   🗂 Cases 0   📧 Activities 15   🤝 Relationships 58   👥 Groups 0
📄 Notes 1   🏷 Tags 0   🔲 Codes Assigned 0   🔲 Codes Redeemed 1   🕘 Change Log   🔗 Match Grants

Contributions 1 | Recurring Contributions

Click Record Contribution to record a new contribution received from this contact. Click Submit Credit Card Contribution to process a new contribution on behalf of the contributor using their credit card.

Click either tab to record a contribution for your organization

⊕ Record Contribution (Check, Cash, EFT ...)   💳 Submit Credit Card Contribution

Total – $ 0.00   # Completed – 1   Avg – $ 0.00

⇕ Amount	⇕ Type	⇕ Source	▾ Received	⇕ Thank-you Sent	⇕ Status			
▸ $750.00	Member Dues	CNM Membership Membership: Offline signup (by Chelsea Hardin)	December 18th, 2019 7:57 PM		Completed	View	Edit	Delete

How to find this page?

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. Click the "contributions" tab at the top.

What information can I find on this page?

Throughout CiviCRM, the term contribution refers to any financial transaction or payment taking place in our database such as a donation, event fee payment, membership fee payment and in-kind contributions. Here you can view all contributions your organization has made to CNM since the database launched in December of 2019.

Can I submit a contribution / payment on this page?

Yes – you can also submit a membership renewal payment in your dashboard (see **page 6**) and a workshop fee in our events section (see **page 14**). To submit a contribution, follow the process below:

1. Click the grey "submit credit card contribution" – a pop up will appear
2. Select the applicable "financial type" from the dropdown menu (what the payment is for – can be recurring)
3. Click the "send receipt" box to be emailed a receipt
4. Enter the required credit card and billing information pertaining to the card you are using and click "save"

What if I do not see a contributions tab?

If there is not a contributions tab in your menu, your organization has not made a contribution since our database has been launched or a recent payment has not yet been recorded.

How do I find a receipt for a contribution?

Click the "view" link to the right of the transaction you want a receipt from. A pop-up will appear with details of the transaction – you can then click the print icon at the top right and print or save as a PDF. You can also hold down the CTRL and PRT SC keys on your keypad to take a screenshot and paste the image in a document to save.

VIEW GROUPS TAB

🏛 Nashville for Puerto Rico

[☰ Actions] [✏ Edit]

In the **Groups** tab – you can join groups within CNM

| 🖼 Summary | 📋 Activities 0 | 🔄 Relationships 261 | 👥 Groups 0 | 🗋 Notes 1 | 🏷 Tags 0 | 🔳 Codes Assigned 0 |

| 🔳 Codes Redeemed 0 | 🕐 Change Log 5 | ⚒ Match Grants |

ⓘ This contact does not currently belong to any groups.

+ Join a Group   [Add]

🔍

Administrators   ← Click groups you would like to join

Case Resources

CEOs of Current CNM Member Organizations

CEOs of unrenewed CNM member organizations

Expired CEO

Expired Member Orgs

Last Change by: Jessie Fulton (February 11th, 2020 12

How to find this page?

When you log into the [CNM website](#) you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. Click the "groups" tab at the top.

What are groups?

Groups are used for grouping organizations within CNM to be treated like a cohesive unit (ex. organizations that have a similar mission). CNM and primary members can manually add and remove organizations from various groups. CNM can then easily send communications to each person who is a member of specific groups without having to search the database. To join a group, select the "join a group" link and choose from the list of existing groups.

VIEW NOTES TAB

🏛 Preserve Nature For The Future

[☰ Actions] [✏ Edit]

| 🖼 Summary | 📋 Activities 0 | 🔄 Relationships 261 | 👥 Groups 0 | 🗋 Notes 1 | The **Notes Tab** shows all notes regarding your organization | Codes Assigned 0 |

| 🔳 Codes Redeemed 0 | 🕐 Change Log 5 | ⚒ Match Grants |

Click view to see all details of the note or click edit to make changes to the note

💬 Add Note ← Click Add Note to enter a new note

Show [10 ⌄] entries

Note		Subject	Date	Created By		Attachment(s)	
Merged Organization ID #3100 (Preserve Nature For The Future and Preserve Nature)	✏		November 4th, 2009	Preserve Nature For The Future			View Edit more ▸

Showing 1 to 1 of 1 entries

Previous [1] Next

How to find this page?

When you log into the [CNM website](#) you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your

organization to the right of your name. Click the "notes" tab at the top.

What are notes?

The Notes tab is a place where both CNM and your organization can record random bits of information about your membership. Since this information is unstructured, you should be careful about using the Notes tab, unless you know that you or other members will remember to look at the tab. To add a note, click the grey "add note" button and type any information you want to have saved. You can specify "Author Only" privacy for a note. This means that only the person who wrote the note or a primary member can view or edit it.

Trees for Tennessee

≡ Actions   ✎ Edit

| 🖼 Summary | ▤ Activities 0 | 🔄 Relationships 261 | 👥 Groups 0 | 🗋 Notes 1 | 🏷 Tags 0 | ▦ Codes Assigned 0 |

| ▦ Codes Redeemed 0 | 🕘 Change Log 5 | ⛏ Match Grants |

⬅ If the Match Grant tab is empty – no one In your organization has used Match Grants for the current calendar year

Manage Match Grant Usage manually here

ⓘ None found.

⊕ Add Match Grant Use   ✕ Done

Click **Add Match Grant Use** to record a new Match Grant use

When you log into the CNM website you will automatically be directed to your personal dashboard. From your dashboard, click on the name of your organization to the right of your name. Click the "match grants" tab at the top.

What if there not any Match Grant use listed?

This could be one of two reasons. 1) Your organization has a budget over $2,000,000 and is not eligible for Match Grants or 2) Your organization has not used any Match Grant's for the current use year. See **page 15** for more information about eligibility or visit our website to view MatchGrant Scholarships FAQs.

Pride in TN

≡ Actions   ✎ Edit

| 🖼 Summary | ▤ Activities 0 | 🔄 Relationships 10 | 👥 Groups 0 | 🗋 Notes 1 | 🏷 Tags 0 | ▦ Codes Assigned 0 |

| ▦ Codes Redeemed 0 | 🕘 Change Log 6 | ⛏ Match Grants |

Manage Match Grant Usage manually here

In the **Match Grant** tab – you can view who has used Match Grant funds

Primary Member Access Only

⊕ Add Match Grant Use

Match Grant ▲	Organization ▲	Individual ▲	Status ▲	
Frist Foundation	Pride in TN	Sylvia Rivera	Used	Edit Delete
Frist Foundation	Pride in TN	Karl Heinrich Ulrichs	Used	Edit Delete
Frist Foundation	Pride in TN	Sylvia Rivera	Used	Edit Delete

How do I know if we have Match Grants available?

Anyone in your organization can use MatchGrant funds if their individual profile is affiliated with your organization. There is a limit of 3 discounted courses per organization – this applies to the organization and not to one member within the organization. *It is up to your organization to decide how to utilize these funds*. MatchGrant scholarships will no longer be available to any member once the collective fund is fully utilized, so we encourage you to register for courses and utilize your funds early in the calendar year.

Under the Match Grants tab, you can view how many Match Grants were used to determine if there is availability for more to be used. The image above shows that all three of the eligible grants have been used for the current year. If the status says "hold" than the funds have already be pre-selected for a workshop and the application has not been completed.