

CMS News

GOOD NEWS FOR THE END-OF-YEAR

So many things to do this time of year! Extra bulletins to prepare, contributor statements to mail, and bonus checks to be cut... and it all means extra work for church staff. But the good news is that you can continue to enter December contributions, attendance, bills, and deposits in January – before you complete your end-of-year process! This year, simply print your End-of-Year Checklist directly from your CMS Module. Click Reports > End-of-Year Checklist, and follow the steps to wrap up EOY details in each particular module.

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CMS FUND ACCOUNTING UPDATE 4.20

December is that time of year when you receive many special gifts from family and friends – including CMS! We are proud to offer you the many new features and changes in our Fund Accounting 4.20 Update:

- Use new backup options – including Simple, Custom, and FTP Backup
- Click or move in the Bill window to a name on the vendor's list and vendor notes will display at the bottom of the window, identifying vendors with same name by reason or address when entering bills
- Click the Bank Account Balance button on the

Bills window to display the running bank account balance, displaying a list of transactions, unpaid bills, and future transactions

- Assign the next available check number when printing a check
- Reprint report changes with the new All Reports selection that remains open after printing
- Print employee timecards with the new Blank Timecard report
- View the new check format with check on top and three-to-a-page



- Reprint financial statements for prior accounting months
- Improved and reformatted Statement of Cash Flow
- Insert calendar Year-to-Date automatically into box 7 for easier 1099 vendor reporting.

WEEDING OUT NON-CONTRIBUTOR'S ENVELOPES

Whether you're printing up labels for envelope boxes, or sending a direct mail file to your envelope company, you can save time and money by weeding out those non-contributor envelope numbers.

From the CMS Contribution System

- Click Reports > Custom List > New Report
- Assign the name "By Last Contribution Date" > click OK

- Starting from the Custom List Selection screen > click the down arrow at Sort/Group Info > choose Last Contrib Date
- Check the Print Group Headings and Totals checkbox
- Click Contrib/Pledge Selections > click the second diamond at Current or Prior Year Contributors > click OK
- Click Print.

This report will sort your contributors by the date of their last contribution, allowing you to easily delete envelope numbers. Be careful not to delete those new members who may not have contributed to the church yet!

DISASTER PLAN AND RECOVERY

Is your church prepared for the unthinkable?

During a construction project earlier this summer, a group of teens climbed a ladder in the middle of the night at Christ Church in Stoughton, WI and lit a bucket of tar on fire. The fire destroyed everything – church, school, and daycare.

“Is your church prepared for the unthinkable?”

Long-time CMS client and administrator-extraordinaire, Gloria Hayne, took her backup CD home just one week earlier. Within days, her insurance company replaced her office equipment, including her computer. CMS shipped her a new program CD and she was up and running in a week!

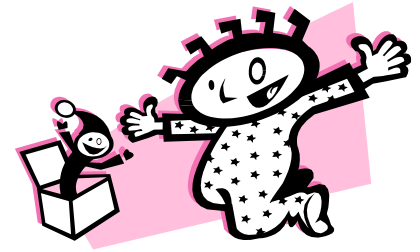
Don't let a crisis catch you unaware. Here are some important tips:

Establish a Regular Backup Schedule for Your Organization

- Backup your CMS database and other important network data (from CMS People Products or Fund Accounting, click > File > Backup).
- Store one backup every week in an *offsite location*, such as CMS's secure FTP server, an external drive, or a CD. Use our regular FTP backup and CMS can send your valuable church data to you when you need it.
- Check regularly to make sure your backup is performing properly.

Store Important Information in an Offsite Location

- Store a copy of bank information, including name, account, and contact numbers in an *offsite location*.



Here are some tips that may just save your sanity in a crisis!

- Store a copy of insurance information, including name, policy, and contact numbers in an *offsite location*.
- Backup your CMS database every week and store it in an *offsite location* (see above).
- Create a “Disaster Plan” phone tree, and make sure you are not the only one who knows where everything is!

No one can prevent a disaster, but with a little bit of preparation, you can minimize loss and recovery time!

CMS TELE-TRAINING

Register today for one of our convenient tele-training classes, or arrange for a classroom trainer to come right to your location. For cost and date information, please visit www.churchmanagementsolutions.com/training.htm or email us at training@ChurchManagementSolutions.com.

Membership Basics—Membership Capabilities, Overview and Navigation, Household and Person Data Tables and Data Entry, Annual Archive, Update Process, Simple Backup and Restore

Membership Reporting Tools—Basic Labels, Event Reporting, Membership Statistics, Custom Reporting List/Checklist, Simple Merge Files

Working with Membership Groups—Activities, Setup Classes, Sunday School, Speed Update, and Standard Reports

Membership Communication Tools—Email, Letter/Mailers, Mail Merge with *Word*, Directories, Photographs

Contribution Basics—Fund Setup, Contribution Entry, Corrections, End-of-Quarter, Statements, End-of-Year

Pledge & Fund Raising Tools—Setup Pledge Drive, Entering/Tracking Pledges, Labels and Custom List, Merge Files and Electronic Funds Transfer.

Ledger & Payables Setup—Chart of Accounts Setup, Account and Vendor Maintenance

Ledger & Payables Transaction Entry—Bills, Deposits, Check Printing, Voiding Checks, Bank Reconciliation, End-of-Month Processing

Ledger & Payables Advanced Tools—Memorized Transactions, Contribution Transfer, Exporting to Excel

Payroll Setup & Processing—Employee Setup, Integration with L&P Setup, Preparation and Processing of Typical Payroll

Backup-Security-Network Management—Setting up Passwords (Staff/Volunteer), Backup to Remote Storage, Workstation Setup, Network Troubleshooting

WELCOME NEW CMS CLIENTS

ALABAMA

Kingdom Life Ministries, Talladega
Messiah Lutheran Church, Madison

ARKANSAS

The Tower of Power Gospel Ministry, Texarkana

ARIZONA

Westridge Lutheran Church, Phoenix

CALIFORNIA

First Immanuel Lutheran Church, San Jose
First Presbyterian Church, San Bernardino
Galatian Community Church, Stockton
Holy Trinity Episcopal Church, San Diego
House of Prayer Peoples Ministry, Corona
Moorpark Evangelical Free Ch, Moorpark
Rancho Murieta Com Church, Rancho Murieta
Revolution Church, Long Beach
River of Life, Pine Grove

FLORIDA

Christ Community Church, Daytona Beach
First Baptist Church, Pointciana

GEORGIA

New Covenant Church of Atlanta, Atlanta
Restoration Ministries, Augusta
Temple of the Higher Call, Loganville

IOWA

Paul VI (Des Moines Parish), Creston
Shelby County Catholic School, Harlan
SS Peter and Paul, Atlantic
St Malachy School, Creston
St Paul UMC, LaPorte City
St Ambrose Cathedral, Des Moines
St Boniface Catholic Church, Waukee
St Elizabeth Seton Parish, Carlisle
St Joseph Catholic Church, Des Moines
St Mary of Nazareth, Des Moines
St Mary-Holy Cross Parish, Elkhart
St Mary-Mission Parish, Anita
St Pius X, Urbandale
The Hola Center, Des Moines

ILLINOIS

First United Methodist, Downers Grove
Hazel Crest Assembly, Hazel Crest
Trinidad Lutheran Church, Chicago

INDIANA

Vineyard Community Church, Mishawaka

KANSAS

Lutheran Church of Our Savior, Kansas City

KENTUCKY

Leesburg Christian Church, Cynthiana

LOUISIANA

St Jane de Chantal, Abita Springs
The First Little Rock Baptist Ch, Baton Rouge

MARYLAND

Kings Way International, Greenbelt
Shiloh AME Church, Baltimore

MICHIGAN

First Presbyterian Church, Gaylord
First Presbyterian Church, Tecumseh
Grace Point Evangelical Free Ch, Adrian
Springs Alliance Church, Grand Rapids
St John AME, River Rouge

MINNESOTA

AMOS EFCA Church Plant, Minneapolis
Asbury UMC, Minneapolis
Chester Park UMC, Duluth
Christ the King Lutheran, Hutchinson
Duluth EFCA Church Plant, Duluth
Edina EFCA Church Plant, Edina
First UMC, Lindstrom
Forest Hills UMC, Forest Lake
Granite Falls UCC, Granite Falls
Hope Tabernacle EFCA CP, Brooklyn Park
Immanuel Lutheran Church, Mora
Lamson Evangelical Free Church, Dassel
Northbrook Community Fellowship, North Branch
St Edwards Episcopal Church, Wayzata
St Joseph, New Hope
St Michael Parish, Madison
The Well Covenant Church, Plymouth
Transforming Ministry, Minneapolis
Triumph Lutheran Brethren Church, Moorhead
Victory Vineyard Church, Burnsville
Wabasha EFCA Church Plant, Wabasha
White Bear Lake UCC, Mahtomedi
Willmar Hispanic, Willmar

MISSOURI

Beyond Housing/NHS, St Louis

MISSISSIPPI

First Parish Church Unitarian, Fitchburg
Word of Faith Christian Center, Yazoo City

MONTANA

Roundup American Baptist Church, Roundup

NORTH CAROLINA

Presbyterian Community of Joy, Colfax

NORTH DAKOTA

Our Lady of Perpetual Help, Hillsboro



St Mary's Catholic Church, Park River

NEW JERSEY

Christ Episcopal Church, Riverton
Crossroads Community Church, Hillsborough
St Gregory's Episcopal Church, Parsippany
St Luke's Episcopal Church, Montclair
UMC Church of Madison, Madison

NEW MEXICO

Aztec Presbyterian Church, Aztec

NEW YORK

Christian Faith Power Center, Staten Island
Durham A.M.E., Bay Shore
First Baptist Church Rochester, Rochester
First Presbyterian Church, Trumansburg
Mt. Olivet Baptist Church, Peekskill
The Church at Shawnee Landing, North Tona-wanda

OHIO

Poastown First Church of God, Middletown
St Patrick Historic Parish, Toledo

OKLAHOMA

First Presbyterian Church, Duncan
First Presbyterian Church, Midwest City

OREGON

Black Sheep Studios LLC, Hood River

PENNSYLVANIA

St Paul Lutheran Church, Monessen

SOUTH DAKOTA

Westminster Presbyterian, Sioux Falls

TEXAS

Praise Temple ChriSt Fellowship, Rowlett
Second Missionary Baptist, Waco

VIRGINIA

Focus Ministries Christian Outreach, Bealeton
St Timothy Lutheran, Norfolk

WASHINGTON

Naselle Evangelical Lutheran Church, Naselle

WISCONSIN

First Baptist Church of Hudson, Hudson
Stony Hills Presbyterian Church, Germantown
Sugar River UMC, Madison

"We wish to welcome all of our new clients who joined the CMS family in 2005!"



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END-OF-YEAR TIPS

Q. I'm dreading the New Year. How will I ever get those end-of-year contribution statements out to our members on time? Can you help?

A. Don't panic! Your question is common this time of year, and your software has tools to help you validate your records and send those statements out in time for tax season. CMS contributor statements were specifically designed to make the year-end process easier for your office staff, and they meet IRS requirements as well. I've listed a few year-end survival tips below, but your best bet is to print our complete step-by-step End-of-Year Checklist from the Report Menu.

5 Tips for Year-End Survival:

1. Print your Envelope Number Listing > Address and Envelope Number report to find and fix blank name or address fields in your family data before sending out any statements. This quick audit can save you time and money.
2. Click your Options > Fund Setup in Contribution and examine your funds. Are fund names clear and accurate?
3. Post all tax-deductible contributions received before December 31, 2005 with the correct donation date – only postings with 2005 dates will be included on 2005 contribution statements.

4. Create your statements. Click Reports > Statements.
5. Double-check your Statement Message and make sure you have included the required IRS line, "Only intangible religious benefits were provided".
6. Click the Print Funds button and double-check the funds you've chosen to print.
7. Click the Additional button and verify who will receive a statement.
8. Print statements.
9. Create both an Archive (click >File > Utilities > Archive CMS) and a backup of your data and store it in a secure offsite location with your other financial data for 2005.

Q. It's tough to keep families updated with home and email address changes. Is there a better way to manage this type of audit?

A. While you're sending those end-of-year contribution statements, why not tuck a *Census Form*, along with a short letter requesting updates, into the same envelope? These registration forms print with the existing family and member data from your database, making it easy for members to spot and correct any inaccuracies. (From CMS Membership, click Reports > Household > Record).

