

# CMS News

## Entering Next Year's Budget... don't wait, procrastinate today

We know you're out there. Those people who hate working on Next Year's Budget. You'll put it off, and put it off, until next thing you know it's February!

But there are a few tools in CMS Ledger & Payables that will make Budget entry, dare we say, bearable?!?! Pleasant?? Enjoyable? (okay, now we're pushing it!)

From your CMS Ledger & Payables system, click **Reports | Budget/History | Budget Worksheet**.

You can print this handy little worksheet either by Account Detail or Summary, choose from five different sort levels, and select the report columns of your choice (Actuals for last year, this year, annual budget, line for revisions, etc).

You can choose to insert the same figures as Current Year's Budget or Current Year's Actual. You can even insert a global change by a percentage!

You can even click the Edit Months button and pinpoint your budget figures by entering in a specific budget per month for the account!

If you really need to dig in and play with the numbers, you can export your Budget into Excel (**File | Utilities | Accounts Export**), play with the numbers, and import it back into CMS (**File | Utilities | Budget Import**)!

Once you have your Next Year's budget entered, click **Reports | Budget/History | Monthly Budget and History**. The Monthly Budget and History report will allow you to compare the Actuals with the Budgeted number for each account per month for two full years. This may help you find patterns and trend that you can account for in the following year's budget!

The system will automatically transfer the Next Year's budget to the Current Year's budget for you!

So no more procrastination! You'll feel better getting it off your desk... today!

Account Code	Shortcode	Description	Next Year Budget
15-10-01-01	400	Envelope - Adults	25,511.00 per month
15-10-01-02	401	Envelope Offering - Youth	750.00 per month
15-10-01-03	402	Plate Offering	1,201.25 per month
15-10-01-01	410	Special Offer	3,100.00 per month
15-10-01-02	411	Visitor Contributions	2,072.50 per month
15-10-01-03	412	Interest - Savings	202.75 per month
12-20-01-01	420	Em. Offerings - Building Fund	4,847.00 per month
12-20-01-02	421	Room & Hall Rental	1,200.00 per month
12-20-01-03	422	Bldg. Endowment Earnings	0.00 per month
15-20-01-01	440	Child Care Fees	9,000.00 per month
15-20-01-02	441	Registration & Supplies Fee	1,421.10 per month

Next Year's Budget Entry

When you print, you'll be able to distribute the budget to the correct department head based on Fund and Program, analyze the numbers, and allocate funds as needed.

Once you have your manual budget worked out, entering is a breeze! From the CMS Ledger Main Menu, click **Process | Budget Entry | Next Year**.

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## Get Help Online... find answers anytime!

Okay, admit it! Sometimes you come to work very early, or stay very late, to just get some work done! Just to avoid the constant phone interruptions or the office chit-chatting!

But inevitably, that's the time you need a little help in CMS!

Now you can get help anytime of the day or night by going to the CMS Online Help at [www.ChurchManagementSolutions.com](http://www.ChurchManagementSolutions.com)

Click the Support Link and choose the CMS Online Help link on the right.

Or, after you've installed your CMS People Products 6.30 update, or CMS Fund Accounting 4.30 update, click the CMS Online Help link under the Help menu.

There are answers to many common, and not so common questions! You can perform a keyword search to find the perfect solution to your problem.

Then you can read and print out easy to use, step-by-step instructions for those answers!

You can request your username and password right online and get started getting those questions answered.... before the phone starts ringing again!

## Email your Bulletin... it saves more than just postage!

Every week you sit at your computer and type up the church bulletin, then print out hundreds of copies, then come into CMS and print up labels, then be sure that you have enough coffee and donuts for the volunteers who come to fold and label them, and then you have to run to the Post Office to drop them off and write out a nice big check for the postage.

There is an easier way...

### Email your bulletin!

Think about the time and money you'll save!  
No more purchasing cases of labels or paper,

or replacing that toner cartridge on your printer or copier every month, and of course.... the POSTAGE savings will be huge!

You may still have to come up with the Krispie Kreme cash, but you can get those volunteers to work on something else in exchange for their weekly sugar rush!

Now I know what you're already thinking, you'll never be able to get everyone's email address, or many people in the church don't even have a computer, so you're still going to have to print some out.

"Some." That's the key.

Even if you only received half of the member's email addresses, that still means your cutting your printing and mailing costs in half.

And as you continue to email your bulletin, more and more people will purchase their very first computer and actually get an email address, and more and more people will give you their existing email address!

Eventually, you may get to the point where you've only got a small portion of your bulletins to be "snail mailed."

But if you start now, you'll start saving now, and the savings will only grow!

"Anyone can open it, it looks perfect, and no one can make changes to it"

... but how do I Email my bulletin?

"Great idea, CMS, but how in the world do I pull this off?"

Easy. Do exactly what you're doing now to prepare the bulletin in the computer... with one small change.

Instead of sending your bulletin to the printer, send it to a PDF printer.

Go to [www.downloads.com](http://www.downloads.com) and type PDF995 in the Search box and click Go. Follow the instructions on screen to download this handy little printer driver that will take anything you can print and convert it into a PDF file.

"A what?"

A PDF (Portable Document File) is a universal file format that preserves the fonts, formatting, colors and graphics of your document, regardless of what software you used to create it. It will open with the free Adobe Acrobat Reader application on any PC or Mac computer.

"Huh?"

Anyone can open it, it looks perfect, and no one can make changes.

"Oh, okay."

Once you have your bulletin PDFed, come into CMS Membership and click Labels/Letter-Mailer and choose the same exact labels you were using for your bulletins before.

But instead of clicking Print, click the Email/Mailing button!

This will start an Email/Mailing Wizard that will walk you through the steps to create an email for anyone selected for this set of labels who actually has an email address.

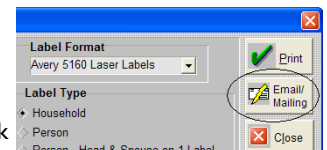
For those people who don't have an email address, they'll get their usual label at the end of the process!

### UPLOADING BULLETIN TO CCO/POL

Once your bulletin has been converted to a PDF file, you can also upload it to your free\* [ParishesOnline.com](http://ParishesOnline.com) (for our Catholic clients) or [ChristianChurchesOnline.com](http://ChristianChurchesOnline.com) web site provided by CMS!

To turn on the Bulletin's page, log into your CCO/POL Web Site and click Admin Services. Click the Configure Navigation Bar button. Click the checkbox at Bulletin and click Save Row, then Submit.

Click the Bulletin link and click Edit to upload your bulletins. Remember, you will not be able to include spaces in your file name when you upload to CCO/POL.



Instead of clicking Print, click the Email/Mailing button!



At CMS, we practice what we preach! All future CMS News will come via email!

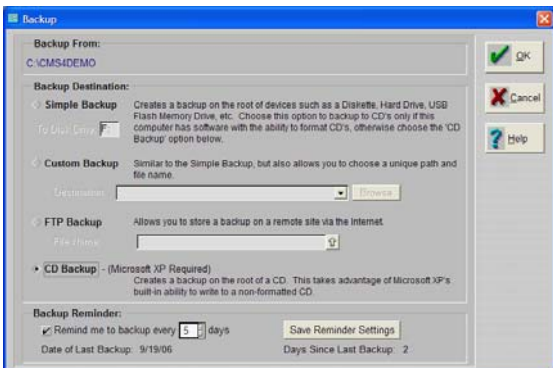
To be sure you receive your next CMS News, go to [www.ChurchManagementSolutions.com](http://www.ChurchManagementSolutions.com) and click News and Sign-Up, and your next newsletter will come via e-mail!

# Updates... Updates... Updates

CMS will be shipping new updates for both the CMS People Products and CMS Fund Accounting Systems in upcoming weeks.

Some of the changes you can expect to see in **both** the People Products and Fund Accounting updates are improvements to the Backup and Restore feature...

- Added an Optional backup reminder with date of last backup.
- The FTP Process will now show the transfer progress, use 512 bit encryption and passive FTP, which means that it should function much better under most firewalls.
- Added an XP Style CD Backup



**New and Improved Backup and Restore capabilities!**

## End of Year.... it's coming!!!

With everything you have on your plate at the end of the year, why stress over your CMS System!

Just remember...

You can continue to enter contributions in the next contribution year without running end of year... you just can't post them.

Option that doesn't require formatting the CD.

End of Contribution Year and End of Fiscal Year are now "smart"! They will...

- Recommend performing an archive if one doesn't exist.
- Default the Pledge EOY process for Pledgable Funds in Contributions.
- Will not allow you to run EOY in the Archive.
- Default the Archive to the same drive as the working directory.
- Allow you to create shortcut only to the icon from the workstation.

You can print an End of Year

### CMS People Products ver 6.30

You can now use a Bar Code Scanner to Enter Contributions in CMS to improve your accuracy and increase your speed!

Plus lots of changes and improvements in data entry and reporting.

See the Readme.txt file for a full listing of changes.

### CMS Fund Accounting ver 4.30

We've added a new feature in the CMS Payroll System that will automatically fill out your 941 report in a PDF file format!

Print out the Readme.txt to view the full listing of changes in the 4.30 update!

Checklist that will give you a step-by-step listing of everything you need to do for that system!

From any CMS Product, click **Reports | End of Year Checklist | Print**.

You can print this out at any time and take a look at what you'll need to do.

So enjoy the holidays, and don't stress over your CMS!

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"You can now use a  
Bar Code Scanner to  
Enter Contributions  
in CMS"

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**Enjoy the holidays, and don't stress over CMS!**



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## Pension Protection Act of 2006... Changes in CMS

On August 17, 2006, the President signed into law the Pension Protection Act of 2006, which provides to strengthen pension funds and provides a myriad of other tax changes.

The Pension Protection Act allows the 70 1/2 year old + taxpayer to contribute directly from their IRA account. The contributor may donate up to \$100,000 per year from their IRA. The distribution will be tax-free and the contributor will avoid the penalty on early withdrawal. Since the distribution will not be included in taxable income, individuals will not be able to claim a tax deduction for the charitable contribution.

You can enter these IRA Transfers in your CMS System, acknowledging the receipt of the contribution, lowering the amount owed on the contributor's pledge, but show that contribution as "non-deductible" to conform with the new law!

From CMS Contribution, click **Options | Contribution Types Setup | Add** and add the type **P** with a Description **IRA Transfer - PPA 2006** and click OK. Click the checkbox at Description required.

When you receive notice of the IRA transfer (remember, the distribution must pass directly from the IRA to the church), click **Enter Contributions** and enter the date of the transfer as the Batch Date.

Bring up the contributor in the Contribution Entry display and enter the amount of the transfer. Change the Contribution type from C to **P** (enter) and a Special Contributions window will display. Enter the amount of the contribution in the Non-Deductible Amount field (the same as the Contributed Amount). Enter a complete description of the transfer in the Description field. Click OK.

Print the Edit List and Post the batch as usual.

When you print your contributor's statement, the system will acknowledge the receipt of the contribution and adjust the pledge balance accordingly. But the Total of all contributions will display the non-deductible amount and reduce the total by that amount!

**CMS Contribution System helps you track IRA Transfers that qualify for the Pension Protection Act of 2006.**