# Table of Contents

Attendance 1
Attendance: Ministries 2
Attendance: Worship Services 3
Backup Data 4
Change List 4
Custom Reports: Search Results 4
Custom Reports: Select Criteria 5
Custom Reports: Select Criteria Examples 6
Custom Reports: Select Report 7
Custom Reports: Attendance 8
Custom Reports: Donations 8
Custom Reports: Pledges 9
Donations 10
Event Participants 11
Events Search 12
Events: Add/Edit 13
Gift Search 13
Installation 14
Installation: Network 15
Main Menu 16
Microsoft Word Merge Files 16
Ministry Members 17

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<table>
<thead>
<tr>
<th>Category</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ministry Search</td>
<td>18</td>
</tr>
<tr>
<td>One Time Settings</td>
<td>19</td>
</tr>
<tr>
<td>Organization Perspective</td>
<td>20</td>
</tr>
<tr>
<td>People Information</td>
<td>21</td>
</tr>
<tr>
<td>People Search</td>
<td>22</td>
</tr>
<tr>
<td>People: Classes &amp; Events</td>
<td>23</td>
</tr>
<tr>
<td>People: Current Ministry Commitments</td>
<td>23</td>
</tr>
<tr>
<td>People: Miscellaneous Comments</td>
<td>24</td>
</tr>
<tr>
<td>People: Network and Evangelism Style</td>
<td>25</td>
</tr>
<tr>
<td>People: Personal Profile Report</td>
<td>26</td>
</tr>
<tr>
<td>People: SHAPE and Evangelism Style</td>
<td>27</td>
</tr>
<tr>
<td>People: Spiritual Milestones</td>
<td>28</td>
</tr>
<tr>
<td>Pledges</td>
<td>28</td>
</tr>
<tr>
<td>Prayer Requests/Comments</td>
<td>28</td>
</tr>
<tr>
<td>Print Reports</td>
<td>29</td>
</tr>
<tr>
<td>Print Reports: Standard Reports</td>
<td>29</td>
</tr>
<tr>
<td>Print Reports: Attendance</td>
<td>30</td>
</tr>
<tr>
<td>Print Reports: Congregation Growth</td>
<td>31</td>
</tr>
<tr>
<td>Print Reports: Custom Reports &amp; Mailing Labels</td>
<td>32</td>
</tr>
<tr>
<td>Print Reports: Donations &amp; Pledges</td>
<td>33</td>
</tr>
<tr>
<td>Print Reports: Ministry Activity</td>
<td>34</td>
</tr>
<tr>
<td>Print Reports: Ministry Profile</td>
<td>34</td>
</tr>
<tr>
<td>Print Reports: S.H.A.P.E. or Network</td>
<td>35</td>
</tr>
<tr>
<td>Topic</td>
<td>Page</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Print Reports: Weekly Reports</td>
<td>36</td>
</tr>
<tr>
<td>Print Reports: Weekly Reports TIPS</td>
<td>37</td>
</tr>
<tr>
<td>Report Writer</td>
<td>38</td>
</tr>
<tr>
<td>Security</td>
<td>38</td>
</tr>
<tr>
<td>Setup</td>
<td>39</td>
</tr>
<tr>
<td>Setup: Address &amp; Phone</td>
<td>40</td>
</tr>
<tr>
<td>Setup: Advertising Choices</td>
<td>40</td>
</tr>
<tr>
<td>Setup: Current Jobs</td>
<td>40</td>
</tr>
<tr>
<td>Setup: Designations</td>
<td>41</td>
</tr>
<tr>
<td>Setup: Edit Year-end Letter</td>
<td>41</td>
</tr>
<tr>
<td>Setup: Email Setup</td>
<td>42</td>
</tr>
<tr>
<td>Setup: Event Titles</td>
<td>43</td>
</tr>
<tr>
<td>Setup: Ministry Positions</td>
<td>44</td>
</tr>
<tr>
<td>Setup: One Time Custom Settings</td>
<td>44</td>
</tr>
<tr>
<td>Setup: Spiritual Milestones</td>
<td>45</td>
</tr>
<tr>
<td>Setup: Titles</td>
<td>45</td>
</tr>
<tr>
<td>Setup: Type of Donation</td>
<td>46</td>
</tr>
<tr>
<td>Setup: Welcome Card Requests &amp; Letters</td>
<td>46</td>
</tr>
<tr>
<td>Setup: Welcome Card Topics</td>
<td>47</td>
</tr>
<tr>
<td>Setup: Worship Service Names</td>
<td>47</td>
</tr>
<tr>
<td>Shortcut Keys</td>
<td>48</td>
</tr>
<tr>
<td>Technical Support</td>
<td>48</td>
</tr>
<tr>
<td>Welcome to CGS Software</td>
<td>49</td>
</tr>
</tbody>
</table>
1 Attendance

Attendance

There are three areas to record attendance
- Worship Service Attendance
- Ministry Attendance
- Event Attendance

There are two methods of recording Worship and Ministry Attendance
- By Individual Names
- By Group Totals

*Your church should choose one of the two methods of counting for Worship and for Ministry Attendance. You can choose to record Worship attendance by group totals and Ministry attendance by individuals or visa versa. You can choose to do both the same. You can record Worship attendance by group AND by individual and compare how many people are actually returning welcome cards or signing in. Attendance reports are produced for either individual or group count but not both totals on the same report. Simply produce two reports to compare the totals.*

Event Attendance:
Event Attendance is assumed from the Event sign-up sheet. After an Event has taken place, add “walk-in” Event participants who did not pre-register and delete registered participants who did not attend.

See Also:
Custom Reports: Attendance
2 Attendance: Ministries

Attendance: Ministries
Located at: Main Menu, Ministries, View Members and Record Attendance

Your church should choose one of the following methods of recording ministry attendance, but not both. Choose either Individual or Group attendance

To record Individual Ministry Attendance:
At the Main Menu, select Ministries, click on a ministry to select it and click View Members and Record Attendance, Select Individual

Click on the Set Attendance Date to add an attendance date
Select the attendance date in the drop-down list
Single-click on ministry member names to record attendance
Double-click on names in Attendance List to remove from attendance list

To record Group Ministry Attendance totals:
At the Main Menu, select Ministries, click on a ministry to select it and click View Members and Record Attendance, Select Group Total

Select the appropriate Ministry, record the date and the group total count.
For efficient data entry, multiple group attendance records can be entered here. However, when you return to this screen after completing the data entry, only the records for the currently selected Ministry will display.

To Track Ministry Attendance by Individual
To record individual ministry attendance:
• At the Main Menu
• Select Ministries
• Select the ministry to take attendance for
• At the Ministry Members screen, select the Attendance by Individuals button
• Select the Set Attendance Dates button and type in the current Attendance Date (You may wish to fill in all the possible attendance dates the semester or year so you can skip this step in the future.)
• Select the date you wish to take attendance for
• Select Worship Service
• Select members from the drop down box, then add selected names

To Track Ministry Attendance by Group Totals
To record ministry attendance by group totals:
• At the Main Menu
• Select Ministries
• Select the ministry to take attendance for
• At the Ministry Members screen, select the Attendance by Group Totals button

See Also:
Custom Reports: Attendance
3 Attendance: Worship Services

Attendance: Worship Services

Individual Attendance Located at: Main Menu, Welcome Cards & People Information
Group Total Count Located at: Main Menu, Attendance, Enter Worship Service Totals

Your church should choose one of the two methods of counting for Worship Service Attendance. You can record Worship attendance by group AND by individual and compare how many people are actually returning welcome cards or signing in. Attendance reports are produced for either individual or group count but not both totals on the same report. Simply produce two reports to compare the totals.

To record Individual Attendance at a Worship Service:
• At the People Search Screen
• In the Individual Attendance column, select the name of the worship service for each person in attendance for current Sunday
• To record past attendance history, change the Current Worship Date at the Main Menu first
  Then go to the People Search Screen and record individual attendance

To record Group Worship Totals:
• At the Attendance Screen
• Select Enter Worship Service Totals
• Enter the Attendance Date
• Enter the Worship Service Name/Time
• Enter the Total Count

Taking Attendance
There are two ways to take attendance using CGS: by individual and by group totals. We recommend you pick one method of counting for consistency in reporting.

You may track attendance for Worship Services and for Ministries. Since Events are typically a one-time occurrence, the sign-up sheet information provides an accurate history of who attended the event.

To Track Worship Service Totals by Individual
You can do attendance for multi services.
To record individual worship service attendance:
• Select Worship Service from the drop down box on top
• Locate the individual at the Search for People screen.
• Use the Individual Attendance drop-down list to select the appropriate service time

To setup the Worship Service times:
• At the Main Menu
• Select Setup
• Select the General Settings tab
• Select Worship Service Names
• Fill in the worship service times, set the order you want the times displayed in the drop-down list, and check the visible checkbox.

To correct individual worship attendance for a previous week:
• Change the Current Worship Date at the Main Menu
• Change the Individual Attendance worship service information.
• Don’t forget to change the Current Worship Date back to the current week when finished.

To Track Worship Service Attendance By Service Totals
• At the Main Menu
• Select Attendance
• Select Enter Worship Service Totals

To setup the Worship Service times:
• At the Main Menu
• Select Setup
• Select the General Settings tab
• Select Worship Service Names
• Fill in the worship service times, set the order you want the times displayed in the drop-down list, and check the visible checkbox.

See Also:
Setup: Worship Service Names
Custom Reports: Attendance
4 Backup Data

To Backup Church Growth Software Data:

- Go to Start, Programs, Church Growth Software. Select Repair Compact and Backup program. Logon to the program and you have three selections.

  1. Backup - Repair Compact Backup (You will also have an icon to Check Last Backup Date)
  2. Restore - Restore Data and Restore Program
  3. Setup - Backup Path

- 

5 Change List

Change List

Located at: People Information screen, SHAPE or Network and Evangelism Style button, any Change button

Shortcuts:
Double-click to add and remove items from list

Customizing the Selection Items Lists:
Click on the Add to List button
Use the Add and Delete buttons to customize the list

6 Custom Reports: Search Results

Custom Reports: Search Results

The list of people does NOT include duplicate names. For example if you asked for all First time visitors from 1/1/05 thru 1/31/05 and all Second time visitors from 1/1/05 thru 1/31/05 if someone came both times, their name would only be listed once.

- View People Information
  - To edit a name’s People Information: Single click on a name, then click View People Information

- Select Report
  - To choose a report: click Select Report
Custom Reports: Select Criteria

Using the Topic, Date Ranges, Age, and PrintMe tabs, you can select any combination of criteria to run a report.

NETWORK VERSIONS OF CGS: Almost all the custom reports are run locally on each individual PC. This means multiple users can be creating unique custom reports and not interfere with each other’s work. THE EXCEPTION to this rule is the PrintMe report option. To use the PrintMe option, you must check individual people at the People Search screen. This information is shared information so no matter what user checks the PrintMe check box, it is the same for all users and all custom reports.

CAUTION!!!!!!! Don’t use too many criteria at once or you will not get accurate lists. You can accurately pick one of any and every criteria. You can also pick the same thing as many times as you want and get accurate results (like 10 different ministries). However, if you want to pick 3 of the same thing and 1 of this and 1 of that – the list WILL NOT be accurate.

HOW CUSTOM REPORTS CRITERIA WORK:
When you select more than one criteria, the resulting people list include only people who appear in BOTH lists. However, when it’s logical to be able to choose AND or OR combinations, the appropriate buttons appear. You are then able to choose AND or OR to build your own specific lists.

View Examples

- **Topic:**
  1) select a topic radio button
  2) select item from drop-down list
  3) click on **Add Topic** button to add to **Chosen Criteria** list

- **Date Ranges**
  1) select a date range criteria radio button
  2) select item from drop-down list (if you selected Spiritual Milestones)
  3) fill in date range
  4) click on **Add Date** button to add to **Chosen Criteria** list

- **Age**
  1) select age group OR fill in age ranges in the From and To fields
  2) click on **Add Age** button to add to **Chosen Criteria** list

- **Print Me**
  At the People Search screen, the PrintMe checkbox is available for picking any person or group of people to print a custom report. These names CAN BE combined with any other custom report criteria.
  To clear all of the PrintMe checkboxes, click the Clear all PrintMe checkboxes button.

- **Use Saved Criteria drop-down list**
  The items listed in the Chosen Criteria list box can be saved for future use. Select an item from the Saved Criteria drop-down list to use a previously saved criteria list.

- **Chosen Criteria list**
  List of currently selected report criteria
  Remove button: select an item in the Chosen Criteria list then click Remove to delete item from the list
  Clear All button: click to clear all selections from the Chosen Criteria list

- **Run Query button**
  Click to run the current Chosen Criteria list
  This button takes you to the next step: Search Results

- **Save Criteria button**
  Click to save the current Chosen Criteria list for future list. The name will appear in the Use Saved Criteria list for future use.

- **Delete Criteria button**
  Click to delete the currently selected criteria. This button is only available when a saved criteria is currently in use.

- **Run Batch button**
  Use this feature to run 2 or more saved criteria at one time.
8 Custom Reports: Select Criteria Examples

Custom Reports: Select Criteria Examples
When you select an event and a ministry, the resulting group of people are participating in BOTH the event and the ministry.

When you select Visit 1 between 1/1/14 and 7/1/14 and Visit 2 between 1/1/14 and 7/1/14 you have the choice of OR or AND.
Custom Reports: Select Report

You may choose to print any of the following reports for:
- All Individuals – including children listed in the result list
- Adult Individuals and Couples. Couples will only be printed if BOTH people appeared in the search results list. Children appearing in the result list are NOT included in this option.

Custom Report Types:
- Mailing Labels
  - In order by Zip Code
- List
  - Alphabetical list of names, phone numbers and addresses
  - Single-click on this report title to view a title field.
  - Type in the title
  - Click on the Print button to preview and print the report
- Print Report Cover Sheet
  - Prints the total count of people and the search criteria used
- Print Postal Report
  - This report subtotals by 3-digit zipcode prefix to assist in bulk mailings
- Send Letters in Word
  - Use this option to create a file called C:\My Documents\CGSList.DOC
  - Then open Microsoft Word and select the following options:
  - Tools, Mail Merge
  - Choose 2 - Data Source
  - Select Open DataSource
  - Choose C:\My Documents\CGSList.DOC
- Create Text file for Bulk Mailer
  - Use this option to create a text file called C:\My Documents\CGSList.TXT
  - This is a comma delimited file that can be used by a bulk mailer
10 Custom Reports: Attendance

Custom Reports: Attendance
Located at: Main Menu, Attendance

Select all available report options before selecting the Preview Report button.

1. Attendance Types: Worship, Ministry or Event
2. Report on One Ministry, One Event, Summary of All Ministries or Summary of All Event Types
3. Count by Individuals or Group Total Count
   Events can only be counted by Individuals
4. Report Type: Graph or Tabular
   Graphs are available for One Ministry, One Event or Worship Reports only
5. Report Date Range: Select the report beginning and ending dates

See Also:
Attendance

11 Custom Reports: Donations

Custom Reports: Donations
Located at: Main Menu, Donations, Custom Reports

Select the Designation to report on
- Top Dollar Donations – enter a range of dollar values such as 1,000 to 10,000
- Donations Between Dates – enter a beginning and ending date for the report
- All Donations to Date – displays all donations for this designation
12 Custom Reports: Pledges

Custom Reports: Pledges
Located at: Main Menu, Donations, View Pledges, Custom Reports

Select the Pledge Designation to report on

• The Total Pledges To Date Report Type has three report options:
  List Donor Details by Name
  List Donor Details by Amount
  Show Totals Only

• The Pledges – People in Arrears has three report options:
  List Donor Details by Name
  List Donor Details by Amount
  Show Totals Only

  In addition, pledge and donor information can be sent to Word and a Merge letter can be created to send reminder letters. The merge data file automatically created is C:\My Documents\CGSPledges.Doc

• Total Pledges by City – displays pledge totals grouped by City

• Total Pledges by Zip – displays pledge totals grouped by Zip Code

• Attenders Who Have Not Pledged – displays all attenders who have not currently made a pledge commitment
13 Donations

Donations
Located at: Main Menu, Donations

What If I can’t find a person I think should be in the CGS software?
The donations Select Person drop-down list is arranged by last name. Verify the spelling of the last name. If necessary, go to the People Search screen and try finding the person by first name.

When recording cash or check donations:
• If the current week’s deposit has NOT been made, leave the default Sunday date for the donation date.
• If the current week’s deposit HAS BEEN made, then record any new cash or check gifts for the following Sunday.
• Look up donor by name OR by Envelope number. When looking up by Envelope number, the name does NOT appear by design. Envelope numbers are assigned at the People Information screen, Misc tab sheet

See Also:
Type of Donation
Designations
People: Misc tab sheet – Set Envelope Number
Custom Reports: Donations
Custom Reports: Pledges
Pledges

Donation Reports:
• Weekly Deposit - assumes that all cash and check donations are associated with a Sunday.
• Current Donor Letter – prints a single letter for current person listing all donations for the current year.
• All Year-End Letters - Prints letters for all donors for the current year. Letters printed in January or February will print for previous tax year.
• Edit Year-End Letter – allows editing the donation letter
• Donation by Designation Report – Lists donations by designation by date range
• Donation Summary Report- Lists donations by week by date range
14 Event Participants

Event Participants
Located at: Main Menu, Events & Sign-up Sheets, select an event, click the View Event Participants button
Optional location: Main Menu, Welcome Cards & People Information, select a person, click the View Information button, select the Classes & Events tab sheet

Event Attendance is assumed from the Event sign-up sheet. After an Event has taken place, add “walk-in” Event participants who did not pre-register and delete registered participants who did not attend.

To add a person to an event at the Event Sign-up screen:
• Select their name from the Full Name list.
• Their phone number information will automatically appear. If the phone number has changed, you may make the correction here and it will automatically be updated at the people information screen as well.
• If desired, fill in the comments field. This will print in the third column of the sign-up sheet.

What If I can’t find a person I think should be in the CGS software?
The Full Name drop-down list searches by first name. If you can’t find someone, use the Search button to look by last name to try to find the person. CGS Software recommends that the “common” name be recorded at the People Information screen to make it easier to find people by first name. For example, Richard may sign his name Dick and Elizabeth may sign her name Beth. So try several logical common names and check by last name before adding a person.

Printing Sign-up sheets:
• Use the Print Menu option to print Blank Sign-up sheets as well as a full list of event participants.
15 **Events Search**

**Events Search**
Located at: Main Menu, Events and Sign-up Sheets

*Events are one-time opportunities for personal spiritual growth and/or service. Ministry commitments are on-going.*

**See Also:**
[Event Titles](#)

Events are grouped by categories. For example, Class 101 is a type or category of Events. The first time a Class 101 is recorded the Event Type Class 101 is entered. Then it can be selected for a Class 101 held on a particular day. When another Class 101 is held at a later time, the Event Type Class 101 is selected and the new start date is entered.

To search for an event:
- Type in the name of the event to search for
- Select either the Current Events button or the Past Events button

When the list of matching events appears, double-click on field to view that event’s participant, or single-click on that event and click the View Event Participants button.

To Add A New Event:
Click on the Add New Event button

To Edit an Event:
Click on the Edit Event Information button

**See Also:**
[Events: Add/Edit](#)
16 Events: Add/Edit

Events: Add/Edit
Located at: Main Menu, Events and Sign-up Sheets, Add New Event OR Edit Event Information

The information filled in at this screen becomes the information at the top of the Event Sign-up sheet.

Fill in the following information:
- Select the Event Type. If the event type is not listed, click on the Add New Event Type button, create a new event type and click Close. Then select the Event Type from the Event drop-down list.
- Start Date
- Start Time
- Description
- Location
- Sign-up Sheet third column title – For example, this can be used to list children’s ages for child care, or what service people attend. You may type more than one line of information as the third column title.

Note: you may sign-up people for an event here, or at the People Information screen, Classes & Events tab sheet.

See Also:
People: Classes & Events

17 Gift Search

Gift Search
Located at: Main Menu, Print Reports, Ministry Profile, Ideal Ministry Involvement button

To prepare a Gift Search report:
- Single-click on a category
- Double-click on a specific topic to select it for the report (double-click on a selected topic to remove it from the report)
- If desired, double-click on any personality traits desired for the report.
- Click on the View Results button to view the Gift Search results
Installation

See Also:
Installation: Network

CGS can be used on a single PC or it can be installed on a network. With the single PC setup, all files are kept in one directory, typically the C:\Program Files\Church Growth Software directory, although the default directory is optional.

Single PC Installation Instructions:
1. Either download or insert the CGS CD (It will automatically run)
2. Find the CGSSetup.exe
3. Double click on the file
4. Follow the prompts in the Setup program
5. Select Full Installation or Workstation Setup when prompted

The setup program installs the software in the C:\Program Files\Church Growth Software directory.

To run the program:
1. Select Start, Programs, Church Growth Software, Church Growth Software or click on the tree icon which is on your Desktop.
2. When prompted to logon, type: SystemAdmin, press Tab, then type the password SystemAdmin, (type the letters just as you see them in upper and lower case).
3. You will need to enter your church name, email address and the serial number to validate the software. You will have to be on the online to do this. If you are not able to be online, go to the validation screen and click on Manual Unlock. There you will find a Fingerprint number. Email it to us and we will send you the unlock code.
19 Installation: Network

Installation: Network

There are two kinds of network installations: Peer-to-peer and networks with mapped drives. Follow the instructions for Both Network types, then choose the appropriate final installation steps for your network type.

Both Network types:
First, install CGS software onto the server:

1. Either download or insert the CGS CD (It will automatically run)
2. Find the CGSSetup.exe
3. Double click on the file
4. Follow the prompts in the Setup program
5. Select Full Installation or Workstation Setup when prompted

The default directory for all installations is C:\Program Files\Church Growth Software directory. You may choose another directory, including a network directory. If you accept the default directory on the C: drive, when this installation is complete, you must copy the CGSData.ACCDB file (and the System.mdw file if using a network with mapped drives) to the appropriate network location: for example G:\Programs\CGS.

• Follow the remaining prompts in the Setup program
  - Select Full Installation for the server and Workstation Setup for the workstations
• After this setup is complete, if necessary, copy the CGSData.MDB file (and the System.mdw file if using a network with mapped drives) to the appropriate network location: for example G:\Programs\CGS.

Second: Set the privileges for the network directory

Networks with mapped drives: All users must have read, write, and create permissions in order to share the data file. Create permissions are required as a security file is created by the first user.

Peer-to-Peer networks: the location must be shared and all users must be able to read and write to this location.

Workstation Installation Setup Instructions for both Networks with mapped drives and Peer-to-peer networks:

1. Either download or insert the CGS CD (It will automatically run)
2. Find the CGSSetup.exe
3. Double click on the file
4. Follow the prompts in the Setup program
5. Select Workstation Setup when prompted

Final Workstation Installation steps for Networks with mapped drives:

• Remove the CGSData.ACCDB and System.mdw file from each C:\Program Files\Church Growth Software directory.
• Each workstation needs the following setup steps performed:
  a. Select Start, Programs, Church Growth Software, Church Growth Software. When prompted to logon, type: **SystemAdmin**, press Tab, then type the password **SystemAdmin**. (Type the letters just as you see them in upper and lower case). CGS Software will prompt with an error message saying it needs to locate CGSData.mdb. Point to the CGSData.mdb file on your network directory.

Final Workstation Installation steps for Peer-to-Peer networks:

• Remove the CGSData.ACCDB file from each C:\Program Files\Church Growth Software directory.
• Each workstation needs the following setup steps performed:
  a. Select Start, Programs, Church Growth Software, Church Growth Software. When prompted to logon, type: **SystemAdmin**, press Tab, then type the password **SystemAdmin**. (Type the letters just as you see them in upper and lower case). CGS Software will prompt with an error message saying it needs to locate CGSData.mdb. Point to the CGSData.ACCDB file on your Peer-to-peer network. The computer with CGSData.ACCDB must be on in order for other people to use the CGS software program.

To backup a Network Installation:

• CGS Software recommends Network Administrators backup all CGS files on the network using their regular backup routine. CGS’s Repair Compact and Backup program (RCB.mdb) should be used on one workstation on a regular basis. The Compact and Backup routine protects data file corruption in the CGSData.ACCDB file. Use this option often to protect your data.

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20 Main Menu

See Also:
FIRST TIME USERS:
• go to the Setup screen and verify all settings are appropriate for your Church.
• Change passwords as desired - Security
• Installation Information
• Shortcut Keys

Current Worship Date: The current worship date is set to default to the most recent Sunday. All Welcome Card Reports are based on this date. To record information or to print reports for a different date, simply type in the alternate Worship Date.
When entering in data, use CTRL+D to enter the date in the Current Worship Date field.

MENU OPTIONS:

Serial Number and Technical Support:
The serial number activates the number of people that can be saved in the database. Additional support is available for a nominal fee. CGS software is available in 6 levels:

Level 0 up to 100 individuals - includes 1/2 hour of free technical support
Level 1 up to 500 individuals - includes 1 hour of free technical support
Level 2 up to 1,000 individuals - includes 2 hours of free technical support
Level 3 up to 1,500 individuals - includes 3 hours of free technical support
Level 4 up to 5,000 individuals - includes 4 hours of free technical support
Level 6 unlimited individuals - includes 5 hours of free technical support

Help:
Displays the software version number and serial number.
CGS System Settings: displays current Personal Profile setting (either SHAPE or Network) and current location of the CGSData file.

The CGS System Setting Button lists the following items:
• Displays current Personal Profile setting: SHAPE or Network
• Displays current path of CGSData.accdb
• Displays current user name

21 Microsoft Word Merge Files

Microsoft Word Merge Files
You can merge information with Microsoft Word. Follow the instructions in Microsoft Word.
Ministry Members

Located at: Main Menu, Ministries, View Members and Record Attendance

See Also:
Ministry Positions
Attendance: Ministries

To add a person to a ministry:
- Select their name from the Full Name list.
- Select their position in the ministry. To change this list see the setup menu for Ministry Positions.
- Their phone number information will automatically appear. If the phone number has changed, you may make the correction here and it will automatically be updated at the people information screen as well.
- If desired, fill in the date they joined the ministry.

What If I can’t find a person I think should be in the CGS software?
The Full Name drop-down list searches by first name. If you can’t find someone, use the Search button to look by last name to try to find the person. CGS Software recommends that the “common” name be recorded at the People Information screen to make it easier to find people by first name. For example, Anthony may sign her name Beth. So try several logical common names and check by last name before adding a person.

Printing Sign-up sheets:
- Use the Print Menu option to print Blank Sign-up sheets as well as a full list of ministry members.
23 Ministry Search

Ministry Search
Located at: Main Menu, Ministries

Ministries are ongoing opportunities for people to be involved in service. CGS software assists in tracking attender/member involvement, and provides sign-up sheets for registering people for ministries. Unlike one-time Events, Ministries are on-going commitments.

See Also:
Ministry Positions
People: SHAPE and Evangelism Style
People: Network and Evangelism Style
Attendance: Ministries

To create a new ministry:
• Type in the new ministry name
• Select the ministry leader. The ministry leader is automatically added to the ministry member list with their ministry position listed as ministry leader.

Note For SHAPE and Network Pastors: When a current ministry is created, the ministry name is automatically added to the Past Ministry Experiences list and the Ideal Ministry Involvement list. For more information, see People: SHAPE and Evangelism Style or People: Network and Evangelism Style

To search for a ministry:

Select one of the search by options:
• Ministry
• Ministry Leader - Last Name

You may type in any part of the Ministry or name that you know.
For example, when looking for the ministry leader with the last name of Anderson:
• type in And and click the Search button – you might see Anderson, Andrews
• or type *son and click the Search button – you might see Anderson, Carlson, Johnson

When the list of matching names appears, double-click on field to view that ministry’s members, or single-click on that ministry and click the View Members and Record Attendance button
24 One Time Settings

One-time Settings – do this first!

Your Serial Number
You may already have a serial number. If not, you can contact Church Growth Software for an evaluation demo so you can get started and can put in up to 30 names for 30 days.

- After the program is installed, you will need to enter your church name, email address and the serial number to validate your demo. You will have to be on the online to do this. If you are not able to be online, go to the validation screen and click on Manual Unlock. There you will find a Fingerprint number. Email it to us and we will send you the unlock code

Your Church’s Name and Address
You’ll want to enter in your Church’s name and address. The state recorded in your church address is automatically filled in as the state for all the addresses that will be entered. You can, of course, change the state on any address as necessary.

- At the Main Menu
  - Select Setup
  - Select the Custom Settings tab
  - Select Address & Phone
  - Fill in your church’s name and address, including the state
  - If you know the bank account number that is used for donations, you can enter it now. Otherwise, the person in charge of doing donations will enter this number at a later time. This deposit account number will automatically print on the donations report each week.

SHAPE or Network
CGS tracks the information gathered from a SHAPE profile or a Network profile. Select which method you plan to use.

- At the Main Menu
  - Select Setup
  - Select the Custom Settings tab
  - Select One-time SHAPE or Network

General Settings
In the Setup Module you can add or change:

- Ministry Positions
- Event Titles
- Spiritual Milestones
- Current Jobs
- Titles
- Worship Service Names
- Email Setup

Custom Settings
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- Select International Phone Numbers (Non US Usage) – No Formatting for Phone Numbers
- Change Greetings


25 Organization Perspective

Producing Organization Data Files

Some districts and denominations will want to collect statistics from a group of churches to see how the group is doing as a whole. CGS creates text files that can be combined in Excel or Access to review multiple church’s growth.

To run the Organization Statistics

- At the Print Reports screen
- Select the Standard Reports tab
- Select Organization Statistics

CGS creates 6 files and puts them in C:\My Documents. These can be attached in an email and sent to a district or denomination headquarters. Send 5 of the 6 files. Choose to send either the CGSAttendanceGroup or CGSAttendanceIndividuals. CGS supports tracking attendance in one of two ways, by individual name or by counting group totals. Typically a church selects only one method of taking attendance. Select the appropriate file to send to the district or denomination.

1. CGSCoversheet – prints the name of the church and the date range used to create the associated text files
2. CGSAttendanceGroup
3. CGSAttendanceIndividuals
4. CGSDonations
5. CGSMilestones
6. CGSWelcomeCards
26 People Information

People Information
Located at: Main Menu, Welcome Cards & People Information, View Information

SHORTCUT KEYS:
Ctrl+D = Current Worship Date
Ctrl+: = Current Date
Ctrl+" = copy field from previous record. For example: if you enter an email address for one person and the next record you create is a family member, at the email field, press CTRL+" and the email address will be copied. This works for all fields. This works only when the two records have been entered sequentially.
Alt+Underscored letter on buttons, menus and tab sheet titles for keyboard shortcuts

FAMILY/PERSONAL INFORMATION tab sheet
Primary Family Contact: Every person must be a Primary Family Contact OR a Member of a family. The primary family contact is a gender-neutral term for the person who is the most active or involved at the church. For example, if Jane Doe attends church, but her husband John Doe does not attend, she should be the primary family contact. When the primary family contact checkbox is checked, the current person is assigned as the primary family contact. All other family members living at home with the primary family contact should be assigned as members of this family.

Printing Directory Tip: When the Primary Family Contact has the Print in Directory Checkbox checked (located on the Misc tab sheet), their children (if any) will also automatically print in the directory. To include the spouse in the directory, check the spouse’s Print in Directory Checkbox. When the Primary Contact does NOT have the Print in Directory Checkbox, NO Family members will be printed in the directory (even if other members of the family individual Print in Directory Checkbox is checked.)

Member of Family: Every person must be a Primary Family Contact OR a Member of a family. This drop-down list contains all current primary family contacts. When a primary family contact is selected, the Address1, Address2, City, State, Zip, County and HomePhone are copied into the current record.

Family Member Button: Click to view all family members. At the Family Member screen, double-click on any name to view that person’s Information screen.

Age/Birthday Information: When the birthday is unknown, select the approximate age group. When the Birthday is typed in, the age is calculated and the approximated age information in no longer visible. The CGS software program will automatically use the birthday date to calculate the actual age for all reports. If the birthdate is not filled in, and the age group is selected, the reports will display the age group.

Year 2000 Tip: If you need to enter in a birthday that is before 1/1/1930 type in mm/dd/yyyy. When mm/dd/yy is typed in, Access assumes the century 1900 for every 2 digit year later than 30. Two digit years less than 30 it assumes the century 2000.

Marital Status/Anniversary Date: When the marital status is “Married” the anniversary date is visible. For all other marital status the anniversary date is not visible. After the Anniversary Date is typed in, the spouse’s Anniversary Date is automatically updated. When entering in a new couple, to avoid extra data entry keystrokes, wait to enter the Anniversary Date until the second person is entered into the system.

ADDRESS/WORK tab sheet
Current Job is also located in the SHAPE or Network and Evangelism Style button screen
Current Job - job titles must be entered into the list before selecting a job title. This drop-down list is limited to jobs on the list

VISITS tab sheet
Visit1, Visit2 and Visit3: when the current worship date is entered (use the shortcut Ctrl+D) an appropriate visit letter is recorded in the Welcome Card screen automatically. However, for children the letter is NOT automatically recorded at the Welcome Card screen.

- Attender Date: when the attender date is filled in, the Print in Directory checkbox on the Misc tab sheet is automatically checked. If this person has a spouse who should also be listed in the directory, go to the spouse’s Personal Information screen and fill in the attender date for the spouse.

- Guest Of: The Guest of drop-down list displays every name in the CGS software. If the person is a guest of someone who is not in the CGS software, you may still type in the name. This list IS NOT limited to just names in the CGS software.
27 People Search

People Search
Located at: Main Menu, Welcome Cards & People Information

To search for a person:

Select one of the search by options:
• First Name
• Last Name
• City

You may type in any part of the name that you know.
For example, when looking for Anderson:
• type in And and click the Search button – you might see Anderson, Andrews
• or type *son and click the Search button – you might see Anderson, Carlson, Johnson

When the list of matching names appears, double-click on field to view that person’s information, or single-click on that person and click the View Information button

Worship Service Attendance:
Select the name of the service in the Individual Attendance column to record individual attendance at a worship service.

See Also:
Worship Service Names
Custom Reports: Attendance
Record Worship Group Totals

PrintMe Checkbox:
The PrintMe checkbox can be used to select any temporary group of people and then create a custom report or mailing labels with the selected group.
See Custom Reports and Mailing Labels for PrintMe Reports

Clear Search Text check box:
After a search has been performed and a single person’s record has been viewed and now you are at the search screen again:
• If Clear Search Text is checked: the search text is erased and all the records are listed again
• If Clear Search Text IS NOT checked: the original search text remains and the list of names IS NOT refreshed.
  (This means if you have added a new person, their name DOES NOT automatically show in the list of names. You must click on the search button again to view their name in the list)
28 People: Classes & Events

People: Classes & Events
Located at: People Information screen, Classes & Events tab sheet

- Select the appropriate Event
- The Event Date will automatically fill in
- The Comments field is available for recording the third column of information on the sign-up sheet. For example, the third column could be used to record children’s names and/or ages for planning for child care.

Note: you may sign up a person for an event at this screen, or at the Event Sign-up screen located at the Main Menu, Events and Sign-up Sheets

See Also:
Event Sign-up Sheets

29 People: Current Ministry Commitments

People: Current Ministry Commitments
Located at: People Information screen, Ministry Commitments tab sheet

- Select the appropriate Ministry
- Select the appropriate Position
- Type in the Date Joined if desired

Note: you may record a ministry commitment at this screen, or at the Ministry Member screen located at the Main Menu, Ministries, View Members and Record Attendance screen

See Also:
Ministry Members
People: Miscellaneous Comments

Located at: People Information screen, Misc tab sheet

- Print in Directory Checkbox: This is automatically set to Yes after the attender date is filled in. If however, a person requests to NOT be in the directory, uncheck this box.

- Fill in the appropriate Giving Envelope Number here. Note: Donations can be recorded by Name or by Giving Envelope Number

See Also:
Donations

- Staff Checkbox: check to indicate person is staff member. To print letters, mailing labels or lists of staff, see Print Reports, Custom Reports & Mailing Labels tab sheet.

- Miscellaneous Comments can be recorded here. For example, additional phone numbers such as pagers, cell phones, additional work numbers.
31 People: Network and Evangelism Style

People: Network and Evangelism Style
Located at: People Information screen, Network and Evangelism Style button

Shortcuts:
Double-click to add and remove items from lists

Network has the following screens:
• Ministry
• Servant Profile
• Ideal Ministry Involvement
• Employment and Education - The Current Job field is the same field that is displayed on the People Information screen.
• Resource Survey
• Evangelism Style

To add or remove items for a person:
• Click on the appropriate Change button
• You may customize the lists at the “Change List” screen by using the Add to List button

Ministry Lists:
There are three customizable ministry lists:
• Past Ministry Experiences – on the Experiences page
• Current Ministry Commitments – located at the People Information screen, Ministry Commitments tab sheet
• Ideal Ministry Involvement – on the Ideal Ministry Involvement page

The reason for three lists is so actual information can be recorded in each case.
• Past Ministry Experiences – may include ministries that are not currently available
• Current Ministry Commitments – includes only current ministries
• Ideal Ministry Involvement – includes possible future ministry(s) that do not currently exist

When a current ministry is created at the Ministry Search screen, the ministry name is automatically added to the Past Ministry Experiences list and the Ideal Ministry Involvement list.

See Also:
Ministry Search
32 People: Personal Profile Report

People: Personal Profile Report
Located at: People Information screen, Personal Profile Report button

The Personal Profile Report is marked confidential. It lists the following topics for the current person:

Page One of the report:
- Name, City, Age, Phone, Current Vocation
- Spiritual Milestones
- Current Ministry Commitments
- Events & Classes Attended
- Ideal Ministry Involvement
- Evangelism Style

Page Two:
Is specific to SHAPE or to Network selection
SHAPE Report Page Two:
- Spiritual Gifts
- Heart: Church Issues, I Love To, People I Love to Work With
- Abilities: Classes Taught, Job History, Special Skills
- Personality
- Experiences: Educational, Ministry, Painful

Network Report Page Two:
- Ministry: Church Issues, Ministry Experiences, People I Love to Work With
- Servant Profile: Availability, Spiritual Gifts, Spiritual Maturity
- Personality
- Resource Survey: Skills

Pastor's Perspective – Printing Reports for Pastors and Leaders

Individual and Family Reports

Personal Profile
This report is available at the People Information screen.

This report lists just about everything that has been entered into CGS about this person, including the People Information screen information, classes and events, ministry involvement, spiritual milestones and all the SHAPE or Network information that has been entered.

To view this report:
- At the Main Menu
- Select Welcome Cards & People Information
- At the People Search screen, locate the person you want to review
- Select the person to review (double-click or single click and select View Information)
- Select Personal Profile Report

Due to the sensitive nature of the information, this report is marked as Confidential.

Care Calling Report
This report is available at the Print Reports, Standard Reports screen.

This report is like an expanded version of the directory. However, it prints one family's information per page. These pages can then be distributed to leaders who are assigned to keep in touch with these families.
33 People: SHAPE and Evangelism Style

People: SHAPE and Evangelism Style
Located at: People Information screen, SHAPE and Evangelism Style button

Shortcuts:
Double-click to add and remove items from lists

SHAPE has the following screens:
• Spiritual Gifts
• Heart
• Abilities - The Current Job field is the same field that is displayed on the People Information screen.
• Personality
• Experiences
• Ideal Ministry Involvement
• Evangelism Style

To add or remove items for a person:
• Click on the appropriate Change button
• You may customize the lists at the “Change List” screen by using the Add to List button

Ministry Lists:
There are three customizable ministry lists:
• Past Ministry Experiences – on the Experiences page
• Current Ministry Commitments – located at the People Information screen, Ministry Commitments tab sheet (for both SHAPE and Network)
  (for Network only – also located on Ministry page)
• Ideal Ministry Involvement – on the Ideal Ministry Involvement page

The reason for three lists is so actual information can be recorded in each case.
• Past Ministry Experiences – may include ministries that are not currently available
• Current Ministry Commitments – includes only current ministries
• Ideal Ministry Involvement – includes possible future ministry(s) that do not currently exist

When a current ministry is created at the Ministry Search screen, the ministry name is automatically added to the Past Ministry Experiences list and the Ideal Ministry Involvement list.

SHAPE and Network – How people are gifted for ministry
CGS tracks the information gathered from a SHAPE profile or a Network profile. Select which method you plan to use.

• At the Main Menu
  • Select Setup
  • Select the Custom Settings tab
  • Select One-time SHAPE or Network

Recording SHAPE People Information
• At the People Information screen
  • Select SHAPE and Evangelism Style

On each of the tabbed pages, CGS tracks the choices people have filled out on their SHAPE profile.

To make a selection for this person,
• Click on the appropriate Change… button
• CGS displays a list on the left to choose from. Double-click to choose as many items as are appropriate.
• To add a new item to the list on the left, click the Add to List button. After you successfully add an item to the list on the left, you may Double-click to add the new item to the person’s Selected Items list on the right.

Current Job: The Current Job selection on the Abilities tab is the same as the Current Job listed on the People Information screen Address/Work tab.

Recording Network People Information
• At the People Information screen

Personality Traits: The personality traits are listed on the Personality tab.

See Also: Ministry Search
34 People: Spiritual Milestones

People: Spiritual Milestones
Located at: People Information screen, Spiritual Milestones tab sheet

- Select the appropriate Spiritual Milestone(s) from the Spiritual Milestone drop-down list.
- Type the appropriate date

See Also:
Spiritual Milestones - Setup

35 Pledges

Pledges
Located at: Main Menu, Donations, View Pledges button

Select Name to view an individual’s pledge commitments

To Enter a Pledge Commitment:
- Select a Pledge Designation. To enter a new designation category see Setup: Designations
- Enter a Begin Date and an End Date
- Enter the Total Amount of the Pledge
- Select the Frequency of the donations: Weekly, Monthly, Quarterly, Annually, or One Time Gift

The last three columns are calculation columns
- The Total Pledged To Date calculates from the beginning date of the pledge until today and displays what dollar amount has been promised. This calculation assumes the donation will be made by the END of the frequency time period.
- The Total Donations To Date are the total number of donations made to this pledge designation.
- The +/- Pledge amount calculates if the donor has given more or less than the promised pledge amount.

36 Prayer Requests/Comments

Prayer Requests/Comments
Located at: People Information screen, Prayer Requests/Comments

- The Current Worship Date is filled in automatically.
- Select the appropriate check box(es) for the Prayer Team and Confidential
- Fill in the prayer request
- Also use the Request/Comment field to type in Welcome Card comments for the Staff to review.

Where the Prayer Requests/Comments are printed:
At the Main Menu: Print Reports, Weekly Reports tab,
All Prayer Requests/Comments
Prayer Team Requests
Unanswered Prayer Requests
Answered Prayer Requests
37 Print Reports

Print Reports
Located at: Main Menu, Print Reports

- Weekly Reports
- Custom Reports & Mailing Labels
- Standard Reports
- Ministry Profile

38 Print Reports: Standard Reports

Print Reports: Standard Reports
Located at: Main Menu, Print Reports, Standard Reports

DEMOGRAPHICS:

- Directory – prints all people who are attenders. When the date is entered in for an attender, the Print in Directory Checkbox on the Misc tab sheet is automatically checked. The Print in Directory checkbox can be checked or unchecked regardless of whether or not the attender date is filled in or not. In order for both names for a couple to be printed in the directory, the Print in Directory checkbox must be checked for both people. Otherwise, if only one of two name should be printed in the directory, make sure the spouse who should appear in the directory is the Primary Family Contact. If you need to switch the Primary Family Contact to the “other” spouse, make the secondary spouse the Primary Family Contact. For example John Doe is the Primary Family Contact and Jane is a family member. If only Jane should print in the directory, make Jane a Primary Family Contact on her own. This temporarily separates the family. Then uncheck the original Primary Family Contact checkbox for John and make him a member of Jane’s family. Make any children a member of Jane’s family as well. Now insure that Jane’s Print in Directory check box is checked and John’s is not.
- Count People by Cities – Lists all cities and the number of people located in each
- Birthdays – lists all people with recorded birthdays by month

ANALYSIS:

These reports are by the requested date range

- Advertising – Lists Advertising Choices by Age Ranges and counts the total number of responses
- Donation Trends – Lists weekly donation totals
- People Statistics – Comprehensive report

Left-hand side of report lists totals by requested Date Range:
Visitor Totals
Spiritual Milestones

Right-hand side of report lists grand totals in the CGS database:
Visitors
Spiritual Milestones
General Statistics
39  Print Reports: Attendance

- At the Main Menu
- Select Attendance
- Select the Attendance Reports Custom Reports button

Here you can follow the numbered steps to create your own custom attendance reports. When an option is not available (grayed out) it means this option is not available for the choices you’ve made in the previous step(s).
40 Print Reports: Congregation Growth

Totals of People and Overall Congregation Growth

Count People by Cities
This report is available at the Print Reports, Standard Reports screen.

This report groups all the people by city and prints a total number for each city, giving the pastor a geographic overview of where people live.

Advertising
This report is available at the Print Reports, Standard Reports screen.

This report prints the totals of how people are hearing about your church for the date range entered on the screen. This information can be collected on your Welcome Cards on a weekly basis with the question “How did you hear about us?”. We suggest you limit the responses with 4 or 5 suggestions printed on the Welcome Card.

To record Advertising responses on the Welcome Cards
  . At the People Information screen:
    . Select the Visits tab
    . Select the appropriate response in the Advertising drop-down list

To customize the Advertising choices
  . At the Main Menu
  . Select Setup
  . Select the Welcome Cards tab
  . Select Advertising Choices for Welcome Cards

Donation Trends
This report is available at the Print Reports, Standard Reports screen.

This report prints a graph of donation totals for the date range entered on the screen

People Statistics
This report is available at the Print Reports, Standard Reports screen.

This report is the core report that CGS produces for pastors.

In the left-hand column, the report list information for the date range entered on the screen. The pastor can see how many new people are coming, and how many are coming a second and third time. Also on the left-hand side, the Spiritual Milestones that have been met during this time period are listed.

In the right-hand column, the report lists information for the history of the data that has been entered into CGS. You can compare how your church is doing for a current time period against how you have been doing for the life of the church (or as much history as you have recorded in CGS.)

The last section on the report, General Statistics, provides total counts for families, dependents and members.

If you are using the CLASS 101, 201, 301, 401 model or are using some other methodology for training people and tracking growth within your church, with this report you can clearly see how your people are doing and where they may be getting stuck in their maturity progress. This report will show how many people have completed each class, giving the Pastor the information needed to know where to focus next.

Administrative tip: Track CLASS attendance as an Event (see Events on page 14). Track signing a covenant statement at the end of each class as a Spiritual Milestone (see Entering People Information – Advanced on page 11). The signing of a covenant helps to clarify who attended for information (recorded as an event), and who actually made a commitment at each CLASS level (recorded as a milestone).

Organization Statistics
  . This report is available at the Print Report module.
  . Go to Standard Report Screen

This exports 6 text files to the My Documents folders
41 Print Reports: Custom Reports & Mailing Labels

Print Reports: Custom Reports & Mailing Labels
Located at: Main Menu, Print Reports, Custom Reports & Mailing Labels

MAILING LABELS:

The following choices are available for standard mailing labels and a variety of other custom reports. When you select one of these options, the next screen allows you to pick what kind of report you would like to print.

• Attenders & Members Only – prints all attenders and members
• Members Only – prints only members
• All Families – prints all families in the CGS Software
• Staff – record a person as a staff member at the People Information screen, Misc tab sheet

CUSTOM REPORTS:

There are 3 steps to creating a custom report
• Select Criteria – select by topic, date ranges, age, and PrintMe options
• Search Results – view selected names
• Select Report – print mailing labels, list, report cover sheet, postal report, letters in Word, or create a text file
Print Reports: Donations & Pledges

CGS tracks the donations of individuals. At the end of the year, a letter is automatically produced for each donor itemizing their tax-deductible gifts for the year.

**Customizing Donation Settings**
- At the **Main Menu**
- Select **Setup**
- Select the **Donations** tab

The following settings should be customized as needed:
- **Type of Donation** – this includes cash, check, gift-in-kind and other. They can be either tax-deductible or non-tax deductible.
- If the Donation is not tax deductible, check off the non taxable box.
- **Designations** – these are the categories that the donation can be assigned to. If pledge campaigns are tracked, use the **Designations** list to name each pledge campaign.
- **Edit Year-end Letter** – edit the tax-deductible letter contents.

**Setting Individual Envelope Numbers**
Envelope numbers can be used with CGS, but it is not necessary. Names can be used to record donations as well.

To set an individual’s envelope number:
- At the **People Information** screen:
- Select the **Misc** tab
- Type in the **Envelope Number**

**Recording Donations**
- At the **Main Menu**
- Select **Donations**
- Use the correct drop-down list to find a person’s donation information. If you have setup individual envelope numbers, select from the **Envelope No** drop-down list. Otherwise, use the **Select Person** list.
- The current worship date automatically appears. You can type over this if necessary.
- Type in the **Amount** and **Check Number**
- Select the **Type** and **Designation**

**Printing Donations Reports**
At the **Donations** screen, there are two places to look for Donations Reports: the **Print Reports** menu and the **Donation Reports** button.

**Weekly Deposit Reports**
The **Print Reports** menu has options for printing the weekly deposit report with or without names.

To setup the Deposit Account number to print on the Weekly Deposit report automatically
- At the **Main Menu**
- Select **Setup**
- Select the **Custom Settings** tab
- Select **Address & Phone**. Along with the church’s address and phone is the **Deposit Account No** field. Fill in the Account Number here.

**Donation Summary Reports**
- At the **Donations** screen:
- The **Print Reports** menu has two standard reports:
- **Donation by Designation Report** – donations by grouped designation
- **Donation Summary Report** – donations grouped by date

**Donation Custom Reports**
- At the **Donations** screen:
- Select the **Donation Reports** button to view the Custom Donations Report builder.
- Select a designation (required)
- Select Donations options and Report options
- Select **Preview Report**

**Year-end Tax-Letters/Statements**
- At the **Donations** screen
- Select the **Print Reports** menu option
- Select **Edit Letter** to change the text in the standard letter
- Select **Taxable or Non-Taxable Donation Reports**. CGS asks for a start and end date for the letters to allow printing quarterly letters.
- These letters/statements could be generated monthly, quarterly or yearly

**Pledge Campaigns**
Pledges are assigned to the standard Designations. To set the Designation options, see Customizing Donation Settings on page 25.

Each pledge requires a **Begin Date** and an **End Date**. If your pledge campaign is for one year, make the begin date 1/1/2005 and the end date 1/1/2006. CGS calculates the amount pledged to date off of the Begin Date, the End Date and the **Frequency**. The **Total Pledge Amount** is the total amount this individual is committing to for the entire campaign. For example, if John Doe is committing to $100 per month for 1 year, then enter $1200 for the Total Pledge Amount and Monthly for the **Frequency**.

**Custom Pledge Reports**
- At the **Pledges** screen
- Select **Pledge Reports**
- Select the **Designation** to report on
- Select the Report type and Report option
- Select **Preview Report**
43 Print Reports: Ministry Activity

- At the **Main Menu**
- Select **Activity Report**
- Type in Start and End Date
- Select Ministry
- Select Members
- Click on Show Report

44 Print Reports: Ministry Profile

**Print Reports: Ministry Profile**

Located at: Main Menu, Print Reports, Ministry Profile

- Find People with Matching Profile – Ability to locate matching ministry profiles by selecting different SHAPE or Network categories and topics
- Ideal Ministry Involvement - Select an event, then click on the Ideal Ministry Involvement button. This report produces a list of people grouped by the ministries they have indicates as their Ideal Ministry(s)
Print Reports: S.H.A.P.E. or Network

Printing SHAPE or Network Reports

Personal Profile
- At the People Information screen
- Select Personal Profile Report to view a confidential report that displays all the SHAPE or Network information for this person.

Matching People with Ministries
- At the Print Reports screen
- Select the Ministry Profile: SHAPE or Ministry Profile: Network tab

The Find People with Matching Profile report builder helps pastors and leaders find people with certain skills, abilities and personality traits. Once you have some SHAPE or Network profiles entered into CGS, you can find people with any number of combinations of characteristics.

- Single-Click to select a Category
- Double-Click to select a Specific Topic
- Continue selecting Categories and Topics until you have all your choices made in the Topics Selected for Report list.
- If you want to add personality traits to the mix, Double-click to add the appropriate choices.
- Click on the View Results button to display a confidential report.

Ideal Ministry Involvement
This report helps pastors and leaders match people with ministries that suit their personal interests and strengths as discovered by attending a 301 class and filling out a SHAPE or Network survey. After the surveys have been entered into CGS you may run this report.

- At the Print Reports screen:
- Select the Ministry Profile: SHAPE or Ministry Profile: Network tab
- Select the class date in the Event Attended drop-down list.
- Click Ideal Ministry Involvement
- CGS displays a report that groups people into Ministries that they would be well-suited for based on their response to the SHAPE or Network survey.
Print Reports: Weekly Reports

Located at: Main Menu, Print Reports, Weekly Reports

See Also:
Print Reports: Weekly Reports Tips
Welcome Card Information Requests – entering in Welcome Cards at the People Information Screen
Welcome Card Requests & Letters – setting up the Welcome Card Topics

- Welcome Card Letters – update any letters before printing. Any couples who request the same information will receive a letter addressed to both people. For example, if both Jane and John Doe are first time visitors on the same Sunday, they will receive a first time visit letter addressed to John and Jane Doe. Or, if Jane requests information on Adult Small Groups, but John doesn’t, then a letter will be addressed only to Jane Doe about Adult Small Groups.

NOTE: Welcome Card Letters are automatically sent to adults, but not automatically sent to children (dependents). When the Visit 1, Visit 2, or Visit 3 dates are typed in at the People Information Screen, the Welcome Card Topic and date are automatically entered for each adult (click the Welcome Card Info button to view this.) You can still send a separate letter to children (dependents), but this would have to be done manually.

- Welcome Card Envelopes – the default printer is a Laser Jet printer. If the print preview doesn’t display a single envelope for your printer, select File, Print Setup, click on the Page tab, then select the appropriate Paper Size and Source from the drop-down lists.

- Welcome Card Labels – print labels for Welcome Card Letters


- Edit Welcome Card Letters – provides ability to edit all Welcome Card Letters

- All Prayer Requests/Comments – enter all prayer requests and Welcome Card Comments here

- Prayer Team Requests – prints only prayer requests and comments marked specifically for the prayer team

- Unanswered Prayer Requests – prints list of all prayer requests that do not have a Date Answered filled in

- Answered Prayer Requests - prints all the requests that have an answered date.
Print Reports: Weekly Reports TIPS

What to check if there are no letters to print:
Three steps must be completed in order for weekly Welcome Card letters, envelopes, labels and reports to be produced:

1. At the People Information Screen, the Welcome Card Info button must be selected, then WELCOME CARD TOPICS MUST BE SELECTED FOR THE CURRENT WORSHIP DATE. (At the main menu select the Welcome Cards & People Information button, select a person, click on the Welcome Card Info button, then select appropriate Welcome Card Letter topics and date.)

2. THE WELCOME CARD LETTER TOPIC MUST HAVE A MINISTRY LEADER. (At the Print Reports screen, select the Edit Welcome Card Letters button, and select a Ministry Leader for the topic.)

3. THE WELCOME CARD LETTER TOPIC MUST BE SET TO PRINT A LETTER, and a letter must be typed in. (At the Print Reports screen, select the Edit Welcome Card Letters, select the topic, select the Welcome Card Letter AND Report button, and also make sure the letter has been typed in.)

How to correct problems printing envelopes:
If the print preview does not display a single envelope for your printer:

1. Select File, Print Setup
2. Select the Page tab
3. Select the appropriate Paper Size and Source for envelopes from the drop-down lists.
48 Report Writer

Report Writer
Located at: Main Menu, Tools

1. Settings
   - Report Title: enter your preferred report title
   - Data Source: select a data source from the available predefined choice
   - Report Type: select Letter or Tabloid (portrait and landscape)

2. Fields
   - Field Name: Select up to 10 fields available from the selected Data Source
   - Display: determines whether the field will be visible on the generated report
   - Field Caption: enter your preferred caption. Default to Field Name
   - Column Width: set column width in inches

3. Group and Sort
   - Select up to 4 fields to group information by. Subgroups are automatically created based upon the selection
   - Select up to 4 fields to sort information by

4. Filters
   - Field Name: select the field name used as filter. Depending on the kind of data it's possible to enter the criteria (characters, numbers or date range) to be used to filter the report data
   - Up to 3 filters can be combined using boolean operators (AND, OR)

When report settings are completed it's possible to generate the report by clicking on the Create Report button.
Tip: last report settings are automatically saved and displayed when the Report Writer is executed.

49 Security

Security
To Change Password: located at Main Menu, Help (menu option), Change Password

CGS software has 5 User Accounts:
   - SystemAdmin – can view ALL screens in the system
   - GeneralUser – can NOT view Donations or SHAPE or Network information and reports
   - Donations – can view Donations information but NOT SHAPE or Network information and reports
   - ShapeUser – can view SHAPE or Network information and reports but can NOT view Donation information
   - NetworkUser – can view SHAPE or Network information and reports but can NOT view Donation information

Default Passwords:
Passwords are Case-sensitive (must type capital letters where capital letters are used)

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>SystemAdmin</td>
<td>SystemAdmin</td>
</tr>
<tr>
<td>GeneralUser</td>
<td>GeneralUser</td>
</tr>
<tr>
<td>Donations</td>
<td>Donations</td>
</tr>
<tr>
<td>ShapeUser</td>
<td>ShapeUser</td>
</tr>
<tr>
<td>NetworkUser</td>
<td>NetworkUser</td>
</tr>
</tbody>
</table>

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50 Setup

Setup

CGS uses the term “setup” to mean modifying the many lists available to customize the software to meet the specific needs of your church. Before using the software, the following lists and custom settings should be verified and changed as necessary.

At the Setup screen the following four tabs are available:

**General Settings:**
- One Time Settings - Do This First
- Ministry Positions
- Event Titles
- Spiritual Milestones
- Current Jobs
- Titles
- Worship Service Names
- Email Setup

**Custom Settings:**
- Address & Phone
- One-Time SHAPE or Network

**Welcome Cards:**
- Welcome Card Requests & Letters
- Advertising Choices for Welcome Cards

**Donations:**
- Type of Donation
- Designations
- Edit Year-end Letter
51 Setup: Address & Phone

Setup: Address & Phone
Located at: Main Menu, Setup, Custom Settings, Address & Phone

Enter your Church’s specific information:
- Name
- Phone
- Fax
- Address
- City
- State – this becomes the default state for all new people added
- Zip
- Email
- Website
- Deposit Account Number – this number automatically appears on each weekly deposit slip for donations

52 Setup: Advertising Choices

Setup: Advertising Choices
Located at: Main Menu, Setup, Welcome Cards, Advertising Choices for Welcome Cards

Enter the advertising sources used by your church.

Where Advertising Choices are used in CGS:
- Recorded at the welcome card at the People Screen
- Printed in the Advertising report located at: Print Reports, Analysis, Advertising. This report is selected by Date Range.

53 Setup: Current Jobs

Setup: Current Jobs
Located at: Main Menu, Setup, General Settings, Current Jobs

Where Current Jobs are used in CGS:
- Recorded at the People Information screen in the Current Job field
- Also can be recorded for SHAPE
  Located at: People Information screen, SHAPE and Evangelism Style button, Abilities, Current Job field
- Also can be recorded for Network
  Located at: People Information screen, Network and Evangelism Style button, Employment and Education tab, Current Job field
54  Setup: Designations

Setup: Designations
Located at: Main Menu, Setup, Donations, Designations

The default choices are:
  • General
  • Love Offering

Where Designation is used in CGS:
  • Donations: located at: Main Menu, Donations
  • Custom Reports: Donations
  • Pledge Designations: located at Main Menu, Donations, View Pledges
  • Custom Reports: Pledges

55  Setup: Edit Year-end Letter

Setup: Edit Year-end Letter
Located at: Main Menu, Setup, Donations, Edit Year-end Letter
Also located at: Main Menu, Donations, Print Reports (menu option), Edit Year-end Letter

Where Year-end Letter is used CGS:
  • Printed in the Current Donor Letter and in the All Year-end letters reports located at: Main Menu, Donations, Print Reports (menu option), Current Donor Letter OR All Year-end Letters

This letter is sent to all donors at the year’s end to provide a record of giving for tax purposes. If letters are printed in the months of January or February the information is for the previous tax year. Otherwise the information is for the current tax year.
56 Setup: Email Setup

Email Setup

Name - the name you want to appear on the email.
Email address - your email address. Gmail works well with this system.
SMTP Server - the SMTP from your Internet Service Provider. Ex. smtp.gmail.com
SMTP Port # - some ISP close some of the ports. Gmail uses port 25.

Then you need to put in the User Name and Password for this email address in the Account Setup.
You will need to check off Outgoing SMTP Server requires Authentication to gain access to these two boxes.

Predefined Emails

You can setup and delete your predefined emails here.
57 Setup: Event Titles

Setup: Event Titles
Located at: Main Menu, Setup, General Settings, Event Titles

Events are one-time opportunities for personal spiritual growth and/or service. Unlike Ministry on-going commitments, Events are one-time commitments.

See Also:
Attendance

Events are typically repeated, although they can also be a one-time, never-to-be-repeated event. Examples of events include:

- CLASS 101, 201, 301, 401 (Purpose-Driven model)
- Networking seminars (Willow Creek model)
- Baby Dedications
- Leadership Training Events (perhaps scheduled quarterly – so they are not considered a ministry commitment, but rather an event).
- Parenting Seminar
- Bible Study (perhaps a short-term 6 week study on a particular topic or book of the Bible)

Type in the event name at this screen. These event names will then be available in the Events and Sign-up Sheets area drop-down lists.

Every event should have an Event Coordinator. This person can be anyone in the CGS database. The Event Coordinator name automatically appears on the Event Sign-up sheet as the contact person.
58  Setup: Ministry Positions

Setup: Ministry Positions
Located at: Main Menu, Setup, General Settings, Ministry Positions

Ministries are ongoing opportunities for people to be involved in service. Ministries are ongoing commitments. CGS software assists in tracking attender/member involvement, and provides sign-up sheets for registering people for ministries. Unlike one-time Events, Ministries are ongoing commitments. Attendance can be recorded for ministry participants by date. Events are assumed to be one-time occurrences. The sign-up sheet is the Event attendance record.

See Also:
Attendance
Attendance: Ministries

The default settings are:
- Coordinator: a volunteer who helps with the administrative duties of this ministry. For example, this might be a person who helps coordinate the administrative duties of the choir ministry, but doesn’t actually sing in the choir.
- Participant: active member of the ministry team. For example, in a youth ministry, these would be the youth. In a discipleship ministry, these would be the people being discipled.
- Ministry Leader: the designated leader of the ministry. CGS software considers this person the ministry leader whether or not the position is a paid ministry position. Every ministry must have a Ministry Leader.
- Volunteer Leader: These are the additional leaders that serve others within the ministry. For example, in Youth ministry, these are the adults that serve the youth. In a discipleship ministry, these are the volunteers that do one-on-one discipleship with new believers (participants).

CAUTION: CGS allows you to change the ministry position titles, but since every ministry must have a Ministry Leader, CGS advises against changing the name of Ministry Leader to avoid confusion in other areas of the software program.

59  Setup: One Time Custom Settings

Setup: One Time Custom Settings
Located at: Main Menu, Setup, Custom Settings, One-Time SHAPE or Network

Select the appropriate Personal Profile choice:
- SHAPE
- Network

This setup choice is made ONE time. All information collected for each person will be recorded based on this choice. SHAPE is used for Purpose-Driven churches and Network is used for the Willow Creek model churches.

The default choice is SHAPE.

- Select International Phone Numbers (Non US Usage) – No Formatting for Phone Numbers
- Change Greetings
60 Setup: Spiritual Milestones

**Setup: Spiritual Milestones**

Located at: Main Menu, Setup, General Settings, Spiritual Milestones

*Spiritual Milestones are points in time that demonstrate a deepening commitment to spiritual growth.*

The default settings include the signed covenants from the CLASS's in the Purpose-Driven church model:
The default milestones are:
- Committed to Christ
- Baptism
- Membership Date – 101
- Maturity Covenant – 201
- Ministry Covenant – 301
- Mission Covenant – 401

These milestones should be customized for your church.

The view order field is available to control the order in which the milestones appear on the screen and in reports. There should never be two milestones with the same number for the view order.

For example, if your church desires to add a spiritual milestone before Committed to Christ, simply change the view order numbers beginning from the bottom of the screen working towards the top. Change the highest number (Mission Covenant – 401 View Order 6) to 7, then change 5 to 6, and so on. The number 1 will then be available for the new milestone topic. The next time you view this screen, the new topic will be listed at the top (or in the correct order, depending on what actual view order number the new topic is given.)

**Where Spiritual Milestones are used in CGS:**
- Recorded at the People Information Screen, Spiritual Milestones tab sheet
- Printed in the Personal Profile report located at: People Information Screen, Personal Profile report button
- Printed in the People Statistics report located at: Print Reports, Standard Reports, People Statistics. This report is selected by Date Range.

**Church Membership:**
The third spiritual milestone records the church membership date. This milestone cannot be deleted, but the name can be changed if desired. Attendance at Class 101 is recorded as an event. If the person joins the church and/or signs the membership covenant, then record the Membership Date 101 spiritual milestone and date.

61 Setup: Titles

**Setup: Titles**

Located at: Main Menu, Setup, General Settings, Titles

The Default Titles are:
- Capt.
- Dr.
- Lt.
- Miss
- Mr.
- Mrs.
- Ms.
- Rev.
62  Setup: Type of Donation

**Setup: Type of Donation**

Located at: Main Menu, Setup, Donations, Type of Donation

The default choices are:
- Cash
- Check
- Gift-In-Kind
- Other

If the donation is a non-cash donation, check off the box at the right of the description

Where Type of Donation is used in CGS:
- Recorded from the Donations screen located at: Main Menu, Donations
- Printed in the Donation by Designation Report located at: Main Menu, Donations, Print Reports (menu option), Donation by Designation

63  Setup: Welcome Card Requests & Letters

**Setup: Welcome Card Requests & Letters**

Located at: Main Menu, Setup, Welcome Cards, Welcome Card Requests & Letters

Welcome Cards are the primary weekly source of information for the CGS Database. At this screen you can search for a topic by title or by Ministry Leader

There are a variety of sample letters available to be customized to meet your church’s needs.
- Add a Welcome Card Topic for each check box on your church’s welcome card.
- Each topic **must have a Ministry Leader** in order for the topic to appear on the Welcome Card Report and in order for a letter to be printed.

See Also:

[Print Reports: Weekly Reports TIPS](#)
64  Setup: Welcome Card Topics

Welcome Card Information Requests can be handled in two different ways:
- A letter can be sent AND the person’s name appears on a ministry report
- The person’s name appears on a ministry report (no letter is sent)

To add a signature to a letter:
- Double-click to select a .BMP file located on your computer.
- Or focus on the signature field and select the menu option Edit, Add Signature.
- Select Create from File
- Click on the Browse button, and locate the appropriate .BMP file
- Click Open
- Click OK to finish

To create a .BMP signature file, use a black felt-tip pen to write the signature, then scan in the signature. The thicker the line, the better the signature will appear.

Addressing a letter to a couple:
(How to avoid having 2 separate letters created for a couple)

When a couple signs both names on the welcome card, if you want a letter to be addressed to both people, simply mark the request for both people when typing in the welcome card information. For example, if Jane and John Doe fill out a card and request information about Adult Small Groups, record the request and request date for both Jane and John, and the letter will sayDear John & Jane Doe.

65  Setup: Worship Service Names

Enter the time of each Worship Service as the Service Name.

Changing a Service Name/Time will retroactively change all past attendance records for this service. If a different Service Name/Time is needed, uncheck the Worship Service Visible checkbox if a particular Service Name/Time should no longer be available for selection.

See Also:
Attendance
Attendance: Worship Services
Shortcut Keys

Church Growth Software Shortcut Keys:
To insert the current Worship Date CTRL+D

Access Shortcut Keys:
To insert the current date CTRL+SEMICOLON (;)
To insert the default value for a field CTRL+ALT+SPACEBAR
To zoom (enlarge) a text field Shift+F2
To insert the value from the same field
in the previous record CTRL+APOSTROPHE (‘)
To add a new record CTRL+PLUS SIGN (+)
To delete the current record CTRL+MINUS SIGN (-)
To save changes to the current record SHIFT+ENTER
To switch between the values in a
check box or option button SPACEBAR

Use Alt+underscored letter to use the keyboard to access buttons, menu options and tab sheet titles

Technical Support

Technical Support:

CGS software is available in 6 levels: Additional support is available for a nominal fee.

Level 0 up to 100 individuals - includes 1/2 hour of free technical support
Level 1 up to 500 individuals - includes 1 hour of free technical support
Level 2 up to 1,000 individuals - includes 2 hours of free technical support
Level 3 up to 1,500 individuals - includes 3 hours of free technical support
Level 4 up to 5,000 individuals - includes 4 hours of free technical support
Level 6 unlimited individuals - includes 5 hours of free technical support
Welcome to CGS Software

Church Growth Software (CGS) is designed to help churches track growth and the health of a church. Based on the Purpose-Driven Church model developed by Pastor Rick Warren of Saddleback Community Church in California, this software tracks events that people attend, ministries that people serve in, and provides a state-of-the-art method to match people with ministries that fit their personal giftedness.

CGS supports the SHAPE model used in Purpose-Driven church models in CLASS 301 for collecting personal ministry profile information. OR if a church is using the Willow Creek Network model to collect personal profile information, a simple one-time decision sets up the software to collect information and report based on the Network model.

See Also:
FIRST TIME USERS:
- Go to the Setup screen and verify all settings are appropriate for your Church.
- Change passwords as desired - Security
- Installation Information
- Shortcut Keys