Cornerstone Fellowship

Cornerstone Fellowship is a vital, vibrant church with five locations throughout the East Bay area — and plans for at least another five. Cornerstone Fellowship employs 80 full-time and 120 part-time personnel and involves hundreds of volunteers. While doing ministry work, staff and volunteers naturally incur expenses. To streamline and simplify the collection, approval, and repayment of those expenses, Cornerstone Fellowship selected Paramount WorkPlace Expense Management solution.

Equipping People to Do Their Best Work

"We want to equip our staff and volunteers to serve in their communities," says Tina Danskin, Senior Finance Assistant at Cornerstone Fellowship. "We wanted to make it easy and convenient to submit expenses and to be able to reimburse our folks as fast as possible for their out-of-pocket expenses." As Cornerstone started to grow into multiple locations, they outgrew the previous portal system they were using to capture expenses. "We began looking at other systems, but they were all price prohibitive for us at the time," says Danskin.

Shortly after Cornerstone learned that the company was no longer updating the portal system they were using, they recognized it needed to step up its search for a viable replacement. "We determined that we wanted to invest in a scalable solution. While the price was still a factor to us, there were many features we were looking for to meet the criteria we set for what we needed. We wanted the solution to be easy to use, have mobile capabilities and have the ability to move our organization towards automation as seamlessly as possible while accommodating the growth of Cornerstone to its goal of 10 campuses."

Paramount WorkPlace Stands Out

Cornerstone reviewed several expense management solutions, including ReQlogic, Concur, and eRequester before deciding on Paramount WorkPlace. "What stood out for us with Paramount WorkPlace is the strong integration with Microsoft Dynamics GP," says Danskin. "It is a robust product that accommodated our processes. The other applications required us to purchase other add-on products to complete the integration."

The organization worked through their Microsoft business partner to purchase and help implement Paramount WorkPlace. With WorkPlace, the AP process has become more efficient that Cornerstone now can close each month with better-informed expense accruals because of the ability to view transactions as they're coming through for approval.

Streamlining Credit Card Reconciliation

The organization equips its ministries with credit cards to simplify purchasing, but trying to capture and reconcile credit card data had been a very manual and tedious process. Using Paramount WorkPlace, credit card reconciliation has become more efficient and entirely paperless. The WorkPlace Mobile App is used to take photos of receipts and categorize expense type. This is automatically uploaded to WorkPlace ready for the receipt to be matched to the credit card transactions that are downloaded weekly from Cornerstone's financial institution then imported into WorkPlace.

Quick and Easy Expense Report Processing

Employees and volunteers were frustrated by the delay in processing transactions with Cornerstone's prior software. There was no way to electronically attach receipts to a submitted expense report, leaving staff and volunteers to send emails or deliver hard copies of the receipts. Sorting through emails and paper documents to match them up with transactions took a lot of time. In addition, approval in the prior system was also delayed since access to that system was only available when approvers were logged into Cornerstone's network. This restricted the approver's ability to approve an expense on demand.

"Our volunteers' expenses made on behalf of the church can be submitted right away with WorkPlace." Receipts are attached electronically with the transaction. Once submitted for approval, it is automatically routed for review. The approver is immediately notified and can approve via email if desired. Once approved, the finance department makes one final check to be sure everything is coded correctly and then transactions are batched into GP, ready for final posting.

Capturing a Complete Audit Trail

Expense receipts and invoice attachments remain associated with the posted transaction record in Dynamics GP and can easily be recalled both from within Paramount WorkPlace and within Dynamics GP. "For every transaction, we have a complete audit trail from start to finish. And it's all electronic, secure, accessible, and searchable," says Danskin. Cornerstone Fellowship's CFO, Collin Lucas, appreciates the visibility of the impact of unposted expenses on the budget which is very helpful in planning and forecasting.

Growing Without Additional Resources

"Before Paramount WorkPlace, we needed one full-time and two part-time staff in our accounts payable department," says Danskin. "Although we've added three additional campuses, we've been able to eliminate the need for the second part-time person," says Danskin. In addition, the ability to capture and store all information electronically not only reduces the need for numerous filing cabinets but also frees up staff time to focus on other projects.

Reaching Our Goals

"We had practical goals for this initiative," concludes Danskin. "Our goals were to make it fast and easy for folks to submit expenses and receive reimbursement and to become paperless in our payables department. We are achieving those goals. In addition, we have goals to grow our mission and remain good stewards of the resources that our congregation trusts us with. We're accomplishing that with the help of Paramount WorkPlace."

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