



ParishSOFT®

May 28, 2019
ParishSOFT Family Suite
Parish Orientation



**DIOCESE
of SAN
BERNARDINO**

Agenda

- ✓ Opening Prayer
- ✓ Welcome & Diocesan Overview
- ✓ ParishSOFT Presentation
 - ParishSOFT Overview
 - Implementation Process
 - Transitions
 - Parish Preparations
 - Training
 - Family Suite Overview
 - Family Suite Demonstration
 - Family Directory
 - Offerings & Pledges
 - IQ (Intelligent Query Builder)
 - Religious Education and Ministry Scheduler
 - Administration
- ✓ Questions & Answers
- ✓ Closing Prayer




Opening Prayer





Background Information

- June 2018 ParishSOFT Announced Sunset Date of Desktop Software
- May 2019 E-mail sent Announcing Move to ParishSOFT Web Version
- Time taken to make informed decision
- Created: **Parish Data Program Advisory Board**



Introducing

- **Elaine Tank**
 - Senior Diocesan Project Manger for ParishSOFT
 - Project Team Lead
 - Serving the Church
 - 32 Years as Local Church Bookkeeper & Administrator
 - 19 Years with ParishSOFT
 - Support, Training, Implementation & Project Management



Serving 9,000+ Catholic parishes in 185+ arch/dioceses,
80 full time employees, over 70% dedicated to
product development and support

A group photograph of approximately 30 ParishSOFT employees of various ages and ethnicities, posing in an office setting. Some are standing in the back rows, while others are kneeling or sitting in the front. The text is overlaid at the bottom of the photo.

ParishSoft Diocesan-wide Implementations

Alexandria-Cornwall	Denver	Madison	Sioux Falls
Allentown	Des Moines	Manchester	Steubenville
Altoona-Johnstown	Detroit	Miami	St. Augustine
Anchorage	El Paso	New Orleans	St. Paul-Minneapolis
Atlanta	Fargo	New York	St. Petersburg
Baltimore	Fort Wayne-South Bend	Peoria	St. Thomas, Virgin Islands
Baker	Galveston-Houston	Personal Ordinariate of the	Toledo
Birmingham	Grand Rapids	Chair of St. Peter	Trenton
Bismarck	Great Falls-Billings	Pueblo	Venice
Boston	Houma-Thibodaux	Richmond	Victoria, BC
Bridgeport	Jackson	Rochester	Washington, DC
Camden	Joliet	Salt Lake City	Wheeling-Charleston
Charlotte	Juneau	San Antonio	Winona
Cheyenne	La Crosse	San Bernardino	Hamilton, Bermuda
Cincinnati	Lansing	San Jose	
Colorado Springs	Laredo	Santa Fe	
Corpus Christi	Lincoln	Savannah	

Technology Development

Desktop Software	Cloud-Based Client Server	ParishSOFT
Windows	Same Desktop software	Brower-based
FoxPro, Access, Paradox	Data Center hosting	SQL database, .net
Locally hosted	Thin Client	Formatted for Mobile, tablets, etc.
Manual updates, backups	Anytime, anywhere	No sync or import/export needed
Sync to Diocese	Sync to Diocese	

ParishSOFT

Network Security & Data Protection

- Firewalled and Partitioned LAN networks protects against unwanted traffic
- Latest data encryption methods and keys providing optimal 24/7/365 security
- Enterprise-level cloud identity governance
- Compliance Programs & Certifications
 - ISO 27001, SOC 1, SOC 2, FedRAMP, UK G-Cloud, PCI DSS, and HIPAA compliant

Network Security & Data Protection



- **Threat Defense**
 - **Automatic security updates**
 - Including anti-malware components, distributed denial-of-service defenses, and advanced threat analytics
 - **Continuous monitoring** and analysis of traffic reveals anomalies and recognizes threats instantly

Project Timeline

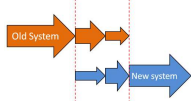


ParishSOFT

ParishSOFT Methodology

Proven Implementation Process

1. Project Planning
2. Live Orientations ◀
3. Onsite Training
4. Data Transition
5. On-going Training



Implementation Timeline

Data Transition

- ✓ Transition Checklist completed and data submitted
- ✓ The ParishSOFT Team transfers Data to ParishSOFT Family Suite – (3 business days)
- ✓ Parish Reviews and Accepts Transitioned Data (2-5 business days)
- ✓ Full Access Granted – Parish Goes Live!

Training (Hands-On Training)

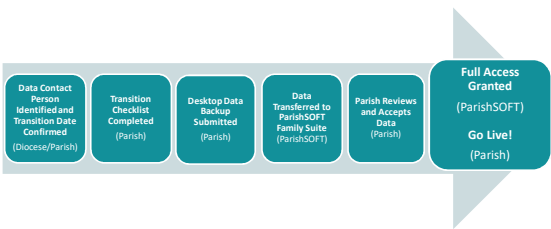
- ✓ Two-Day on-site hands-on training
 - Day 1 – Family Directory, Administration, IQ
 - Day 2 – Offering & Pledges, Ministry Scheduler, Religious Education

PATHFinder LMS

- ✓ Ongoing self-paced learning following your Transition
- ✓ Available to all who will be using ParishSOFT Family Suite
- ✓ Link to site and registration code will be emailed to you



Transitioning from Parish Desktop



Parish Preparations

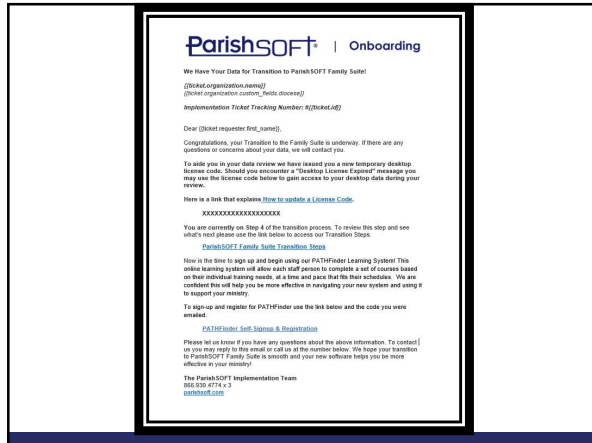
- Review and update your data per the [Transition Checklist](#).
 - Run Duplicate Checker
 - Verify all Users have a named Staff Record and have a password that is at least 6 characters long (two of which must be numbers).
 - Close all Offering Batches
- Watch “Intro to ParishSOFT Family Suite” Video
 - <https://vimeo.com/parishsoft/cn-training/video/120628843>
- Verify you know how to back-up your data to the ftp site
 - <https://support.parishsoft.com/hc/en-us/articles/360000907331-IMP-MISC-Backup-ParishSOFT-Desktop-FTP-Backup>
- Be prepared to review your transitioned data 3 business days after submitting your back-up



Email Communications

- Sent through our Support Center
- Regular Emails from ParishSOFT
 - Please respond timely
 - Diocesan Project Manager copied
- Identified issues tracked separately
- Full process available to view online





Training

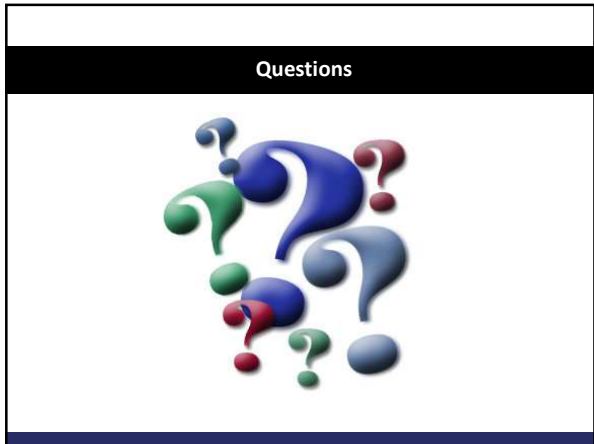
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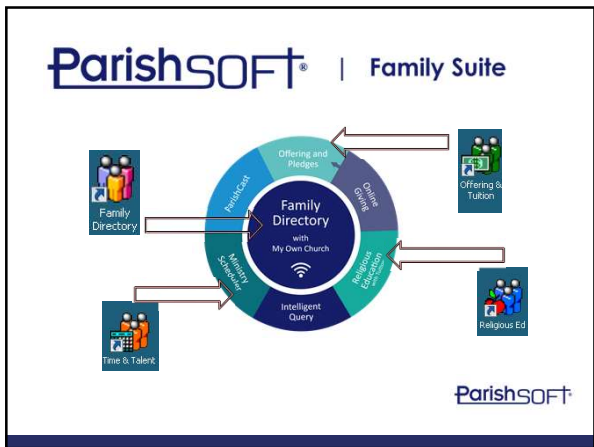
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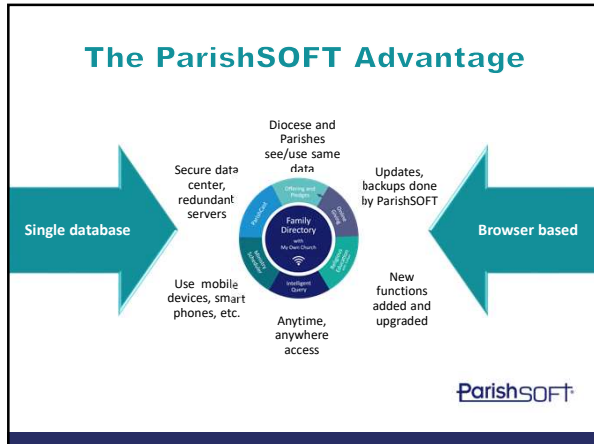


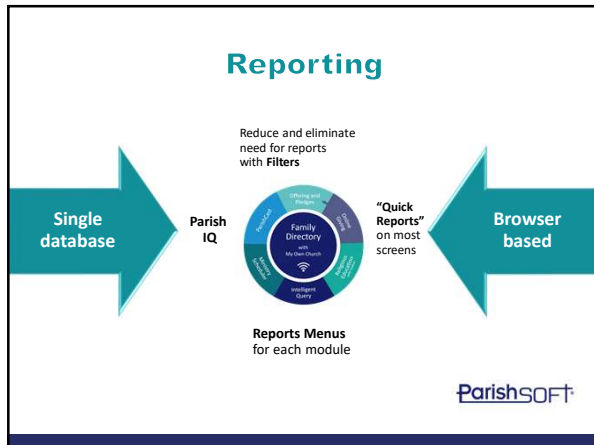


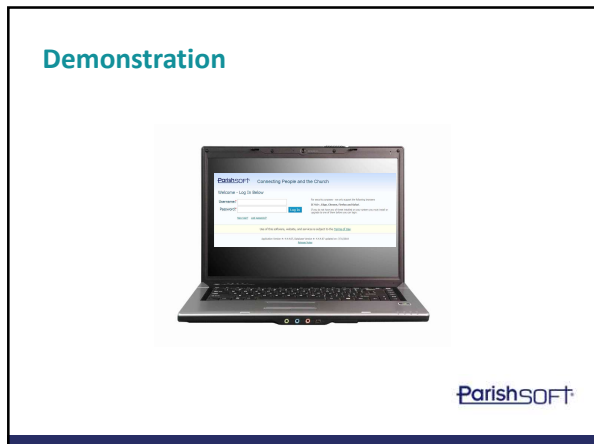
Agenda

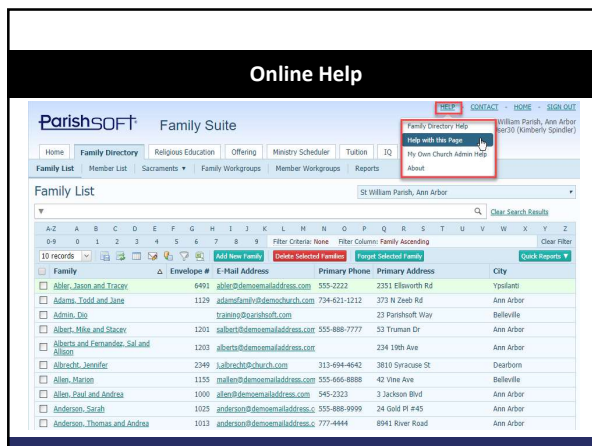
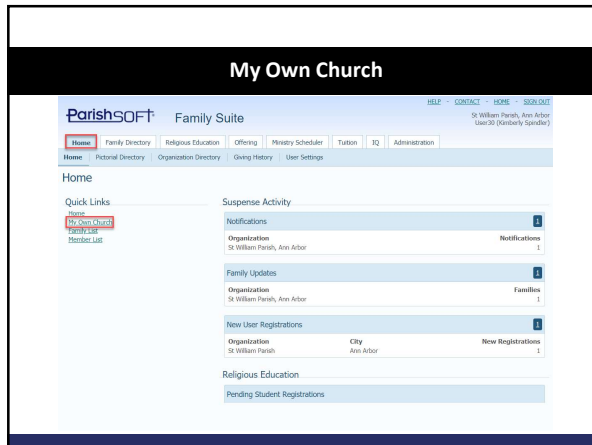
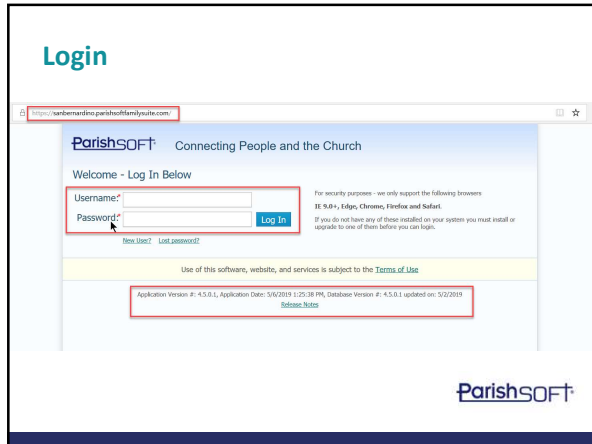
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ParishSOFT Knowledge Base & Training Website

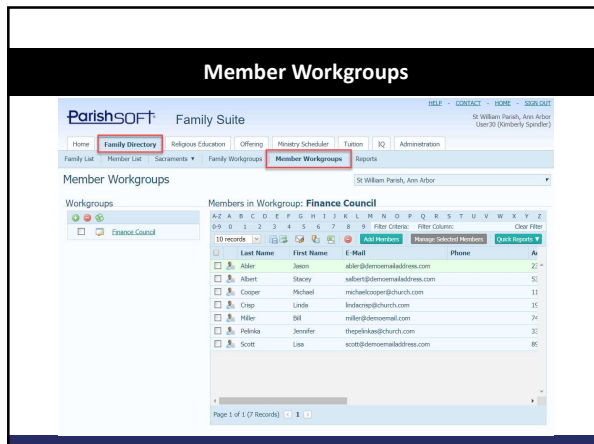
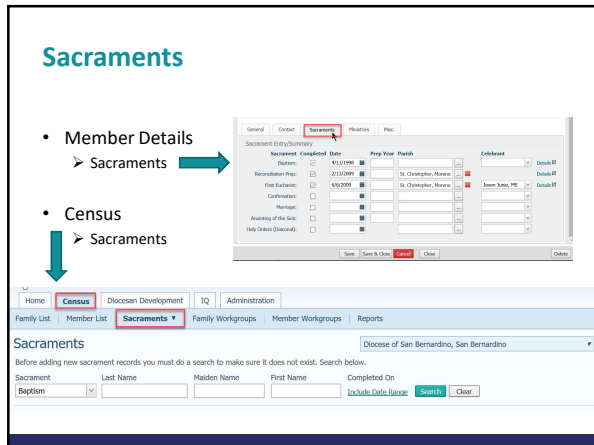
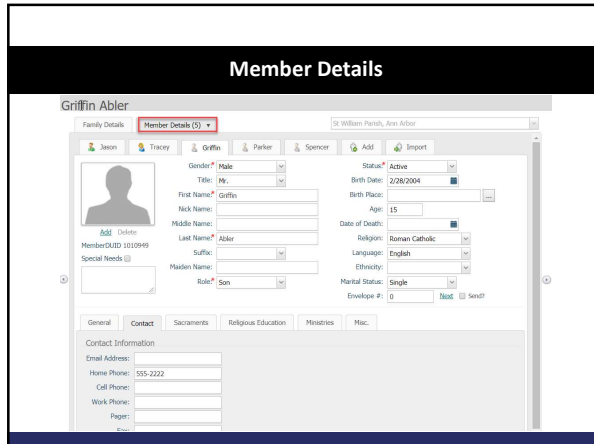
- <https://www.parishsoft.com/training/ps-familysuite/>
- <https://support.parishsoft.com/hc/en-us>

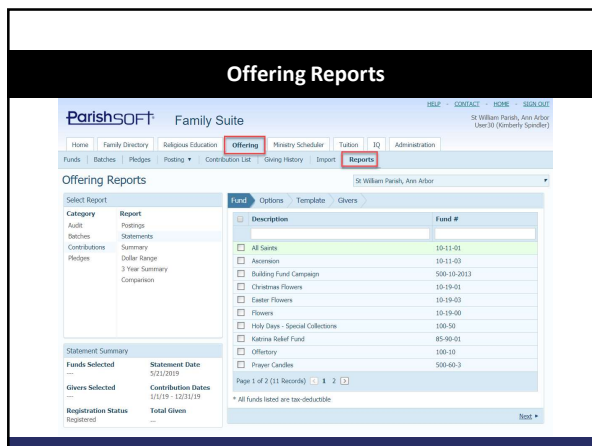
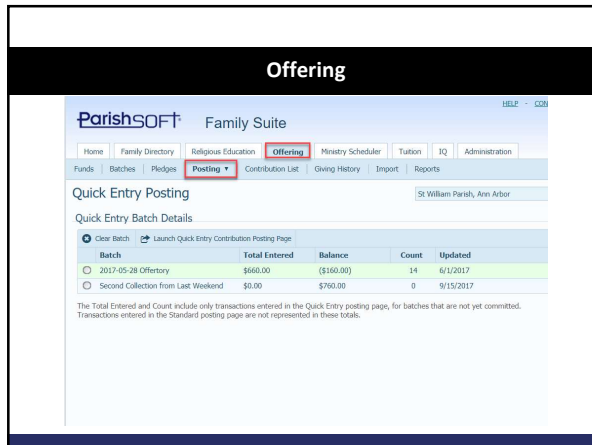
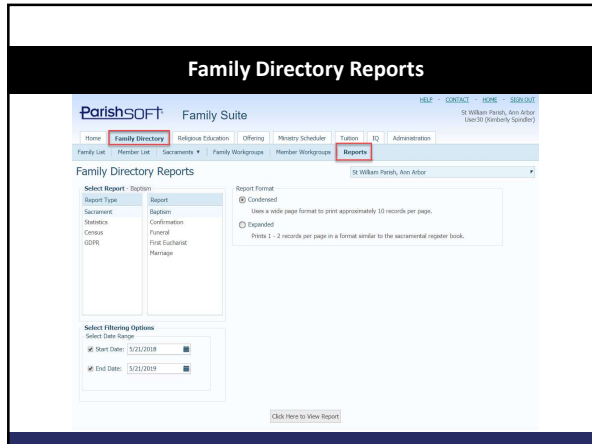
Family List

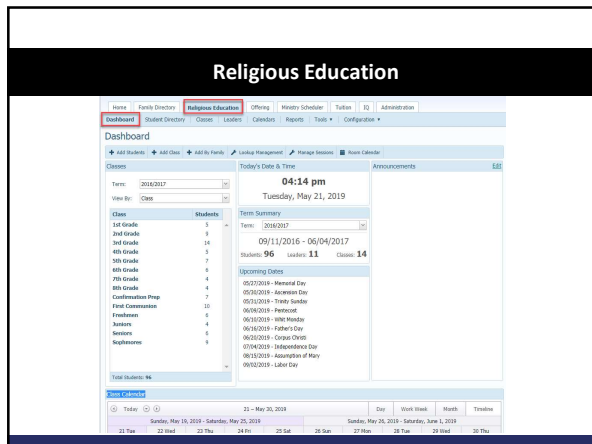
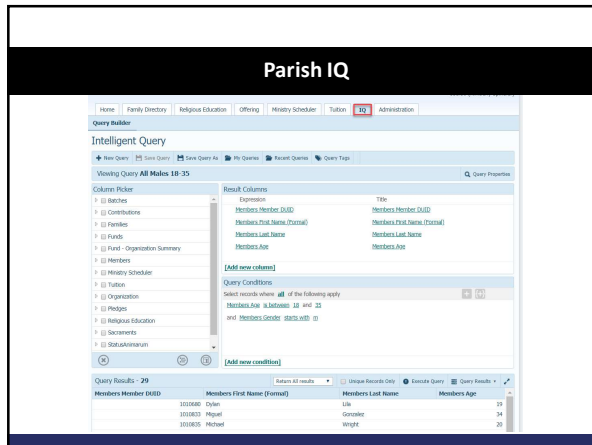
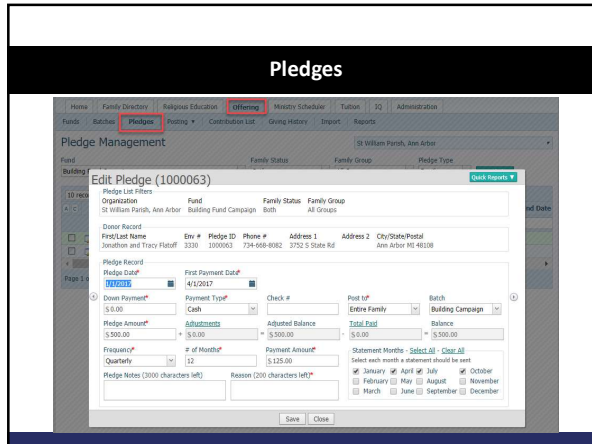
Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
Abler, Jason and Tracy	6491	abler@demomailaddress.com	555-2222	2251 Elsworth Rd	Ypsilanti
Adams, Todd and Jane	1129	adamsfamily@demochurch.com	734-421-1212	373 N Zeeb Rd	Ann Arbor
Adams, Dale		tdadams@parishsoft.com		23 Fanshott Way	Detroit
Allen, Mike and Tracy	1200	allen@demomailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
Albata and Fernandez, Sal and Alison	1200	albat@demomailaddress.com		234 19th Ave	Ann Arbor
Albrecht, Jennifer	2340	lalbrecht@demochurch.com	313-664-4642	3810 Spruce St	Detroit
Allen, Jason	1125	allen@demomailaddress.com	555-666-8888	42 Vine Ave	Detroit
Allen, Paul and Andrea	1000	allen@demomailaddress.com	545-2322	3 Jackson Blvd	Ann Arbor
Anderson, Sarah	1025	anderson@demomailaddress.com	555-888-9999	24 Gold Pl #45	Ann Arbor
Anderson, Thomas and Andrea	1013	anderson@demomailaddress.com	777-4444	8941 River Road	Ann Arbor

Member List

Member Last	Member First	Family Last Name	Member ID#	Registered	Family Group	Member E-Mail	More
Abler	Jason	Abler	1010948	Yes	Active		Active
Abler	Tracy	Abler	1010950	Yes	Active	tracy@parishsoft.com	Active
Abler	Jason	Abler	1010951	Yes	Active	abler@demomailaddress.com	Active
Abler	Spencer	Abler	1011095	Yes	Active		Active
Adams	Maia	Adams	1011039	Yes	Active	maia@parishdemo.com	Active
Adams	Bernstein	Adams	1011040	Yes	Active	bern@parishdemo.com	Active
Adams	Jane	Adams	1011041	Yes	Active	jane@parishdemo.com	Active
Adams	Todd	Adams	1011042	Yes	Active	todd@parishdemo.com	Active
Adams	Dale	Adams	1010903	No	Staff	dale@parishsoft.com	Active







Tuition

ParishSOFT Family Suite

Home | Family Directory | Religious Education | Offering | Ministry Scheduler | **Tuition** | IQ | Administration

Customers

Customer Name	Address	Env #	# Invoices	Total	Balance
Cantu, Stephen and Ellen	25 West St Ann Arbor MI 48106	3333	0	\$0.00	\$0.00
Skoushan, Susette	452 Stonegate Rd Ann Arbor MI 48103 1545	2044	0	\$0.00	\$0.00

Ministry Scheduler

ParishSOFT Family Suite

Home | Family Directory | Religious Education | Offering | **Ministry Scheduler** | Tuition | IQ | Administration

Ministry Scheduler Configuration

Groups: Festival, Funeral, Liturgy, Parish Life

Ministries: Bake Sale, Carnival Rides, Cotton Candy, Dunk Tank, Snow Cones, Ticket Sales Booth

Roles: Eweramics, Cookies, Pies

Events: 10AM - 12PM, 12PM - 2PM, 2PM - 4PM, 4PM - 6PM, 6PM - 8PM, 8PM - 10PM

Administration – Manage Staff

ParishSOFT Family Suite

Home | Family Directory | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | **Administration**

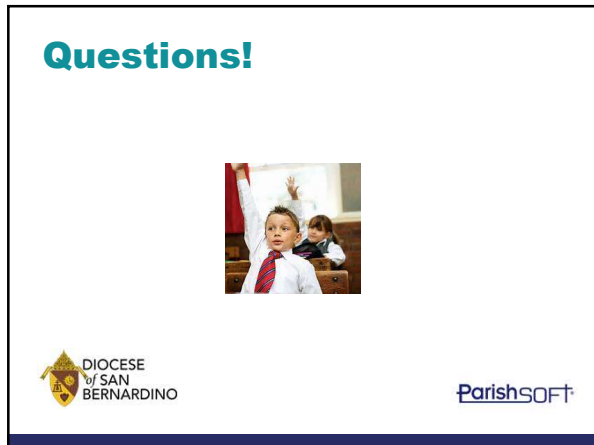
Manage Staff

Staff List

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organization ID
Adrian, Dio	Ms			unknown	7/29/1960	St William Parish	50001
Scott, Lisa	Ms			Administrative Assistant	5/9/1971	St William Parish	50001
Spindler, Kimberly	Mrs.			Administrator	2/20/1973	St William Parish	50001
Trainer, Joe	Mr.			Bookkeeper	9/13/1981	St William Parish	50001

Page 1 of 1 (4 Records)









Thank You!

ParishSOFT
