

San Bernardino ParishSOFT Family Suite Training

Day 1

*Class times are approximate and subject to change

9:00 am – 9:15 am: Opening Prayer

Brief overview of My Own Church

- **Included Topics:** Family Detail, Education, Offering, and Ministry.

9:15 - 11:00 am: Intro, PS Family Directory Basics

- **Included Topics:** Main/Home Screen, Family List, Adding a family, Family & Member Details, Member list, and Reports.

11:00 am – 11:30 am: Workgroups & Communication

- **Topics:** Creating and managing Member & Family workgroups, Emailing in PS, and Mail merge

11:30 am – 12:00 pm: Sacraments

- **Included Topics:** Searching for Sacramental Records, Adding & Editing Sacraments, Certificates, and Sacramental Registry Reports.

12:00 pm – 1:00 pm: Lunch

1:00 pm – 1:30 pm: Sacraments (Continued)

1:30 pm – 2:30 pm: Administration

- **Included Topics:** Lookup Management, Adding new staff, How to Add Churches not in the united states, Merge Families

2:30 pm – 3:45 pm: PS Intelligent Query

- **Included Topics:** Building a query, Setting Sorting and Conditions, Saving and Modifying Queries, exporting to csv, and mail merging.

3:45 pm – 4:00 PM: Additional Questions

Day 2

*Class times are approximate and subject to change

9:00 am – 11:15 am: PS Offering

- ***Included Topics:*** Fund management, Fund permissions, Batches, Contribution Posting, Editing Contributions, Giving History, and Reports.

11:15 am – 12:00 pm: Pledges

- ***Included Topics:*** Creating a batch for pledges, creating pledges (in bulk and individually), posting payments, and reports.

12:00 pm – 1:00 pm: Lunch

1:00 pm – 2:15 pm: PS Religious Education

- ***Included Topics:*** Configuration, setting up terms, sessions, classes, students, and leaders, attendance, and reports.

2:15 pm – 3:00 am: PS Tuition

- ***Included Topics:*** Funds, Customers, Templates, Invoice items, Invoices, and Reports.

3:00 pm – 3:45 pm: PS Ministry Scheduler

- ***Included Topics:*** Creating a new ministry group, ministry, and events, Adding Ministers, and how to schedule including auto schedule.

Preferences

- ***Included Topics:*** Batch Edit and bulk end date ministers, setting family and member preferences, setting up teams, and Reports.

3:45 pm – 4:00 PM: Additional Questions

Closing Prayer