

Day 1 Onsite Training

8:45AM – 9:00AM

SIGN IN

9:00AM – 9:15AM

INTRODUCTIONS

9:15AM – 10:45AM

FAMILY DIRECTORY

- Fundamentals
- Navigating Family Directory
- General (demographic) data for a new family
- Importing family from other parish in Archdiocese
- Entering a new family
 - o Family naming
- Assigning Envelopes

10:45AM – 11:00AM

BREAK

11:00AM – 12:00PM

FAMILY WORKGROUPS

- Adding families to a work group
 - o Annual Appeal,
 - o Georgia Bulletin
- Creating a workgroup

12:00PM – 1:00PM

LUNCH BREAK

1:00PM – 2:15PM

MEMBER DIRECTORY

- Overview of Member screens
- Enter new members for family
- Sacraments for family member
- US Parishes adding foreign parish to table

2:15PM – 2:30PM

BREAK

2:30PM – 4:00PM

RELIGIOUS EDUCATION (abbreviated)

- Building Session
- Building Class
- Adding Students

Day 2 Onsite Training

9:00 AM – 10:15 AM

OFFERING

- Add a New Fund
- Edit and Delete a Fund
- Creating Batches

10:15 – 10:30 AM

BREAK

10:30- 12:00PM

POSTING

- Post Contributions
- View and Export Daily Postings
- Offering & Pledge - Reports
- NSF and other Adjustments

12:00PM – 1:00PM

LUNCH

1:00PM – 2:15PM

OFFERING CONTINUED

- Manage Membership Pledge Records
- Add a Family to a Fund,
- Enter Pledge Record Data
- Post Pledge Payments

2:15PM – 2:30PM

BREAK

2:30PM – 3:30PM

TIME AND TALENT (abbreviated)

- Create/Edit Lookup Tables
- Add an Event, a Ministry Group, and a Ministry.
- Minister Directory: Add a New Minister,
- Filter Directory View

3:30PM – 4:30PM

PARISHSOFT SYSTEM TECHNICAL INFORMATION

(Recommended Attendee: Parish staff member responsible for technical systems administration.)

- Manage staff list
- Master machine designation
- Database Maintenance Check
- Perform back-up