Agenda
ParishSOFT Basics
Day One

9:00 AM – 9:15 AM **SIGN IN & INTRODUCTIONS**

9:15 AM – 10:45 AM **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

10:45 AM –11:00 AM **BREAK**

11:00 AM – 12:00 PM **FAMILY WORKGROUPS**
- Adding families to a work group
  o Annual Appeal,
  o Georgia Bulletin
- Creating a workgroup

12:00 PM – 1:00 PM **LUNCH**

1:00 PM – 2:15 PM **MEMBER DIRECTORY**
- Overview of Member screens
- Enter new members for family
- Sacraments for family member
- US Parishes adding foreign parish to table

2:15 PM – 2:30 PM **BREAK**

2:30 PM – 4:00 PM **RELIGIOUS EDUCATION** (abbreviated)
- Building Session
- Building Class
- Adding Students

Agenda
ParishSOFT Basics
Day Two

9:00 AM – 9:30 AM	**PARISHSOFT REPORTS**
9:30 AM – 10:15 AM	**OFFERING**

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

10:15 AM – 10:30 AM	**BREAK**
10:30 AM - 12:00PM	**POSTING**

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

12:00 PM – 1:00 PM	**LUNCH**
1:00 PM – 2:00 PM	**OFFERING CONTINUED**

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

2:00 PM – 2:15 PM	**BREAK**
2:15 PM – 3:15 PM	**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

3:15PM – 4:00PM	**PARISHSOFT SYSTEM TECHNICAL INFORMATION**

- Manage Staff List
- Master machine designation
- Database Maintenance Check
- Perform Back up