



Memo

Date: January 10, 2022

To: All parish business managers and finance personnel

From: Susan Shirley, systems administrator, Office of Finance

Re: Training/Support resources for upcoming ParishSOFT offering upgrade

ParishSOFT Family Suite Offering Module will be upgraded on Tuesday, February 15. The new module will be available for use beginning Wednesday, February 16. Important training and support dates follow.

Prior to the update, we recommend the following:

- Save a copy of your year-end contribution letters (as a pdf file). Once you have compiled the letters, you will easily find the options to print and/or save. Saving this file will ensure your access to these records, if needed, while the system is unavailable during the upgrade.
- Please make any final adjustments to contribution batches in ParishSOFT Family Suite prior to Thursday, February 10. The upgrade process from ParishSOFT Offering & Pledges to ParishSOFT Redesigned Offering handles batches as follows:
 - Closes all balanced batches (Open Batches, Quick-Entry uncommitted, and Quick-Entry committed)
 - Open Batches are brought into balance and closed.
 - Any Quick-Entry batch that is not in balance will remain open.

It is recommended that all volunteers and staff with offertory posting responsibilities, take advantage of *both* the recorded online learning and the instructor led hands-on-training. The two training options are:

- ParishSOFT PathFinder On-Demand Video Training – follow link on dashboard, below. Self-paced option.
- Instructor led hands-on-training Tuesday, February 1- Friday, February 4 – two sessions each day, morning and afternoon. Registration link on dashboard – please select your preferred session early as we have limited spaces for each session.

Enhanced Support Options (after conversion)

- Two instructor-led open support sessions – Wednesday, February 16, and Tuesday, February 22 from 10 a.m. to 2 p.m. Link on dashboard.
- Premium email support for our archdiocese, offering update questions, with a guaranteed 24-hour, or less, response time. Custom email link on the dashboard.
- The Office of Finance/Parish Support personnel will be available to offer instruction and diocesan best-practice advice. Links on the dashboard.

We trust you will find the new system to be a robust new framework with many enhanced features to assist your donor management activities.

(At the time of publication of this memo, the registration links are pending completion. The dashboard, below, will be updated as soon as they become available.)

The Office of Finance/Parish Support dashboard:

<https://app.smartsheet.com/b/publish?EQBCT=ad542c23b3c04070b185e2059a196616>