2021 ParishSOFT Roadshow Workshops List

Workshop Classifications

Beginner = Our beginner level workshops are designed to share fundamental information about our products or common workflows that will help users be effective in leveraging ParishSOFT tools. While much of the information presented may be review for long-time ParishSOFT users, experienced users may learn new tips since we are regularly updating software functionality.

Intermediate = Our intermediate workshops are designed to present products, features and concepts that will help you go beyond the basic use of your ParishSOFT systems. While this tends to be information geared towards more experienced users that isn't always the case, so don't let the intermediate label scare you away from attending. Some features are deemed intermediate or more advanced because they are things users are generally not ready for until they have mastered the basic tasks they need to accomplish in the program. The items we present in these workshops are intended to help you move to the next level of use so that you can further support your ministry and organizational growth through your use of ParishSOFT.

Accounting Track Workshops

Beginner Accounting Track Workshops

Accounting Tips & Tricks (Beginner)

Attend this session to learn tips & tricks from our knowledgeable staff on ways to more effectively leverage your software. You will learn how to save time on data entry, research, and reporting. This is sure to be an information-packed session for all ParishSOFT Ledger & Payables users.

Accounts Receivable Overview (Beginner)

Through a demonstration of the ParishSOFT Accounts Receivable software, see how parishes and schools can easily integrate invoices, payments, credits, and reports for common church receivables. This workshop will focus on the core functionality of the Accounts Receivable module and show how it is fully integrated with the general ledger in your Ledger & Payables program. This session is designed for organizations that are considering adding the Accounts Receivable module or have just purchased the module.

Effectively Recording Credit Card Transactions (Beginner)

A large number of churches have started to use credit cards. It can be a challenge to properly track and record credit card charges in your accounting software. If your organization is using or considering credit cards, ParishSOFT Accounting can designate credit card accounts, manage entered transactions, and provide a reconciliation feature to ensure everything on your statement is in your system.

Family Suite Contribution Reporting for Accounting Staff (Beginner)

Have you ever wondered what contribution information is available from the ParishSOFT Family Suite program to help you be more effective in tracking the financial information for your organization? This session will explore the different types of contribution information and reporting available from the ParishSOFT Family Suite. Leveraging this information can make you more effective in tracking the overall financial health of your organization.

Financial Statements: How to Read Them and Who Should Get Them (Beginner)
In this workshop, we will detail the content of common financial statements and show you how to analyze the reports for better financial administration of your parish. We will discuss the different level of detail you might want to consider for the many different groups you have and show you the importance of understanding them. Learn how to decide who gets which financials and make sure they contain the right information.

How to Build Your Budget (Beginner)
Budgeting can be a valuable tool in managing the financial health of your organization. Learn how to enter a budget into ParishSOFT Ledger & Payables and how to use reports to compare actual totals to your budget amounts throughout the year. This session also includes an overview of the budget import process.

Importing and Exporting in PS Accounting (Beginner)
Manually entering all your transactions can be time-consuming. Learn how to quickly get information in and out of ParishSOFT Accounting as well as help with consistency. We will demonstrate the process you'll need to know to easily produce single or multiple transactions in just a few clicks.

Ledger & Payable Standard Reports Overview (Beginner)
This session will walk you through the numerous reports in the Ledger & Payables module. We will cover common month and year end reports, as well as less commonly known reports. An open discussion on what reports parishes and schools are using will be included.

Permissions and User Administration in Accounting (Beginner)
This workshop will walk you through the different types of logins and how the permissions work with each of them. Learn the purposes behind different types of permissions and see examples that will help you determine how you should use permissions for your organization. Learning how to utilize the templates for user permissions will be included in the class. Discuss best practices on creating and maintaining your users and their permissions.

Purchase Order Overview (Beginner)

ParishSOFT's Purchase Order module allows your organization to create purchase orders to vendors in seconds and track them in ParishSOFT Accounting. Purchase order management is about getting your parish staff what they need with speed, accuracy, and within budget. Our flexible and secure purchase order software gives your organization an effective way to meet the needs of your staff and eliminate paperwork while easily managing purchases. ParishSOFT stores and sorts all your purchase orders in a centralized database so you can easily see your purchasing history or search through past purchases in seconds. Receiving is the most crucial link between purchase and payment in your process. Knowing what was delivered, who received it and when it was received is essential. Track all that and more in your ParishSOFT Purchase Order module. Attend this workshop to learn more about how Purchase Order may be able to help your organization.

Tracking Your Assets in Fixed Asset Management (Beginner)

Tracking assets is an important concern of every organization, regardless of size. Without an accurate method of keeping track of these assets, it would be very easy for an organization to lose control of them. The ParishSOFT Accounting Fixed Asset module allows organizations to track what assets they own, where each is located, who has what, warranties, insurance, maintenance schedules, and the cost and depreciation of each asset. Nonprofit organizations are not required to use depreciation; even though the Fixed Asset module has a straight-line depreciation process, the organization can choose to not use the depreciation and just use the software to maintain information about assets they own. This workshop will show you how helpful this module can be in keeping track of all your assets. This session is designed for organizations that are considering adding the Fixed Assets module or have just purchased the module.

What You Need to Know About Bank Reconciliation (Beginner)

The monthly bank reconciliation can be challenging. This workshop will discuss the importance of reconciling your bank account as well as best practices to solve an unbalanced reconciliation. The tips and tricks included in this class will help you quickly find problems and reconcile your bank account in record time!

Intermediate Accounting Track Workshops

Accounting Ask the Expert (Intermediate)
Our expert staff will be available to take questions from the audience about our accounting products. This is your opportunity to ask those questions you may have but have not yet asked about the accounting products you use. You will have the opportunity to submit your questions ahead of time during registration or ask them during the session. Please note that questions related to specific user issues may not be able to be answered during this general session.

Analyzing Financial Statements & Providing Valuable Reports (Intermediate)
In this workshop, we will detail the content of common financial statements and show you how to analyze the reports for better financial administration of your parish. We will discuss the different level of detail you might want to consider for the many different groups you have and show you the importance of understanding them. Learn how to decide who gets which financial reports and make sure they contain the right information.

Church Manager Advanced Options (Intermediate)
Explore some of the more advanced options available to you in ParishSOFT Accounting. These options are enabled in the Church Manager Module. During this session we will discuss tracking multiple subsidiary general ledger accounts in the same primary bank account, processing your payables through Bill Pay, fighting fraud with Positive Pay, and keeping your entities in balance automatically. One of these advanced features may be your pathway to using ParishSOFT Accounting more effectively.

Ledger Report Writer: Getting the Custom Statements Your Parish or School Needs (Intermediate)
Get the data you want in the format you need. Learn how the Ledger Report Writer lets you create custom consolidated or organization-level statements of activity and financial position from your general ledger. Use those statements to produce flexible reports that deliver real-time, accurate financial data for any given organization, or your entire diocese, at any time, for any period, directly from your chart of accounts. You will also see some example reports that may help you. This session is designed for organizations that are considering adding the Ledger Report Writer module or are new to Ledger Report Writer.

Projects: Organize and Group for Effective Reporting (Intermediate)
Using projects effectively requires forethought. We demonstrate how you can set up projects and project groups to organize and report efficiently to departments, finance councils, and pastors. For those who have created a "project monster" by having a project for "everything," discussion will be held on how to organize by using project groups to your advantage.

User Round Table Discussions (Intermediate) General Session
We will facilitate a set of user discussions during a round table session where ParishSOFT users can network with others in their same role or area to learn and share best practices and ideas.

Family Suite Track Workshops

Beginner Family Suite Track Workshops

Family Suite Overview (Beginner)
ParishSOFT Family Suite's solutions have modern, intuitive interfaces that make them easy for everyone to use, from staff to parishioners. Plus, they are packed with features specific to the needs of a Catholic organization. While any of these products can be used on their own, they really shine as part of a fully integrated suite! This workshop will highlight some of the key features and functionality offered within the ParishSOFT Family Suite modules.

Family Suite Tips & Tricks (Beginner)
Attend this session to learn tips & tricks from our knowledgeable staff on ways to more effectively leverage ParishSOFT Family Suite to increase your efficiency in doing your daily work. You will learn how to save time on data entry, research, and reporting. This is sure to be an information-packed session you won't want to miss.

Getting the Data You Need from Family Suite (Beginner)
Explore the various ways you can use the power of ParishSOFT to get the data you need for your pastor, co-workers, volunteers, and parish groups. Learn how export functions, quick reports, Intelligent Query (IQ), and workgroups can empower you to enhance your ministry. Discover how tools from ParishSOFT can help you reach and address your members, and get the right information to the right people.

How to Effectively Manage Staff & Permissions in Family Suite (Beginner)
Learn how to grant the appropriate level of access to your staff and volunteers based on staff role and needs. We will also explore some best practices for making sure you are maintaining an accurate staff list to ensure you are keeping your parishioners' data secure. Learn why understanding equals greater security for your organization. This session is a must for all administrators!

Managing Mail Merge from Family Suite (Beginner)

Walk through the nuts and bolts of creating mail merge templates from ParishSOFT Family Suite. In this workshop you will learn the various ways you can export information from the ParishSOFT Family Suite modules and use the export results to link to a MS Word merge document to create a mail merge template. The tools you learn in this workshop can save you time and help you be more efficient when you need to communicate with many parishioners at once.

Ministry Management (Beginner)

Ministry Scheduler is for more than just generating schedules. Learn how this tool can help you organize any service, special event or ministry and keep track of all your parishioner's involvement in the life of your parish. From liturgical volunteers to your annual festival, and everything in between; Ministry Scheduler supports effective, detailed management of the various ministries within the church!

My Own Church (Beginner)

Your ministries and communications rely on accurate parishioner information and tools that support full engagement in parish life. ParishSOFT's My Own Church is a secure parishioner portal that eases administration and improves the accuracy of your parishioner records while connecting members to places they interact most with the Church. In this workshop learn more about the My Own Church (MOC) parishioner portal from the point of view of both a parishioner and an administrator. Become familiar with processes such as getting your parishioners to sign up, approving suspense activity and leveraging the information you receive to engage your parishioners in ministry and more.

Offering: The Process from Bank to Basket (Beginner)

Many churches have varying processes in place regarding the handling of contributions. What is the right process? What risks are associated with the process currently in place? This open discussion will focus on the many varying steps involved with accepting contributions, and the necessary controls to ensure financial security and the avoidance of risk throughout the entire process. We'll identify points of inefficiency and potential risk and discuss techniques to ensure security.

Offertory Management Best Practices (Beginner)

This workshop will focus on the best practices for offertory management from the receipt of the donation through the entry into the system to the reporting. We will discuss tips to help you be more efficient and effective in your data entry process and how to build in good internal controls to your process to reduce risk and improve data accuracy.

ParishSOFT's Next Generation of Online Giving (Beginner)
ParishSOFT Giving is our next generation of online giving software. During this workshop you can see how it integrates with the rest of your ParishSOFT Family Suite; saving you time and money. Learn about how much more parishioners are willing to give when it is made easy for them to do so. With features like Text to Give, Kiosk Giving, Online Event Registration and Payments; your parish can truly engage your parishioners and encourage them to give their time, talents, and treasures to serve so that they can be true stewards of God.

Quality Data That Works for You (Beginner) *General Session 1.5 hours*
ParishSOFT Family Suite contains a wealth of information. Discover how ParishSOFT tools can help you reach and engage your members and get the right information to the right people. Understanding export functions, quick reports, and workgroups will empower you to enhance your ministry.   Having good data standards can make your data more useful. In this workshop we'll show you how to leverage the powerful reporting features in ParishSOFT, as well as how to begin crafting data standards for your parish. We want to remove some of the barriers that are preventing you from fully leveraging your data, so that you can discover what pieces of data are the most useful for engaging your parishioners and growing your parish.

Query Your Way to Better Ministry with IQ (Beginner)
Learn how to effectively use the ParishSOFT Intelligent Query (IQ) tool to better understand your parishioners and their engagement with your parish. Build custom queries that can help you make better strategic decisions that support your mission.

Sacramental Recording & Reporting (Beginner)
In this workshop you will learn best practices for entering sacramental records and maintaining them for reporting purposes. You will learn tips such as how to avoid entering duplicate matrimony records and how to manage sacraments for non-registered parishioners. If you are responsible for the sacramental management at your parish this is a must attend workshop.

What's New with ParishSOFT Family Suite (Beginner)
In this workshop we will explore some of the newer features in the ParishSOFT Family Suite. We will review high-value features that may be new to you and discuss ParishSOFT's strategy and priorities for planning and new development.

Intermediate Family Suite Track Workshops

Duplicate Records Management (Intermediate)
In this joint session the Diocese and ParishSOFT staff will provide information on the benefits of a single-family record throughout the system, the impact of duplicate records, best practices for avoiding duplicate records and the process to address existing duplicate records. This workshop will build on the quality data standards information provided in the first general session of the day.

Expand Your Reach with Parish IQ (Intermediate)
In this workshop you will learn ways to utilize the ParishSOFT Parish Intelligent Query (IQ) tool to mine your data to expand your ministry. We will share tips and tricks to minimize the time you spend manually compiling data. Come explore real life query examples with us in the areas of Family Directory and Religious Education. In addition to learning how to query more complex data, we will also explore ways to leverage that data outside the system to better understand and reach your parishioners. We will discuss some Excel functions that can be useful as you work to leverage the data you are capturing. For example, how do you add a leading zero or splitting out a field such as First and Last Name. You will also learn how to create some basic pivot tables that can help you combine one or more lists to get the data you need to target specific demographics in your parish for outreach and programming. Those that attend will receive a list of the queries covered during the presentation so that you can recreate them in your own database.

Family Suite Ask the Expert (Intermediate)
Our expert staff will be available to take questions from the audience about our Family Suite products. This is your opportunity to ask those questions you may have but have not yet asked about the Family Suite products you use. You will have the opportunity to submit your questions ahead of time during registration or ask them during the session. Please note that questions related to specific user issues may not be able to be answered during this general session.

How to Maximize Your Outreach & Church Growth (Intermediate)

ParishSOFT Family Suite contains a wealth of information and data. Although there are many options available to gather, filter, sort, and report the data, which pieces of data are most useful for building the Church? This workshop will explore data mining options geared towards reaching new and 'fringe' participants, and how to successfully integrate them into the daily life of the parish. During this session we will also explore the variety of communication tools ParishSOFT offers to help you more deeply engage your parishioners and grow your parish.

Implementing User-Friendly Standard Operating Procedures SOP (Intermediate)

Are you lacking standards for your ParishSOFT users? Does the lack of centralized standards limit your ability to leverage your data effectively? Come join our workshop to learn how to create, train, and maintain an effective SOP. We will explore the key elements of a SOP, best practices for training users on the SOP, and ideas for maintaining the SOP as policies and applications change. Leave this workshop with the tools you need to successfully implement data standards throughout your organization that will help you achieve greater data accuracy.

Leveraging Complex Features in IQ (Intermediate)

Learn how to leverage the ParishSOFT Intelligent Query (IQ) tool to better understand your parishioners and their engagement with your parish. Our knowledgeable staff will demonstrate how to use more advanced features that can help you make better strategic decisions that support your mission. During this workshop we will cover Subqueries, Aggregate Functions, using Query Tags to manage your queries, Group conditions, and using the results of a query in another query. If you are already familiar with the basic functions of IQ and want to take your query building skills to the next level, this workshop is for you!

Mentoring to Advance God's Kingdom: Building a Mentorship Program (Intermediate)
For lack of guidance a nation falls, but victory is won through many advisers. (NIV) Proverbs 11:14. Do your parishioners have someone to turn to when faced with life's challenges and decisions that can bring believers closer to God? We all can benefit from someone else's faith journey. Many of us have gifts and life experiences to share with others. Do you currently have a mentoring program that can help advance the Kingdom of God?

In this workshop, we will cover the benefits of having a mentoring program at your parish. Takeaways that you will receive include: How to start a program or take an existing program to the next level. Different forms and structures of a mentoring program. The benefits to individuals, members and the community. You will also leave with resources that will guide you on developing and maintain a mentoring program that is beneficial to your parish and those that are participating.

Online Event Registration & Payments: It's Possible with ParishSOFT! (Intermediate)
Learn how to better utilize ParishSOFT Giving forms to allow your parishioners to register and pay for events online. Here you will see how to custom build online forms that allow parishioners to submit payments. These forms can be used to take an online census, allow parishioners to register and pay for religious education, and give your parishioners the opportunity to register and pay for events, such as summer camps, online — all while giving you access to the information needed in an easy to use format.

ParishCast: Powerful Group Communication Tool (Intermediate)
Learn more about one of our newer add-on products. The ParishCast communication platform can be used to rapidly alert and notify members of your parish, religious education department, or parochial school. Quickly and easily communicate via voice calls, text messages, email, push notifications to smart phones, social networks and more – all within moments! We will also share some best practices for engaging your parish community in both emergency and non-emergency situations.

ParishSOFT Giving: Beyond the Basics (Intermediate)
ParishSOFT Giving provides predictable income, easy set up and ways to connect with your parishioners. This session is designed for those already using ParishSOFT Giving and will take a closer look at Reporting, Virtual Terminal, Text Giving, and Forms functionality within ParishSOFT Giving.

Religious Education: Beyond the Basics (Intermediate)
Learn how to go beyond the basics and take advantage of all the tools ParishSOFT Religious Education has to offer. We'll look at topics such as online registration, attendance tracking, and communication with parents and students.

Religious Education: Electronic Forms & Payments (Intermediate)
Learn how to leverage ParishSOFT Giving Forms feature to streamline your Religious Education payment process. With ParishSOFT Forms you can allow your parishioners to register for Religious Education and submit payments all through the same interface. We will demonstrate how you can custom build online forms that allow parishioners to submit payments when they register. In addition to Religious Education, these forms can be used to take an online census or pay for other events, such as summer camps or vacation bible school, all while giving you access to the information needed in an easy to use format.

The Truth Behind Increased Giving Campaigns (Intermediate)
Although resources vary from parish to parish, the need for financial viability remains constant. Whether funding short term projects, such as a building campaign, or desiring parishioners to amplify existing gifts long term, this workshop will focus on various initiatives to increase giving. We will also discuss some of the common obstacles and pitfalls associated with such campaigns.

User Round Table Discussions (Intermediate) General Session
We will facilitate a set of user discussions during a round table session where ParishSOFT users can network with others in their same role or area to learn and share best practices and ideas.

Priest Track Workshops

Please note that priest workshops can be presented as Demonstration or Hands-On Workshops.

Accounting Workshops

Accounting Reports (Beginner)
During this workshop we will dive into the key reports that would be beneficial for you to know and help you understand what financial information is displayed on each report so you can better monitor and manage the financial health of your parish.

Dashboards & Finding Information on Screens (Beginner)
This workshop will help you understand what key information is available to you in ParishSOFT Accounting and where to find it. We will provide an overview of the accounting dashboard and some of the primary information screens.

Getting Key Financial Information for Your Parish (Beginner)
Pastors need an understanding of the Financial Reports and how to get important information for the parish without needing to know how to use all the entry screens of the accounting system. This workshop will focus on the key areas that are important for the pastor to monitor parish financials to help make decisions for the organization.

Tracking Budgets & Projects (Beginner)
Learn how to use reports to compare actual budget totals to your budget amounts throughout the year and how creating effective projects in the accounting system can you help you more efficiently obtain valuable reports. Both features can help you more closely monitor the financial health and track important details of your parish.

Family Suite Workshops

Family Suite Reporting (Beginner)

We will review the key census reports that will help you better understand the demographics of your parishioners as well as their level of engagement in areas such as ministry, religious education and donations.

Family/Member Information & Communication Tools (Beginner)

This workshop will review the family and member information available to you in the ParishSOFT Family Suite. Then we will demonstrate the communication tools available within the program to help you more fully engage your parishioners.

Key Insights for Pastors from ParishSOFT Family Suite (Beginner)

Learn how to quickly look at key reports and metrics to better understand your parish community and to know where to focus your efforts to best support your mission. These reports are founded on a few key data standards your staff needs to know to help you get the most from ParishSOFT.

Hands-On Workshops

Accounting Workshops

Ledger Report Writer Basics (Beginner)
Use the Ledger Report Writer module to create custom financial statements in ParishSOFT Accounting. Learn how to create some basic reports that will be helpful to your organization. Take advantage of personal instruction from ParishSOFT staff while using the Ledger Report Writer in a test environment. Collect what you learn from this workshop to take full advantage of the Ledger Report Writer module.

Transaction Entry (Beginner)
Review how to enter transactions in ParishSOFT Accounting. Learn ParishSOFT best practices when entering Bills, Deposits, Journal Entries, and Memorized Transactions. You may even find some time saving tips!

Family Suite Workshops

Family Directory Basics (Beginner)
This workshop will focus on best practices for entering families and available search and filtering options. Learn how to avoid adding a duplicate family when adding new families to your system. Understand how the filtering and sorting options work within the program to access the data you are searching for more efficiently.

Offering Basics (Beginner)
This workshop will teach you the fundamentals of ParishSOFT Offering and how to effectively track family and member contributions. This includes creating batches, posting contributions, editing contribution postings, and common reporting. The tools you learn will help you be more efficient in your contribution management process.

Parish IQ (Intelligent Query) (Beginner)

In this hands-on workshop, you'll learn how to get the parishioner data you really need from your database. It's easy, and you can do it – without having to master any advanced database skills! You'll create lists that bring your data to life, export your lists to Excel or do a mail merge. You'll learn how to build queries for Family Directory, Offering & Pledges, Religious Education and Ministry Scheduler that can help you more fully engage with your parishioners.

Religious Education Basics (Beginner)

How can the Religious Education module work more effectively for you as you prepare for the upcoming school year? Find out in this hands-on training class! Learn the best practices in ConnectNow Religious Education to leverage the power of the software for the benefit of your educational ministry and parishioners. By the end of this workshop you will understand how best to setup your terms, sessions, and classes so you can more effectively manage your Religious Education program for the coming year.

Sacrament Entry (Beginner)

Learn how to manage sacramental details for each of your members using the special fields designed for Baptism, Reconciliation, First Eucharist, Confirmation, Matrimony, and Funeral. Discover how accurate sacramental data lets you take advantage of the software's sacramental notifications and certificate templates and provides reliable sacramental reports, parish statistics, and Kenedy reports at any time.

General Workshops

Engaging All Generations in Today's World (Intermediate)

Do you struggle to stay up to date with all the available ways to communicate today, wonder what really works or what tools you should be using? In addition to print media does your organization utilize, Twitter, Instagram, Facebook, text, and email to communicate with parishioners and your community? Do you know what all those platforms are and if they are actually effective? Join us for this workshop to explore the changing ways we all communicate and how you can leverage them to reach the different generations within your community. By understanding how each generation communicates you can better utilize tools that will reach a broader range of those within your parish. Once engaged people become involved, they have a better sense of belonging which will help them remain active Catholics for many years to come.

New Employee On-boarding & Learner Management with ParishSOFT PATHFinder (Intermediate)

During this workshop we will answer one of the most common questions we hear from our customers; "How can we best on-board new employees who utilize ParishSOFT Products?" Turnover is a reality for the majority of parishes we serve, and effective on-boarding processes can greatly improve the success of new employees and reduce costs. Join us for this workshop where we will discuss the employee on-boarding processes, challenges and new solutions with ParishSOFT's PATHFinder Learning Management Tool.

Preparing for the Unexpected (Intermediate)

It is human nature to believe something bad: a fire, medical emergency, theft or shooting won't happen at our parish. But what if it does? It can be a devastating time. Having procedures in place when the unexpected happens can alleviate some of the stress that occurs with such events. In this webinar we will discuss phases of emergency management, the types of emergencies a parish might face, why it is important to have procedures in place and publicized prior to an emergency, data backup plans and how you can use ParishSOFT and other methods to communicate with your parishioners if something does happen. As a takeaway we will provide you resources that can be used as templates to create a plan for your parish.