



Transition Guide for J.S. Paluch Software Users to ParishSOFT

Thank you for considering ParishSOFT as your next software company!

This guide provides important information regarding ParishSOFT's software and services, along with tips for making a successful transition from your current Paluch software. It provides specific comparisons of the J.S. Paluch and ParishSOFT products as well as answers to commonly asked questions.

Why is ParishSOFT the Best Choice for Catholic Churches?

Selected by the J.S. Paluch Company, developers of PCMS, Arise, COMP, PREP, SMP, e-Contributions, and e-Paluch Software and Web Solutions products

Mary Prete, Vice President of Parish Services at J.S. Paluch, stated, "With this new partnership, J.S. Paluch customers will continue to receive the fine service and support they have come to expect. With ParishSOFT, they'll be partnered with the company that is now simply the best choice for Catholic parishes."

The strengths of J.S. Paluch Software carried on through ParishSOFT

J.S. Paluch has served Catholic churches with their church management software programs for 27 years. Since 2002, ParishSOFT has helped more than 450 former PCMS, COMP and Arise customers transition to ParishSOFT and provide our best testimony to the improvements you will enjoy when you transition to ParishSOFT.

Powerful, easy-to-use software saves time, improves communication, and enhances ministry

ParishSOFT continually invests in our technology to provide you with regular product updates and new tools. Our products and services reduce your administrative workload and connect your church with staff, parishioners, and the communities you serve. Satisfaction guaranteed.

"ParishSOFT is great! It has much more to offer than our previous software [PCMS]. Not only was our data conversion accurate, it was much easier than I ever expected."

Nancy Leoncini, Administrator
St Brendan Parish • Dorchester, MA

Proven track record of service to J.S. Paluch software customers and Catholic churches

Today more than 5,200 Catholic churches in nearly every U.S. arch/diocese, including more than 450 former J.S. Paluch software customers, use ParishSOFT. Collectively, our customers have found our software to be more efficient and comprehensive, yet more user-friendly than their former programs. They also applaud our outstanding training programs and qualified, responsive customer support.

A smooth transition

We have converted data for thousands of parishes, including 450 parishes that used PCMS, COMP and Arise. They have found that our intuitive products make it possible to get up and running

quickly with ParishSOFT programs. We are committed to helping you switch to ParishSOFT with as little disruption to your parish as possible. Our transition team includes dedicated, experienced staff from ParishSOFT and J.S. Paluch.

Special Information for e-Contribution and e-Paluch Users

E-Contribution users can continue to use the e-Contribution system and receive support and maintenance from J.S. Paluch until their contract end date or December 31, 2010. Prior to expiration of your maintenance contract, ParishSOFT will contact you regarding obtaining consent from your parishioners to convert their financial information using safe and secure protocols. Compared with the e-Contribution program, ParishSOFT's Online Giving program offers additional features and reduced costs—we encourage you to take advantage of this service.

Following the expiration of e-Paluch customer contracts with J.S. Paluch, ParishSOFT will host e-Paluch user websites on ParishSOFT servers at no additional charge over the next year. During this period, ParishSOFT will notify e-Paluch customers, well in advance, of the timeline for transitioning their Websites to the ParishSOFT's free Web Solutions service. This will require a new website URL for your presence on the Internet. Your website URLs will be converted from an e-paluch.com site to a myownparish.com site effective June 1, 2010. For example, the site *ctka2.e-paluch.com* would become *ctka2.myownparish.com*.

Recommended Evaluation Process

Since you weren't necessarily planning to change software right now, we would like to help you with your evaluation process. We recommend that you:

1. Read this Transition Guide.
2. Meet with your staff and pastor to determine the expiration date of your existing maintenance contract with J.S. Paluch and assess any additional software needs.
3. Learn about ParishSOFT products on www.ParishSOFT.com—we offer several options so you can choose the method that is most efficient for you, including:
 - a. Review information and product briefs
 - b. See pre-recorded video demonstrations
 - c. Request a guided product demonstration with a knowledgeable ParishSOFT transition team member
 - d. Install a demonstration copy of the software
4. Call us at 866-930-4774 ext. 1 with any questions, and ask your ParishSOFT representative about the current offer for J.S. Paluch customers.
5. Ask for references—we'll provide the names of other ParishSOFT customers, including former PCMS, COMP and Arise customers in your area.

ParishSOFT Software

Products to Manage People, Ministries, Communications

Family Directory – Maintain complete, up-to-date census, membership, sacramental information for your entire parish. All other modules in the ParishSOFT suite use this central database to guarantee that all your staff have the same information for each family and member.

Religious Education & Tuition – Manage all phases of your religious education and school programs, from registration and scheduling to sacramental certificates and reports.

***ConnectNow Ministry Scheduler** – Tame all the complexities of volunteer management, recruiting, and scheduling using the only online scheduling software that integrates with ParishSOFT.

***Mailroom: Bulk Mailing** – Save on mailing costs by verifying mailing addresses with the NCOA and CASS databases and preparing applicable labels and forms.

***Mailroom: Address Quality** – Save on mailing costs and keep your database more accurate with automatic NCOA updates for the 10% or more of your families who move every year.

***My Own Church** – Let parishioners register online, update their personal information, view giving history, and see ministry opportunities and assignments. Submissions from members are subject to approval by your church, and approved changes will update your central database.

***NotifyNow** – Send instant communications fast to any group via text, phone, or email.

***Parish IQ** – Get answers fast, to almost any question about your church community, with this simple, easy-to-use tool for custom queries and reporting.

***Web Solutions** – Take advantage of this free service, which includes **your own website**, parish calendar, facility scheduler, email, and remote backup. See examples at www.ParishesOnline.com.

Products to Manage Finances

Offering & Pledges – Organize your parish income, including contributions, payments, and pledges. Will transfer data directly to ParishSOFT's ConnectNow Ledger and Payables or QuickBooks®.

Online Giving – Accept gifts and fees online through Web pages personalized for your parish.

***ConnectNow Church Accounting Suite: Ledger and Payables, Payroll Modules** – Track your church and school financials, budgets, and payroll using powerful Web-based church accounting, budgeting, and payroll systems. Access your data anytime, anywhere—very securely—using accounting products designed to meet the specific needs of churches.

Mobile Access

***Remote Solutions** – Access your ParishSOFT applications from any Internet connection.

**Indicates products not available from J.S. Paluch*

Order Products or Learn More

Call 866-930-4774 ext. 1

Email info@parishsoft.com

Visit www.ParishSOFT.com to view product videos or request a free guided tour

ParishSOFT Advantages Over J.S. Paluch Software (Arise, PCMS, and COMP)

People

- Enter new families and all their information in just minutes
- Filter your main list of families to view exactly the information you need, including tracking of the deceased
- Manage all aspects of church ministry from a central database, including full census and sacramental records, religious education programs, volunteer scheduling, offering, and pledges
- Create and print professional sacramental certificates with data merged from ParishSOFT
- Standardize your data and get better reporting from lookups that let you populate sacramental records with the names of parishes, parents, spouses, and sponsors already in your database

Communications

- Communicate easily with families and members via email, voice, text, and Constant Contact® from public or unlisted home phone, cell phone, email or other address information
- Merge ParishSOFT data seamlessly with Microsoft® Word® and Excel® for letters, lists, etc.
- Notify arch/diocese or parish of baptism of sacraments using convenient Word templates
- Email from directly within the software
- Post liturgical schedules to parish Web calendar easily

Finances

- Track contributions, stewardship, and tuition
- Save contribution entry time with minimum-keystroke posting
- Monitor stewardship easily—even over multiple years
- Export to QuickBooks or ParishSOFT's ConnectNow Church Accounting software
- Keep the books, get a handle on your budget, and do your own payroll using the Web-based ConnectNow Church Accounting Suite, designed especially for churches

Mobility

- Access your church records and financials anytime and from anywhere using ConnectNow My Own Church or Remote Solutions
- Accept gifts, stewardship pledges, and fees through your church's personalized, secure Online Giving Web page and have it update donor records in your Offering & Pledges Module
- Let members update their personal information, view giving history, and manage their personal ministry volunteer experience using the ConnectNow applications

Reporting

- Powerful, comprehensive reporting that is flexible and easy to use
- Create custom lists and data extracts easily, and use your data to improve ministries and stewardship (e.g., find all donors who gave \$200–\$300 during any period of time)
- Produce mailing labels using powerful sort and select options
- Create custom contribution statements
- Easily export data to other applications, like Microsoft Office®
- Customize ParishSOFT standard reports using Microsoft Access®

Support and Training

- Learn all software modules using our teletraining classes with live trainers

- Highly acclaimed technical support team that answers 70% of calls immediately and resolves the rest with a personal call back from one of our representatives, usually within two hours.
- Regular updates and enhancements let you work smart using the latest technology
- Quality technology and outstanding service provided by a company focused solely on software for churches

Systems and Information Technology

- Compatibility with Microsoft® Windows® 7, Windows Vista®, and Office® 2007
- ParishSOFT programs work with 64-bit operating systems
- Scheduled off-site data backups to ParishSOFT's backup server are FREE
- More options for password security
- Secured access to your data with user permissions that you configure and control to allow users access only to the areas they need to perform their job functions
- Easily setup screen viewing options to maximize use of your video screens
- Customize drop down choices to fit your church



Recommended Implementation for New ParishSOFT Users

We recommend the following implementation process once you place your order for ParishSOFT software:

1. Register and complete the Fundamentals teletraining class on <http://www.parishsoft.com/training/registration.htm> (free within the first 90 days of software purchase). This course provides an overview of the core Family Directory module, family and member record setup, backup configuration, staff login management, and reports.
2. Register for teletraining classes for any additional modules you have purchased on <http://www.parishsoft.com/training/registration.htm>.
3. Send us your J.S. Paluch database for conversion (see page 8), and put your data entry on hold until you receive your new ParishSOFT database.
4. Install your ParishSOFT programs—we provide a demonstration database that you can use for teletraining and any self-paced learning.
5. Load your newly converted ParishSOFT database and begin using your new software.

"I am very impressed with the classes and the extra mile that everyone is going, and it makes me very comfortable and glad to be working with people who are kind and extremely capable. I have every confidence in your company and solutions."

**Danielle Klinedinst, Parish Secretary
St. Vincent de Paul Parish • Hanover, Pennsylvania**

ParishSOFT Services

Training

ParishSOFT offers comprehensive training programs to help you get up and running quickly in our software. Training also helps ensure that you're taking full advantage of the productivity available in each of our products.

ParishSOFT offers a variety of training and consulting options geared to different learning styles. Whether you're a brand new user of our software or an experienced veteran, you can get the training and consulting that works best for you.

Teletraining Courses

Convenient and cost-effective teletraining uses teleconferencing to provide you and your staff with hands-on training led by one of our knowledgeable and proficient instructors—and it's all done from the comfort of your own office.

For course descriptions and prerequisite information, please visit <http://www.parishsoft.com/training/registration.htm> or contact us at 866.930.4774 x 6 or training@parishsoft.com.

Technical Services and Support

Our professional services team stands ready to help you integrate ParishSOFT technology in ways that will save you time and improve your church ministries. Whether you have a simple question or a big project that requires special reports and high-level data management, we can help you accomplish your goals through:

- Live-answer, industry-leading customer support
- Data analysis and conversion
- Training
- System hosting
- Custom reporting
- Consulting services

Data Conversion

Our conversion team is committed to providing you with an accurate, complete data conversion from your J.S. Paluch system to ParishSOFT. Conversion includes mapping data fields from your J.S. Paluch (COMP, PCMS, Arise) database to a new ParishSOFT database that will run with our software. Our process includes:

- Data mapping and translation of all J.S. Paluch software fields to ParishSOFT
- A thorough quality control process to clean, conform, and normalize your data (e.g., we fix data to be the proper case, ensure consistent data formats, and add mailing and tag names to your existing data)
- Conversion and translation process that helps you take advantage of new ParishSOFT features not available in your J.S. Paluch system.

To get started with your conversion from COMP, PCMS, or Arise:

1. Complete and submit the Data Conversion Checklist on <http://www.parishsoft.com/support/dataconversionchecklist.asp>.
2. Zip or compress your COMP folder, PCMS folder, or Arise SQL database. Copy to a CD, flash drive, or to our **Conversions FTP Site** <ftp://ftp.parishsoft.com> (username: *conversions*; password: *thanks*).
3. Email conversions@parishsoft.com to let us know your file has been posted. Please include your parish name, city and state.

Once you have sent the backup copy of your database for conversion, do not enter anything new into your J.S. Paluch system, as the data entered after you send your database to ParishSOFT will not be included in the conversion.

After we complete the conversion, we will send the converted data back to you on CD. Please allow up to two weeks for your data to be returned to you, although converted data is usually returned within a few days.

You do not have to wait for your converted data to start your teletraining (see page 6).

If you have questions, please email us on conversions@parishsoft.com. For step-by-step FTP instructions, please include “FTP instructions” in the subject line of your email. Please include your parish name, city and state in your email.

For information regarding conversion for **e-Contribution** and **e-Paluch** users, please see page 2.

Special Pricing for J.S. Paluch Customers

Please contact your ParishSOFT representative at 866.930.4774 ext. 1 for pricing and information about our current special offer for J.S. Paluch Customers.

ParishSOFT Questions and Answers

1. How long has ParishSOFT been around?
ParishSOFT was founded in 1998 by Fr. David Rosenberg.
2. How many parishes use ParishSOFT?
Over 5,200 parishes in nearly every arch/diocese in the U.S. use ParishSOFT software.
3. How can I evaluate ParishSOFT?
 - *View a self-paced online demonstration at our website*
 - *Sign up for a guided tour or webinar, or schedule a private tour.*
 - *Request a demonstration copy of our software by phone at 866-930-4774 ext. 1*
 - *Ask to talk to other ParishSOFT users in your area*
4. How do I reach ParishSOFT for support?
 - *Toll-free 866.930.4774 ext. 2*
 - *Calls are handled on an incoming basis or, if necessary, responded to within 2 hours*
5. What are your support hours, and can I email you my questions?
 - *9 A.M. – 7 P.M. Eastern Time (6 A.M. – 4 P.M. Pacific Time)*
 - *Log onto the customer support section of the website anytime to access Knowledgebase, Forums, FAQs, User Guides, Software Updates, and more*
 - *Email your questions to support@ParishSOFT.com anytime.*
6. What tools do you have to help me learn ParishSOFT quickly?
 - *Free Fundamentals teletraining classes – see www.ParishSOFT.com/training*
 - *Complete set of User Guides*
 - *Customer Support on our website has Knowledgebase, FAQs, Software Updates, Query Library, User Forums, and more*
 - *Call or email us your questions*
7. Does ParishSOFT allow our parishioners to access and update their information via the Web?
Yes, with My Own Church they are able to update family and member information, make contributions, pay fees, register for religious education and other classes and events online.
8. Why should I choose ParishSOFT?
 - *We provide top quality software and responsive, knowledgeable support.*
 - *You'll find our software easy to use, and you'll enjoy having the information you need most at your fingertips.*
 - *We are devoted to serving the Catholic Church and Catholic community.*
 - *Only ParishSOFT offers the most accurate data conversion from COMP, PCMS & Arise.*
 - *We offer a 100%, no questions asked, money-back guarantee.*