



## Transition Guide for LOGOS 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 LOGOS software. It provides specific comparisons of the LOGOS and ParishSOFT products, as well as answers to common questions.

### Why is ParishSOFT the Best Choice for Catholic Churches?

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#### The LOGOS executive team selected ParishSOFT

Wes Haystead, President and CEO, LOGOS Management Software said, *"Moving from a competitive relationship to a partnership lets us channel all of our energies and strengths into a singular focus: providing the best software and services to churches."*

#### The strengths of LOGOS Software carry on through ParishSOFT

LOGOS has served Catholic churches with their church management software programs for 31 years. Since 2002, ParishSOFT has helped dozens of LOGOS customers transition to ParishSOFT. Those parish staff 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.

Switching from LOGOS to ParishSOFT was excellent....ParishSOFT is so explainable and easy to get a hold of and understand. The service is great—if I have questions, they're right there....If I can use it, it has to be doggone simple. I would absolutely recommend ParishSOFT to LOGOS users. "

**John Gerargi**  
**The Community of Holy Rosary**  
**and St. John, Columbus, OH**

#### Proven track record of service to LOGOS software customers and Catholic churches

Today more than 5,300 Catholic churches in 170 arch/dioceses, including dozens of former LOGOS 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. They have found that our intuitive products make it possible to get up and running quickly with ParishSOFT programs. Our transition team includes dedicated, experienced staff from ParishSOFT and LOGOS who are committed to working together to make your switch to ParishSOFT as easy as possible--with the absolute minimal disruption.

## Recommended Evaluation Process

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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 what improvements you are looking for, how you would capitalize on Web-based software, and whether you have any additional software needs.
3. Learn about ParishSOFT products on [www.ParishSOFT.com](http://www.ParishSOFT.com)—we offer several options so you can choose the method that is most efficient for you, including:
  - a. Read information and product briefs
  - b. Watch pre-recorded video demonstrations
  - c. Attend a free webinar led by a knowledgeable ParishSOFT transition team member—see [www.parishsoft.com/webinars](http://www.parishsoft.com/webinars) to register
  - d. Install a demonstration copy of the software
4. Call us at 866-930-4774 ext. 1 with any questions.
5. Ask for references—we'll provide the names of other ParishSOFT customers, including former LOGOS customers.

## ParishSOFT Software

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### 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.

**\*Ministry Scheduler** – Create accurate, balance schedules really fast, and let your parishioners log in to volunteer and set their own scheduling preferences. It's never been so easy and automatic to recruit volunteers, engage them in parish life, and manage all the details of your ministries.

**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.

**Notify Now** – 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](http://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.

If your diocese has required you to use LOGOS Accounting, please continue using that product. And know that we'll be adding great new functionality to the LOGOS Accounting suite, including offering those products on the ConnectNow platform.

## Mobile Access

\***ConnectNow Products** – ParishSOFT's Ministry Scheduler, My Own Church, ConnectNow Church Accounting, and Online Giving products run on our fully browser-based ConnectNow Web platform, so there's no software to install or update...you simply access your secure systems from anywhere you have Internet access. Our Family Directory, Offering & Pledges, and Religious Education modules are currently being redesigned for the ConnectNow platform.

**Remote Solutions** – Access your ParishSOFT applications designed for desktop installations from any Internet connection.

### Order Products or Learn More

Call 866-930-4774 ext. 1

Email [info@parishsoft.com](mailto:info@parishsoft.com)

Visit [www.ParishSOFT.com](http://www.ParishSOFT.com) to view product videos or register for a free webinar

## ParishSOFT Advantages Over LOGOS Software

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### People and Sacramental Management

- Enter new families and all their information in just minutes or allow your parishioners to do so
- Be instantly comfortable using software designed from the ground up for the Catholic Church
- Filter your main list of families to view exactly the information you need
- 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, merge and print customizable, professional sacramental certificates and notifications
- 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
- Quickly identify your parishioners for reporting by using Family and Dynamic Workgroup features
- Instantly pull up and put in any parish as “Parish of Sacrament” within the program

### Religious Education Management

- Manage all aspects of Catholic faith formation programs
- Use versatile Tuition system to accommodate payment schedules and coupon reminders
- Track student requirements and manage catechists’ safe environment criteria
- Move quickly from a class list to a member or family record in our integrated, single database
- Use bilingual registration forms that include sacramental information with dates

### 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
- Use unique “memorial gift” system for giving on behalf of someone else
- Reconcile deposits and funds easily
- Enjoy many more giving receipt and reporting options
- Export to QuickBooks, ParishSOFT’s ConnectNow Church Accounting, or LOGOS Church Accounting software
- Get fully browser-based church accounting with unlimited users (at no additional cost), drill-down to source transactions, unique project coding to track events, and much more

### **Mobility**

- Access your church records and financials anytime and from anywhere using our ConnectNow browser-based products 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, register online, view giving history, and see ministry opportunities and assignments using the ConnectNow applications

### **Reporting**

- Get 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)
- Create custom contribution statements
- Report by family or other dynamic list of parishioners
- Export data to other applications, like Microsoft Office®
- Customize ParishSOFT standard reports using Microsoft Access®

### **Support and Training**

- Learn all software modules using our live teletraining classes, led by proficient trainers
- Use our highly acclaimed technical support team, which answers 70% of calls immediately and resolves the rest with a personal call back from one of our representatives, usually within two hours.
- Put the latest technology to work for your parish with our regular updates and enhancements
- Enjoy quality technology and outstanding service provided by a company focused solely on software for churches

### **Systems and Information Technology**

- Unlimited users with all ParishSOFT systems at no extra cost!
- 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 menu choices to fit your church



## Recommended Implementation for New ParishSOFT Users

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

1. Register and complete the Family Directory Basic (FD10) 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 and privacy settings, record lookup, envelope number assignments, and staff setup, FD10 is a prerequisite for all other teletraining courses.
2. Register for teletraining classes for any additional modules you have purchased on <http://www.parishsoft.com/training/registration.htm>.
3. Send us your LOGOS 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.

## ParishSOFT Services

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### 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 tools 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 in short, 60- to 90-minute sessions.

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](mailto: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

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Our conversion team is committed to providing you with an accurate, complete data conversion from your LOGOS system to ParishSOFT. Conversion includes mapping data fields from your LOGOS II or accounting database to a new ParishSOFT or ConnectNow database that will run with our software. Our process includes:

- Data mapping and translation of all LOGOS 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 LOGOS system.

### To get started with your conversion from your LOGOS software:

1. Complete and submit the Data Conversion Checklist on <http://www.parishsoft.com/support/dataconversionchecklist.asp>.
2. Create a zipped or compressed backup of your LOGOS II and/or LOGOS Accounting database(s). 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](mailto: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 LOGOS 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](mailto: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.

## Special Pricing for LOGOS Customers

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ParishSOFT's standard monthly and annual pricing is already lower than current LOGOS pricing, but we're pleased to offer you the following special pricing options to make your switch to ParishSOFT even easier:

- 40% discount off most ParishSOFT desktop module(s) or subscription pricing (Appendix I)
- 40% off data conversion from LOGOS II or LOGOS Accounting
- Free Fundamentals teletraining classes for the first 90 days
- Free product updates and unlimited support for your first year
- Free networking and an unlimited number of users at no additional charge
- Free website, email, online calendar and facility scheduler, and remote backup

Act now to save hundreds of dollars, prepare for year-end, and enjoy continued, dependable access to prompt technical support. You can enjoy peace of mind knowing that you have a strong company of more than 75 employees dedicated to serving you.

To determine your pricing, please contact a ParishSOFT/LOGOS Transition Specialist at 866-930-4774 x1. All ParishSOFT software includes a 60-day, 100% money-back guarantee.

## ParishSOFT Questions and Answers

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1. How long has ParishSOFT been around?  
*ParishSOFT was founded in 1998 by Fr. David Rosenberg.*
2. How many parishes use ParishSOFT?  
*Over 5,300 parishes in 48 states in 171 dioceses 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](mailto:support@ParishSOFT.com) anytime.*

6. What tools do you have to help me learn ParishSOFT quickly?
- *We offer regularly scheduled teletraining courses on all products that your staff can take any time. And as part of this special offer, you can enjoy our Fundamentals teletraining classes for FREE for the first 90 days – see [www.ParishSOFT.com/training](http://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, Online Giving, and Ministry Scheduler, your members can go online to update family and member information, register in your parish, make contributions, pay fees for religious education and other events, volunteer for ministries, and manage their entire volunteer experience on the Web – saving you countless hours of data entry.*
8. Why should I choose ParishSOFT?
- *We provide the best 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 LOGOS.*
  - *We offer a 100%, no questions asked, money-back guarantee.*

## Appendix I: Logos Transition Pricing to Web-based ParishSOFT (RS/CN)



**All ParishSOFT products include at no extra charge:**

- Support, updates & Web Solutions for the 1st year
- Free fundamentals teletraining on purchased modules first 90 days
- Unlimited number of users of the software

### ParishSOFT Transition PRICE LIST – Annual

Number of Families – Up To:	99	199	399	699	999	1,499	1,999	2,999	More <sup>(1)</sup>
<b>Family Suite Modules:</b>									
Family Directory <sup>(6)</sup>	\$ 158	\$ 190	\$ 229	\$ 284	\$ 348	\$ 387	\$ 442	\$ 514	\$ 71/1,000
Offering & Pledges <sup>(6)</sup>	63	95	126	158	190	221	253	292	40/1,000
Parish IQ (Intelligent Query) <sup>(6)</sup>	55	63	79	95	119	134	150	174	24/1,000
Religious Ed & Tuition <sup>(6)</sup>	126	150	190	221	253	284	316	379	63/1,000
ConnectNow Ministry Scheduler <sup>(6)</sup>	79	119	158	178	198	237	257	296	40/1,000
<b>Family Suite Total:</b>	<b>\$ 481</b>	<b>\$ 617</b>	<b>\$ 782</b>	<b>\$ 936</b>	<b>\$ 1,108</b>	<b>\$ 1,263</b>	<b>\$ 1,418</b>	<b>\$ 1,655</b>	<b>\$238/1,000</b>
ConnectNow My Own Church	108	162	216	270	324	378	432	486	\$54/1,000
<b>ConnectNow Church Accounting: <sup>(2)</sup></b>									
Ledger & Payables	162	216	324	378	432	486	594	702	108/1,000
Payroll	108	108	162	216	216	216	270	324	54/1,000
<b>Additional Software:</b>									
Contribution Bridge	54	54	108	108	162	216	270	324	54/1,000
Mailroom: Bulk Mailing <sup>(9)</sup>	324	324	324	378	432	486	540	594	54/1,000
<b>One-Time Tele-training &amp; Setup Fees: (per order)</b>									
Remote Solutions <sup>(2)</sup>	250	250	250	250	250	250	250	250	250
ConnectNow <sup>(2)</sup>	250	250	250	250	250	250	250	250	250
Online Giving <sup>(4)</sup>	200	200	200	200	200	200	200	200	200
NotifyNow <sup>(7)</sup>	200	200	200	200	200	200	200	200	200
Mailroom: Address Quality <sup>(8)</sup>	250	250	250	250	250	250	250	250	250

**Notes:** PS Transition – 12/6/11

1. **Churches >2,999 Families.** Additional license fees apply for churches >2,999 families and calculated in increments of 1,000 families.
2. **ParishSOFT ConnectNow and Remote Solutions.** These products are licensed on a subscription basis for a minimum of 12 months. The subscription fee includes continued usage of the product(s), updates, technical support, hosting in a secure, reliable commercial data center, data backup, and access to Web Solutions. Subscription fees are payable in advance. Note that the balance of the month that the order form is signed is free and that the paid subscription period begins on the first day of the following month. ParishSOFT agrees to hold data on behalf of the Church in accordance with Confidentiality section on the License Agreement. Pricing includes unlimited users. ParishSOFT products are integrated with Excel®, Word® and Access®. Microsoft® requires your organization to have for each user of Remote Solutions a legally licensed version of these Microsoft products equal to or newer than on our server, as described on our website. If you need to purchase these products, charity pricing may apply.
3. **Upgrades.** From ParishSOFT to the same software program in ConnectNow are free through the end of your current maintenance period, and then annual subscription fees will apply.
4. **Online Giving.** The \$200 one-time fee includes initial training and setup. Each transaction plus a daily batch closing fee is \$0.29. There are no additional ACH (bank account) transaction fees; Visa & MasterCard charge 2.8% for credit card transactions plus \$0.02 additional transaction fee. \$20/month Maintenance Fee. Annual PCI Compliance Fee is \$50.
5. **Mission Pricing.** The annual subscription for a Mission, when purchased at the same time as “sponsoring” parish, is priced at the 99 families level.
6. **Pricing Policy.** Family Suite Transition Pricing is effective during the 60 months following the month that the order form is signed. Prices for products and services are subject to change without notice. ParishSOFT reserves the right to suspend support and usage for any user who violates the terms of the Software License Agreement.
7. **NotifyNow.** The \$200 initial fee includes training & setup. Calls and text messages for parishes may be purchased for \$1.25/family/year unlimited. After first year, annual maintenance is \$100.
8. **Mailroom: Address Quality.** Includes Mailroom: Address Quality with National Change of Address (NCOA) only. NCOA processing is \$.01 each address, \$35 minimum and recommended at least twice per year.
9. **Mailroom: Bulk Mail.** Includes CASS, PAVE, and NCOA. NCOA processing is \$.01 each address, \$35 minimum.
10. **CA Sales Tax.** Software sold to churches in CA is subject to an 8.25% sales tax.