



Parish and School Financial Operations

The Roman Catholic Archdiocese of Washington

Calendar 2024 ParishSOFT Training Webinars Ledgers & Payables and Family Suite

Please mark your calendar for our 2024 training classes led by our ParishSOFT vendor via webinar. Each training webinar will be recorded and available on the Parish & School Financial Operations webpage for all to view after the training. This is the link for past [webinar training recordings](#).

Each class requires a minimum of 5 attendees and a maximum of 25. Registration links will be emailed prior to each class.

*Registered participants will be expected to attend, unless a cancellation is received one day prior to the class. If a registered participant fails to cancel or attend the class, they will not be able to register for another class, unless there is an opening available the day before the class.

If you have any questions, please contact Florence Moore, Parish & Schools Financial Operations at MooreF@ADW.org or 301-853-5386.

- December 7, 2023, Thursday, Family Suite -Family Directory Basics Part 1 10am-11:30am
Main/Home Screen, Family List, Adding a family ([repeats March 5](#))
Suggested for: New/untrained Secretary/Bookkeeper/Family Suite user
- December 14, 2023, Thursday, Family Suite -Family Directory Basics Part 2 10-11am
Member Details, Member list, and Reports ([repeats March 7](#))
Suggested for: New/untrained Secretary/Bookkeeper/Family Suite use
- January 11, 2024, Thursday, Ledgers and Payables Accounting Basics Part 1 10-11:30am
Navigation, entering vendors, projects, entering bills, check layout, printing checks, entering deposits, and creating journal entries
Suggested for: New/untrained /Bookkeeper/Pastor
- January 18, 2024, Thursday, Ledgers and Payables Accounting Basics Part 2 10-11:30am
Check layout, printing checks, entering deposits, creating journal entries, and memorizing transactions,
Credit Cards -adding and reconciling credit cards
Suggested for: New/untrained /Bookkeeper/Pastor
- January 23, 2024, Tuesday, Family Suite -Offering Basics 10am-11am
Batches, Contribution Posting, Editing Contributions, and Giving History
Suggested for: New/untrained Secretary/Bookkeeper/Family Suite user

- January 25, 2024, Thursday, Family Suite – Offering Advanced Fund management, Correction Batches, and How to Customize EOY Statements, and additional Reports 10am-11am
Suggested for: Secretary/Family Suite user/Coordinator
- February 7, 2024, Wednesday, Ledgers & Payables -Reporting Filtering, columns and Sorting, Report Options, Report Navigation, Month/Year End Reports 10am-11am
Suggested for: New/untrained Bookkeeper/Pastor
- February 29, 2024, Thursday, Family Suite – Administration & MOC Suspense, My Own Church, Lookup Management, Adding new staff, Module Settings and Notifications 10am-11am
Suggested for: Secretary/Family Suite user/Coordinator
- March 5, 2024, Tuesday, Family Suite -Family Directory Basics Part 1 Main/Home Screen, Family List, Adding a family 10am-11:30am
Suggested for: New/untrained Secretary/Bookkeeper/Family Suite user
- March 7, 2024, Thursday, Family Suite -Family Directory Basics Part 2 Member Details, Member list, and Reports 10am-11am
Suggested for: New/untrained Secretary/Bookkeeper/Family Suite use
- May 2, 2024, Thursday, Ledgers and Payables -Budget Entry Add, Update and Remove Budget, Send and Receive Budgets, Import Budget, and Reports 10am-11am
Suggested for: Bookkeeper/Pastor
- May 9, 2024, Thursday, Family Suite – Administration & MOC Suspense, My Own Church, Lookup Management, Adding new staff, Module Settings and Notifications 10am-11am
Suggested for: Secretary/Family Suite user/Coordinator
- May 16, 2024, Thursday, Family Suite – Workgroups & Communication Creating and managing Member & Family workgroups, Emailing in PS, Life Events and Basic Mail merge 10am-11am
Suggested for: Secretary/Family Suite user/Coordinator
- June 11, 2024, Tuesday, Family Suite Intelligent Query Building queries, Sorting Results Columns, Query Tags, Saving and Modifying Queries, and Queries Results Opportunities 10am-11am
Suggested for: Bookkeeper/Family Suite user/Coordinator

ADW.org Parish and School Financial Operations page [YouTube playlist for training videos and webinars](#)

Free ParishSOFT online Training- Pathfinder click the link:

<https://adw.org/wp-content/uploads/sites/2/2020/03/ParishSOFT-Software-Video-Learning.pdf>

Free ParishSOFT support Support@ParishSoft.com for any questions.