Diocesan Pre-Upgrade Checklist

ParishSOFT
by Ministry Brands®

How to Best Prepare:

Thank you for taking this essential step towards upgrading to the newly enhanced ParishSOFT platform. This checklist has been thoughtfully designed to guide you through the process smoothly and efficiently. Let's get started!

- ❑ Inform your parishes about the upcoming upgrade schedule! Download a communication **Template**.

- ❑ Notify your Diocesan users of ParishSOFT, ParishSOFT Giving and/or WeShare Giving using the same **Template**.

- ❑ Coordinate with your parish admins and/or department leads to perform user audit.

- ❑ Audit Diocesan Level Users in ParishSOFT, ParishSOFT Giving or WeShare Giving
  - ❑ Remove users no longer using systems
  - ❑ Review current module access and permissions: Adjust as needed.
  - ❑ Review which users will have Dio Admin or Org Admin Right: Adjust as needed
  - ❑ Ensure every user has a unique login. No shared login credentials
  - ❑ Verify every user has a unique email address associated with the user.
    - These will become the User ID for logging into ParishSOFT
  - ❑ Verify that the same email is used in Family Suite and ParishSOFT Giving/WeShare for Administrators who use both systems
    - This ensures all modules transition to the Single Sign-On Environment

- ❑ Merge duplicate donor records in ParishSOFT and/or WeShare Giving

- ❑ Ensure users document their current login credentials, including their user ID, password, and email particularly if stored in browser settings

- ❑ Notify your parishes about changes to My Own Church. **More Information**.

- ❑ Encourage online donors to record their User ID and password as credentials stored in a browser may not populate after the update

Check Out Our Landing Page Built Around the Changes!
Click Here!
For more Info

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