Parish Pre-Upgrade Checklist

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 parish users about the upcoming upgrade schedule! Download a communication **Template**.

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

- ❑ Audit Parish level users in ParishSOFT, ParishSOFT Giving or WeShare Giving
    - ❑ Remove users no longer using ParishSOFT system.
    - ❑ Review current module access and permissions; Adjust as needed.
        - • Users will be brought into the new system with the same access and permissions
    - ❑ Review which users have org admin rights: Adjust as needed.
        - • These users will transfer to the new system with administrator rights
    - ❑ Ensure every user has a unique login. No shared login credentials between users.
    - ❑ Verify every user has a unique email address associated with the User.
        - • Email addresses will become the User ID for logging into ParishSOFT.
        - • If not updated prior to upgrade, the second user who logs in will be prompted to enter a new email to generate their User ID (**Help Article**)
    - ❑ 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
    - ❑ Verify each user has a Cell Phone in their Member Record Phone Number in Preparation for Multi-Factor Authentication

- ❑ 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!
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For more Info