ParishSOFT® | Family Suite

Frequently Asked Questions (FAQ)

1. How long will it take ParishSOFT to merge the parish's databases?

- A typical parish merger will take 10-12 business days to complete from the time we pull your backup until you are live in your new parish database. *It can take longer if your merge work requires a Conversion or Conversion with data Integration.*
- Please note this timeline assumes the client review steps are completed within the timeframe outlined. Any delays in the validation from the client will extend the timeline.

2. What is the merge work timeline?

- Basic Merge Timeline:
    - i. Parish backups are retrieved AND Parishes continue working in their production data.
    - ii. ParishSOFT merges data into a staging site (5 business days).
    - iii. Parish (& Diocese if required) reviews and approves data in stage site (2 business days).
    - iv. New Parish backups are retrieved AND Parishes stop working in production data (1 business day).
    - v. ParishSOFT completes merge work in new production site (3 business days)
- If a Data Conversion or Data Integration is needed as part of a merge, additional fees/time will be required. This additional work will also need to be coordinated, scheduled, and completed in advance of the merge work.
    - i. Single Data Source Conversions typically take 12 business days to complete.
        1. 10 business days for ParishSOFT to complete conversion work.
        2. 2 business days for parish to review and approve converted data.
    - ii. Data Integration will be needed if the Diocesan database already has data in their database for the converting parish(s). This is a two-step process. Parish will be live in the ParishSOFT after 20 days.
        1. Single Source Conversion takes approximately 12 business days.
            a. Parishes can view data in current databases but should not do any data entry during this time.
        2. Data Integration takes approximately 8 business days.

3. What type of data can be merged?

- Family and Member data, including sacraments and workgroups can be merged. New workgroups can also be created during the merge process.
- Contributions and Funds as of the effective date of the merge can be merged. Funds will be prefixed with the Parishes Organization ID.
- Religious Ed can be merged as long as it meets the following criteria:

i. If a new parish is being created, one of the merging parish's RE can be brought into the new parish
ii. If parish A is merging into an existing parish B with RE, only the RE from parish B data will be retained
iii. If parish A is merging into an existing parish B, parish A's RE WILL NOT be moved into parish B IF parish B has RE data already in it

4. What type of data cannot be merged?

- Ministry Scheduler and Tuition cannot be merged.
- Pledges and historical contribution data will not be merged, as the newly merged parish is a new and/or different legal entity.
- ParishSOFT Accounting data.

5. Will I have access to the historical data that cannot be merged?

- A separate read-only login will be provided for the merging parishes to access historical data for a period of two years.
- ParishSOFT Accounting data can be viewable in a read only format based on your diocesan policies.

6. What happens to the existing envelope numbers?

- You have several options regarding envelope numbers.
  i. You may retain the existing envelope numbers. However, any duplicate envelope numbers will be removed, and a report provided of the removed numbers.
  ii. They may all be zeroed out, so you can assign new envelope numbers after the merge.
  iii. You may prefix the envelope numbers from each parish. For example: 10###, 20###, 30###, etc. Note: Only numbers may be used to prefix the envelope number.
  iv. You may have new envelope numbers assigned to all those marked as registered at the parish.

7. What happens to the existing assignment records in the merging parishes?

- Assignment records for all staff in the merging parishes will be end dated. A Parish Admin record will be created with read-only access to each of the merging parishes for looking up historical data.
- If target organization is an existing organization the staff records will remain the same. If target organization is a new organization, the primary merge contact will have a new assignment record created with full access permission.

8. Is there a charge for the merge work?

- Yes, your ParishSOFT Account Executive will provide you a merge work estimate based on the scope of your merge work. If all the parishes are using ParishSOFT Family Suite and are part of a centralized Diocesan database, the new parish may opt to manually pull in the merging families into the new parish.

9. What if our merger creates a brand-new Parish?

- If your merger will create a new Parish, ParishSOFT must issue this parish a new Organization ID (Official Customer #) and insert the new organization into the ParishSOFT Database.

10. What will ParishSOFT need to create this new parish record?

- You will need to provide ParishSOFT the New Parish's: Name, Address, Phone # and primary contact information.

11. What does ParishSOFT need if our merger does not create a new Parish?

- ParishSOFT will need to know which parish will be receiving the merging data and any changes in the primary contact information.

12. Is there any other information that ParishSOFT needs?

- Yes, we will need to know:
    i. The Name and Email of both a Parish and Diocesan contact for the merge work.
    ii. The Organization ID (Customer #'s) of all the merging parishes.
    iii. The effective date of your merger.
    iv. Specific details about your merge work.
    v. A ParishSOFT Project Manager will assist you to gather the specific details.
    vi. If your Arch/Diocese uses ParishSOFT Diocesan Development Manager.

13. Does my Arch/Diocese need to be involved in the merge work details?

- If your diocese has a centralized ParishSOFT database, then yes, the diocese will need to be involved in the merge work details and data review process. If your Arch/Diocese is using ParishSOFT Diocesan Development Manager, they will also need to provide information on how to handle the diocesan pledges and contributions associated with the merging parishes.

14. May we add or remove ParishSOFT Modules during the Merge Process?

- Yes, just let us know which modules to remove or which additional modules are desired.

15. Are there pre-merge tasks we need to complete?

- Yes, ParishSOFT recommends you complete the following:
    i. Family Directory - You should run any statistical reports you will require for historical purposes, as this data will not be available after the merge has been completed.
    ii. Offerings - You will only have view access to the historical contribution data, you should run your end-of-year Contribution Statements prior to the merge to verify that you have correctly posted all contribution data.
    iii. Tuition and Ministry Scheduler data cannot be merged or moved, you must run any reports needed for statistical or historical purposes prior to the merge. Following the merge work this data will no longer be visible.