

# ***PDS Church Office Beginner Training***

*By*

*Trinity Publications – Software & Support Department*

*Led by David Cotton*

- I. PDS Church Office**
  - a. Program Overview**
  - b. Family – Member – Contribution relationship**
  - c. Best Practices**
    - i. Mixed Case with all entries**
    - ii. Keywords – integral to the program**
    - iii. ID Numbering Concepts**
  - d. Navigation Tab Basics – Finding families & members**
  - e. Tasks Tab Basics – Adding, Changing, & Deleting information**
  - f. Family Screen Detail**
    - i. “Active” vs. “Inactive”**
    - ii. ID/Env Number**
    - iii. Family Status**
    - iv. Checkboxes**
      - 1. Env User**
      - 2. Synch w/Diocese**
      - 3. Send No Mail**
    - v. Address Standardization**
    - vi. Phone Numbers & Texting**
    - vii. Email Addresses**
    - viii. Family Keywords vs. Remarks**
    - ix. Reasons for Changes**
    - x. Log of Activity**
    - xi. Importance of “Date Left Parish”**
    - xii. Add a Family to the database**
      - 1. Title Standardization**
      - 2. Name Formats (including salutations)**
  - g. Member Screens Detail**
    - i. Personal Screen**
      - 1. Member Names – including members with different last names**
      - 2. Member Type - Importance of a Head of Household for every family**
      - 3. Member Relationship vs. Member Type**
      - 4. Occupation - it’s what you do and not who you work for**

- 5. Grades – Keep it simple. Mainly used with Religious Education.
- 6. Other Member-type Keywords
  - a. Religion, Disability, Ethnicity
  - b. User Defined
  - c. Member Keywords
- 7. Location – What does it mean?
- ii. Communication Screen
- iii. Sacraments Screen
  - 1. Entering information
  - 2. Celebrants
  - 3. Sacrament Place Names
  - 4. Printing Certificates
  - 5. Scanning and storing Baptismal Certificates
- iv. Talents & Ministries Screen
- v. Reassign a member into another family
- vi. Quick Posting
- vii. Add a Member to the database
- h. Contribution Screens Detail
  - i. Fund Setup
    - 1. Fund Numbers & Fund Periods
    - 2. Groups vs. Activity Names vs. Activity Functions
  - ii. Fund Examples
    - 1. Sunday & Holy Days
    - 2. Capital Campaign
    - 3. Diocesan 2<sup>nd</sup> Collections
  - iii. Quick Posting of Sunday Offering
- i. Reports
  - i. Report Types
  - ii. Report Samples
  - iii. Report Screens
    - 1. Overview screen
    - 2. Printer Screen
    - 3. Layout Screen – Listing & Letter
    - 4. Selection Screen
      - a. Sortation
      - b. Specific Families
      - c. Additional Selections – access to the entire database
  - iv. Labels & Letters
- II. Sacramental Registers Overview
- III. Enhancement Suggestions – “Get Satisfaction”
- IV. Support – Where to go with questions and problems. 877-455-9300.