PDS Church Office Beginner Training

By

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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 2nd 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.