



ShulCloud Onboarding

PUBLISHED 2020

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Welcome!

Mazel tov to you and your team on your transition to ShulCloud!

Moving to a new software will create incredible opportunities to improve efficiency and we think you will be very happy with your choice of ShulCloud.

We know it can seem daunting to transition to a new software and this guide is designed to help you every step of the way. Whether you have a staff of dozens or you're going at it with a small but mighty team of three - you've got this and we're here to help!

Real Time Strategy is available for customized training (individual and group) as well as project management and technical support. You are not alone in this transition: we've done this before, we've got a plan, and we're just a phone call or email away.

Welcome to your new database adventure!

Caroline + Ellie

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Okay...

So where do I begin with ShulCloud?



REAL TIME STRATEGY

- 01** Determine your top priorities.
No one can do it all from the beginning - start slow. We recommend beginning with online payment processing, managing accounts, and forms/event registrations.
- 02** Figure out who your Super User is.
You're looking for someone who's dependable, tech savvy, and has the bandwidth to dig in.
- 03** Enable permissions based on your staff.
- 04** Create a timeline for your transition.
 - 3-4 weeks for staff to use ShulCloud internally while also using current software for money management.
 - 1-2 weeks for staff to use ShulCloud internally, including transactions and deposits.
 - 1 week for soft launch with invested lay-leaders
- 05** Join the ShulCloud Users Facebook group for access to quick help and FAQs.

SETTINGS	STAFF USE	REAL TIME STRATEGY RECOMMENDS
	1-2 ShulCloud Super Users.	Save this for staff who know ShulCloud well and who are authorized to change how it functions.
MY LISTS	STAFF USE	REAL TIME STRATEGY RECOMMENDS
When you can't find a setting, chances are good it lives in My Lists. Can't be subdivided. Extremely useful but too many people with access can be messy. Most common uses include adding tags, charge types, calendar categories, and Template Text.	Administrators, finance staff, select staff who you depend on to make sure systems work efficiently.	Be thoughtful. Because many things live here you're likely going to have many staff who need this permission. Train and explain the elements and that small changes can have big impact. Staff should only change the items they are confident about.
ACCOUNTS, PEOPLE	STAFF USE	REAL TIME STRATEGY RECOMMENDS
See the account info and enjoy the ability to make changes. Add a child, change someone to deceased, change an address, make "Resigned" etc.	Senior staff. Lead administrative staff. Membership staff.	Start with a smaller group of staff who can make changes to accounts and then broaden as people feel more comfortable
ACCOUNTS, PEOPLE	STAFF USE	REAL TIME STRATEGY RECOMMENDS
See the account info beyond just phone/address. Birthdays, anniversaries, children ages, join date, etc.	Most staff. Lay leaders like Executive and Development Committee members.	Great for lay people who need to see more than just address but don't need to make changes. Also any staff who are not authorized to edit accounts.
AUDIO LIBRARY	STAFF USE	REAL TIME STRATEGY RECOMMENDS
ShulCloud's system of uploading songs or audio in files.	Clergy or clergy assistants, marketing professionals, anyone who uploads music or recordings.	Does not include video; just simple Mp3 files.

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Got it!

Now how do we transition our congregation?

- 01** Set up ShulCloud email senders.
- 02** Enable Amazon SES.
- 03** Prep and send email to involved lay people.
- 04** Prep and send email to congregation.
- 05** Prep and setup email for new login links.
- 06** Include information about transition in your congregation's bullet.



RTS

More questions?

Let's work together!



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