

Parish preparation

Preparation checklist

Use this free checklist to gather information for self-service configuration. If a support meeting is arranged, return it at least two business days beforehand. Mark missing items so the conversation can focus on your questions.

Getting started

Self-service setup, documentation and basic email support are included. Work through the configuration guides at your own pace. A checklist or inquiry does not reserve a meeting or promise dedicated training or done-for-you setup.

Parish name

Coordinator name and contact email

Meeting date, time and time zone (once agreed)

Resources your parish manages

Your parish creates and maintains its Google account, Google Calendar, Google Forms and donation-provider accounts, including events and form responses. The guides explain how to connect these resources. Basic support does not include ongoing content management or custom development.

Keep credentials private

Do not include passwords, payment details, private API keys or private parishioner data in this checklist. Enter configuration keys directly in the authorized portal. Use supported delegated access rather than sharing passwords.

Readiness checklist

Mark each item

Ready = available for parish configuration. Need help = tell us what is missing. Not applicable = your parish will not use this feature. Keep public-resource references on the next page.

Verified portal account and parish registration

Select status

Parish name, address, website and time zone

Select status

Logo file, brand colors and image permission

Select status

Google Calendar created with approved public events

Select status

Calendar ID and API access prepared (no keys here)

Select status

Clergy names, titles, photos and public contacts

Select status

Important contacts: names, roles and public details

Select status

Published Google Forms and responder links

Select status

Existing donation-provider links, if wanted

Select status

Announcement categories and sample message

Select status

Admin/staff emails and authorization confirmed

Select status

App installed; test phone and participant consent

Select status

Missing items, help needed, or constraints

Public content & resource inventory

Supply only approved material

Provide public links or file names here, or arrange a suitable file transfer with your coordinator. Do not include form responses or private parishioner records. Additional public contacts can be supplied on a separate sheet.

Public address, website, contact phone/email; languages**Logo/photo file names or approved sharing links; colors****Calendar ID and public calendar link (not an API key)****Clergy: full name, title, public email/phone, photo file****Important contacts: name, role, approved public email/phone****Forms: title, purpose and published responder link****Donation links and desired announcement categories**

Walkthrough plan & handoff

Before the meeting

If a support meeting is arranged, agree on goals and scope in advance. Prepare the resources you want to connect, bring your questions and choose one or two examples to discuss. Your parish administrator remains responsible for configuration and content.

Top questions and priorities for the session

Example 1 to complete together (e.g. add a contact)

Example 2 to complete together (e.g. test announcement)

Suggested discussion topics

Confirm goals and current configuration. Review the task where help is needed, work through agreed examples and, with consent, test on a phone. Finish with questions, relevant guides and next steps. Meeting scope and availability are agreed separately. Do not send test messages to the whole parish without agreement.

Authorized representative: name and date

Content confirmation

By returning this checklist, confirm you are authorized to represent the parish and have permission to publish supplied photos and public contact information. This checklist is not a payment authorization. Agree any follow-up scope and timing with your coordinator.

Resources & return instructions

Guides: cupolaconnect.com/docs (Google Calendar, Google Forms, onboarding checklist). Keep this for your own setup, or share with support@cupolaconnect.com when asking for help. For an agreed meeting, return it to your coordinator. Replies are sent personally; no automatic email is sent.