A PRODUCTIVE FIRST CONVERSATION

Start with your real work.

Use this guide with your finance and IT teams to shape a demonstration and identify the requirements that a pilot must prove.

01 **Your community**

How many parishes, schools and other entities participate? Who needs diocesan access, review authority or access limited to their own entity?

02 **Your account rules**

Which deposits, certificates and loans do you operate? Identify rate history, tiers, day counts, compounding, credit cycles, payment allocation and maturity rules.

03 **Your daily workflow**

Who enters transactions? Which actions need an independent review? How are bank payments made, confirmed and reconciled?

04 **Your close and reports**

Which statements, reports, confirmations and accounting exports are essential? What blocks a period close, and who approves it?

05 **Your current system**

What authorized exports are available? Include field definitions, sample reports and opening control totals. Agree separately on any historical conversion.

06 **Your IT requirements**

Hosted or customer-server? Identify identity/MFA requirements, network controls, data location, retention, backup, restoration and support responsibilities.

Share workflow descriptions first. Send financial records only through an agreed secure discovery process; do not attach sensitive records to the public demo inquiry.

PROVE THE FIT BEFORE MOVING LIVE WORK

Agree on the evidence.

A demonstration shows the workflow. A pilot should prove that it fits your policies, records and operating environment.

- [ ] **Reconcile opening balances**

  Compare account counts, principal and accrued-interest totals with an authorized source export. Explain every difference.

- [ ] **Validate representative calculations**

  Use approved examples covering ordinary interest, rate changes, leap years, backdated entries, loans, certificates and credit-cycle boundaries.

- [ ] **Test permissions and review**

  Confirm each role and parish scope, independent approval rules, denied actions and recorded activity with representative users.

- [ ] **Complete a reporting cycle**

  Review interest, resolve pending items, close a period, produce statements and test the mapped journal in the target accounting system.

- [ ] **Exercise operations and recovery**

  Test sign-in and MFA, backups and restoration, access removal, deployment updates and operational ownership.

- [ ] **Record a go / no-go decision**

  Document accepted workflows, remaining gaps, migration scope, training and support. Agree on rollback and cutover responsibilities.

Current scope to discuss

Full historical DLS conversion, customer-specific accounting interfaces, unattended scheduling and bank payment integration are not turnkey capabilities. Customer-server deployment is not fully offline. Production security and recovery acceptance remain required.

Arrange a fit conversation: infinity@7sector.com