

Two parish offices in a pastoral unit: the role scope

In a Merged pastoral unit, create a role that applies only in some parishes and give it to the people who work in a single parish office.

6 min · Merged pastoral unit · 2026-09-27

Before you begin

- ✓ You work in a Merged pastoral unit with the add-on active.
- ✓ The people you assign already have an account and follow a community of the unit.
- ✓ You need the Manage collaborators permission.

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Understand why the scope matters

In Merged mode the preset roles, such as the parish office, apply to the whole pastoral unit: whoever holds them sees and manages the data of every parish. If each parish has its own office, create a custom role and limit where it applies with **Role scope**.

Open **People → Roles & permissions**. In Merged mode the page splits **Pastoral-Unit-level roles**, **Shared roles** and **Custom roles** · **per parish**: the latter “apply only in the parishes selected in their scope” and show next to the name the parishes where they apply.

Bulk Operations

In Bulk Operations you don't need a scope: each community has its own assignments. Pick the parish in the switcher at the top and assign the office role there, then repeat for the other one.

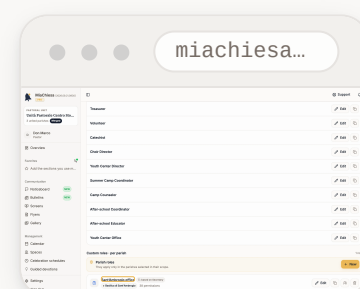


Fig. 1 The role shows the parish where it applies.

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Create the office role

Select **New role** and, under **Duplicate a preset role**, pick the parish office: you start from its permissions and change only what you need. You can also use **New** in the **Custom roles · per parish** section.

Type the **Role name**, for example "Parish office", and pick an icon. Then scroll to **Role scope**.

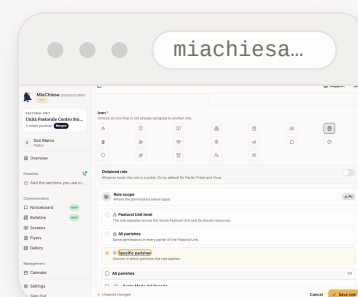


Fig. 2 Role scope decides where the permissions apply.

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Choose the scope

Role scope has three choices: **Pastoral Unit level** (the role works across the whole PU), **All parishes** (the same permissions in every parish) and **Specific parishes** (you pick which).

For two parish offices the simplest way is one role with **All parishes**: when you assign it you choose each person's parish. If you prefer one role per parish, choose **Specific parishes** and tick the parish: under the permissions you read "Apply in the selected parishes." Select **Save role**: "Role saved" appears.

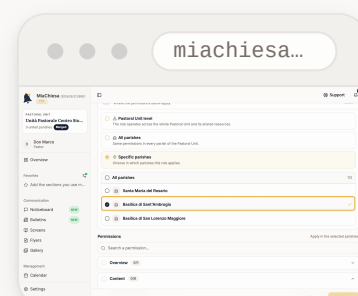


Fig. 3 Here the role applies only in the ticked parish. It is not saved yet.

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Assign one office per parish

Open **People → Parishioners**, open the person and select **Assign role**. In **Parish role** pick the role you created: **Where the assignment applies** appears, with the parishes allowed by its scope. Tick only that office's parish and select **Add to staff**.

Repeat for the second person with the other parish. If the person already holds an active assignment in one of the chosen parishes, the new role replaces it.

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STEP 5 OF 5 · 1 MIN

Fix the scope later

To move a person to another parish open **Settings** → **Collaborators & roles**, open the **Member actions** menu on their row and choose **Edit scope**; confirm with **Save scope**.

Changing the role scope in **Roles & permissions** applies to everyone who holds that role.

What you have achieved

- ✓ Each parish office sees and manages only its own parish's data.
- ✓ Per-parish roles show in Roles & permissions where they apply.

Troubleshooting

I don't see Role scope



It appears only in a Merged pastoral unit. In Bulk Operations or in a single community, roles already apply in the community where you assign them.

Where the assignment applies does not appear



It appears only for roles scoped to All parishes or Specific parishes. Preset roles and Pastoral Unit level roles apply to the whole unit.

I see "Select at least one parish"



With Specific parishes you must tick at least one parish before saving.

I see "This person already holds a Pastoral Unit-level assignment"



Edit or remove the pastoral-unit-level assignment first, then assign the per-parish role.