

Manage communities in a pastoral unit

Separate shared settings from local ones and use the switcher before every change.

12 min · Requires active pastoral-unit access · 2026-09-21

Before you begin

- ✓ Sign in to an account associated with at least one active pastoral unit.
- ✓ Before changing members, verify that you have the «Manage places and celebrations» permission in at least two communities in the unit.

SECTION 1

Read the managed-communities page

Open Settings > "Your parishes & PU". "The communities you manage." shows "Operating as ...", the number of associated communities, pending requests and any available pastoral unit.

Below the community list, "Pastoral Units" identifies each unit by name, member count and mode. Do not use edit until you have checked whether the row says "Bulk Operations" or "Merged": the modes have different effects.

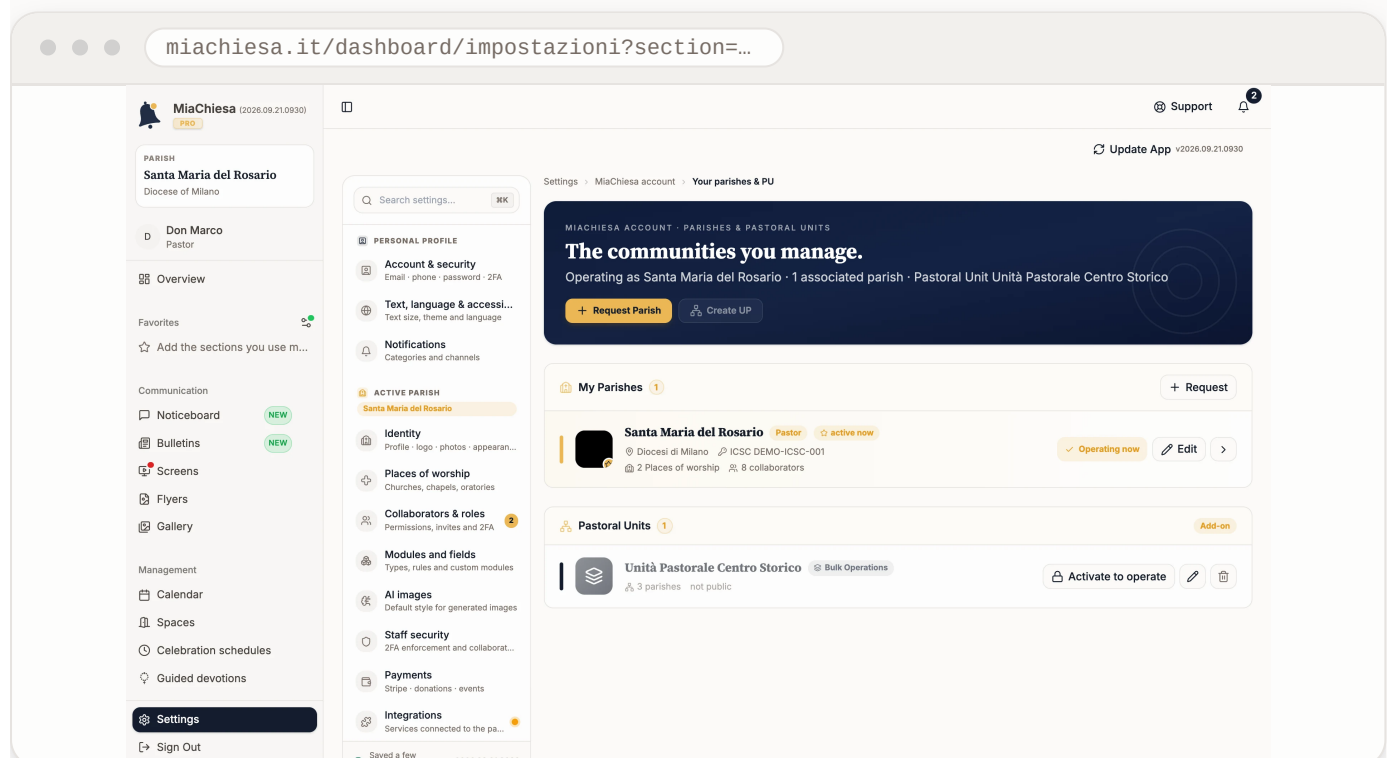


Fig. 1 "The communities you manage." summarises the current scope; each pastoral-unit row shows its mode, community count and operating state.

SECTION 2

Enter the pastoral unit

On a "Bulk Operations" row, select "Operate as"; on a "Merged" row, select "Operate as this one". When the unit is already active, the row says "Currently operating" and the heading changes to "Operating as [name]".

If the control says "Activate to operate", the unit exists but the required access is not active, so the remaining workflow is unavailable. Return to a single-community context until pastoral-unit access is available.

SECTION 3

Read the switcher before working

Functions that keep per-community data show "Select parish". Choose the correct member and read the note below: "What you create here stays in this parish" identifies a local operation.

Other pages in bulk mode can state that new content will be published to all communities in the unit. The page note is decisive; do not infer scope from the name in the heading alone.

SECTION 4

Edit the name and member communities

For a "Bulk Operations" row, use the pencil button. In "Edit Pastoral Unit", update name and description, select Next, then choose communities from the list; search appears when the list is long.

You can save only with at least two manageable communities selected. Membership uses the «Manage places and celebrations» permission; do not treat a community you cannot manage or one already assigned to another unit as available.

SECTION 5

Manage a merged unit

A "Merged" row also shows "Visible" or "not public", follower count and places of worship. Select "Edit" to open settings for the merged identity; the interface activates that unit first and then opens Identity.

The visibility pill changes whether the unit is public. If a strip reports content "still to import into the PU", use "Import" only after reviewing what should move into the merged identity: importing is separate from simply changing context.

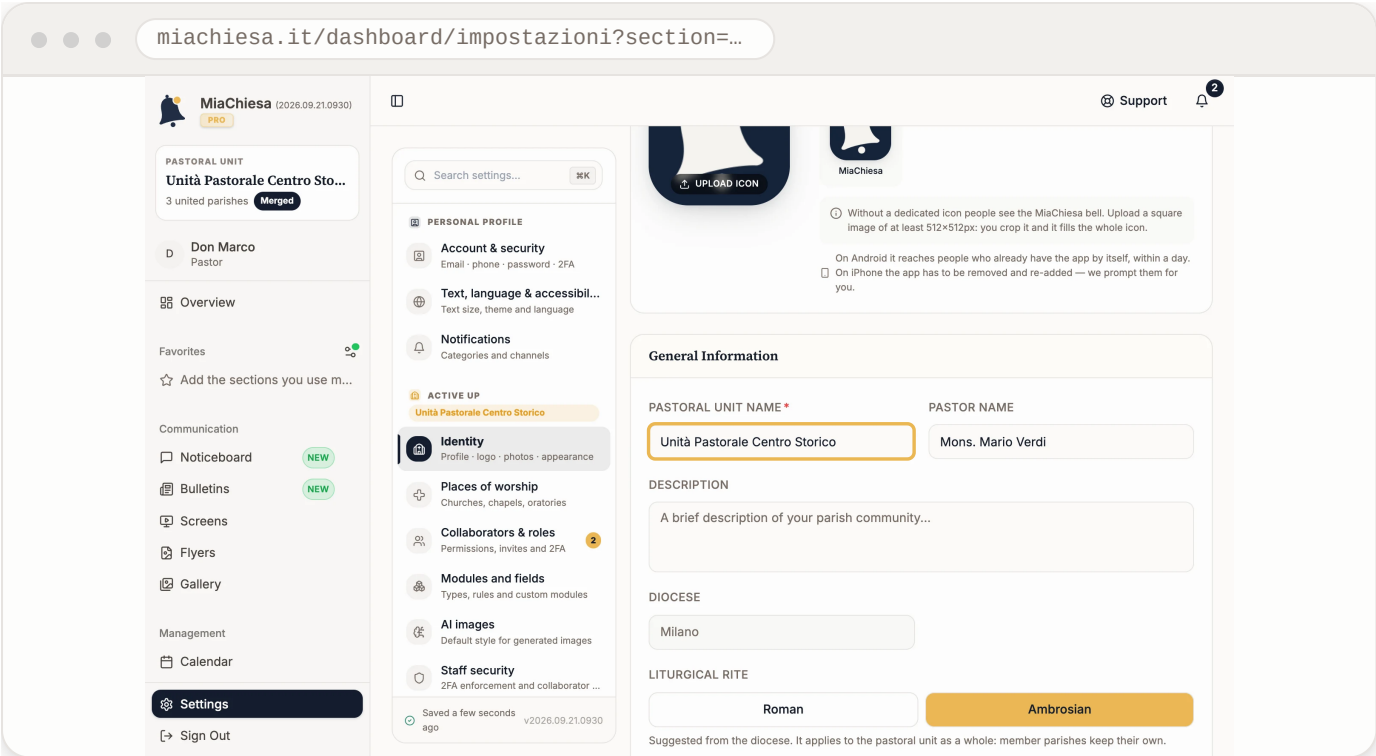


Fig. 2 For the active merged unit, Identity shows General Information; Pastoral Unit Name controls the shared identity's name.

SECTION 6

Verify scope after the change

Return to “The communities you manage.” and check the name in “Operating as ...”. On the unit row, verify community count, mode and “Currently operating” before opening another function.

Open a function with the switcher and confirm the active community. For a local change, verify the data inside that member; for a merged-identity change, return to the unit context and use its public preview.

SECTION 7

Access and conditions

Applied controls		
Operation	Condition	Result
Open “Your parishes & PU”	Manage account communities	Shows associated communities, requests and pastoral units.

Operation	Condition	Result
Create or change membership	«Manage places and celebrations» permission in at least two communities	Enables member selection and saving.
Operate as a pastoral unit	Active access to the unit	Enables “Operate as” or “Operate as this one”.
Edit a merged identity	Active Merged unit and available access	Opens the unit’s Identity settings.
Change local data	Community chosen in that function’s switcher	Applies data to the member identified by the scope note.

SECTION 8

Bulk Operations or Merged

Bulk Operations Coordinates several communities while preserving separate identities and public pages. ✓ The row is marked “not public” ✓ The switcher and note state where each operation applies	Merged Uses one public pastoral-unit identity and a merged operating context. ✓ The row shows “Visible” or “not public” ✓ Some data remains per community and still uses the switcher
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SECTION 9

Terms used

Operating context The community or pastoral unit named by “Operating as ...”.	Bulk Operations A mode that coordinates actions across communities while keeping their identities separate.	Merged A mode with one public identity and merged workspace for the pastoral unit.
Community switcher		

The control that selects the member receiving data managed locally.

SECTION 10

Frequently asked questions

Why is "Create UP" disabled?



At least two configured communities are required; to select them, you need the «Manage places and celebrations» permission in at least two of them.

Why do I see "Activate to operate"?



The configuration exists, but the access required to enter the unit context is not active.

How do I know where a new item will be created?



Read the note below the switcher on the current page. It may say the data stays in the selected community or that the creation applies to several members.

What you have achieved

- ✓ The page shows the correct pastoral unit as the operating context and the expected mode.
- ✓ Each local change has been checked in the community named by the switcher.

Troubleshooting

A community is missing from the switcher



Check that you have the «Manage places and celebrations» permission in that community and that it does not already belong to another unit.

A function opens unexpected data



Return to the managed-communities page and recheck "Operating as ..." before continuing.