

Bulk Operations or Merged: what changes

Compare the two pastoral unit modes feature by feature: public page, parishioners, content, collaborators and donations.

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Before you begin

- ✓ You need the «Manage account communities» permission to see and create pastoral units.
- ✓ The pastoral unit is a paid add-on: it needs the Essentials plan or higher.

SECTION 1

The two modes in short

Bulk Operations

Several communities run from one place, each keeping its own identity.

- ✓ Each community keeps its public page, parishioners and content.
- ✓ The unit has no public page: it is a workspace.
- ✓ You publish once and the content is copied into the chosen communities.

Merged

Several communities presented as a single one.

- ✓ The unit has its own public page and parishioners follow the unit.
- ✓ Noticeboard, calendar, events, groups and bulletin belong to the unit.
- ✓ The communities remain for donations, payments and tax purposes.

You choose the mode when you create the unit, at the "How do you want to manage the parishes?" step.

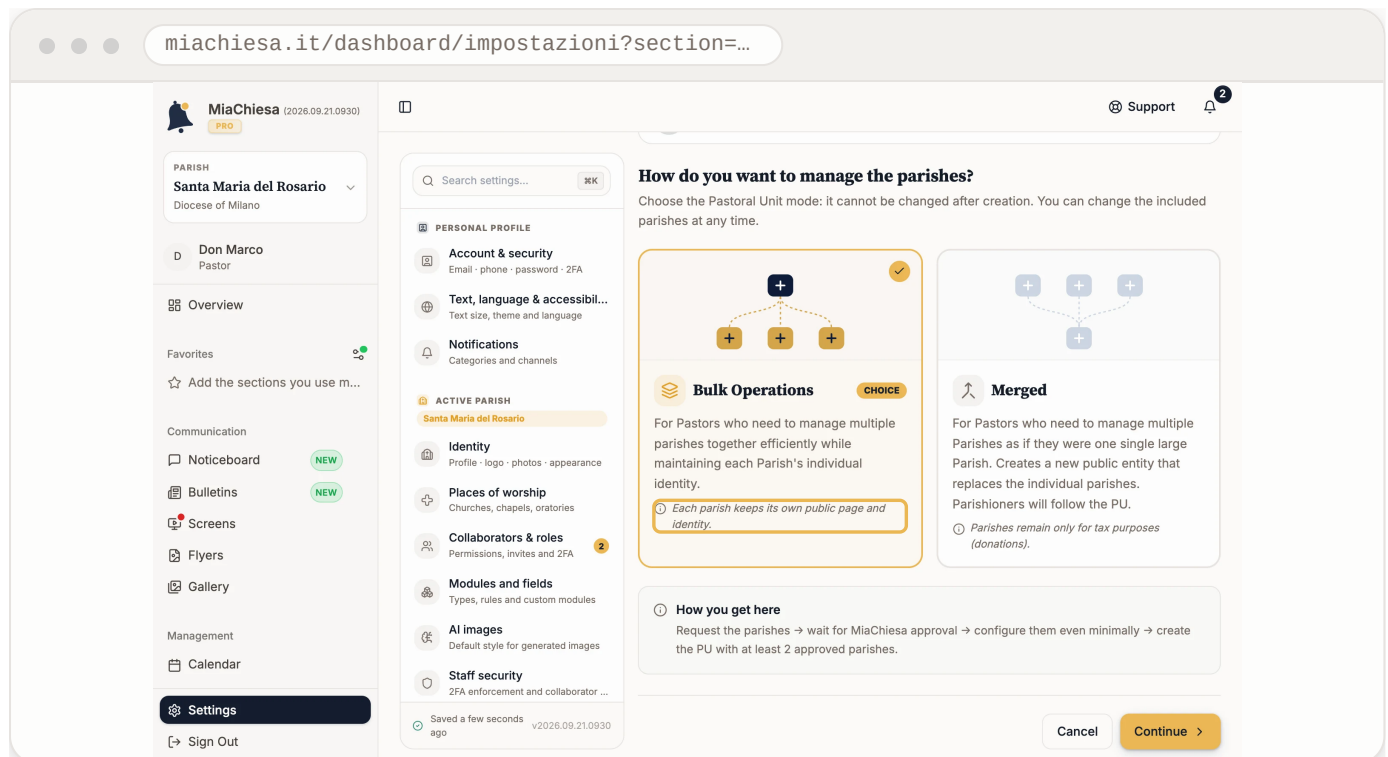


Fig. 1 Each card sums up what stays with the individual communities.

SECTION 2

What changes, feature by feature

Bulk Operations and Merged compared

Feature	Bulk Operations	Merged
Public page	Each community keeps its own; the unit is "not public"	A page for the unit, visible when you turn on Public profile
Who parishioners follow	The individual communities	The pastoral unit
Noticeboard, calendar and In Memoriam	A copy in each chosen community	A single item of the unit
Events, catechism and bulletin	Stay with the community picked in the switcher	Belong to the unit
Groups	The group is created in each selected community	The group belongs to the unit

Feature	Bulk Operations	Merged
Collaborators	Positions in each community	Positions on the unit
Donations and payments	Per community	Unit totals; Stripe stays per community
Parishioner search	Unchanged	The unit's communities can be hidden
Catechism and enrolment from records	Each parish enrolls from its own records	One catechism: each group has its Hosting parish and minors of every parish are enrolled
Per-parish roles	Positions assigned in each community	Preset roles apply to the whole unit; with Role scope you limit a custom role to some parishes
Google Calendar	Each community connects its own	One connection for the unit; after Import Contents the communities' syncs stay paused
GrEst and after-school fees	The edition's parish collects	Choose the Collecting parish for each edition
Fee on payments	Follows each community's plan	Follows the unit's plan, for every parish

SECTION 3

Bulk Operations: choose where to publish

In the sections that support it, such as the calendar, "Data of" shows which community you are looking at, while the pill below says where new content goes: for example "New content goes to all 3 parishes".

Select the pill to open **Choose where to publish**: the choice applies to everything you create in that section, until you change it. You can publish only in communities where you have a position; if some do not receive the content, "Published in ... of ... parishes" appears.

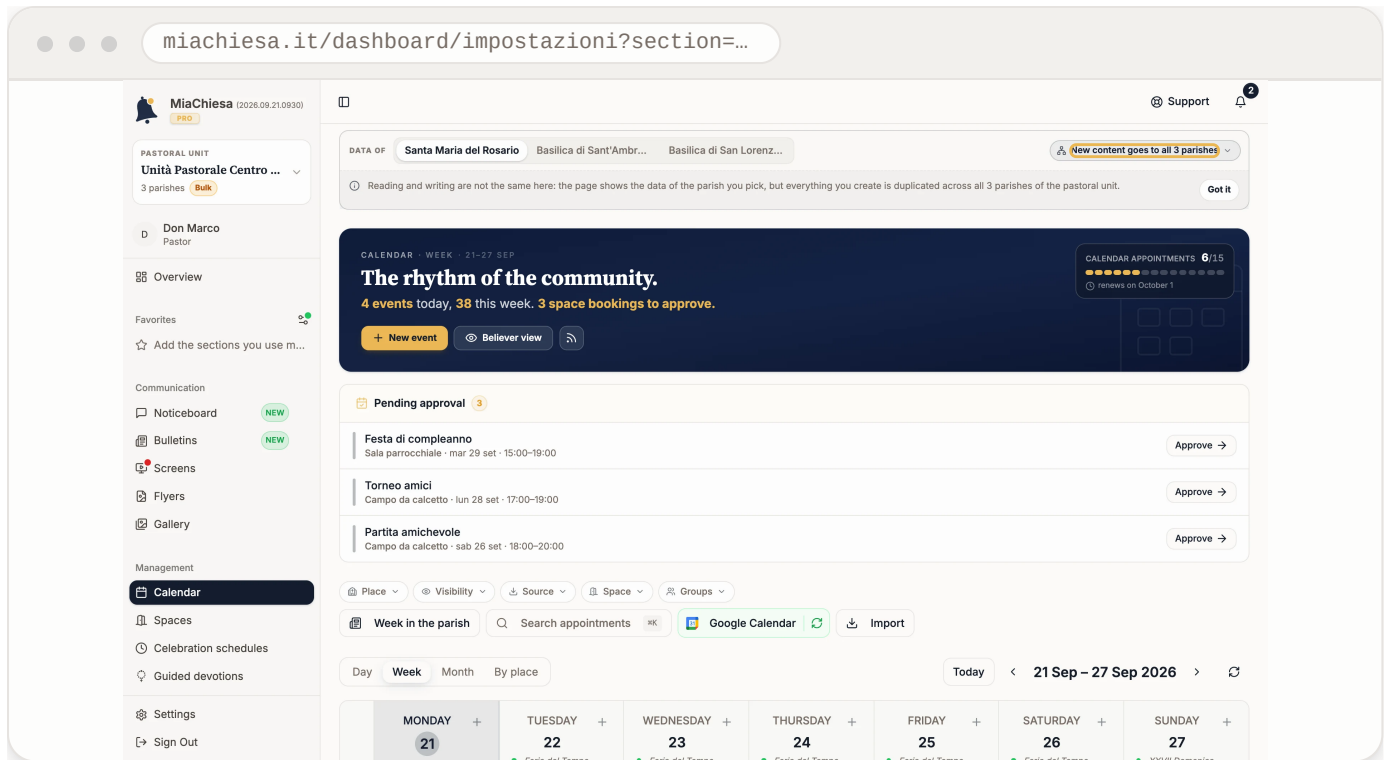


Fig. 2 The pill says how many communities the next item will reach.

SECTION 4

Merged: one identity, some settings per community

In Merged, **Identity** edits the unit: profile, photos, social links and appearance are what parishioners see. The **UP management** tab gathers **Public profile**, the **Parishes in the Unit** (at least two) and **Parish Visibility**, where you can hide individual communities from search.

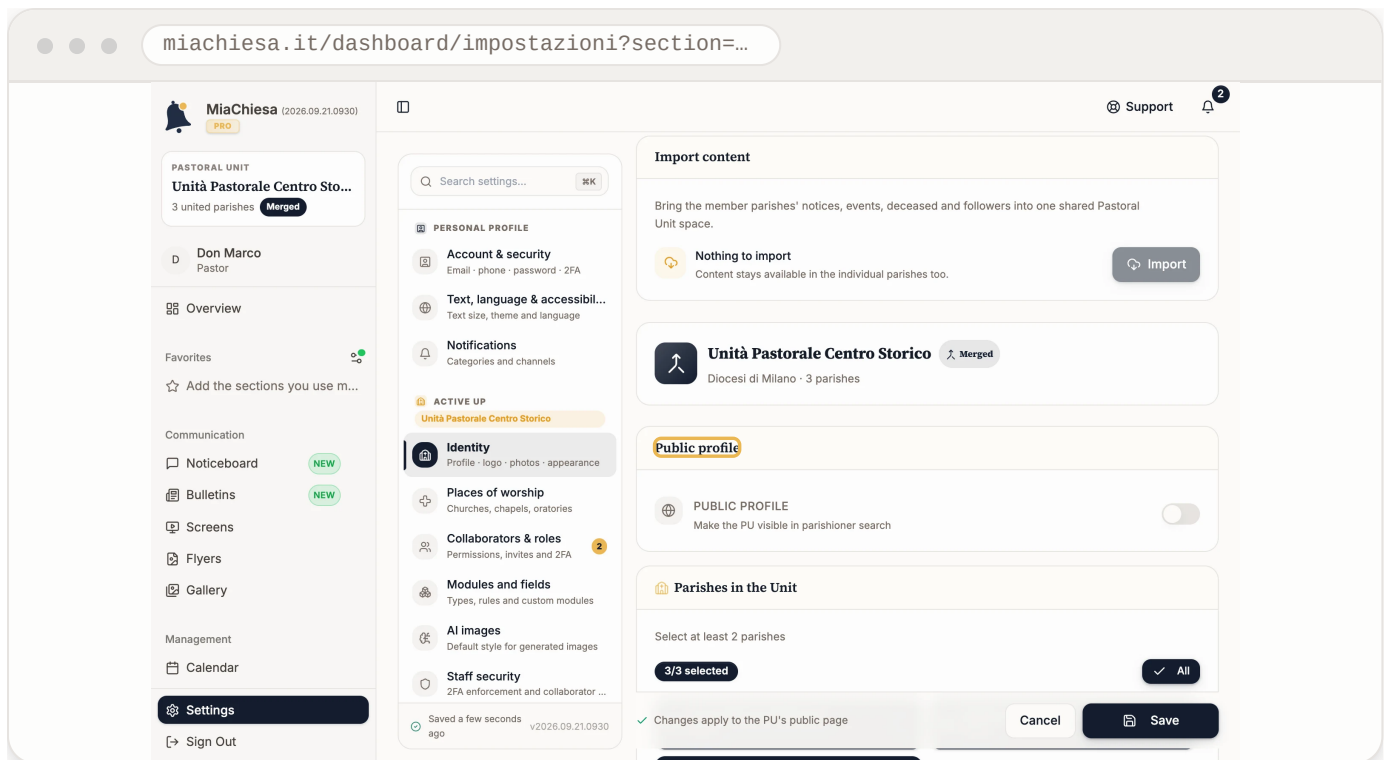


Fig. 3 Public profile decides whether the unit's page appears to parishioners.

Some settings stay per community in Merged too, such as payments: those pages show "Settings of" and the pill "Merged · settings per parish", and you pick the community to configure.

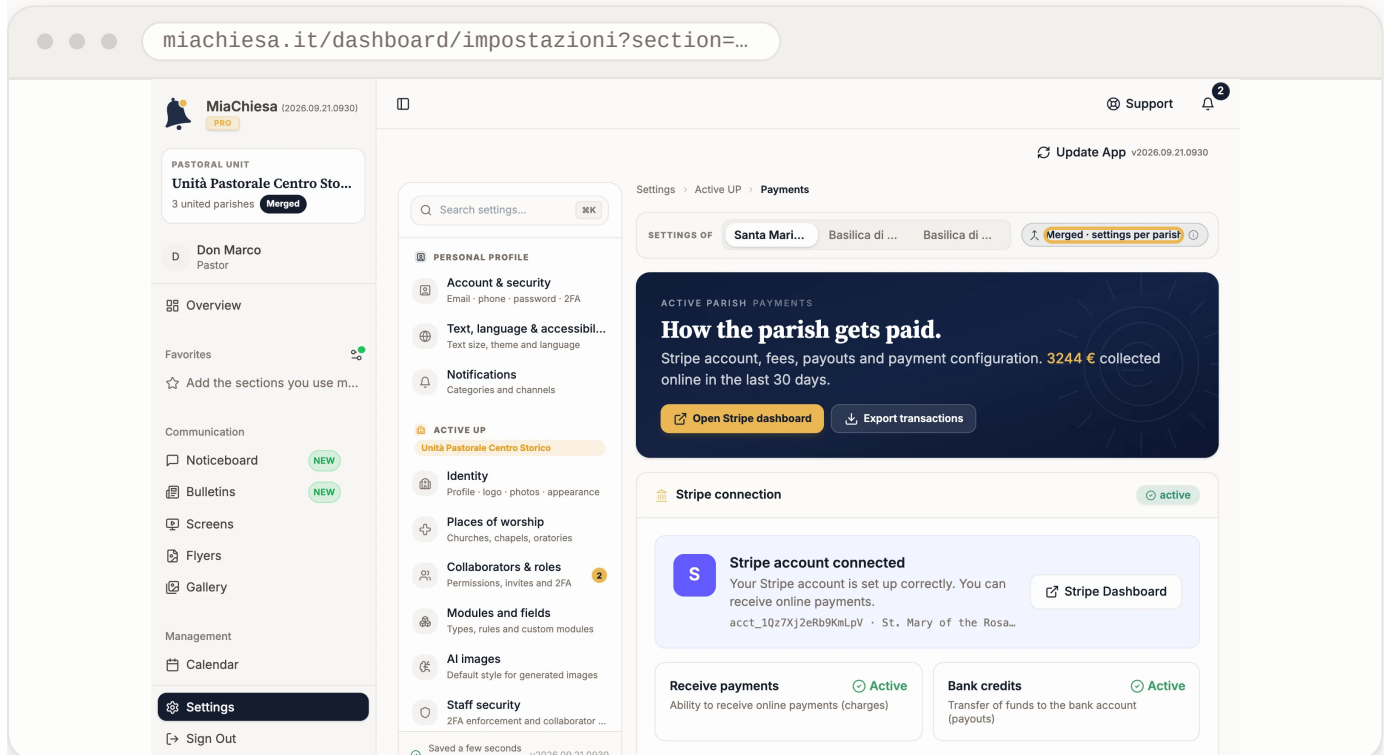


Fig. 4 Stripe and tax details stay tied to each community.

SECTION 5

How to choose

Choose Bulk Operations if...

- ✓ the communities want to stay recognisable, each with its own parishioners
- ✓ you mainly want to save time by publishing the same content in several communities
- ✓ collaborators hold different positions in each community

Choose Merged if...

- ✓ the communities present themselves to parishioners as one
- ✓ you want a single noticeboard, a single calendar and a single bulletin
- ✓ collaborators work for the whole unit

Before you confirm

You choose the mode when you create the unit and the app has no command to change it afterwards. In Merged, importing the communities' content into the unit (Import Contents) cannot be undone and disconnects the communities' integrations (Facebook, Instagram, WhatsApp, Google Calendar): the communities' Google Calendar syncs stop and you connect Google Calendar once for the unit, from Settings → Integrations. The primary parish's calendar link moves to the unit and keeps working; the other parishes' links stop working.

What you have achieved

- ✓ You know what stays with the communities and what moves to the unit in each mode.
- ✓ You know which mode to choose before creating the pastoral unit.

Troubleshooting

Can I switch from Bulk Operations to Merged later?



The app has no command to change the mode after creation. If you already created the unit with the wrong mode, write to Support before publishing.

In Bulk Operations a community did not receive the content ✕

Check the new content pill and **Choose where to publish**; you can publish only where you hold a position, so check that you have one in the missing communities.

In Merged parishioners still find the individual communities ✕

Open Identity → UP management and, under **Parish Visibility**, select **Hide** next to the community.