



VERSION 4.5.4 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.5.4 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

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ParishSOFT Family Suite

What's New

Family Directory

Life Events Feature

We are excited to introduce a new feature to ParishSOFT Family Suite, called Life Events. This feature gives parishes the ability to track key life events, important milestones, and achievements in the lives of their clergy and members. Events and milestones that a parish can track include confirmation and baptism requirements, catechetical leadership training, priest education, community service activities, continuing religious education studies, and background screening requirements, to name a few.

The Life Events feature can serve as a valuable resource to parishes, enabling them to gain deeper insights into their members. Using Life Events, parishes can create custom fields to capture event and milestone data important to their organization yet not available elsewhere in ParishSOFT Family Suite. Parishes can add any number of custom event fields to meet their needs, and information on each event and member can be collected and reported using the new Life Events reporting tool. While each parish has unique data needs and will customize the feature accordingly to track events of interest, all parishes can benefit from using Life Events to learn more about the people in their parish so they can serve them even better.

Managing Permissions for Using Life Events

Family Directory permissions determine what tasks users can perform and what event information they can view in members' records. Permissions are managed in the Administration module by a user with **Organization Admin** access rights.

The following table lists the Family Directory permissions that can be granted and the associated Life Events actions users can perform. If you need to perform a specific task but lack a permission to accomplish it, contact your organization administrator for assistance.

Family Directory Permission	Users Can Perform These Actions
View	View existing life events data in members' records.
View + Add/Edit	<ul style="list-style-type: none">• Add new life events data to members' records.• Change existing life events data in members' records.
View + Delete	Remove life events data from members' records.
View + Print	Generate Life Events reports.

Setting Up and Using the New Life Events Feature

The information in this section guides you through the process of setting up and using the new Life Events feature.

Step 1. Define Events and Organize Events into Categories

Before you begin, we recommend that you define the life events of interest to your organization and then organize them into logical groups. Taking the time to plan and organize the events you want to track makes the process of entering event data into ParishSOFT Family Suite go more smoothly.

For your convenience, the Life Events feature provides seven pre-defined event categories:

Note

*If you are a former user of desktop Family Directory, any milestones data you created in the desktop can be moved to the **OLD-From Desktop** event category. If you need assistance migrating your existing desktop values to the appropriate event category, contact ParishSOFT Support for assistance. For the best ways to contact Support, see "Contacting ParishSOFT" on page 23.*

- **Baptism**
- **Eucharist**
- **Confirmation**
- **RCIA**
- **Marriage**
- **Community Service**
- **OLD-From Desktop**

You can add custom events to the predefined categories. For example, if you want to track members' baptism preparation, you can create custom events like the following to add to the **Baptism** category:

- Parent Baptism Information Meeting
- Baptism Preparation Class
- Godparent Active Member Check

If the predefined categories are not sufficient for your organization's needs, you can create your own. For example, suppose you need to track the background screening requirements of your organization's paid staff and active volunteers. You could create a list something like the following of the requirements you want to track:

- Background Check
- VIRTUS
- Competency Test
- Driver's License
- Driving Record

You could then create a custom category called "Background Screening" and add your requirements to it.

As shown below, a simple table is useful for listing events and organizing them into categories.

Event Category	Milestones/Events/Achievements/Requirements
Baptism (predefined)	Parent Baptism Information Meeting
	Baptism Preparation Class
	Godparent Active Member Check
Background Screening	Background Check
	VIRTUS
	Competency Test
	Driver's License
	Driving Record

After organizing your events, you are ready to set up the Life Events feature. The setup process is described in Step 2.

[Step 2. Create Lookup Values for Categories and Events](#)

Setting up the Life Events feature entails creating a lookup value for each event you plan to track. Lookups are created on the **Lookup Management** page in the Administration module.

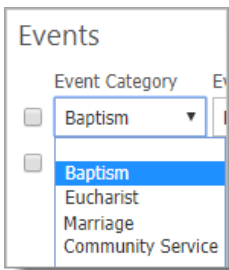
Note

*You must have **Organization Admin** rights to access the Administration module.*

The goal in the setup is to create a lookup value for each category and each event defined in Step 1. Keep in mind that your lookups define the actual options users can select when adding event data to members' records. You will create two types of lookups:

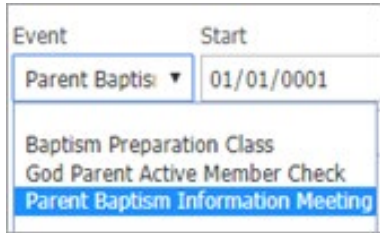
- Event Category Lookups

Event category lookups represent your main groups or categories. The system copies these lookups to the **Event Category** dropdown list in Family Directory where they appear as options users can select when adding event data to members' records. An example of an **Event Category** dropdown list is shown below. Options in the list come directly from category lookups created in the setup.



- Event Lookups

Event lookups represent the specific events within an event category. The system copies these lookups to the **Event** dropdown list in Family Directory where they appear as options users can select when adding event data to members' records. An example of an **Event** dropdown list for the Baptism category is shown below. Options in the list come directly from event lookups created in the setup:



Users encounter the **Event Category** and **Event** dropdown lists during the event entry process. The **Event** dropdown list is dependent on the **Event Category** dropdown, which means it displays only the options configured for the category the user selects in the **Event Category** dropdown. In the illustration below, **Baptism** is the selected category, so in the Event dropdown the user sees only the events configured for the Baptism category.

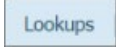



Steps 2a and 2b show you how to create category and event lookup values. Follow these two steps in the order given. A category must be created before you can add event lookups to it.

Note

You will experience a faster setup if you define your events and organize them into groups as recommended in Step 1.

Step 2a. Create Event Category Lookups

1. Open the **Administration** module. Click  to display the **Lookup Management** page.
2. In the left panel, select the **Event Category** table in the **Family Directory** group.
The **Event Category** grid is displayed. If this is your first time creating lookups, the grid is empty.
3. For each lookup you want to create for an event category, complete the following:
 - a) In the toolbar, click  to open the **Add "Event Category" Record** window.
 - b) In the **Description** field, type a name for the category. For example, "Background Screening."

Note

*Check your spelling because the text you provide appears exactly as typed in the **Event Category** dropdown list that users encounter when adding event data to members' records.*

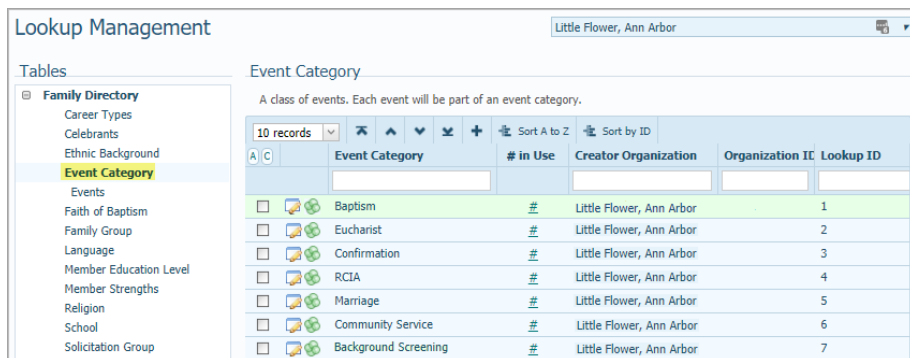
- c) Click .

The system does the following:

- ❖ Adds the category lookup to the **Event Category** table (shown below).

Note

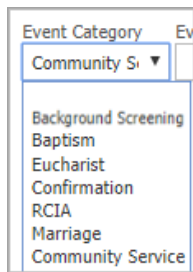
*The **Event Category** table has the same functions as other Lookup Management tables, meaning you can add lookups to it, sort them, and modify them. For details on working with Lookup Management tables, see the Administration module's online Help.*



The screenshot shows the 'Lookup Management' window for 'Little Flower, Ann Arbor'. The 'Event Category' table is displayed with the following data:


Event Category	# in Use	Creator Organization	Organization ID	Lookup ID
Baptism	1	Little Flower, Ann Arbor		1
Eucharist	2	Little Flower, Ann Arbor		2
Confirmation	3	Little Flower, Ann Arbor		3
RCIA	4	Little Flower, Ann Arbor		4
Marriage	5	Little Flower, Ann Arbor		5
Community Service	6	Little Flower, Ann Arbor		6
Background Screening	7	Little Flower, Ann Arbor		7

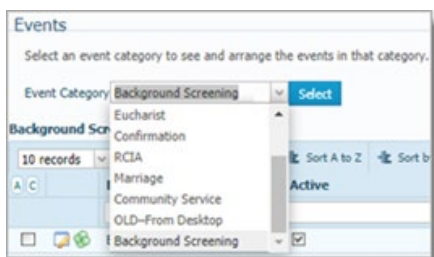
- ❖ Adds the category to the **Event Category** dropdown list in Family Directory. For example:




Step 2b. Create a Lookup for an Event

After you create a category, you can add event lookups to it. Here's how:

1. In the **Family Directory** group on the **Lookup Management** page, select the **Events**.
The **Events** grid is displayed in the right panel.
2. In the **Event Category** dropdown list, click , and then select the category you want to add the event lookup to. For example, select **Background Screening**:



Then, click  to display the lookup values currently in the selected category.

3. To add an event lookup to the category, complete the following:
 - a) In the toolbar, click  to open the **Add "Event Name" Record** window.
 - b) In the **Description** field, type a descriptive name for the lookup.
For example, "VIRTUS."

Note

*Check your spelling because the text you provide appears exactly as typed in the **Event** dropdown list that users encounter when adding event data to members' records.*

- c) Select the **Active** checkbox if you want the lookup value to appear as an option in the **Event** dropdown list in Family Directory. If you leave the checkbox deselected, the option is not visible to users.

Note

*If you do not want a lookup to be in use immediately, leave the **Active** checkbox deselected. When you are ready allow users to select the option associated with the lookup, edit the lookup record and select the **Active** checkbox.*

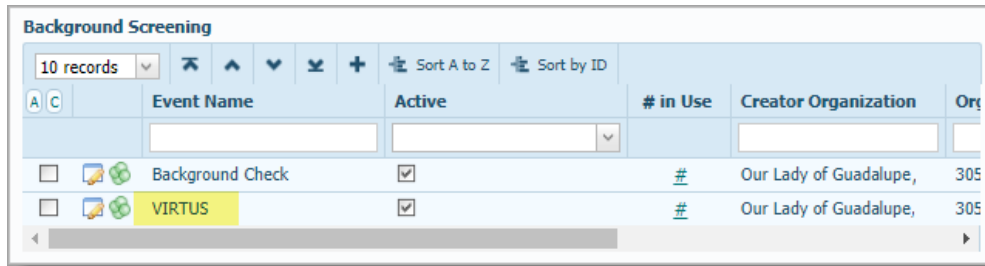
d) Click **Save**.

The system does the following:

- ❖ Adds the new lookup value to the selected category's lookup table. As shown below, VIRTUS is added to the **Background Screening** table:

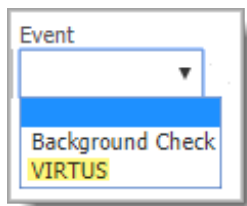
Note

The table has the same features and functions as other Lookup Management tables, meaning you can add lookups to it, sort them, and modify them. For details on working with Lookup Management tables, see the Administration module's online Help.



	Event Name	Active	# in Use	Creator Organization	Org
<input type="checkbox"/>	Background Check	<input checked="" type="checkbox"/>	#	Our Lady of Guadalupe,	305
<input type="checkbox"/>	VIRTUS	<input checked="" type="checkbox"/>	#	Our Lady of Guadalupe,	305

- ❖ Adds the new lookup value to the **Events** dropdown list in Family Directory. If you set the status of the lookup to **Active** (in Step 3c), it appears as an option that users can select from the Event dropdown list when adding event data to members' records.



4. To add another lookup, repeat this procedure starting at Step 2.

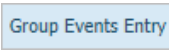
Step 3. Add Event Data to Members' Records

Now that you have created lookups for each event you want to track, you can add the events to members' records. Two methods can be used to enter event data:

- Group data entry
If you need to add the same event data to multiple members' records, use the group entry method to enter the data simultaneously.
- Separate data entry
If you are adding different data to member's records, use the separate data entry method.

These methods are documented in the following sections.

Adding Event Data to Multiple Records at the Same Time


1. Open Family Directory. Click  to display the **Group Events Entry** page.
2. Search for the members whose records you want to add event data to. To do this:
 - a) In **Step 1**, enter your search criteria in the desired **Member Search** fields.

Note

If searching for student members, specifying Religious Education criteria can speed the search and improve your results.

- b) Click .

The names of members matching your search criteria are displayed in the **Member Records** grid.

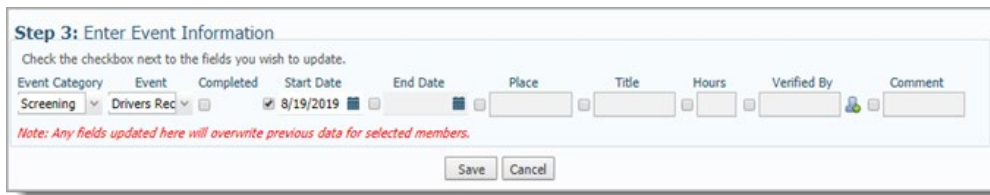
3. In **Step 2**, select the members whose records you want to update. To do this, click this button to the left of each member's name: .

The system displays the names of the members you selected in the **Selected Members** grid on the right.

Note

*If you need to remove a member from the **Selected Members** grid, click .*

4. In **Step 3**, the fields you can update in the selected members' records is displayed:





Complete the following:

- In the **Event Category** dropdown list, select the event group. Then in the **Event** dropdown list, select the specific event you are adding.
- If you want to indicate that the event is completed, select the **Completed** checkbox. Otherwise, leave the checkbox deselected.
- If you want to specify a start or end date or a date range for the event, select the **Start Date** and/or **End Date** checkboxes. Then, enter dates in the fields below.
- As necessary, enter information in the remaining fields:

Note

For each field you want to update, select its checkbox to activate it. Then, type or select the information in the field below.

- ❖ **Place:** if you want to indicate where an event took place, type the location in this field.
- ❖ **Title:** use this field to enter a name or label that describes an individual's degree level or appointment. For example, Deacon, Retired, Doctorate.
- ❖ **Hours:** if you are keeping track of the hours for an activity (for example, volunteer work), enter the number of hours in this field.
- ❖ **Verified By:** if the accuracy of the data being tracked for the event must be verified or approved, click  to search your member records for the name of the individual providing verification.
- ❖ **Comment:** use this field to add specific notes pertaining to the event, milestone, or achievement.

5. Click  to update the members' records with the event data you entered.

Adding Event Data to a Single Member's Record

1. Open Family Directory. Click [Member List](#) to display the **Member List** page.
2. Find the member whose record you want to add event data to. Then, click the member's name link to open his or her **Member Details** record.
3. To add life events data to the selected member's record, complete the following:

a) Open the **Events** window. You can do this in several ways:

- o To view all event records created for the member, click the [Life Events](#) link, highlighted in the illustration below:

The screenshot shows a member details form for 'Moira'. The form includes fields for Gender (Female), Title (Mrs.), First Name (Moira), Nick Name (Moira), Middle Name (Annette), Last Name (Adams), Suffix (M.D.), Maiden Name, and Role (Wife). A 'Life Events' link is highlighted in yellow at the bottom left of the form.





- o To view life events records associated with a specific sacrament, select the **Sacraments** tab. Then, click this button to the right of the desired sacrament: [...](#)

The screenshot shows the 'Sacraments' tab with two sections: 'Anointing of the Sick' and 'Holy Orders'. Each section has a checkbox and a three-dot menu button to its right. Arrows point to these menu buttons.

- o To view life event records created for a specific event category (for example, Community Service), click the event category link. As illustrated below, you can find event category links on various tabs (for example, General and Religious Education) in Member Details.

The screenshot shows the 'Student Notes' tab with a text area and a 'Community Service' link highlighted in yellow at the bottom. A character count '175 Characters Remaining' is visible below the text area.

- b) In the **Event Category** dropdown list, select the desired category. Then in the **Event** dropdown list, select the event you want to add.
- c) If you want to indicate that the event is completed, select the **Comp?** checkbox. Otherwise, leave the checkbox deselected.

- d) If you want to specify a date or date range for the event, enter a date in the **Start Date** and/or **End Date** fields.
 - e) As necessary, complete the remaining fields:
 - ❖ **Place:** if you want to indicate where an event took place, type the location in this field.
 - ❖ **Title:** use this field to enter a name or label that describes an individual's degree level or appointment. For example, Deacon, Retired, Doctorate.
 - ❖ **Hours:** if you are keeping track of the hours for an activity (for example, volunteer work), enter the number of hours in this field.
 - ❖ **Verified By:** if the accuracy of the data being tracked for the event must be verified or approved, click  to search your member records for the name of the individual providing verification.
 - ❖ **Comment:** use this field to add specific notes pertaining to the event, milestone, or achievement.
4. Do one of the following:
- To add another life event to this member's record, click . Then, repeat Steps 3b– 3d.
 - To save events, click . Then, click  to exit the **Events** window.

Additional Functionality Added to Support Use of the Life Events Feature

This section describes functionality added in this release to support an organization's use of the new Life Events feature.

Creating a Life Events Report

The **Census** group on the **Family Directory Reports** page features a new reporting tool, called **Life Events**:




The Life Events report collects the organization's life events data from multiple member records, enabling users to view this information in a central location instead of having to locate it in individual member's profiles. The report provides the names of individuals associated with the selected life events who match selected filter criteria.

To generate a Life Events report:

Note

You must have Family Directory View + Print permissions to generate a Life Events report.

1. Open **Census**. Click  to display the **Family Directory Reports** page.
2. In the Organization list, select the desired organization.
3. Select **Census > Life Events** to display the report setup.
4. Complete the following to set up a report:
 - a) If desired, use the **Date** filters to find event records in the report that meet your date criteria.
 - Start date and end date: to find event records within a specific period, select a date in the **Start Date** and **End Date** fields.

The system pulls all records that fall within the date range you specify. The system also pulls records that match the date in the **Start Date** field but have no value in the **End Date** field.
 - Start date only: to find event records with a specific start date, select a date in the **Start Date** field and leave the **End Date** field blank.

The system pulls all records with a start date on or after the date selected in the **Start Date** field.
 - End date only: to find event records with a specific end date, leave the **Start Date** field blank and select a date in the **End Date** field.

The system pulls all records with an end date on or before the date selected in the **End Date** field.
 - b) To restrict the data in the report to specific member groups, select the desired **Membership** and **Student Status** filters.
 - c) Select the desired event categories and, within those categories, the specific life events of interest.

5. Generate the report. To do this, click one of these report buttons:

- **Group By Person**

Organizes the report content in alphabetic order by individuals' first and last names. The illustration below shows an example of a Life Events report in which event records are grouped by person:

Little Flower (Ann Arbor): Life Events (By Person)

Adams, Brynn

Category	Events	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Baptism	God Parent Active Member Check	N	08/17/2019	08/17/2019	St. Mary's				

Eberhardy, David

Category	Events	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Baptism	Baptism Preparation Class	N	08/17/2019	08/17/2019					

Hable, Lawrence

Category	Events	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Baptism	Baptism Preparation Class	N	08/10/2019	08/10/2019					
Baptism	God Parent Active Member Check	N	08/02/2019	08/02/2019					

Jacobs, Michael

Category	Events	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Baptism	Baptism Preparation Class	N	08/17/2019	08/17/2019					

Rager, Alma

Category	Events	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Baptism	Baptism Preparation Class	N	08/17/2019	08/17/2019					
Baptism	God Parent Active Member Check	N	07/13/2019	07/13/2019					

- **Group By Event**

Organizes the report content in alphabetic order by event category. Within each category, the list of events is organized alphabetically. The illustration below shows an example of a Life Events report in which event records are grouped by event:

Little Flower (Ann Arbor): Life Events (By Event)

Baptism Preparation Class

Name	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Zettel, Missy	N	08/17/2019	08/17/2019					
Jacobs, Michael	N	08/17/2019	08/17/2019					
Rager, Alma	N	08/17/2019	08/17/2019					
Hable, Lawrence	N	08/10/2019	08/10/2019					
Eberhardy, David	N	08/17/2019	08/17/2019					

God Parent Active Member Check

Name	Comp	Start	End	Place	Title	Hrs	Verified By	Comments
Adams, Brynn	N	08/17/2019	08/17/2019	St. Mary's				
Zettel, Missy	N	08/03/2019	08/03/2019					
Rager, Alma	N	07/13/2019	07/13/2019					
Hable, Lawrence	N	08/02/2019	08/02/2019					

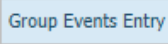
Recording an Event As Completed

Life Events features a completion option that enables you to record an event as completed. You can record completions one of two ways:

- Group data entry
If you need to record the same event as completed in multiple members' records, you can enter the data into those records simultaneously.
- Separate data entry
If you need to record events as completed in a few member records, you can enter the data into those records individually.

These methods are documented in the following sections. Use the method that meets your needs.

Marking an Event As Completed in Multiple Members' Records at the Same Time


1. Open Family Directory. Click  to display the **Group Events Entry** page.
2. Search for the members that have events you want to mark as completed. To do this:
 - a) In **Step 1**, enter your search criteria in the desired **Member Search** fields.

Note

If searching for student members, specifying one or more of the Religious Education criteria can help improve your search results.

- b) Click .


The names of members matching your search criteria are displayed in the **Member Records** grid.

3. In **Step 2**, select the members whose event data you want to mark as completed. To do this, click this button to the left of each member's name: .

The names of selected members are listed in the **Selected Members** grid on the right.

Note

*To remove a member from the **Selected Members** grid, click .*

4. To mark an event as completed, do the following:
 - a) In **Step 3**, select the desired category from the **Event Category** dropdown list. Then, select the event from the **Event** dropdown list.
 - b) Select the event's completed checkbox in the **Completed** column.
 - c) Click .

The event is recorded as completed in all selected members' records.

Marking an Event As Completed in a Single Member's Record

1. Open Family Directory. Then, click [Member List](#) to display the **Member List** page.
2. Find the member whose life events record you want to mark as completed. Then, click the member's name link to open his or her Member Details record.
3. Open the **Events** window. You can do this in several ways:

- If you want to view all event records for the member, click the [Life Events](#) link, highlighted in the illustration below:

Member Details form for Moira. Fields include: Gender (Female), Title (Mrs.), First Name (Moira), Nick Name (Moira), Middle Name (Annette), Last Name (Adams), Suffix (M.D.), Maiden Name, and Role (Wife). The 'Life Events' link is highlighted in yellow at the bottom left.

- If you want to mark a specific sacrament event as completed, select the **Sacraments** tab. Then, click this button to the right of the desired sacrament to view the associated event records: [...](#).

Sacraments tab showing 'Anointing of the Sick' and 'Holy Orders' with checkboxes and three-dot menu buttons. Arrows point to the three-dot buttons.

- If you want to delete an event record belonging to a specific event category (for example, Community Service), click the event category link to view event records in the category. As illustrated below, you can find event category links on various tabs (for example, General and Religious Education) in Member Details.

Student Notes tab showing a text area and a 'Community Service' link highlighted in yellow.

4. Click [Edit Events](#) to switch to edit mode.
5. If you don't see the event you want to mark as completed, find it by selecting the category and event from the **Category** and **Event** dropdown lists, respectively. Then, select the **Comp?** checkbox for the event. For example:

Events window showing a table with columns for Category, Event, and Comp?. The 'Screening' category and 'VIRTUS Train' event are selected, and the 'Comp?' checkbox is checked.


6. Click [Save](#) to update the record with the change. Then, click [Close](#) to exit the **Events** window.

Removing an Event Record

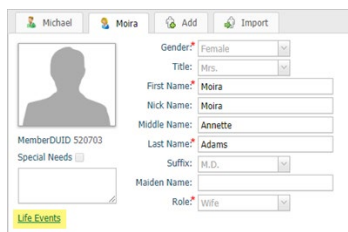
If you determine that you no longer want or need to track a specific event for a member, you can remove the event from the member's record.

Note

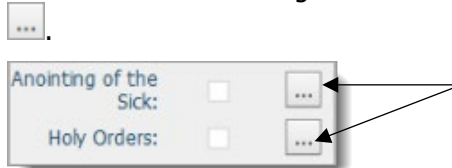
You must have Family Directory > Delete permissions assigned to your login credentials to remove event data from members' records.

1. Open Family Directory.
2. Click  to display the **Member List** page.
3. Find for the member whose event record you want to remove. Then, click the member's name link to open Member Details.
4. To remove a life events record, complete the following:
 - a) Open the **Events** window. You can do this in several ways:

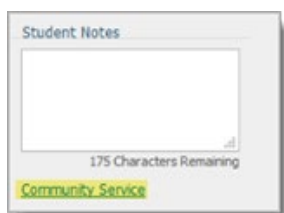
- If you want to view all event records for the member, click the [Life Events](#) link, highlighted in the illustration below:



- If you want to remove a specific sacrament event record, select the **Sacraments** tab. Then, click this button to the right of the desired sacrament to view the associated event records:

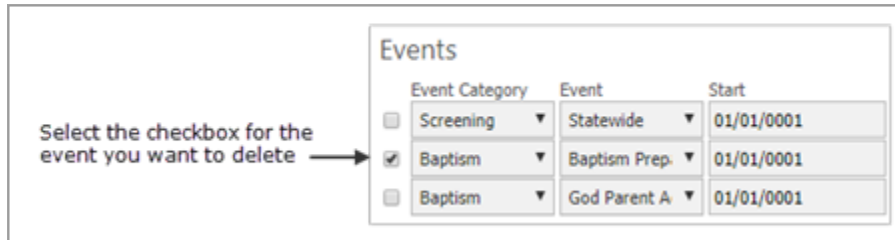


- If you want to remove an event record belonging to a specific event category (for example, Community Service), click the event category link to view event records in the category. As illustrated below, you can find event category links on various tabs (for example, **General** and **Religious Education**) in **Member Details**.



b) Click **Edit Events** to switch to edit mode.

c) For the event you want to delete, select its checkbox, as illustrated below:



Then, click **Delete Event**.

The selected event record is removed.

5. Click **Close** to exit the **Events** window.

IQ

[Columns Added to Members > Life Events Group](#)

The following columns were added to the **Members > Life Events** group in the **Column Picker** panel. Users can add pull data from these columns in queries and apply them as query conditions:

- **Event ID:** internal key ID for an event.
- **Event End Date:** end date for the completion of an event.
- **Member Name:** first and last name of the member an event is assigned to.
- **Verified By:** first and last name of the member verifying the event.

Resolved Issues

Home

[Display Options Used to Reorder Member Name Tabs in Family Details Not Working](#)

Some customers reported that, when selected, the **Member Tab Display** options, located on the User Settings page, did not change the order of name tabs in Family Details. We fixed this issue. When selected, the options now work as expected.

Family Directory

[Deleted Ministries Continue to Show on Ministry Tab in Member Details](#)

We resolved an issue that caused the name of a deleted ministry to continue to appear on the **Ministry** tab in **Member Details**.

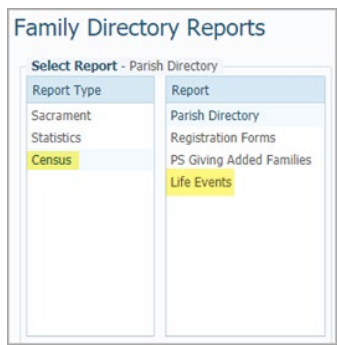
ParishSOFT Diocesan Suite

What's New

Census

Life Events Report Added

The **Census** group on the **Family Directory Reports** page features a new reporting tool, called **Life Events**:



The Life Events report collects the life events data from multiple member records, enabling you to view this information in a central location instead of having to locate it in individual member's profiles. The report provides the names of individuals associated with the selected life events who match selected filter criteria. For details about this new report, see "Creating a Life Events Report" on page 12.

IQ

Columns Added to Members > Life Events Group

The following columns were added to the **Members > Life Events** group in the Column Picker. Users can add pull data from these columns in queries and apply them as query conditions:

- **Event ID:** internal key ID for an event.
- **Event End Date:** end date for the completion of an event.
- **Member Name:** first and last name of the member an event is assigned to.
- **Verified By:** first and last name of the member verifying the event.

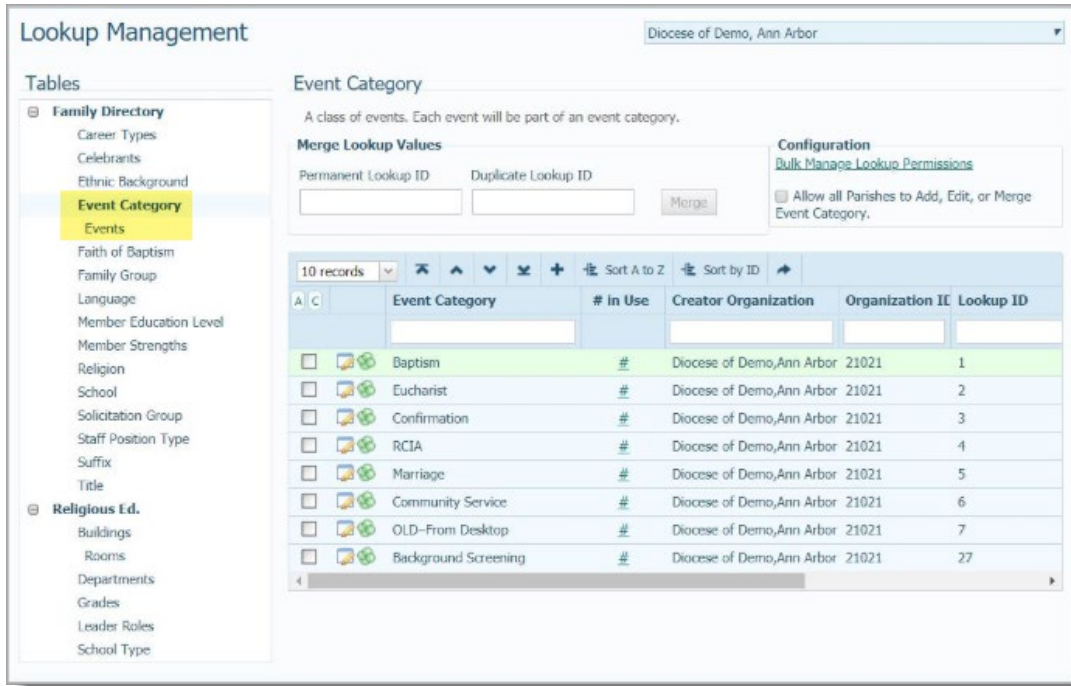
Acknowledgement Date Column Added for DDM Pledges

We added a new column labeled **Acknowledgement** to the **Pledges** group in the **Column Picker**. Users can query this column to pull acknowledgement dates for DDM pledges. The new column can also be applied as a condition.

Administration

Lookup Tables for Life Events Added to Lookup Management

As shown in the following illustration, two lookup tables were added to the **Family Directory** group on the **Lookup Management** page: **Event Category** and **Events**.



As diocesan administrator, you can create and manage lookups in the tables to support parishes' use of the new Life Events feature announced in this release. For a detailed description and introduction to Life Events, see "Life Events Feature" on page 2.

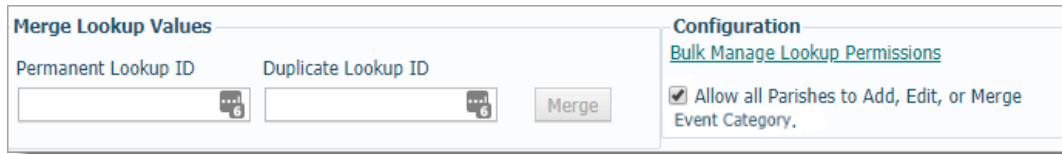
As with all tables, you can merge lookup values and manage permissions that give parishes the ability to add, edit, and merge category and event lookups. Functionality added in this release that enables you to perform these tasks are described under "Options Added to Control Parishes' Ability to Modify Life Events Lookup Data" on page 22.

Options Added to Control Parishes' Ability to Modify Life Events Lookup Data

Note

The configuration options described below are available to diocesan administrators only.

As shown in the illustration below, the newly added **Event Category** and **Events** lookup tables contain configuration options that enable diocesan administrators to the ability for all parishes in the diocese to add, edit, and merge values in the tables:






The screenshot shows a user interface with two main sections. The left section, titled "Merge Lookup Values", contains two input fields: "Permanent Lookup ID" and "Duplicate Lookup ID". Each field has a small icon with a plus sign and a lock symbol. A "Merge" button is positioned between the two fields. The right section, titled "Configuration", contains a link "Bulk Manage Lookup Permissions" and a checkbox labeled "Allow all Parishes to Add, Edit, or Merge Event Category." which is currently checked.

- [Bulk Manage Lookup Permissions](#) link: click this link to display the **Lookup Permissions Manager** menu. By default, add, edit, and merge permissions are enabled for all Family Directory lookup tables. To disable permissions for a specific table, deselect its checkbox.
- **Allow all Parishes to Add, Edit, or Merge** checkbox: by default, this checkbox is selected to allow all parishes permission to add, edit, or merge the table's lookup values. To disable the permission, select (to clear) the checkbox.

Contacting ParishSOFT

If you have questions or require support while using the application, use any of the following methods to contact us:

	https://support.parishsoft.com
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)