PARISHSOFT
NEWSLETTER

Brought to you weekly by the Diocese of Salt Lake City

Our Goal is to make ParishSOFT information easily accessible to all Parishes in the Diocese, and guide all with simple tips & tricks when using ParishSOFT 💡

Our Weekly Focus: How to Merge Records

Some records on ParishSOFT has been duplicated. The resolution for these duplicate records is to merge the records so that there is one record on the ParishSOFT database.

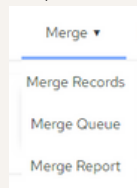***To merge records you will need to do the following steps:***

- Sign in

- Select ⚙ Administration

- Under "Administration" select "Merge"

Suspense ▾	Lookups	System Setup ▾	Organizations	Manage Staff	Module Settings	Utilities ▾	Merge ▾	Notifications	Reports

- When you select the dropdown arrow, the merge options will appear, select "Merge Records"

  Merge ▾
  Merge Records
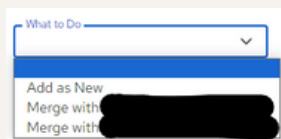 Merge Queue
  Merge Report

- You can merge either "Families" or "Members" records

  Merge Type
  ● Families
  ○ Members

- When you are merging records, you will need to have the Permanent DUID and the Duplicate DUID

- Once you have searched the records, you are prompted to select "What to Do"

  What to Do
  Add as New
  Merge with
  Merge with

- Select the record you are wanting to merge and "Submit to Queue"   Submit to Queue   Cancel

- The records will merge overnight on ParishSOFT

ParishSOFT Latest Update

For more information on training and updates, you can visit the ParishSOFT website via the links provided for their **Success Lab** and **Home Support Page**.

For All ParishSOFT FamilySuite related matters, contact:

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CATHOLIC
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of Salt Lake City