

# Reason for Change Setup

The Diocese asks that all parishes use the “Reason for Change” feature on family records, to help with an information trail for all changes.

## To enable this feature in PDS Church Office

1. On the Ribbon, click the **File** menu.
2. Under Setup, click **Initial Setup**.
3. Select the **Ask for Reason on Significant Changes** option.

The screenshot shows the 'Initial Setup' dialog box with the following settings:

- Sharing Data:** Default Picture Subdirectory, Federal ID # for Statements (Optional), Automatically Update: Check in 1 week, Default Documents Subdirectory.
- Program Options (Family / Member / Personnel):**
  - Weekly is Weekly on Sunday
  - Warn if Change ID or Name
  - Save Order when Exit Program
  - Processes Should Affect Family Date Changed
  - Ask for Reason on Significant Changes
  - Default Synchronize with Diocese to True
  - Disable Add Head/Spouse when Add Family
  - Disable Family/Member Name Change Help
  - Default to Show Totals for All Funds
  - Processes Should Affect Member Date Changed
  - Rates can be Charges or Payments
  - Default Envelope User to True
  - Split M/M if Spouse has Different Last Name
- Sharing Data Options:**
  - Share Church Inactive Flags
  - Share Church Family Keywords
  - Share Church Date Registered
  - Share Church Family Remarks
- Fund Recap Defaults:**
  - Fund Recap Defaults to Totals to Date
  - Fund Recap Defaults to Grand Totals

Buttons: Save/OK, Cancel

4. Click **Save/OK**, then **Close**.

## Logging Reason for Changes

The reason for changes logs occurrences of important changes to family data and the reasons for the changes.

The screenshot shows the 'Reason for Change to 1 - Van Loon,Jeff(Jeane),M/M' dialog box with the following settings:

- Type of Change:** Synchronize With Diocese Changed
- General Reason for Change:** Other (selected from dropdown)
- More Info. for the Change:** [Empty text box]
- Original Value:** [Empty text box]
- New Value:** [Empty text box]

Buttons: Log/OK, Cancel

The reasons for changes display in red if they were made in another PDS program that is sharing data with PDS Church Office.



The Reason for Changes applies when making changes to the following family information:

- Family Name
- Lines 1 and 2 of the Street, Mailing or Alternate addresses
- City/State
- Zip/Postal
- Deleting Email addresses
- Information to be synched with the diocese
- Family Status (active or inactive)
- Deleting a family or member



### Useful Information

You can view logged changes and reasons from three locations within the program:

- The Reason for Changes link in the Families navigation pane
- The View Log of User Activity dialog box
- The Synchronize with Diocese/Metropolis process