## Combine Families & Members Process

Do you have duplicate families in your data? If two users add the same family, you end up with duplicates. Sometimes you can simply delete one or the other. However, if the duplication was not discovered right away, it is possible that important information was added to both family records. When this happens, use the Combine Families process to identify and combine duplicate records.

Click on File | System Processes | Combine Families



Select your options, then click Build List. This takes a few minutes to complete:

_		
B	Build List Options	× he program e box below.
	Below, mark the types of potential duplicates you want to add to the list. Clear the types of potential duplicates you want to remove from the list.	
	Family Names that Match Exactly	
	Family Last Name & First Name of Head	
	Beginning of Family Name and Street Address Number	ber
	Family and Member Phone Numbers	
	✓ ID/Envelope Numbers	
	The program can merge two families together if all of their fields match. If you want the program to do this automatically without the opportunity to check the fields manually, check the box below Merge Families that Match Exactly Automatically	v.
	This process will take awhile. Click the Build List button to begin. Click the Cancel button to stop. <u>B</u> uild List Cance	

A list of possible duplicates displays. Review the list and select the ones you want to examine further. Click Review Details Before Combining Families.

Nama	Etreet Address 1	Church ID/Env	Form ID	School ID	Church Family	Fann Fa	4
Bailey,Ralph H(Mary],MM	7705 W Marce Pole Rd	111			Church		
Pickerton,Mark(Sandra),M/M	12025 S Hall Moon Dr	31	66		Church	Formatik	
Mullins,Donna,Mrs.	8355 E Vie De Belleza	16	5	5	Dhurch .	Formati	
Burke,Matthew (Mary), Mr. &	444 S Higley Rd Apt 214	5			Church	Formetic	
Owens,Norman (Nancy), Mr. & M.	1933 W Guadalupe Rd Apt 1717		184	120		Formatie	
Hampton, Phillip(Sara), M/M, III	3400 S Ironweed Dr	184		1.	Church		
Reynolds, Cole (Irene), Nr. 5	1835 E Ranch Rd		120	131		Formatic	
Sonmid Jeffrey (Lenore), M/M	11675 N 1018 St	Э			Church	Formati	
Schmid, Jethey (Lenore), M/M	11675 North 1015T Street	112		1.	Church		
Van Loon Jeff Jeane) M/M	14430 N 19th Ave Apt 30	1			Church	Formatic	i
Wylie Barbara Mrs.	1739 W Parkview Ln	29		1	Church	Formatic	1
Wylie, Barbara, Mrs.	1738 W Partview Ln	20		1	Church	Formati	+
C and							

The program displays the information from one record on the left and the other on the right. Discrepancies display in red. Select the information you want to keep from each record.

	Family	Matching Family	
amily Name:	Schmid, Jeffrey(Lenore), M/M	Schmid, Jeffrey(Lenore), M/M	
Date Created:	11/07/2002 6 Members	08/26/2010 2 Members	
ate Changed:	01/21/2011	01/21/2011	
amily Belongs to:	Church, Formation	Church	
	Items shown reddo not match. Pla	ace a checkmark next to the information you want to k	eep.
amily Detail			
Mailing Name:	Mr. & Mrs. Jeffrey Schmid	Mr. & Mrs. Jeffrey Schmid	
Formal Salutation:	Mr. & Mrs. Schmid	Mr. & Mrs. Schmid	
Informal Salutation:	Jeffrey & Lenore	Jeffrey & Lenore	
Church ID/Envelope:	3	112	
Second ID Number:	120-3		
Church Inactive 1:	V No	No	
Church Inactive 2:	V No	No	
Church Inactive 3:	V No	No	
Church Inactive 4		ГП м-	
	Mark All Red Delete First Family	Mark All Red Delete Matching Family	

- After you have addressed all discrepancies, click Combine Families. This pulls all the information you chose to keep into a single record and deletes the other family record.
- This includes all fund information assigned to both families. However, you must also reconcile the members of those duplicate families.

## Important: When the following message displays, click Yes.



- > The process then allows you to review and combine all members in the families.
- The list of members displays, along with suggestions for what actions to take. In the example below, the suggestion is to combine Schmidt,Lenore,Mrs. from one family with Schmidt,Lenore{R}[Duarte] in the other program.
- Select that line, then click Review Details Before Combining Members.

Family Name		Church Family	Formation Family	School Family	Chu	rch Formati ) ID	on Sch II	ool )
Schmid, Jeffrey(Lenore), M/M		Church	Formation		3			
Scott,Henry,Mr.		Church			253			
Sebastian,Martin(Dolores),M/M		Church	Formation		193			
Sene, Cheryl, Ms.		Church			254			
Senter, Thomas(Vickie), M/M		Church			362			
chmid,Jeffrey(Lenore),M/M lembers of: Schmid,Jeffrey(Lenore),M/M Action to Take	Mer	nber Nar	ne	Date o	f Birth	Relationship	Турн	2
chmid,Jeffrey(Lenore),M/M lembers of: Schmid,Jeffrey(Lenore),M/M Action to Take	Men	nber Nar	ne	Date o	f Birth	Relationship	Турн	
chmid,Jeffrey(Lenore),M/M lembers of: Schmid,Jeffrey(Lenore),M/M Action to Take Do Nothing	Mer Schmid, Jeffre	nber Nar y{J}(Jeff)	ne ,Mr.	Date o	f Birth 1974	Relationship Head	Type Head of	e Ho
chmid,Jeffrey(Lenore),M/M lembers of: Schmid,Jeffrey(Lenore),M/M Action to Take Do Nothing Combine With: Schmid,Lenore,Mrs.	Mer Schmid,Jeffre Schmid,Lenor	nber Nar y{J}(Jeff) re{R}[Dus	ne ,Mr. arte]	Date o 12/10/ 09/03/	f Birth 1974 1974	Relationship Head Spouse	Type Head of Spouse	e Ho
chmid, Jeffrey(Lenore), M/M Action to Take Do Nothing Combine With: Schmid, Lenore, Mrs. Do Nothing	Mer Schmid, Jeffre Schmid, Lenor Mc Laughlin, S	nber Nar y{J}(Jeff) re{R}[Dus Shanna{	ne ,Mr. arte] M}	Date o 12/10/ 09/03/ 04/13/	f Birth 1974 1974 1995	Relationship Head Spouse Niece	Type Head of Spouse Child	e Ho
chmid, Jeffrey(Lenore), M/M Action to Take Do Nothing Combine With: Schmid, Lenore, Mrs. Do Nothing Do Nothing	Men Schmid,Jeffre Schmid,Lenor Mc Laughlin,S Schmid,Georg	nber Nar y{J}(Jeff) re{R}[Du Shanna{ ge{Edwa	ne "Mr. arte] M} rd}.,Jr.	Date o 12/10/ 09/03/ 04/13/ 11/01/	f Birth 1974 1974 1995 1999	Relationship Head Spouse Niece Child	Type Head of Spouse Child Child	e Ho
chmid, Jeffrey(Lenore), M/M Action to Take Do Nothing Combine With: Schmid, Lenore, Mrs. Do Nothing Do Nothing Do Nothing	Men Schmid,Jeffre Schmid,Lenor Mc Laughlin,S Schmid,Georg Schmid,Mega	nber Nar y{J}(Jeff) re{R}[Dus Shanna{ ge{Edwa an{S}	ne ,Mr. arte] M} rd},.Jr.	Date o 12/10/ 09/03/ 04/13/ 11/01/ 03/27/2	f Birth 1974 1975 1999 2002	Relationship Head Spouse Niece Child Child	Type Head of Spouse Child Child Child	e Ho
chmid, Jeffrey(Lenore), M/M Action to Take Do Nothing Combine With: Schmid, Lenore, Mrs. Do Nothing Do Nothing Do Nothing Do Nothing Do Nothing	Men Schmid, Jeffre Schmid, Lenor Mc Laughlin, S Schmid, Georg Schmid, Mega Schmid, Steve	nber Nar y{J}(Jeff) shanna{ ge{Edwa in{S} :n{Josepl	ne ,Mr. arte] M} rd}.,Jr.	Date o 12/10/ 09/03/ 04/13/ 11/01/ 03/27/ 10/11/2	f Birth 1974 1975 1995 1999 2002 2004	Relationship Head Spouse Niece Child Child Child	Type Head of Spouse Child Child Child Child	e Ho
chmid, Jeffrey(Lenore), M/M Action to Take Do Nothing Do Nothing Do Nothing Do Nothing Do Nothing Do Nothing Do Nothing Do Nothing	Mer Schmid, Jeffre Schmid, Lenor Mc Laughlin, S Schmid, Georg Schmid, Mega Schmid, Steve Schmid, Jeffer	nber Nar y{J}(Jeff) re{R}[Dus Shanna{ ge{Edwa in{S} in{Josep! y,Mr.	ne ,Mr. arte] M} rd}.,Jr.	Date o 12/10// 09/03/ 04/13// 11/01// 03/27// 10/11/2	f Birth 1974 1974 1995 1999 2002 2004	Relationship Head Spouse Niece Child Child Child Head	Type Head of Spouse Child Child Child Child Head of	e Ho

Once again, the program displays the detail for both member records. Differences display in red. Select the information you want to keep.

nember Details			_			
	Member	Matching Member				
Member Name:	Schmid,Lenore,Mrs.	Schmid,Lenore{R}[Duarte]				
Date Created:	08/28/2008	11/07/1996				
Date Changed:	01/25/2012	01/21/2011				
Member Belongs to:	Church Church, Formation					
	Items shown reddo not match. Place a	a checkmark next to the information you want to keep				
Member Detail						
Mailing Name:	Mrs. Lenore Schmid	Character Schmid				
Formal Salutation:	Mrs. Schmid	Lenore Schmid				
Informal Salutation:	V Lenore	Lenore				
Church Mem ID/Env.:		4014				
Church Inactive 1:	V No	No				
Church Inactive 2:	V No	No				
Church Inactive 3:	V No	No				
Church Inactive 4:	V No	No				
Church Inactive 5:						
	Mark All Red Delete First Member	Mark All Red Delete Matching Member				

Click Combine Members. This combines the member, removes the duplicate record, and returns to the list of members so you can combine any additional duplicates within the family.