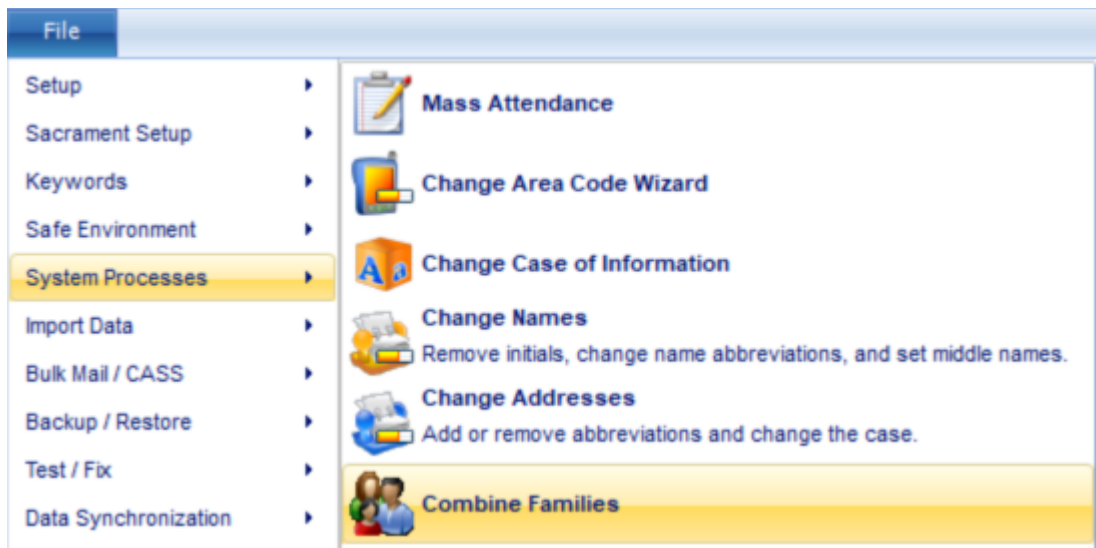| Combine Families & Members Process |
| --- |

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:

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


➤ 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.


➤ 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.
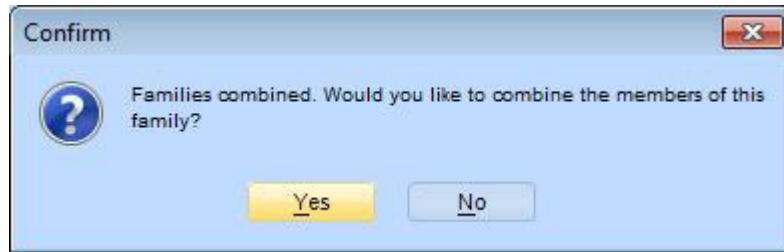
➢ The process then allows you to review and combine all members in the families.

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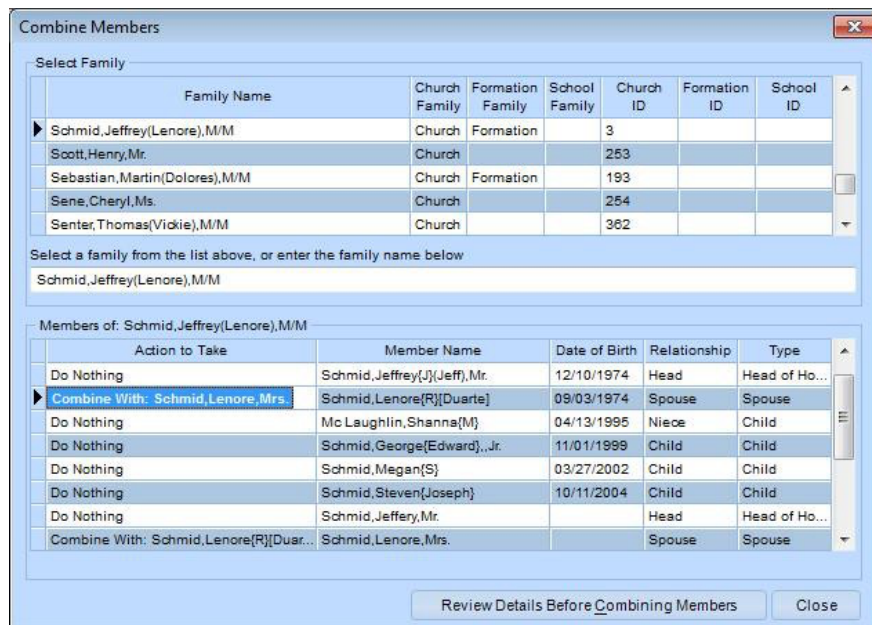
➤ Once again, the program displays the detail for both member records. Differences display in red. Select the information you want to keep.

➤ 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.