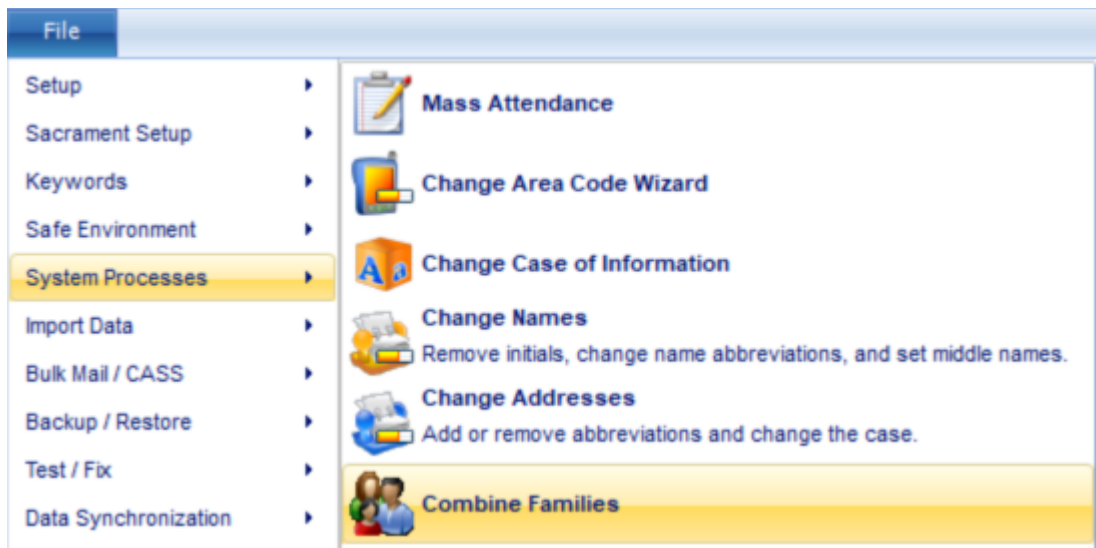


## Combine Families & Members Process

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:

Build List Options

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
- 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

This process will take awhile. Click the Build List button to begin.  
Click the Cancel button to stop.

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

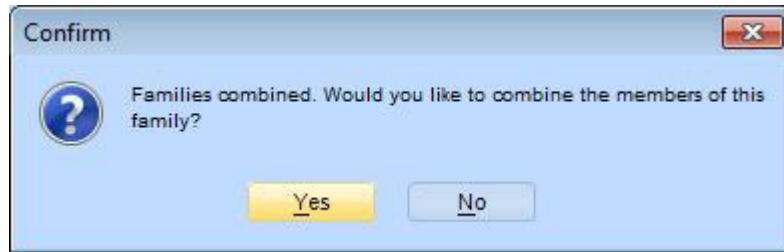


- The program displays the information from one record on the left and the other on the right. Discrepancies display in red. Select the information you want to keep from each record.

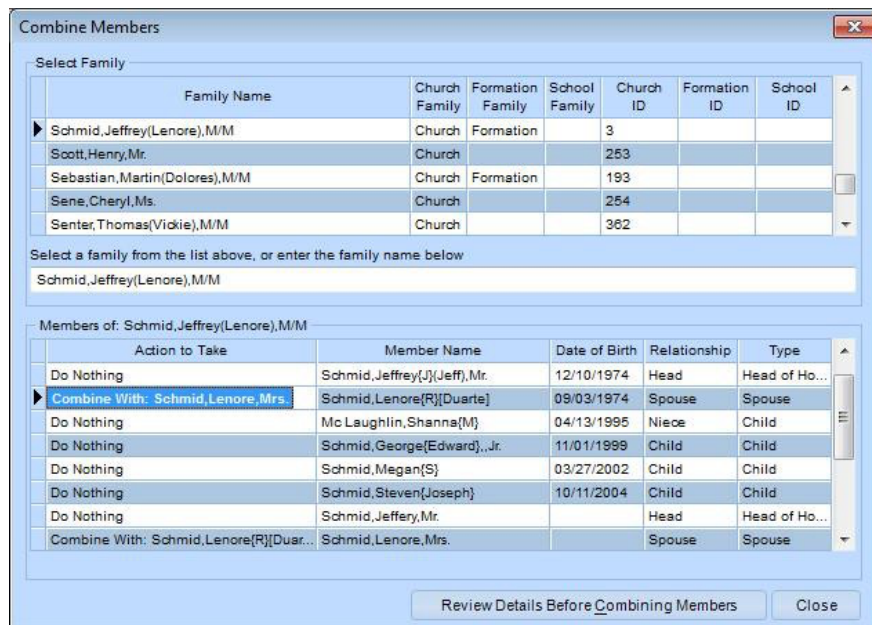


- After you have addressed all discrepancies, click Combine Families. This pulls all the information you chose to keep into a single record and deletes the other family record.
- This includes all fund information assigned to both families. However, you must also reconcile the members of those duplicate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

Member Details

	Member	Matching Member
Member Name:	<input type="checkbox"/> Schmid, Lenore, Mrs.	<input type="checkbox"/> Schmid, Lenore[R][Duarte]
Date Created:	08/26/2008	11/07/1998
Date Changed:	01/25/2012	01/21/2011
Member Belongs to:	Church	Church, Formation

Items shown in red do not match. Place a checkmark next to the information you want to keep.

Member Detail

Mailing Name:	<input type="checkbox"/> Mrs. Lenore Schmid	<input type="checkbox"/> Lenore Schmid
Formal Salutation:	<input type="checkbox"/> Mrs. Schmid	<input type="checkbox"/> Lenore Schmid
Informal Salutation:	<input checked="" type="checkbox"/> Lenore	<input type="checkbox"/> Lenore
Church Mem ID/Env.:	<input type="checkbox"/>	<input type="checkbox"/> 4014
Church Inactive 1:	<input checked="" type="checkbox"/> No	<input type="checkbox"/> No
Church Inactive 2:	<input checked="" type="checkbox"/> No	<input type="checkbox"/> No
Church Inactive 3:	<input checked="" type="checkbox"/> No	<input type="checkbox"/> No
Church Inactive 4:	<input checked="" type="checkbox"/> No	<input type="checkbox"/> No
Church Inactive 5:	<input checked="" type="checkbox"/> No	<input type="checkbox"/> No

Mark All Red   Delete First Member   Mark All Red   Delete Matching Member

Print Worksheet   **At least one entry above is still red**   Combine Members   Go Back Without Combining Members

- 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.