

If a person appears in the Donation or Membership module more than once, there are duplicate individuals that could have giving on each record. It is important to figure out which record is the GOOD record. Typically, the Membership record with the most information is the GOOD record. **Please note:** data may need to be manually added to the GOOD record.

Reminder: People entered as Donation's Givers only appear in Donations, but people entered through Membership; appear in BOTH Membership and Donations.

To begin, go to *Donations>Manage Givers* and identify duplicates. Our example is James Kildare who is appearing multiple times. There are two records with a *Members* category, one with a *Visitors* category and one from *Donations*. Member records may show as (M) or no letter after the last name. Visitor records have a (V) and Donation records have a (D). Donations Givers also have - Don - in the Mem/Don Giver column.

Manage Givers

Individual Givers Families & Groups

Sort by Giver #

| Giver # | First Name | Middle | Last Name | Mem/Don Giver |
|---------|------------|--------|-------------|---------------|
| 78 | James | | Kildare [M] | -- Mem -- |
| | James | | Kildare [M] | -- Mem -- |
| 13 | James | | Kildare [V] | -- Mem -- |
| 261 | James | | Kildare [D] | -- Don -- |

Find the records in Membership

Go to *Membership>People>Person Lookup*

- At the Person Lookup, enter the *Last Name* and choose one of the records.
- Review each record to determine the GOOD record. The Family # will help track the duplicates.

People

Find Grid Filter By Categories Show Inactive Person Lookup

kildare

Save Cancel

Add Family Delete Family

This Family's Category: Members [M]

James Kildare Family Info Comments Photo Other

Family # 59 Make Family Inactive

Add Individual

| Name | Address1 |
|-------------------|------------------|
| James Kildare [M] | 1234 Main Street |
| James Kildare [M] | 1234 Main Street |
| James Kildare [V] | 1234 Main Street |

James Kildare Group

First Name Jame

Nickname

Middle Name

- Check if each record has giving (current and prior years), go to the *Giver #* field and click on the *envelope icon*.
- If the record has giving, Transfer the giving to the GOOD record.

Note: If you do not use Giver #s may want to put an asterisk (*) after the last name as an indicator of the GOOD record. Or make the duplicate records *Inactive* so they show in red.

Show Inactive Person Lookup

Save Cancel

Add Individual Delete Individual Transfer Individual(s)

James Kildare* Groups/Classes Skills/Interests Addresses/Phones/Email Comments Photo Files

First Name James Title

Nickname Use nickname

Middle Name

Last Name Kildare* Suffix Indiv # 59-1

Individual Fields

Customize Fields

Last Giving Date 01/20/2020

Show in Scheduler

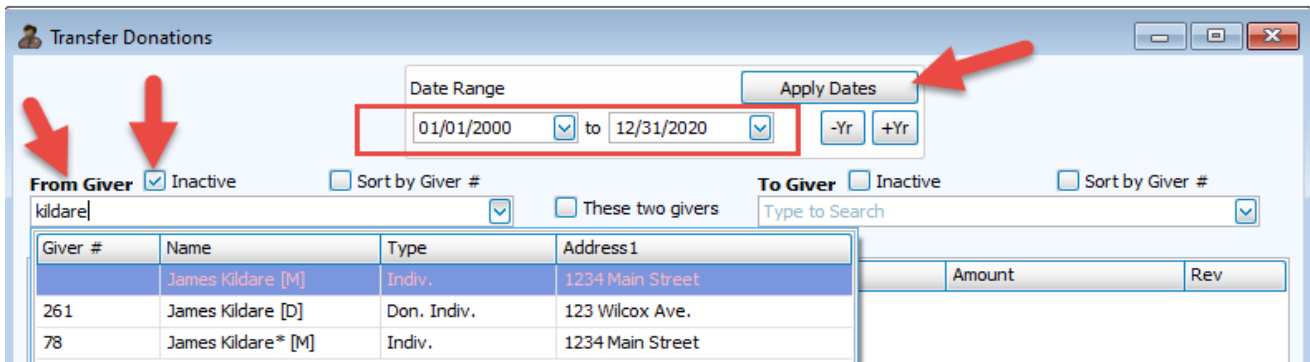
Giver # 78

The GOOD record is James Kildare* (with Giver #78).

To Transfer Giving between records, go to *Donations>Givers>Transfer Donations*.

- Change the *Date Range* (we recommend going back several years because ALL giving should be included).
- Check *Inactive*

In the Example, we show records that have giving. All giving should be transferred to the GOOD record which is the record with the asterisk.



Transfer Donations

Date Range: 01/01/2000 to 12/31/2020 [Apply Dates] [-Yr] [+Yr]

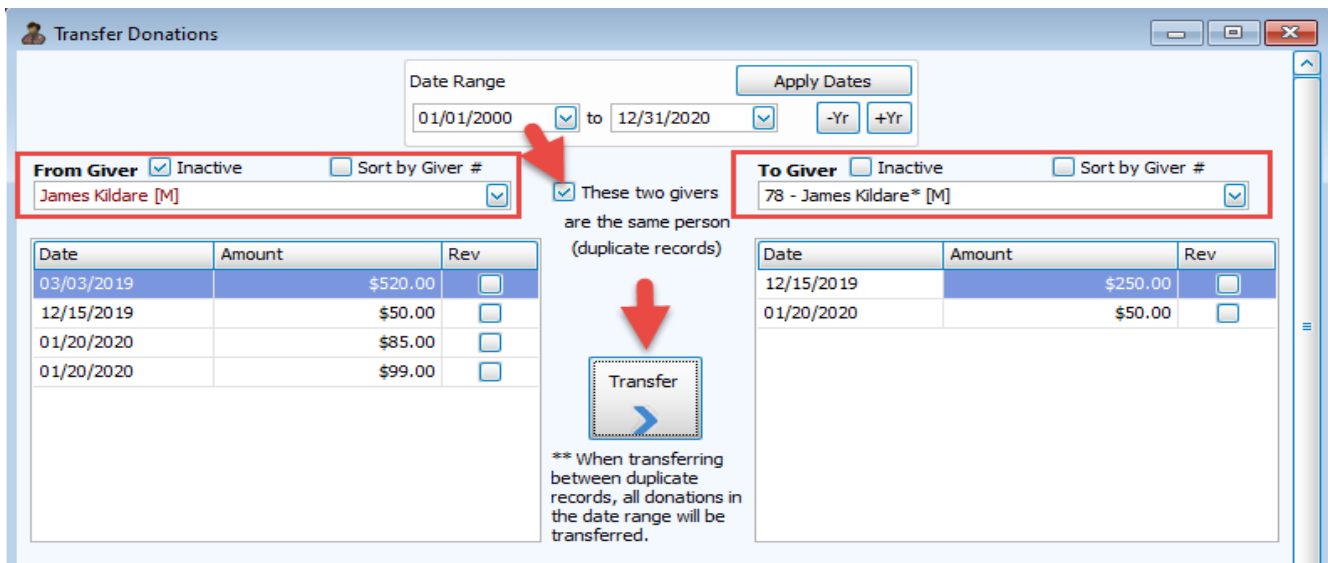
From Giver ☒ Inactive ☐ Sort by Giver #
kildare

To Giver ☐ Inactive ☐ Sort by Giver #
Type to Search

| Giver # | Name | Type | Address1 |
|---------|--------------------|-------------|------------------|
| | James Kildare [M] | Indiv. | 1234 Main Street |
| 261 | James Kildare [D] | Don. Indiv. | 123 Wilcox Ave. |
| 78 | James Kildare* [M] | Indiv. | 1234 Main Street |

| Amount | Rev |
|--------|-----|
|--------|-----|

- In the *From Giver* box, find the first duplicate record to transfer the giving. **Please Note:** If you cannot find the record in the From Giver list, there is no giving to transfer.
- In the *To Giver* box, find the name of the GOOD record (choosing James Kildare* with Giver #78).
- Check *These two givers are the same person (duplicate records)*. Checking the box allows you to transfer giving to the GOOD record. Once you remove giving from the duplicate record you will have the ability to delete the duplicate record.
- Repeat the transfer process until all the giving is transferred to the GOOD record.



Transfer Donations

Date Range: 01/01/2000 to 12/31/2020 [Apply Dates] [-Yr] [+Yr]

From Giver ☒ Inactive ☐ Sort by Giver #
James Kildare [M]

To Giver ☐ Inactive ☐ Sort by Giver #
78 - James Kildare* [M]

☒ These two givers are the same person (duplicate records)

Transfer

** When transferring between duplicate records, all donations in the date range will be transferred.

| Date | Amount | Rev |
|------------|----------|--------------------------|
| 03/03/2019 | \$520.00 | <input type="checkbox"/> |
| 12/15/2019 | \$50.00 | <input type="checkbox"/> |
| 01/20/2020 | \$85.00 | <input type="checkbox"/> |
| 01/20/2020 | \$99.00 | <input type="checkbox"/> |

| Date | Amount | Rev |
|------------|----------|--------------------------|
| 12/15/2019 | \$250.00 | <input type="checkbox"/> |
| 01/20/2020 | \$50.00 | <input type="checkbox"/> |

Are you sure 'James Kildare [M]' and 'James Kildare* [M]' are the same person and that you want to transfer the selected giving?

Yes **No**

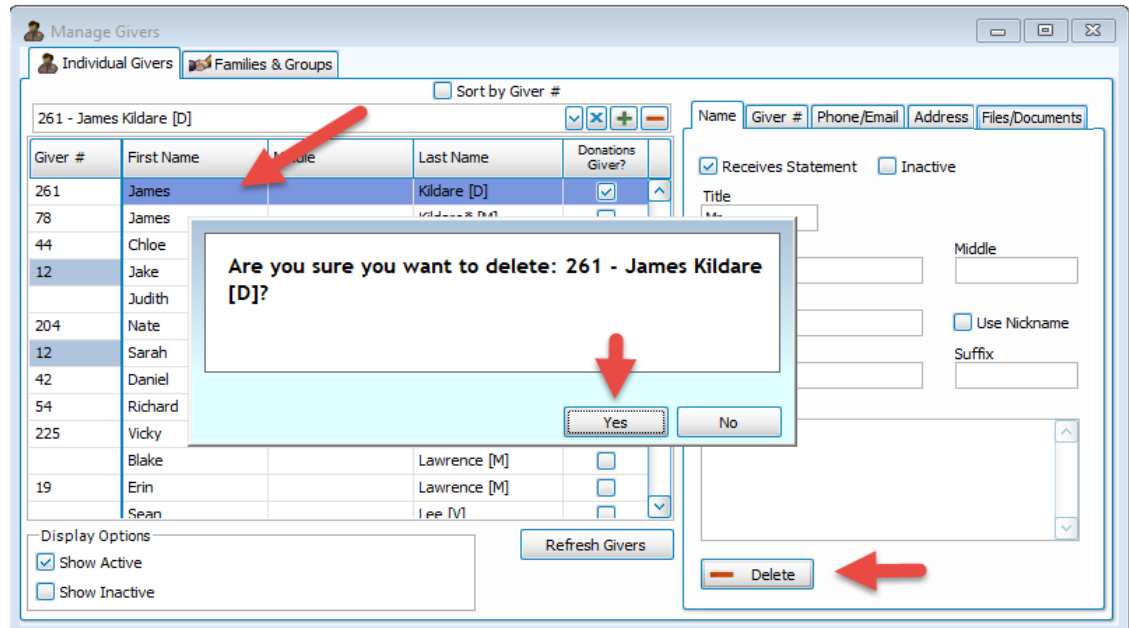
Giver was changed on selected donations.

OK

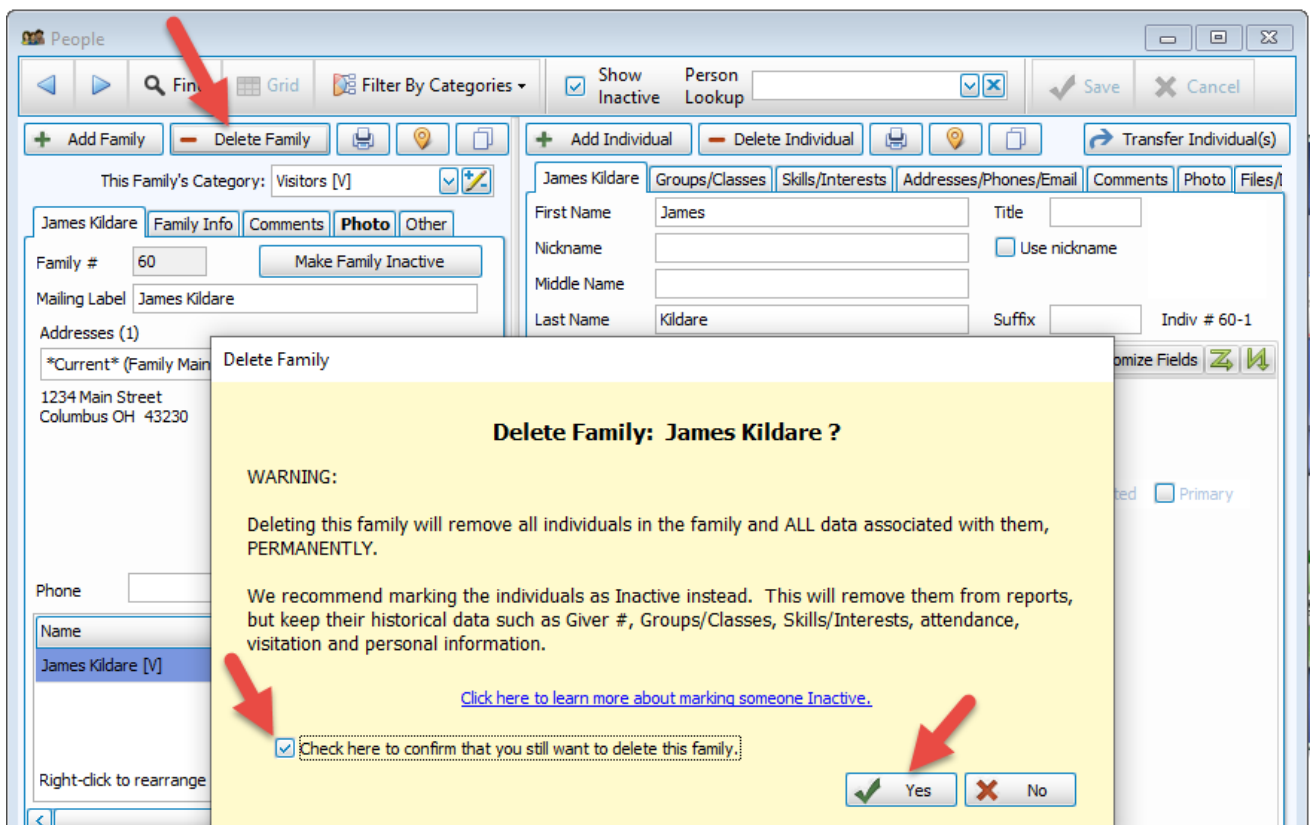
Please Note: If you are a pledging church, verify the pledges are recorded on the GOOD record. Also, if your church records Attendance, you may want to transfer the attendance to the GOOD record.

After you transfer giving you may delete the duplicates...

To delete Duplicates in Donations, go to *Donations>Manage Givers*. Find the *Donations Giver*, highlight, and click Delete.



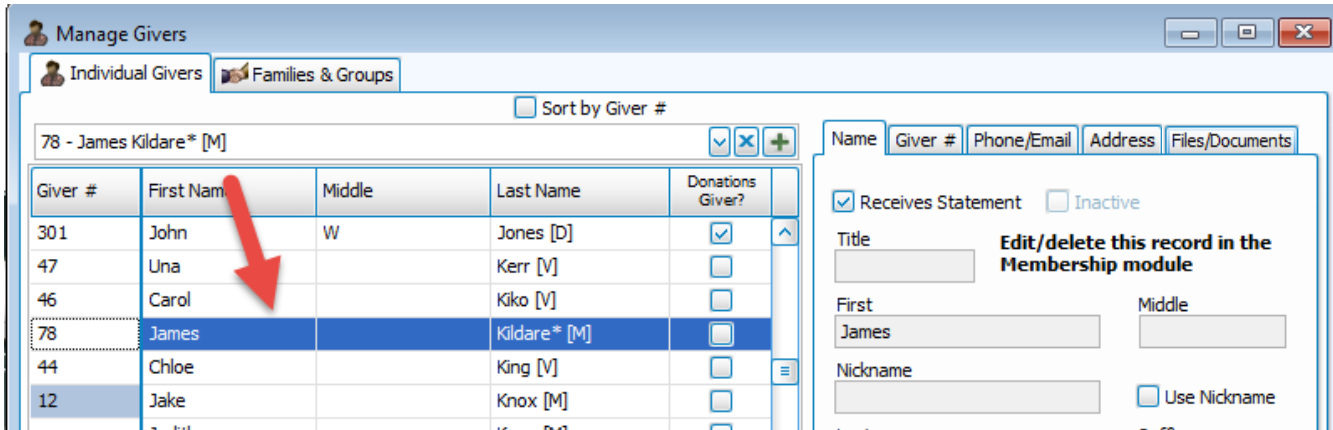
To delete Duplicates in Membership, go to *Membership>People>* go to the duplicate record(s). Click on *Delete Family* and if you want to permanently delete the record, click on the *Check here to confirm that you still want to delete this family*.



You may need to **Reassign Giver #s**

- Go to *Donations>Givers>Manage #s*
- Use the Giver search box (top left) to locate the Giver
- After selecting the Giver, click on the *Add New #* button to add a Giver #
- To remove a Giver #, fill in an End Date

In *Donations>Manage Givers* - enter the name of the GOOD record and you should only see that record.



Manage Givers

Individual Givers Families & Groups

Sort by Giver #

78 - James Kildare* [M]

| Giver # | First Name | Middle | Last Name | Donations Giver? |
|---------|------------|--------|--------------|-------------------------------------|
| 301 | John | W | Jones [D] | <input checked="" type="checkbox"/> |
| 47 | Una | | Kerr [V] | <input type="checkbox"/> |
| 46 | Carol | | Kiko [V] | <input type="checkbox"/> |
| 78 | James | | Kildare* [M] | <input type="checkbox"/> |
| 44 | Chloe | | King [V] | <input type="checkbox"/> |
| 12 | Jake | | Knox [M] | <input type="checkbox"/> |

Name Giver # Phone/Email Address Files/Documents

☒ Receives Statement ☐ Inactive

Title **Edit/delete this record in the Membership module**

First Middle

James

Nickname ☐ Use Nickname