

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.

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: kildare

Filter By Categories: Members [M]

Family # 59

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

- 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.

Person Lookup: kildare

James Kildare*

First Name: James

Nickname:

Middle Name:

Last Name: Kildare*

Suffix:

Indiv # 59-1

Last Giving Date: 01/20/2020

Show in Scheduler:

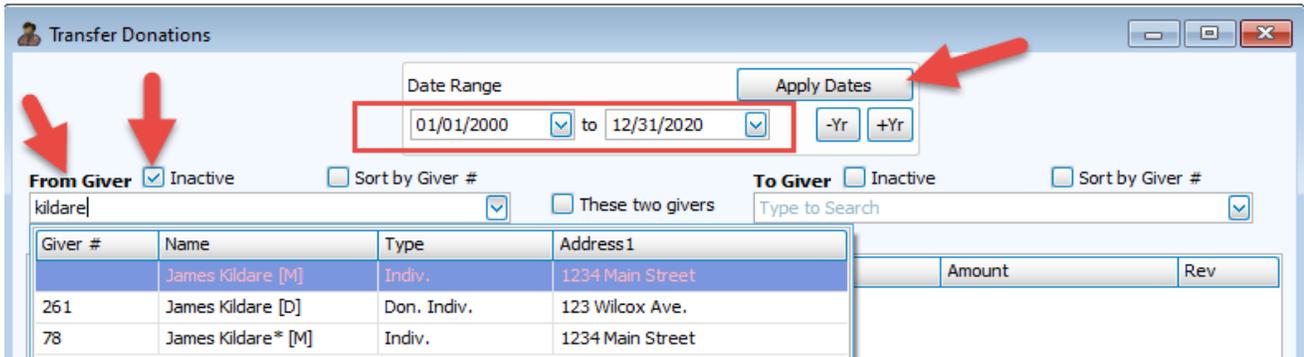
Giver #: 78

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

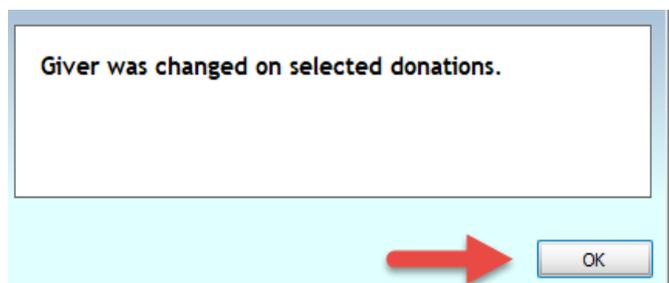
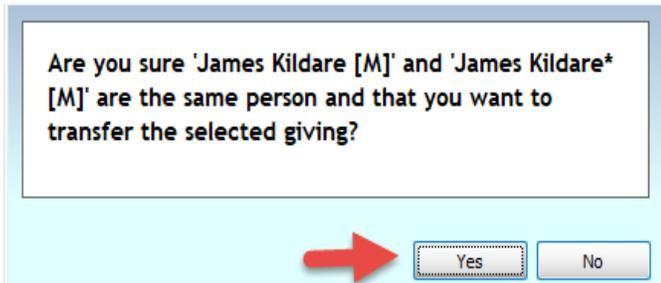
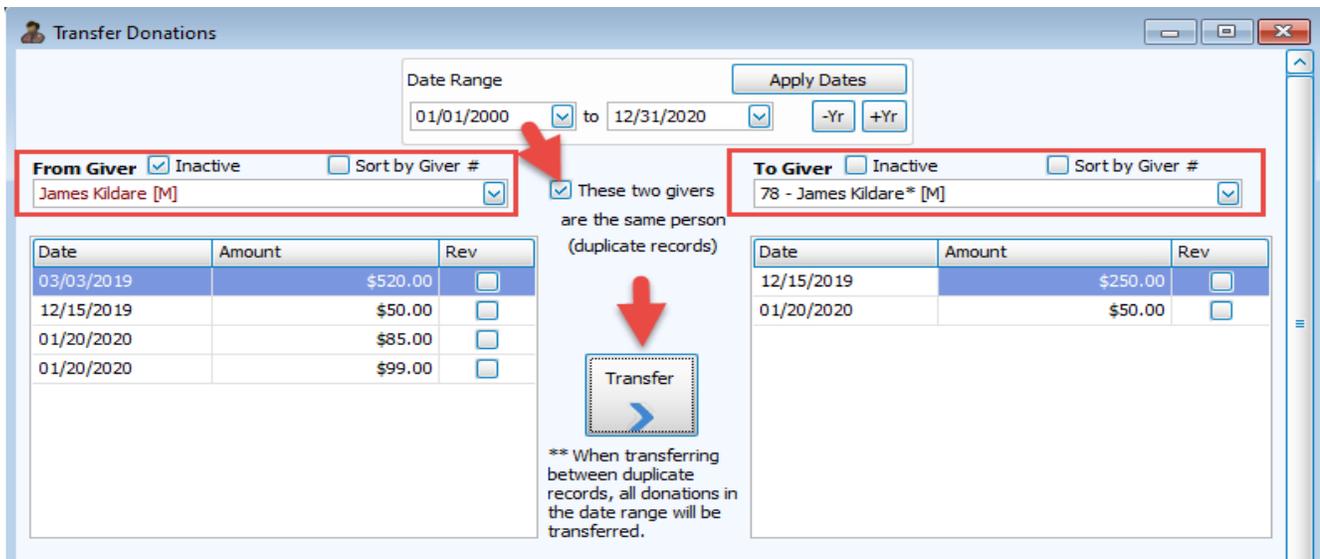
To Transfer Giving between records, go to *Donations>Givers>Transfer Donations*.

- 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.



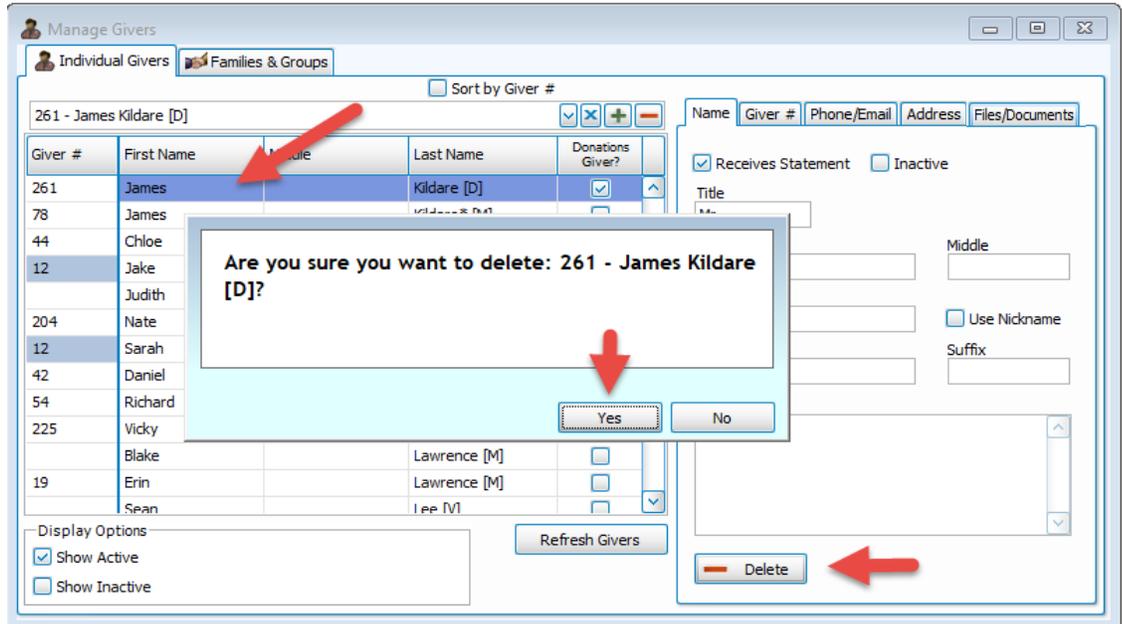
- In the *From Giver* box, find the first duplicate record to transfer the giving. **Please Note:** If you cannot find the record in the From Giver list, there is no giving to transfer.
- In the *To Giver* box, find the name of the GOOD record (choosing James Kildare* with Giver #78).
- Check *These 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.



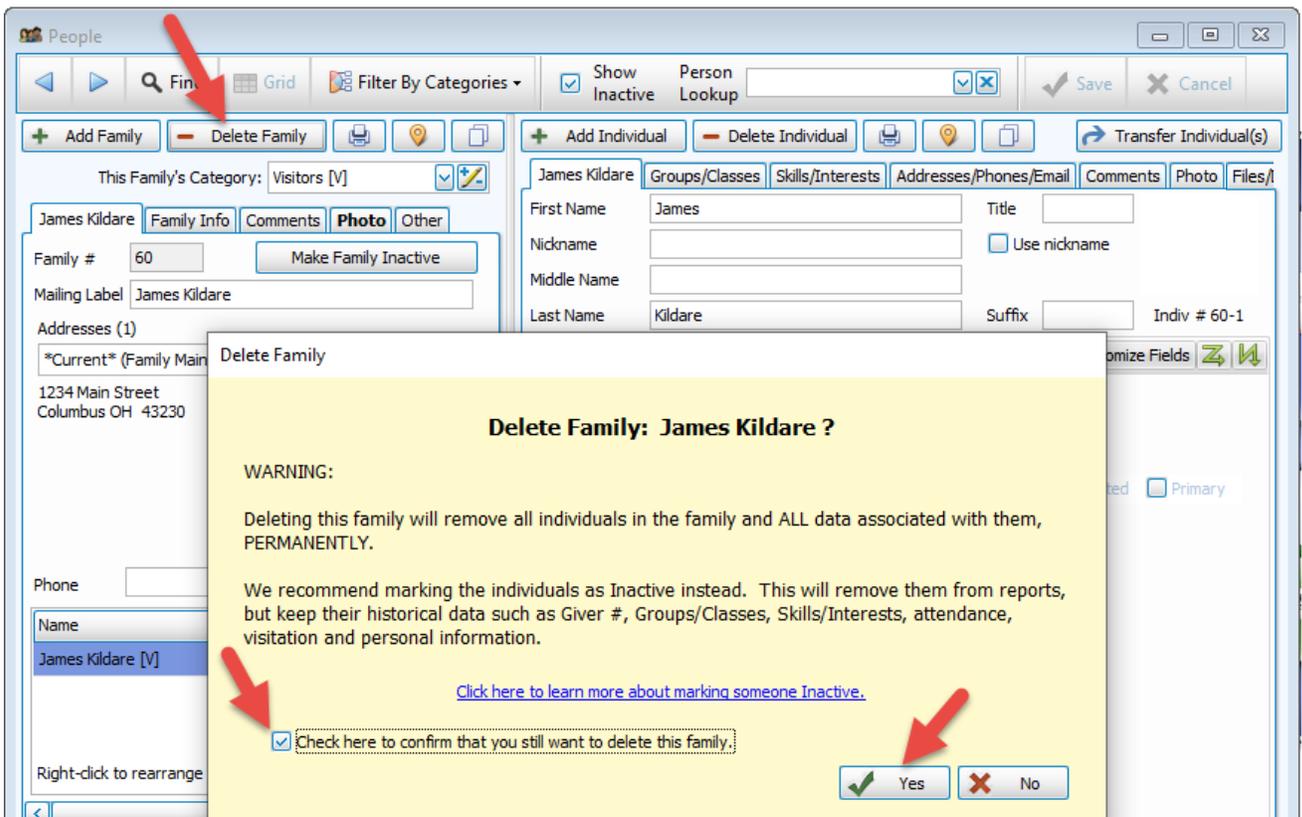
Please Note: If you are a pledging church, verify the pledges are recorded on the GOOD record. Also, if your church records Attendance, you may want to transfer the attendance to the GOOD record.

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.



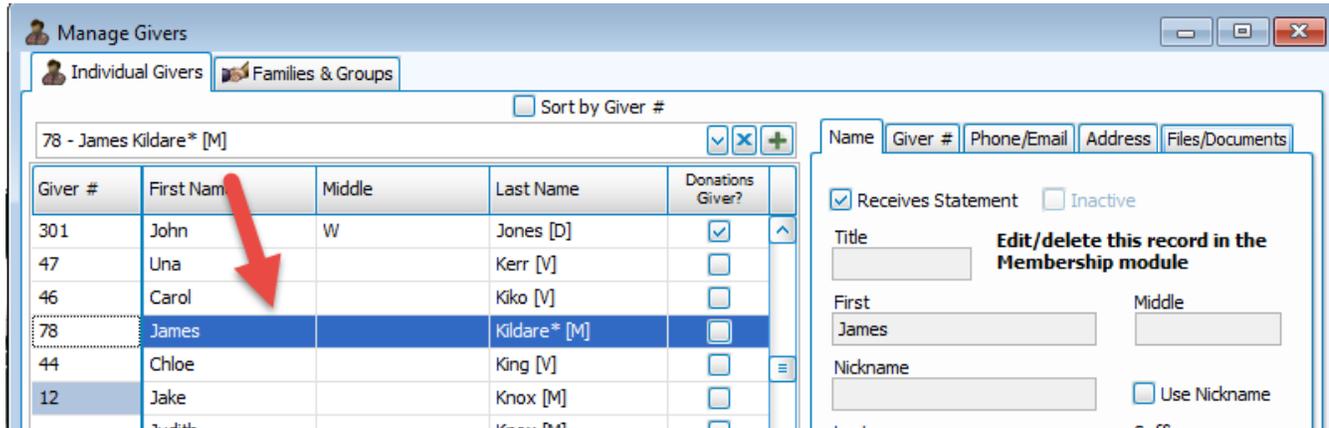
To delete Duplicates in Membership, go to *Membership>People>*go to the duplicate record(s). Click on *Delete Family* and if you want to permanently delete the record, click on the *Check here to confirm that you still want to delete this family*.



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.



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"/>