

Membership & Donations

Version 22 & Newer

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 <u>manually</u> 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	e Givers							
👗 Individual Givers 📷 Families & Groups								
Sort by Giver #								
Giver #	First Na	me I	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.

Image: Second Se	By Categories → Show Person Lookup kildare	X Cancel	
Add Eamily Delete Eamily	Name	Address1	
	James Kildare [M]	1234 Main Street	
This Family's Category: Members [M]	James Kildare Group James Kildare [M]	1234 Main Street	
Jame dare Family Info Comments Photo	Other Jame Jame James Kildare [V]	1234 Main Street	
Family # 50 Make Family I	Nickname		
Pamily # 59 Make Pamily 1	Middle Name		
Charle if a sch was and has	Show Person	e 🗙 Cancel	
Check If each record has	Inactive Lookup	e concer	
giving (current and prior	🛨 Add Individual 😑 💿 🗇	Transfer Individual	
years), go to the Giver # field			
and click on the envelope icon.	James Kildare* Groups/Classes Skills/Interests Addresses/Phones/Email C	omments Photo Fil	
If the record has giving	First Name James Title		
Transfer the giving to the	Nickname Use nicknam		
GOOD record		-	
	Middle Name		
te: If you do not use Giver #s	Last Name Kildare* Suffix	Indiv # 59-1	
y want to put an asterisk (*)	Individual Fields	tomize Fields 🔀 😡	
icator of the GOOD record			
make the duplicate records	Last Giving Date 01/20/2020		
ctive so they show in red			
and so they show in red.	Snow in Scheduler		
	Giver # 78 🗱 🖂 🗐		



Handling Duplicate Givers

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 D	onations						×
		Date Range		Apply Date	s		
	•	01/01/2000	V to 12/31/2020	✓ -Yr	+Yr		
rom Giver kildare	Inactive 🔲 S	Sort by Giver #	These two givers	To Giver	Inactive	Sort by Giver #	-
kildare Giver #	Inactive S	Sort by Giver #	These two givers	To Giver) Inactive ch	Sort by Giver #	-
From Giver kildare Giver #	Name James Kildare [M]	Sort by Giver # Type Indiv.	These two givers Address1 1234 Main Street	To Giver	Inactive ch Amount	Sort by Giver #	-
kildare Giver # 261	Name James Kildare [M] James Kildare [D]	Sort by Giver # Type Indiv. Don. Indiv.	These two givers Address1 1234 Main Street 123 Wilcox Ave.	To Giver) Inactive ch Amount	Sort by Giver #	

- 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 Dona	tions							
		Date Range 01/01/2000	to 12/31/2020	Apply Dates				
From Giver 🗹 James Kildare [M	Inactive Sort b	y Giver #	These two givers are the same person	To Giver 🔲 Inact 78 - James Kildare*	ive	Sort by Giver #		
Date	Amount	Rev	(duplicate records)	Date	Amount	Rev		
03/03/2019	\$520	.00		12/15/2019		\$250.00		
12/15/2019	\$50	.00		01/20/2020		\$50.00		
01/20/2020	\$85	.00						
01/20/2020	\$99	.00	Transfer					
			records, all donations in the date range will be transferred.					
re you sure 'James Kildare [M]' and 'James Kildare* A]' are the same person and that you want to ansfer the selected giving?								
		Yes	No			ОК		



Handling Duplicate Givers

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(Rev 05/22)

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.

🔓 Manag	e Givers	
👗 Individ	lual Givers 👔	💋 Families & Groups
		Sort by Giver #
261 - Jam	es Kildare [D]	Name Giver # Phone/Email Address Files/Documents
Giver #	First Name	: Last Name Donations Giver? Receives Statement Inactive
261	James	Kildare [D] 🔽 🔨 Title
78	James	VIJ
44	Chloe	Middle
12	Jake	Are you sure you want to delete: 261 - James Kildare
	Judith	[D]?
204	Nate	Use Nickname
12	Sarah	L Suffix
42	Daniel	
54	Richard	
225	Vicky	Tes No
	Blake	Lawrence [M]
19	Erin	Lawrence [M]
	Sean	Lee M 🗌 💟
Display C	ptions	Refresh Givers
🖌 Show A	Active	- Delete
🔲 Show I	nactive	

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.*

Q Fin	Grid 🎼 Filter By Categories	✓ Show Inactiv	Person /e Lookup		Save X Cancel
+ Add Family -	Delete Family	+ Add Individ	dual 🗕 Delete Individual 🖳 🥥		Transfer Individual(s)
James Kildare Family I	info Comments Photo Other	First Name Nickname	James	Title	kname
Family # 60 Mailing Label James Kild	Make Family Inactive	Middle Name Last Name	Kildare	Suffix	Indiv # 60-1
Current (Family Main	Delete Family				omize Fields 🔀 😡
1234 Main Street Columbus OH 43230 Phone Name James Kildare [V] Right-click to rearrange	Dee WARNING: Deleting this family will remove a PERMANENTLY. We recommend marking the ind but keep their historical data suc visitation and personal informati <u>Click here</u> Check here to confirm that you	elete Family: all individuals in lividuals as Inac ch as Giver #, G on. e to learn more ab i still want to delet	: James Kildare ?	vith them, rom reports, lance, No	ted Primary



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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.

🔏 Man	age Givers									
👗 Ind	👗 Individual Givers 📷 Families & Groups									
٢			📃 Sort by Giver	#						
78 - Ja	mes Kildare* [M]			~ ×+	Name Giver #	Phone/Email Address Files/Documents				
Giver #	First Nam	Middle	Last Name	Donations Giver?	Receives State	ement 🔲 Inactive				
301	John	w	Jones [D]		Title	Edit/delete this record in the				
47	Una 🚽	1	Kerr [V]			Membership module				
46	Carol		Kiko [V]		First	Middle				
78	James		Kildare* [M]		James					
44	Chloe		King [V]		Nickname					
12	Jake		Knox [M]			Use Nickname				
	Tudith		Keey MI		1	cuffere				