



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. James Kildare is entered multiple times. There are two records with a Members category, one with a Visitors category and one from *Donations*. Visitors records have a (V) and Donations records have a (D) after the last name. Donations Givers also have a check mark in the Donations Giver? column.

| 🚴 Manage | Givers | | | |
|----------------|----------------------|----------|-------------------|---------------------|
| 👗 Individu | al Givers 😿 Families | & Groups | | |
| Individual Giv | ers | | 🔲 Sort by Giver # | |
| Type to Sea | arch | | | ~ ×+ |
| Giver # | First Name | Middle | Last Name | Donations Giver? |
| 78 | James | | Kildare | |
| | James | | Kildare | |
| 13 | James | | Kildare [V] | |
| 261 | James | | Kildare [D] | |
| | | | | |

To find the records in Membership

Go to Membership>People>Person Lookup

- 1. At the Person Lookup, enter the Last Name and choose one of the records.
- 2. Review each record to determine the GOOD record.

| | 🗯 People | | | | | | | • | | |
|--------------|------------------|--------------------------|-----------------------------|--------------------------------|-----------------------------------|----------------|-----------|----------|----------|--------------------|
| | | 🔍 Find 📰 Grid | 🛛 🔀 Fil | ter By Categories | Person Lookup | kildare 🖌 | | VX | Save | X Cancel |
| | Add Ex | mily Delete Ear | alu III | | Add Individ | Name | | | | Address1 |
| | | | Wy 🖽 | | | James Kildar | e [V] | | | 999 James Street |
| | Thi | s Family's Category: Vis | itors [V] | ⊻ ⊻ | James Kildare | G James Kildar | e | | | 1234 Main Street |
| | lames Kilda | re Family Info Comme | onte Dhota | Other | First Name | James Kildar | e | | | 1234 Main Street |
| | | Person Lookup | kildare | | | × 🗸 | Save | 🗙 Cance | | |
| | | + Add Individu | ual 🗧 | Delete Ind | lividual 📳 | 9 | D | 7 | ansfer I | ndividual(s) |
| 3. To check | if the record | James Kildare | Groups/C | Classes Skills | /Interests Add | resses/Pho | nes/Email | Comments | Photo | |
| has givir | ng, go to the | First Name | James | | | | Title | | | |
| Giver # fie | eld and click | Nickname | lickname | | Use nickname | | | | | |
| on the e | nvelope icon. | Middle Name | | | | | | | | |
| 4. Click Fin | d. | | vel da car | | | | C | | | b. # 60.4 |
| | | Last Name | Kildare | | | | Sumx | | Inc | IV # 60-1 |
| | | Individual Field | s | | | | | | 20 | Customize Fields 💈 |
| | | ~× <u>*</u> | | Last Visit Da | te | | | | | |
| | | | | Last Giving D | Date | | | | | |
| | | | | Show in Sche | eduler | | | | | |
| | | ite | $\mathbf{\nabla}\mathbf{X}$ | Giver # | | 13 | | |] | |
| | | | | Alternate Ph | ione | | | Ext | | Unlisted 🔲 Prima |
| COMPUTER HE | ELPER PUBLISHING | www.C | HURCH | WINDOWS.C | COM SUF | PORT@C | HURCHW | /INDOWS. | сом | 800.533.5 |





Handling Duplicate Givers

• To Inactivate the duplicate record(s) check the *Inactive box* on the Individual's record. Add the Inactive reason of *Duplicate*. If Duplicate does not exist, you may create the new code by clicking the *pencil icon*. Also, add an *inactive date*. Please Note: Each Family Member should be marked with the *Inactive* reason.

| _ | | | | |
|---|--------------|----------------------|---------------------------|-----------------------------------|
| | Person Look | cup | | Save 🗙 Cancel |
| | + Add Indi | vidual 📒 Delete | Individual 🔛 🎯 | Transfer Individual(s) |
| | James Kildar | e ** Inactive Groups | /Classes Skills/Interests | Addresses/Contacts Comments Photo |
| | First Name | James | | Title |
| | Nickname | | | Use nickname |
| | Middle Name | | | |
| | Last Name | Kildare | | Suffix Indiv # 59-1 |
| | Individual F | ields | | |
| | 3 | | Last Update | 04/25/20 9:36 AM |
| | 5 | | Inactive | 9 - Duplicate Recon |
| | 5 | | Last Updated By | Universal Login |
| | | ▼× *∕ | Date Created | 04/25/20 9:36 AM |
| | 3 | | Created By | Universal Login |

To remove **Duplicates** in Donations, go to *Donations>Manage Givers*. Find the *Donations Giver*, highlight, and put a check mark in the *Inactive* box.

| | 👗 Individua | al Givers 😿 Families & Grou | ups | | | |
|---|-----------------|-----------------------------|-----------|-------------|---------------------|-------------------------------|
| 1 | Individual Give | ers | 🔲 Sort by | / Giver # | | |
| | 261 - James | Kildare [D] | | ▼×+ | | Name Giver # Contacts Address |
| | Giver # | First Name | Middle | Last Name | Donations Giver? | Receives Statement 🛛 Inactive |
| | 78 | James | | Kildare | | Title |
| | | James | | Kildare | | Mr. |
| | 13 | James | | Kildare [V] | | First |
| | 261 | James | | Kildare [D] | | James |

To Transfer giving between records.

- Click Donations>Givers>Transfer Donations.
- 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.
- Click Transfer Selected. The system will reverse the donations and re-post them to the correct Individual's record. You will be asked to verify the transfer. Click the Yes button.
- Repeat for all duplicates.

| Note: May want to | 🍰 Transfer Donations | | | | | |
|--|---------------------------------|-----------------|------------------------|-----------------|--|-----------------|
| Adjust Date range to include all giving. The date range can cover- more than one vear | From Giver James Kildare DNJ | Sort by Giver # | Date Range 01/01/20 | 🗙 to 12/31/20 🖌 | Apply Dates Y -Yr +Yr To Giver /8 - James Kildare | Sort by Giver # |
| Inactive individuals will appear in red in search boxes. | Sel. Date ⊕ ♥ 03/28/20 | Amount | \$25.00 | View Donations | Date ⊕ 08/06/20 | Amount \$200.00 |
| | | | | Selected | | |



Giver #s may need to be removed from the inactive records. In our example, James Kildare with Giver #78 is the record we wish to keep. So, Giver #s 13 and 261 need to be deleted.

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Handling Duplicate Givers

- Go to Donations>Givers>Manage #'s
- Find and click to highlight the duplicate Giver # to be removed
- Click the *minus* (-) at the end of the row
- Choose the *Delete Giver number* option.
- Repeat for all duplicates.

| Manage #'s Filter by selected Giver Giver 13 - James Kildare DNU [V | Sort by Giver # | 🗙 🛨 🗛 Add New 🐇 | Receives Sta | atement amily | Show Qurrent | Eist #'s |
|--|---------------------------------------|--|------------------------|------------------------|--------------|----------|
| Drag a column header here | e to group by that colum | Start Date V | End Date 🛛 | Address | | |
| Chloe King [Delete Giv Mr and Mrs . Giver # 13 | er # Options for James Kildare DNU | V] | | 1234 Main Street | | |
| Daniel Lango Richard Lango Vicky LaRust | e Previous Number - Gi | ver did not have a gi | ver number as of 0: | 1/02/2017 to continue. | | |
| Jason MacKe John McClar O Stop us Greyson P M | ing Giver #'s for this g | verstarting on e anv giver numbers th | hat start after this d | ate) | | +- |
| Mel L Miller Ruth Miller | | | | | OK Cancel | |

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

- Go to Donations>Givers>Manage #s
- Use the Giver search box (top left) to locate the GOOD Giver
- After selecting the Giver, click on the *Add New* # button
- Enter the Giver #
- Enter *Start Date* (for the Start Date to apply, the Giver # must be available on that date)

In Donations>Manage Givers - scroll to the last name, you will see only the GOOD record.

| Lindivid Individual G 13 - James | lual Givers 💕 Fa ivers Kildare | milies & Groups | | Refresh Giver | Name Giver # C | Contacts Address |
|--|--------------------------------------|-----------------|------------|---------------------|----------------|--------------------------------|
| Giver # | First Name | Middle | Last Name | Donations Giver? | Receives State | ment Inactive/Terminated |
| 74 | Steve | с. | Kelley [V] | | Title | Edit/delete this record in the |
| | Charles | | Kersey | | | Membership module |
| | Sheryce | | Kersey | | First | Middle |
| | Sheryl | | Kersey | | James | |
| 13 | James | | Kildare | | Nickname | |
| 51 | William | | King [V] | | | 🔲 Use Nickname |
| | Carla | Danelle | Loy [V] | | Last | Suffix |
| | James | | Lov M | | Kildare | |

**If you are a pledging church, verify the pledges are recorded on the GOOD record.