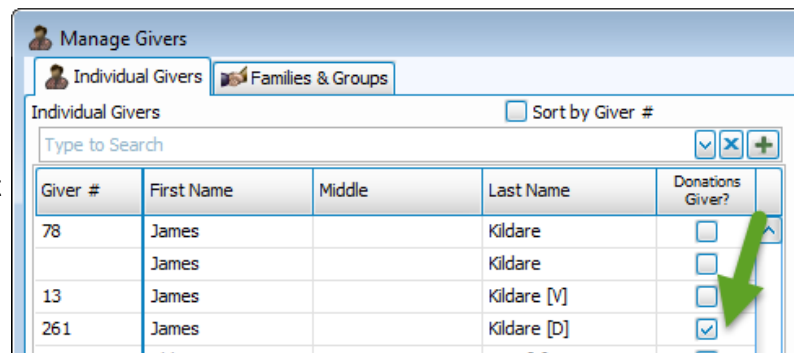If a person appears in the Donation or Membership module more than once, there are duplicate individuals that could have giving on each record. It is important to figure out which record is the GOOD record. Typically, the Membership record with the most information is the GOOD record. Please note: data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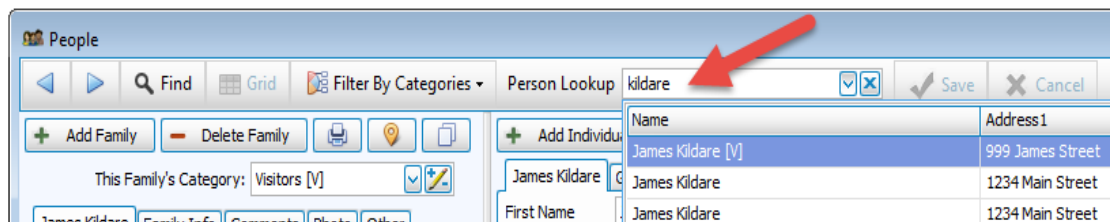

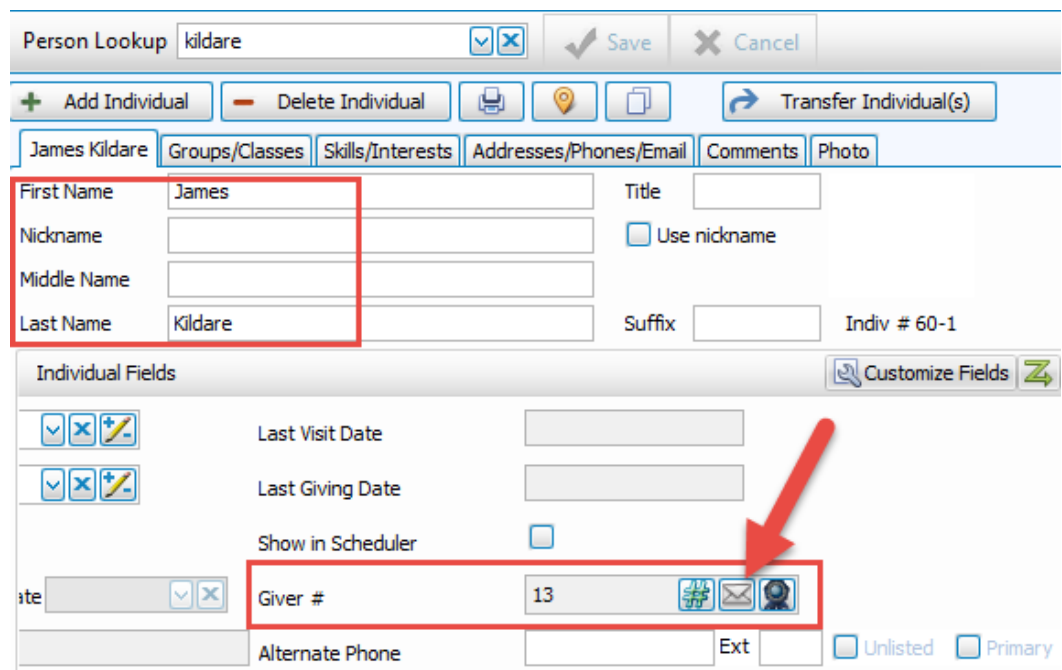To find the records in Membership
Go to *Membership>People>Person Lookup*
1. At the Person Lookup, enter the *Last* Name and choose one of the records.
2. Review each record to determine the GOOD record.

3. To check if the record has giving, go to the *Giver #* field and click on the *envelope icon.*
4. Click *Find.*
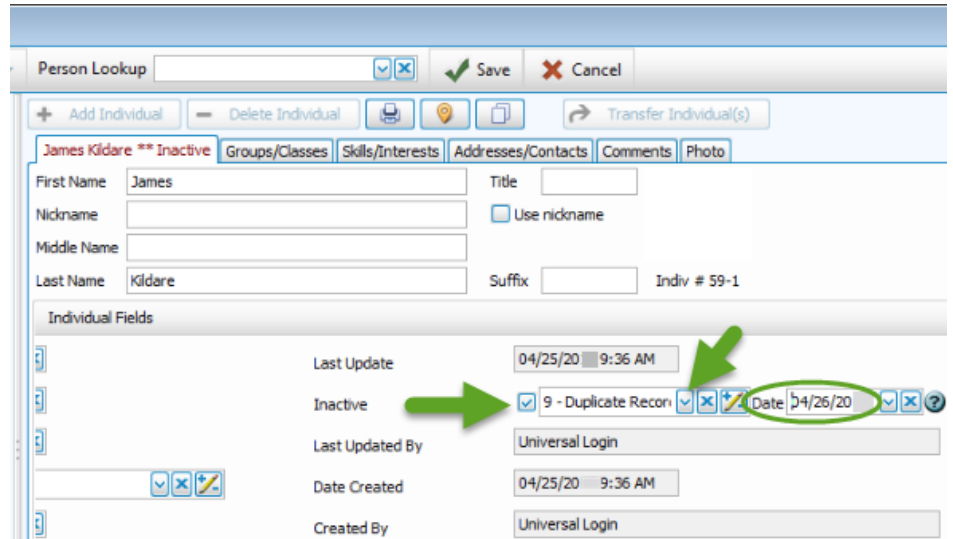
- To Inactivate the duplicate record(s) check the *Inactive box* on the Individual's record. Add the Inactive reason of *Duplicate*. If Duplicate does not exist, you may create the n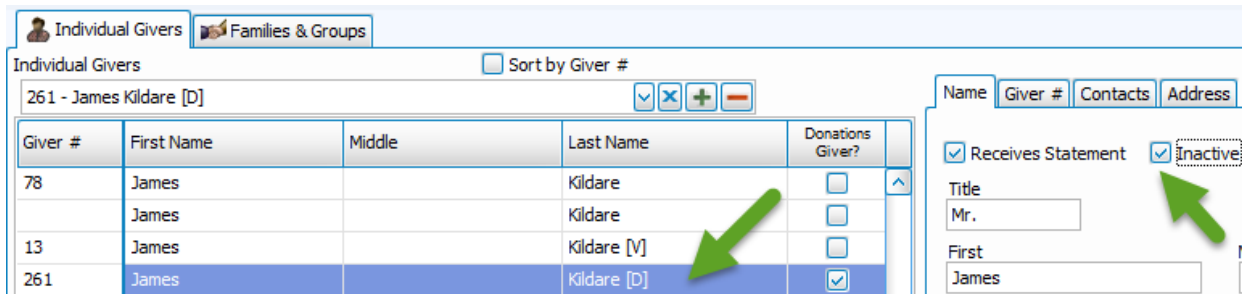ew code by clicking the *pencil icon.* Also, add an *inactive date.* Please Note: Each Family Member should be marked with the *Inactive* reason.

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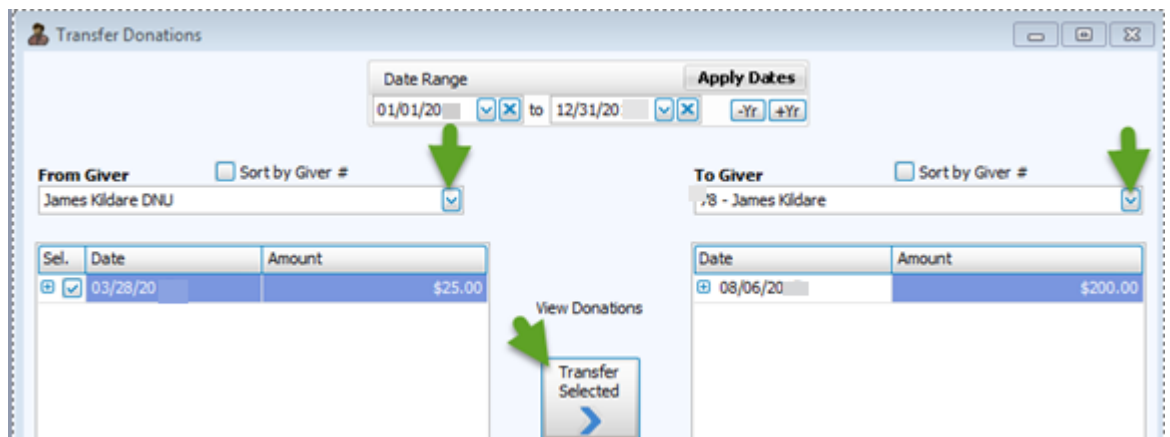

To **Transfer giving** between records.
- Click *Donations>Givers>Transfer Donations.*
- In the *From Giver* box, find the first duplicate record to transfer the giving. ***Please Note:*** If you cannot find the record in the From Giver list, there is no giving to transfer.
- In the *To Giver* box, find the name of the GOOD record.
- Clic*k Transfer Select*ed. 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 th*e Yes* button.
- Repeat for all duplicates.

Note: May want to Adjust Date range to include all giving. The date range can cover more than one year.

Inactive individuals will appear in red in search boxes.

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.

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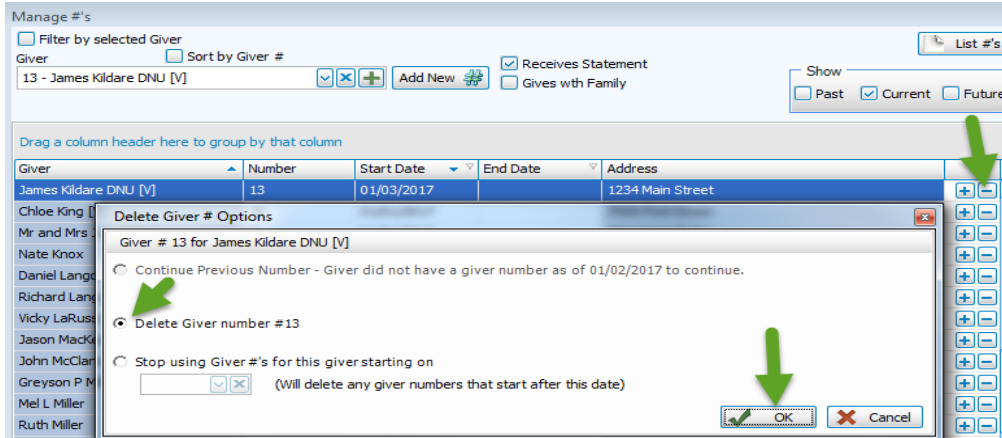
You may need to **Reassign Giver #s**

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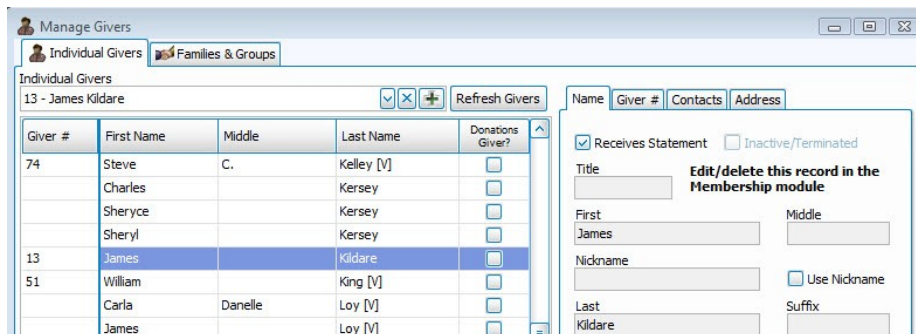
**If you are a pledging church, verify the pledges are recorded on the GOOD record.