

How do I divorce / marry / delete / swap a constituent?

Found under Maintenance – Choose Link / Delete Constituents

Constituent Link / Unlink / Delete

Constituent Info | Salutations

Constituent

I.D. [] [magnifying glass]

Set New Marital Status To [dropdown]

Constituent primary address [text area]

Spouse

I.D. [] [magnifying glass]

Set New Marital Status To [dropdown]

Spouse primary address [text area]

Address Options

Keep constituent address as primary

Delete constituent address

Keep spouse address as primary

Delete spouse address

Link Unlink Swap Delete Close

Link – To make two households into one household, you use the link function. Click the magnifying glass and search who you want to be the Primary constituent. For spouse side, you will search for them too. The primary is the normally the most associated with the school or gender based. Depends on schools preferences.

Delete – used to delete a duplicate that has no giving attached – it lets you know if there is giving and that you can't delete the record.

Swap – if the wrong person is the primary - used to swap them. NOTE: If the primary becomes deceased you swap them so the survivor is the primary