

How do I merge constituent records?

MERGES CONSTITUENTS AND WHAT DOES AND DOESN'T MERGE WHEN PROCESS IS DONE

Users will have duplicate constituent records by accidentally creating two or when a new family comes in without the accurate family id linking. Also happens for faculty and Alumni constituents who are in the system, but Admissions isn't searching for them when creating the address to link onto it (this prevents the duplicates). When you see there are duplicate constituent records in Alumni you will want to view both records and as a default keep the record linked to a family id.

Go to maintenance / merge constituents

Note that Giving will merge in either direction. It will not merge and delete.

To merge constituents you always want to remember to merge the constituent record WITHOUT the family id into the record with the family id. The family id is found on the address tab in the family id column (or newer record).

To check for family ids you will want to view both records address tab and as a default keep the record linked to a family id.

WHAT DOES NOT MERGE WHEN MERGING: take snapshots or note info mentioned below prior to merge.

NAME (and constituencies) info,

INFO info and ADDRESS (constituent main from old record) info does not merge.

SALUTATION TAB (Additional Salutation or salutations with class year info)

Make sure you add back the information you copied so you have all the current information carried into the final record you want to keep.