



Dealing with Duplicates - Combine Contacts Tool

This tool is available to SPOCs only because undoing this action will cost \$100



1. On the **Advanced** menu, click **People List** and choose **Contact Relationships**.
2. Choose the view: **Duplicates – Review Step 1** (Quick link: <https://my.eriecd.org/mp/290-1555>)
3. Focussing on the first set of duplicates,
 - a. Scroll through the view **horizontally**, making note of important information found on this view. These are custom columns created for the Diocese. You will use these note below in the **yellow** section.
 - b. Review the names of household members in P1 Family Members and P2 Family Members. If they don't match, proceed carefully. Are the contacts really duplicates? If they are duplicates, could one household be the person's parent's household and the other their adult household? Does one household include children that should be moved to the other household too. Knowing this answer will help you determine which record to keep and which record to merge. AND ensure you don't turn the children into orphans.
4. Click the **Tools** button in the upper right corner and choose **Combine Contacts Tool**.

IMPORTANT: NEVER click the Find Duplicates button.

5. Review both columns to determine which to keep.
 - a. If upon review one of the columns should NOT be combined just don't click that column's check box. When you check mark any of the other columns on the screen they will be marked as the red "Merge" column.
 - b. If you want to make a different column the "Keep" column, uncheck all of the columns and check the correct column first followed by the rest of the columns.
 - c. **IMPORTANT:**
 - If the number in the **Household Name** field is >1, keep that column. Choosing a record with a smaller number may result in the person being removed from the household with their family members.
 - You may have to fix the **Participant Type** later if neither reads **Registered Member**.
 - The record with the lowest **DonorRecord ID** is oldest and may be the best to keep.
 - The record with the most **Donations** may be the best column to keep.

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6. Scroll down placing dots next to items you'd like to combine. For example, if you want the email from the red column instead of the email in the green column, place the dot next to the red column's email address.
7. Click **Merge** and **Close**.
8. Repeat steps 3-8 above to process any additional duplicates
9. Enter any yellow notes when you have finished combining duplicates.

Combine Contacts Tool

Selected Records (2) Find Duplicates

	Papalia, Amara Will be kept	Papalia, Amara Will be Merged
Contact to Keep:	<input checked="" type="radio"/> Contact #76793	<input type="radio"/> Contact #185877
Prefix:		
First Name:	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
Nickname:	<input checked="" type="radio"/> Amara	<input type="radio"/> Amara
Middle Name:	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
Last Name:	<input checked="" type="radio"/> Papalia	<input type="radio"/> Papalia
Suffix:		
Date of Birth:	<input checked="" type="radio"/> 09-13-2012	<input type="radio"/> 04-08-2005
(Age):	(27)	(21)
Contact Status:	<input checked="" type="radio"/> Active	<input type="radio"/> Inactive
Email:		<input checked="" type="radio"/> [Redacted]
Mobile Phone:	<input checked="" type="radio"/> [Redacted]	<input type="radio"/> [Redacted]
Gender:	<input checked="" type="radio"/> Female	<input type="radio"/> Female
Household Position:	<input checked="" type="radio"/> Head of HH	<input type="radio"/> Head of HH
Marital Status:	<input checked="" type="radio"/> Single	<input type="radio"/> Single
Household ID:	#27681	#82133
Household Name:	<input checked="" type="radio"/> Papalia (2)	<input type="radio"/> Papalia (2)
Home Phone:		614-960-8007
Address:	2422 Glenwood Park Ave #2422 Glenwood Park Ave	
City:	Erie	
State:	PA	
Postal Code:	16509	
Congregation:	Our Lady of Mount Carmel St. George Erie	
Participant Start Date:	<input checked="" type="radio"/> 09-13-2012	<input type="radio"/> 04-08-2005
Participant Record ID:	#27681	#82133
Participant Type:	<input checked="" type="radio"/> Registered Member	<input type="radio"/> *Change Me
Group Participation:	2 records	0 records
Event Participation:	12 records	0 records
Donor Setup Date:		<input checked="" type="radio"/> 05-05-2022
Donor Record ID:		#31706
Envelope:		
Donations:	0 records	92 records
Contact Files:	0 records	0 records
User Account:		

Adding yellow notes into the combined contact

- a. Click on **Contacts** and locate the merged contact.
- b. Enter any information you took note of in the step highlighted in **yellow** above. Most of it would appear on Contacts/General but some may appear on Families/General, Member/General or Donors/General.
- c. Click the blue chain link next to **Member Record** and enter a **Participant Type** of **Registered member** if appropriate.

Handling Contacts that aren't actually duplicates

Occasionally the system or a user may incorrectly identify records as duplicates (e.g., father and adult son have the same name). You can remedy this situation by indicating the records as similar records, which will indicate to the system and other users that these records can be ignored as possible duplicates.

1. Select both contacts.
2. Launch the combine contacts tool.
3. Unselect them in the tool.
4. Check the **Mark un-selected records as similar to merged record box**.

Combining contacts who live in the same household:

The views listed above won't show duplicates if they exist in the same household. Follow these instructions to combine duplicates within the same household

1. Open **Contacts** and search for his/her name.
2. Check mark both instances.
3. Click the **Tools** button in the upper right corner and choose **Combine Contacts Tool**.
4. Click the check box for both records which will turn on the green "will be kept" and red "will be merged" designations at the top of the screen.
 - By default, the oldest record (which will have the lowest contact number) will appear on the left as the green column. If you want to swap which one will be kept (green) and which one will be merged (red), place the dot next to the appropriate contact number. For example you put the dot next to the contact number in the right column, that column will turn green.
5. Scroll down to check each record placing dots next to items you'd like to combine. For example, if you want the email from the red column instead of the email in the green column, place the dot next to the red column's email address.
6. Click **Merge** and **Close**.