Request Duplicate Record Merge

Over time as you accumulate records in your database, duplicate entries ca occur. Duplicate records cab slow down the performance of applications in ParishSOFT Family Suite, congest the grids, and make it more difficult for you to find the records you want to work with. One way to effectively maintain the accuracy and integrity of you database is to regularly merge duplicate records. The Merge utility is a diocesan-level feature to help you with this important cleanup task.

Church parish Checklist:

o It is the Church Parish's Responsibility to gather the family information and identify the duplicates.
o The goal of this process is to end up with one primary family record to be shared with all locations where they are "registered" or "unregistered".
o All duplicates must be merged at the diocesan level.
o The diocese will only merge duplicates in which there is a clear match.
o If there is any question regarding the ability to match a record, the diocese will contact the person requesting the merge. Include your diocesan signature in your email.
o Export anyone who should be moved into their own family record. (For example, adult children who are active in the Church or moved out of the home.)
o Determine which family record is most complete or accurate and make a note of the **Family DUID—**This will be your Permanent Record.
o If records have different address: Update the "Permanent" Family Record with the correct contact information (address, phone, email). If the correct contact information is not on the "Permanent" record it may be lost during the merge.
o Once records are merged, they cannot be undone. Research must be accurate and thorough at the parish level.
o Records are NEVER deleted. The preferred method for removal of records is the process of merging to that only one permanent record remains and all duplicated information is reviewed and combined into one record.
o A merge does not remove the record from other organizations that the family or member is affiliated with. After the merge, the duplicate family's or member's associations to other organizations are maintained and transferred to one permanent family record.
o Organization-specific data in the duplicate family record is not overwritten, but transferred to the permanent family record during the merge. These fields include: Family Group, Envelope #, Informal Name, Informal Salutation, Send Mail, Send Contrib. Env., Member Status and Member Notes.
o Merged Sacramental Records Settings: When the records are merged at the diocesan level, the <u>Sacrament Merge Configuration</u> process will choose the completed sacramental record that is marked as complete and will be saved in the merge. If the permanent record and duplicate family both have sacraments marked complete, the Diocesan admin will be forced to review and select the preferred, correct data. To ensure a clean merge - update your permanent sacramental record with the correct information. Duplicate sacramental records NOT marked complete will not be merged.

Merge Request:

1. You can add the request in an email message.
2. List all family member names.
3. Note the **Permanent** Family DUID .
4. List the **Duplicate** Family DUIDs.
5. **Do not list more than 5 permanent merges per email.** This will help the diocesan admin to timely manage open tickets.
6. Email: support@htdiocese.org, subject line: Merge Request
7. **Example: Subject Line: Merge Request   Message:**
   Boudreaux, John, Amy, Josh, Peggy   Permanent: 465824   Duplicates: 548755, 355456, 23455
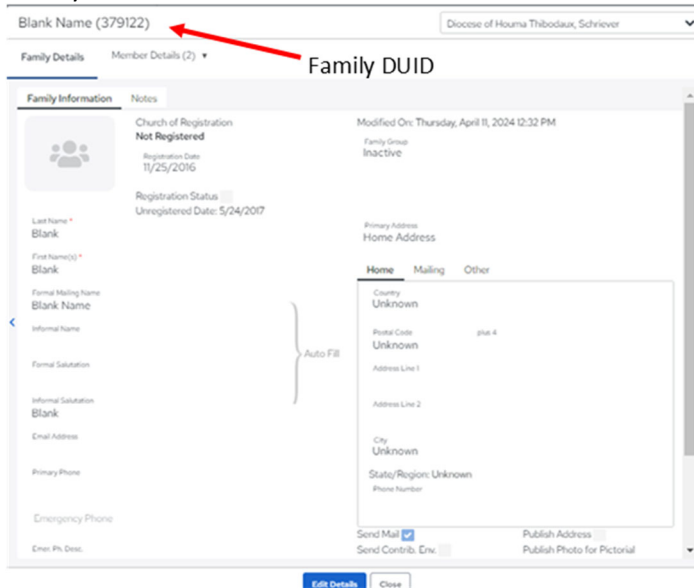
Include your diocesan email signature with your church name and phone number.

(NOTE: MERGES take at least 24 hours to process AFTER the Diocesan Admin submits them to ParishSOFT)

Where to find Family DUIDs:

- Family DUIDS are found at the top left of a **Family Record**.
- Sacramental records ONLY provide Member DUIDs. The member DUID is listed under the picture icon on the record. The record number at the top left of a sacramental record is the Sacramental Record Number, NOT the Family DUID.
- If you ONLY have a member DUID, Search the Member list to find the Family DUID. (Family Directory > Member List)
- For assistance, call Michelle Ohmer, 985-850-3175 or email mohmer@htdiocese.org.

- Family Record

- Sacramental Record