Merging Duplicate Families

Merging families is occasionally needed when a family is accidentally added into the system either through an online giving program or through manual error. This process is NOT reversible. If you are not 100% positive that it’s a duplicate, do NOT merge it. (or first print all histories of donations on both records, incase you need to “split” the record in the future)

1) First identify the families, as seen below.

![Family List](image1)

2) In the example above of the Larry and Bernice Smith family, we will also want to open each record to identify which is the master and write down their family ID numbers. (highlighted in yellow)

![Mr. and Mrs. Larry Smith](image2)

3) In the example above, we are able to identify that the Master record should be Family ID: 171565 and the duplicate is: 44628.
4) Next, we go to the **Administration** tab, and select the **Merge Family** area, then the **Merge Family Records** option beneath that area, as seen below:

5) Your screen will appear similar to the one below. Type in the master family ID and the duplicate family ID.

6) Next click **Search** and you will see the member information, similar to below:
7) Under each of the members click the drop down arrow on the right and select what to do. Similar to below:

8) Finally, click the **Submit to Queue** button and the screen will either be back at the beginning, or it will show you any conflicts that are present between member sacraments.

9) You will see a message telling you the family records will merge overnight, as seen below. Click **OK**.