

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, in case you need to "split" the record in the future)

- 1) First identify the families, as seen below.

Family List All Organizations

▼ smith Clear Search Results

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
 0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Primary Address Ascending Clear Filter

10 records Add New Family Delete Selected Families Quick Reports

Family	Primary Address	Primary Phone	Envelope #	E-Mail Address	City
<input type="checkbox"/> Smith, Gregory and Teri	3814 Country Grove Dr	608-845-8413	1046	smith7fam@charter.net	Madison
<input type="checkbox"/> Smith, Matthew and Jessica	401 Burnt Sienna Dr	507-458-2710	534	jmalecks7822@gmail.com	Middleton
<input type="checkbox"/> Smith, Bryan and Megan	402 Kane St	920	745		Fall River
<input checked="" type="checkbox"/> Smith, Larry and Bernice	404 Nordic Trl	608-437-5782	215		Mount Horeb
<input checked="" type="checkbox"/> Smith, Larry W. and Bernice	404 Nordic Trl	608-437-5782	3070	lwsemq@yahoo.com	Mount Horeb
<input type="checkbox"/> Smith, Jill	406 Hummingbird Ln	608-221-9811	1148		Madison
<input type="checkbox"/> Smith, Lucy	4293 County Road J	608-798-3525	214		Mount Horeb
<input type="checkbox"/> Smith, Clifton and Colleen	4468 Wind Chime Way	608-839-4019	297	ccsmith@chorus.net	Cottage Grove
<input type="checkbox"/> Smith, Bradford and Laura	4505 Pendleton Ct	608-774-0144	1221	isackson@charter.net	Milton

- 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 (44628) Env#: 215

Family Details Member Details (2)

Family Information Notes

Church of Registration: [REDACTED]

Details Modified On: Monday, March 9, 2015 7:43 AM

Family Group: Active

Registration Status:

Registration Date: 1/1/1900

Unregistered Date:

Last Name: Smith

First Name(s): Larry and Bernice

Formal Mailing Name: Mr. and Mrs. Larry Smith

Informal Name: Larry and Bernice Smith

Formal Salutation: Mr. and Mrs. Smith

Informal Salutation: Larry and Bernice

Email Address:

Primary Phone: 608-437-5782

Emergency Phone:

Emer. Ph. Desc.:

Envelope #: 215 Next

Annual Gift \$: 0

Map Code:

Primary Address: Home Address

Home Mailing Other

Country: United States

Postal Code: 53572 1715

Address Line 1: 404 Nordic Trl

Address Line 2:

City: Mount Horeb

State/Region: Wisconsin

Phone Number: (608) 437-5782

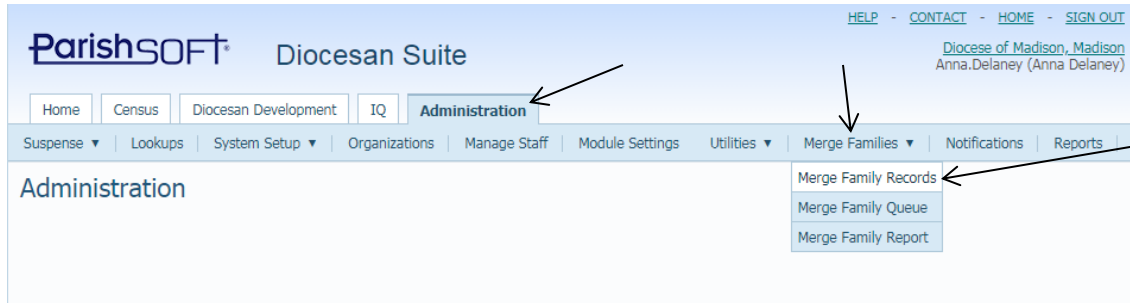
Send Mail: Publish Address:

Send Contrib. Env.: Publish Photo for Pictorial Directory:

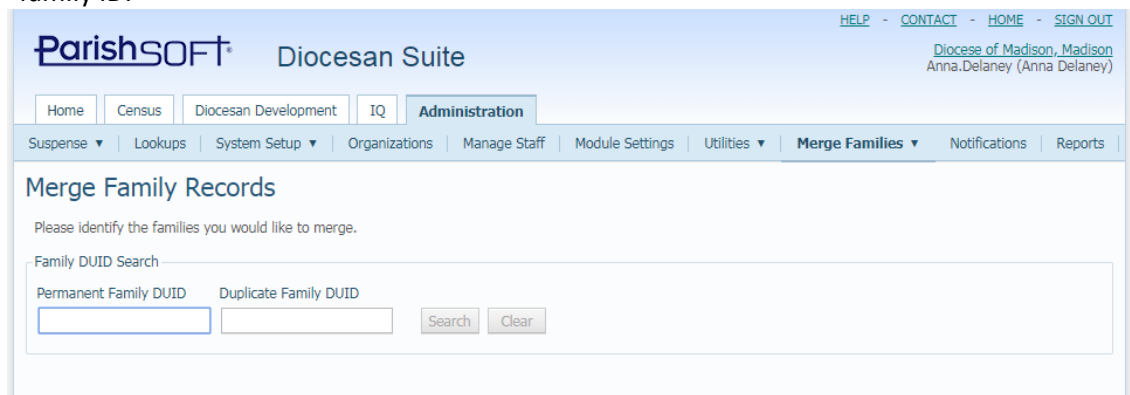
Publish Phone: Send Magazine:

- 3) In the example above, we are able to identify that the Master record should be Family ID: 171565 and the duplicate is: 44628.

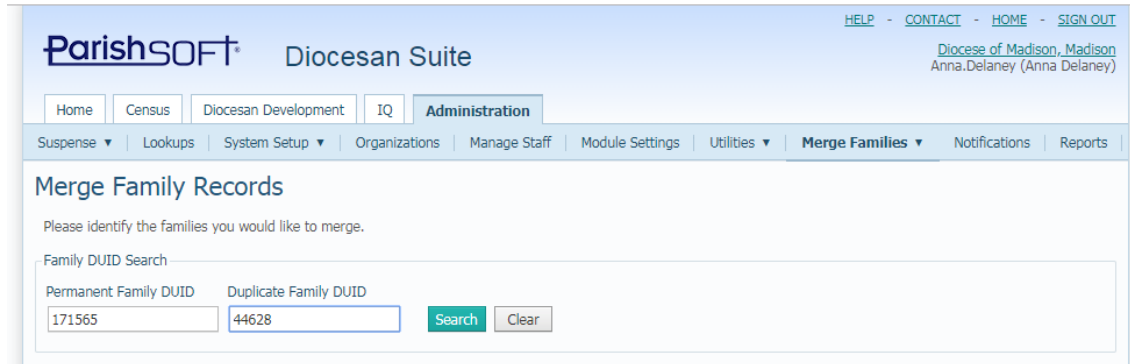
- 4) Next, we go to the **Administration** tab, and select the **Merge Family** area, then the **Merge Family Records** option beneath that area, as seen below:



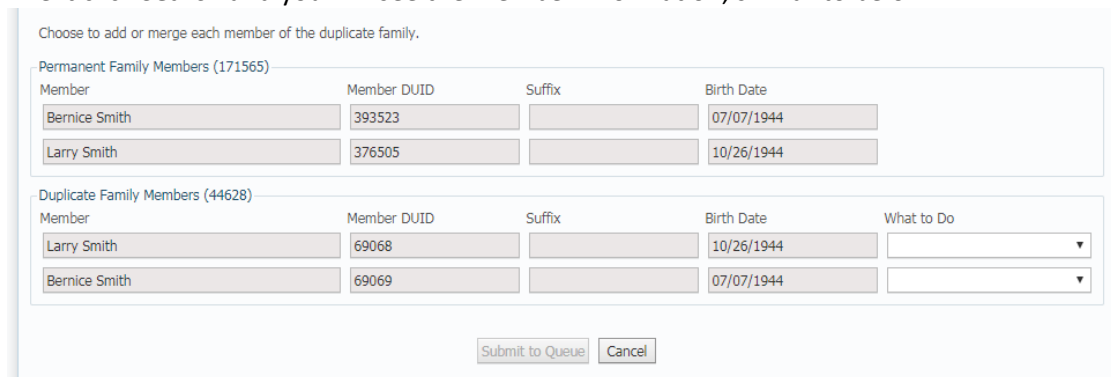
- 5) Your screen will appear similar to the one below. Type in the master family ID and the duplicate family ID.



Vs



- 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:

ParishSOFT® Diocesan Suite

HELP - CONTACT - HOME - SIGN OUT
Diocese of Madison, Madison
Anna.Delaney (Anna Delaney)

Home | Census | Diocesan Development | IQ | Administration

Suspense | Lookups | System Setup | Organizations | Manage Staff | Module Settings | Utilities | Merge Families | Notifications | Reports

Merge Family Records

Please identify the families you would like to merge.

Family DUID Search

Permanent Family DUID: 171565
Duplicate Family DUID: 44628
Additional Duplicate Family DUID:

Search Clear Add

Choose to add or merge each member of the duplicate family.

Permanent Family Members (171565)

Member	Member DUID	Suffix	Birth Date
Bernice Smith	393523		07/07/1944
Larry Smith	376505		10/26/1944

Duplicate Family Members (44628)

Member	Member DUID	Suffix	Birth Date	What to Do
Larry Smith	69068		10/26/1944	Merge with Larry Smith (376
Bernice Smith	69069		07/07/1944	Merge with Bernice Smith (3

Submit to Queue Cancel

- 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**.

