



Constituent Duplicates and Merge Tasks Guide

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Manage Duplicate Constituents



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Duplicate constituent data can be a problem. Data entry errors, imported prospect lists, and data merged from different organizations or chapters can introduce redundant data into your database. Duplicate constituent data can be costly, and it can skew statistics and projections. Duplicate constituent records can have a direct impact on expenses related to constituent appeals, such as mailings and fundraising.

The program enables you to locate and consolidate duplicate constituent data in your database. To see a list of possible duplicates, you can view the Duplicate Constituents Report. You can view and manage constituent merge configurations and processes. After you set up a merge process, you can merge constituent records as necessary. You can merge groups of constituents, select the types of data to merge, and set up schedules to automatically run the constituent merge process. To find a merged constituent, you can use the lookup ID to trace the constituent to the record into which it was merged.

Duplicate Constituent Workflow

The system provides tools you can use to identify and merge duplicate constituent records. To help you understand the steps and typical processes involved, we provide the following checklist.

- ❑ Use SQL Server Integration Services (SSIS) to find duplicates or use the **Full duplicate search** and **Incremental duplicate search** tasks provided on the Duplicates page. Both the SSIS package and the **Full duplicate search** and **Incremental duplicate search** tasks identify possible duplicates based on scoring parameters you configure. For more information about the SSIS package, see the *Installation Guide*. For more information about the search tasks provided on the Duplicates page, see “Manage Duplicate Constituent Search Processes” on page 3.

Warning: The duplicate search process can take an extended period of time to run depending on the number of records in your database and the configuration options you select for the process.

Note: The **Full duplicate search** and **Incremental duplicate search** tasks provided on the Duplicates page are commonly used by hosted organizations who do not have direct database access and cannot use the SSIS package to identify duplicates.

- ❑ Run the Duplicate Constituents Report to view a list of constituent records identified as potential duplicates by the SSIS package or search process. When you run the report, you select whether to view it for the last SSIS process run or the last full or incremental search process run. For more information, see “Run the Duplicate Constituents Report” on page 16.
- ❑ View the Duplicate Constituents Report and verify that the records identified as duplicates are indeed duplicates that should be merged. If records are found that are not duplicates, take appropriate steps to correct or clarify information on their constituent records. For example, if relationships have not been configured for family members with the same last name and address, they may be identified as duplicates. To correct this, access their constituent records and add the appropriate relationships. After the relationships are added, they will no longer be identified as duplicates. For more information, see “Run the Duplicate Constituents Report” on page 16.

Note: If you make changes to constituent records after viewing the Duplicate Constituents Report, you should run the duplicate search or SSIS process again. After that, run the Duplicate Constituents Report again and verify the constituents listed are duplicates.

- ❑ Add a merge configuration to determine the information to merge from the source record to the target record. For more information, see “Manage Constituent Merge Configurations” on page 19.
- ❑ Add a merge process. This process will merge records identified as duplicate constituents based on the merge configuration you select. For more information, see “Add Constituent Merge Processes” on page 26.
- ❑ Preview the merge process. Before you run the merge, from the process record, select the Preview Merge tab. On this tab, review the source and target records that will be merged. If you notice records that should not be merged, select them and click **Do not merge**. For more information, see “Preview Constituents to Merge” on page 34.
- ❑ Run the merge process to merge the source and target records identified as duplicates. For more information, see “Start a Constituent Merge Process” on page 31.

Warning: The duplicate merge process can take an extended period of time to run depending on the number of records being merged.

- Confirm that the duplicates have been merged. After the merge process completes, run the constituent search or SSIS process again, then run the Duplicate Constituents Report again. View the report and verify that the duplicate records have been merged. Some duplicates may not have been merged due to settings on the merge configuration. In this case, you can access the Preview Merge tab again on the process record and manually merge these.

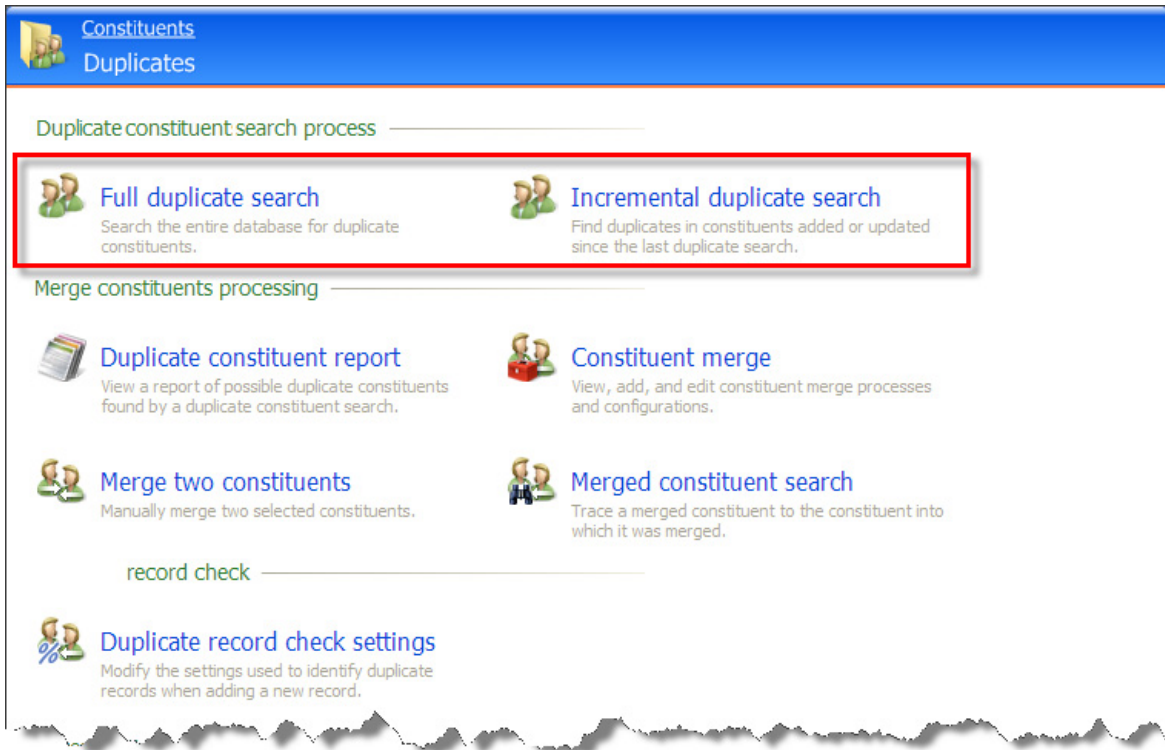
Manage Duplicate Constituent Search Processes

From *Constituents*, you can run a full or incremental duplicate search process to identify possible duplicate constituent records in your database. After you run a full search, you can reduce the time required for subsequent searches by running the incremental process. The incremental duplicate search process compares only those records that have been added or updated since the last search process was run.

Note: The **Full duplicate search** and **Incremental duplicate search** tasks provide an alternative to using SQL Server Integration Services (SSIS) to find duplicates. For more information about the SSIS package, see the *Installation Guide*.

Understand Constituent Search Processes

The full and incremental constituent search processes are designed to help you accurately and efficiently locate duplicate constituent records in your database. To identify duplicates, the constituent search processes leverage the Soundex phonetic algorithm. This algorithm helps the system locate names that sound the same but have minor differences in spelling. These minor spelling differences coupled with other matching criteria like address, phone, and email are used to identify possible duplicate records.



Both the full and incremental processes can be run in “fast process” mode, “detailed process” mode, or with custom settings you define. Descriptions of each mode are provided below along with usage recommendations.

| Search process type | Description |
|-------------------------|---|
| Fast process | The Fast process duplicate search is designed for speed and efficiency. In this mode, the search process filters out as many records as it can based on matching parts of the constituent name, email, phone, address, and other features. If two records are matched by this process, there is a high likelihood that they are duplicates. This type of process will generate fewer results than the detailed process, so there is a possibility that some duplicates may be overlooked. |
| Detailed process | The Detailed process duplicate search will take longer than the “fast process” but can potentially find more duplicates. This process uses fewer filters to exclude potential matches. It will generate more results than the fast process and may catch some duplicates that the fast process misses. For example, it is much better at finding duplicate constituents with different addresses or phone numbers. Because the detailed process uses fewer filters to exclude records, there is a greater possibility of getting results that are not really duplicates. |

| Search process type | Description |
|---------------------|---|
| Custom settings | Select Custom settings to run a duplicate search based on comparison settings you define. You can choose which constituents to compare, which filters to apply, and the minimum confidence level for two records to be considered a match. In most cases, we recommend that you use the fast or detailed process as the selections you make on the Custom settings tab can have lengthy running times. |

Although the full and incremental search processes can help you find possible duplicate records, the results can include false positives. To avoid merging false positive duplicates, you should always run and review the Duplicate Constituents Report to examine the results of a search process. If you identify records that should not be merged, take appropriate steps to correct or clarify information on the respective constituent records. For example, if relationships have not been configured for family members with the same last name and address, they may be identified as duplicates. To correct this, access their constituent records and add the appropriate relationships. After the relationships are added, the records will no longer be identified as duplicates.

Note: If you make changes to constituent records after viewing the Duplicate Constituents Report, you should run the duplicate search process again. After that, run the Duplicate Constituents Report again and verify the constituents listed are duplicates.

There may be a small percentage of duplicates that are not found through the search process. This can be caused by misspellings that are phonetically dissimilar and therefore not recognized by the Soundex phonetic algorithm. Typically, this is not a problem because most misspellings do not change the beginning phonetic sound of the name. But in some cases, it could be an issue. For example, two constituent records with the same address and the last names “Tanner” and “Manner” will not be flagged as duplicates because the phonetic sound of the last name is too dissimilar.

It is also important to note that you should have consistent data entry policies for entry of organization names to avoid duplicate issues. Specifically, you should either always or never include an article at the beginning of an organization name. For example, “The Boys and Girls Club” and “Boys and Girls Club” will not be identified as duplicates due to the phonetic differences of the first word. If you have organizations in your database that may have an article as the first word of their name, you should manually search for possible duplicates.

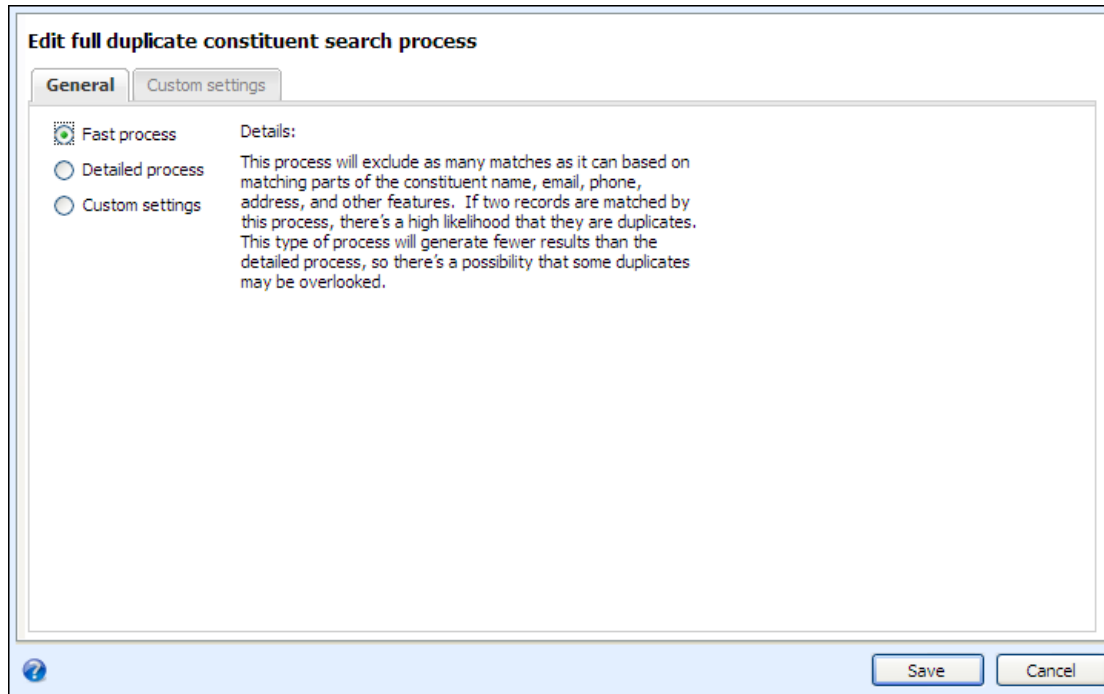
Run the Full Duplicate Constituent Search Process

You can run the full duplicate search process to compare and identify possible duplicate constituent records in your database. After you run a full search, you can reduce the time required for subsequent searches by running the incremental process, which compares only those records that have been added or updated since the last search process was run.

► Run the full duplicate constituent search process

1. From *Constituents*, click **Duplicates**. The Duplicates page appears.
2. Click **Full duplicate search**. The Full Duplicate Constituent Search Process screen appears.

3. Click **Edit process**. The Edit full constituent duplicate search process screen appears.



4. On the General tab, select **Fast process**, **Detailed process**, or **Custom settings**. For more details about each type, see “Understand Constituent Search Processes” on page 4.
 - The **Fast process** duplicate search is designed for speed and efficiency. In this mode, the search process filters out as many records as it can based on matching parts of the constituent name, email, phone, address, and other features. This type of process will generate fewer results than the detailed process, so there is a possibility that some duplicates may be overlooked.
 - The **Detailed process** duplicate search that will take longer than the “fast process” but can potentially find more duplicates. This process uses fewer filters to exclude potential matches. It will generate more results than the fast process and may catch some duplicates that the fast process misses.
 - Select **Custom settings** to run a duplicate search based on comparison settings you define. You can choose which constituents to compare, which filters to apply, and the minimum confidence level for two records to be considered a match. Because the selections you make on the Custom settings tab can cause the search process to run for an extended period time, we recommend that you use the fast process or detailed process option.

- If you select **Custom settings** on the General tab, also select the Custom settings tab to review and configure search process options. For detailed information about each setting option, see the “Edit Duplicate Constituent Search Process Screen” on page 10. This tab is accessible only if you select **Custom settings** on the General tab.

Edit full duplicate constituent search process

General Custom settings

Selected constituents:

Required name confidence level to match: Low (70%)

Required address confidence level to match: Low (70%)

Required overall confidence level to match: Low (70%)

Process

Match constituents without token filtering

Match constituents based on email address

Match constituents based on phone number

Individual constituents

Include middle names in comparison

Include maiden names in comparison

Filter individuals by birth date

Filter individuals by gender

Pre-filter addresses by

State

Zip; Digits required for inexact match: 3

Country

Include options

Include Inactive

Include Deceased

Include Groups

Include Organizations

Save Cancel

- Click **Save**. You return to the Full Duplicate Constituent Search Process screen.
- To begin the duplicate search process, click **Start process**. The Recent status tab displays information about the process as it runs. After the process is done, the “Completed” status is displayed along with a green checkmark.

Warning: The time required to run the search process can be lengthy. The duration depends on multiple factors, including the number of records being compared and the search process mode you select. If you run the process with custom settings, the custom settings you choose can also effect the process duration.

- After the search process is complete, run the Duplicate Constituents Report to view a list of constituent records identified as potential duplicates by the process. For more information, see “Run the Duplicate Constituents Report” on page 16.

Run the Incremental Duplicate Constituent Search Process

After you run a full search, you can reduce the time required for subsequent searches by running the incremental search process. The incremental duplicate constituent search process compares only those records that have been added or updated since the last search process was run.

▶ Run the incremental duplicate constituent search process

- From *Constituents*, click **Duplicates**. The Duplicates page appears.

- If you select **Custom settings** on the General tab, also select the Custom settings tab to review and configure search process options. For detailed information about each setting option, see the “Edit Duplicate Constituent Search Process Screen” on page 10. This tab is accessible only if you select **Custom settings** on the General tab.

Edit incremental duplicate constituent search process

General Custom settings

Selected constituents:

Required name confidence level to match: Low (70%)

Required address confidence level to match: Low (70%)

Required overall confidence level to match: Low (70%)

Process

Match constituents without token filtering

Match constituents based on email address

Match constituents based on phone number

Individual constituents

Include middle names in comparison

Include maiden names in comparison

Filter individuals by birth date

Filter individuals by gender

Pre-filter addresses by

State

Zip; Digits required for inexact match: 3

Country

Include options

Include Inactive

Include Deceased

Include Groups

Include Organizations

Save Cancel

- Click **Save**. You return to the Incremental Constituent Duplicate Search Process screen.
- To begin the duplicate search process, click **Start process**. The Recent status tab displays information about the process as it runs. After the process is done, the “Completed” status is displayed along with a green checkmark.

Warning: The time required to run the search process can be lengthy. The duration depends on multiple factors, including the number of records being compared and the search process mode you select. If you run the process with custom settings, the custom settings you choose can also effect the process duration.

- After the search process is complete, run the Duplicate Constituents Report to view a list of constituent records identified as potential duplicates by the process. For more information, see “Run the Duplicate Constituents Report” on page 16.

Edit Duplicate Constituent Search Process Screen

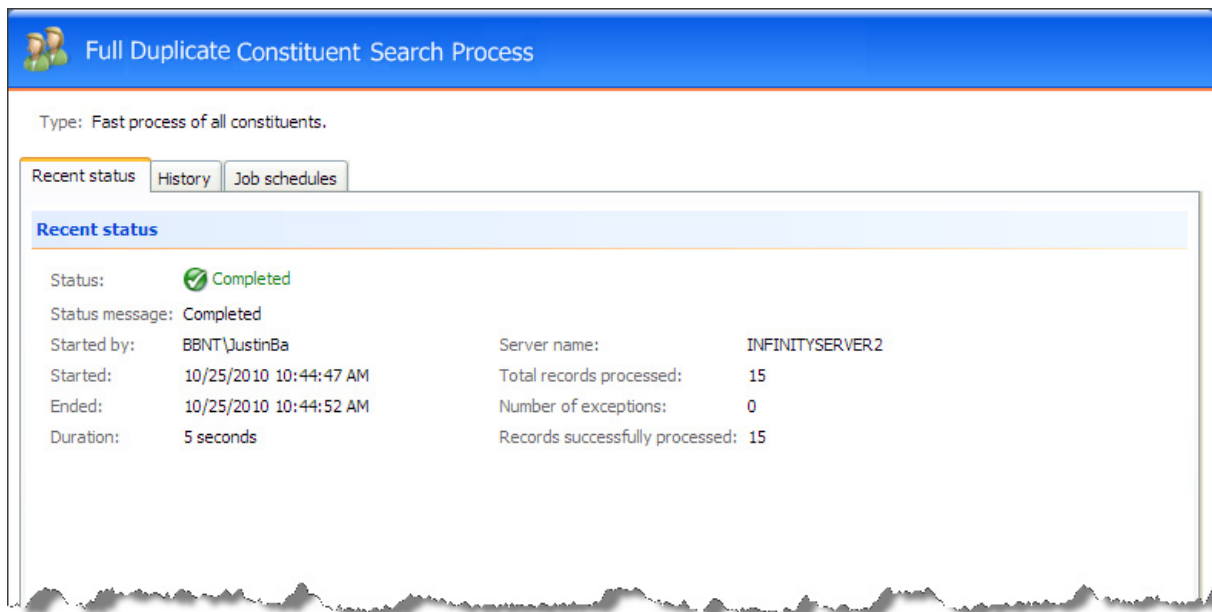
From *Constituents*, you can run a full or incremental duplicate search process to identify possible duplicate constituent records in your database. Before you run a search process, you can access the Edit duplicate constituent search screen and configure settings to determine how constituent records are compared.

| Screen Item | Description |
|---|---|
| Fast process | On the General tab, select Fast process to run a duplicate search designed for speed and efficiency. In this mode, the search process filters out as many records as it can based on matching parts of the constituent name, email, phone, address, and other features. If two records are matched by this process, there is a high likelihood that they are duplicates. This type of process will generate fewer results than the detailed process, so there is a possibility that some duplicates may be overlooked. |
| Detailed process | The Detailed process duplicate search will take longer than the “fast process” but can potentially find more duplicates. This process uses fewer filters to exclude potential matches. It will generate more results than the fast process and may catch some duplicates that the fast process misses. For example, it is much better at finding duplicate constituents with different addresses or phone numbers. Because the detailed process uses fewer filters to exclude records, there is a greater possibility of getting results that are not really duplicates. |
| Custom settings | Select Custom settings to run a duplicate search based on comparison settings you define. You can choose which constituents to compare, which filters to apply, and the minimum confidence level for two records to be considered a match. In most cases, we recommend that you use the fast or detailed process as the selections you make on the Custom settings tab could possibly result in lengthy running times. |
| Selected constituents | On the Custom settings tab, in the Selected constituents field, you can choose a constituent query selection to compare for duplicates. This allows you to search for duplicates within a specific selection of constituent records, which is especially helpful if you have a large database as it allows you to run the duplicate search in manageable waves. For example, you can create queries that group constituents by last names that start with A-B, C-D, etc. For information about selections, see the <i>Query and Export Guide</i> . |
| Match constituents without token filtering | By default, token filtering is enabled as it saves search time. With token filtering, constituents must meet a criteria threshold before they are included in comparisons. If you select this checkbox, you disable token filtering. Running the process without token filtering can possibly return more potential duplicates but will take longer. |
| Match constituents based on email address | Address is always included as matching criteria for potential duplicate constituents. To also include email address as matching criteria, select this option. |
| Match constituents based on phone number | Address is always included as matching criteria for potential duplicate constituents. To also include phone number as matching criteria, select this option. |
| Include middle names in comparison | To include full middle names in duplicate comparisons, select this option. If you enter only a middle initial on constituent records, you can clear this option to possibly save process running time. |
| Include maiden names in comparison | To include full maiden names in duplicate comparisons, select this option. You can clear this option to possibly save process running time. |

| Screen Item | Description |
|---|--|
| Filter individuals by birth date | If you record birthdays on constituent records, select this option to compare birthdays when identifying potential duplicates. |
| Filter individuals by gender | If you record gender on constituent records, select this option to compare gender when identifying potential duplicates. |
| Required name confidence level to match | Select Low (70%), Medium (80%), High (90%), or Exact (100%). This controls the threshold of potential duplicates returned based on name comparison. "Low" returns more potential duplicates but will also include some that are not true duplicates, while "Exact" returns less and may miss some that are potential duplicates. |
| Required address confidence level to match | Select Low (70%), Medium (80%), High (90%), or Exact (100%). This controls the threshold of potential duplicates returned based on address comparison. "Low" returns more potential duplicates but will also include some that are not true duplicates, while "Exact" returns less and may miss some that are potential duplicates. |
| Required overall confidence level to match | Select Low (70%), Medium (80%), High (90%), or Exact (100%). This controls the threshold of potential duplicates returned based on the average of the name, address, and secondary (email or phone) scores. "Low" returns more potential duplicates but will also include some that are not true duplicates, while "Exact" returns less and may miss some that are potential duplicates. |
| State | Under Pre-filter address by , select State to filter out potential constituents if their state does not match. |
| Zip | Select Zip to filter out potential constituents if their Zip does not match. Also enter the number of digits required to constitute a match. For example, enter a "3" to compare only the first three digits of each Zip for pre-filtering. |
| Country | Select Country to filter out potential constituents if their country does not match. |
| Include Inactive | This controls whether constituents marked as inactive are included in the duplicate search. |
| Include Deceased | This controls whether constituents marked as deceased are included in the duplicate search. |
| Include Groups | This controls whether groups are included in the duplicate search. |
| Include Organizations | This controls whether organization constituents are included in the duplicate search. It is important to note that you should have consistent data entry policies for entry of organization names to avoid duplicate issues. Specifically, you should either always or never include an article at the beginning of an organization name. For example, "The Boys and Girls Club" and "Boys and Girls Club" will not be identified as duplicates due to the phonetic differences of the first word. If you have organizations in your database that may have an article as the first word of their name, you should manually search for possible duplicates. |

Duplicate Constituent Search Process Page

From the Duplicates page, click **Full duplicate search** or **Incremental duplicate search** to access the page for each process. Each page contains multiple tabs on which you can view the status of the most recent process run and the history of previous process runs. Additionally, if you have the required system role, you can access the Job Schedules tab to schedule the duplicate search processes to run automatically.



View Duplicate Search Process Status

On the Recent status tab, you can view the details of the most recent instance of the search process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server on which the process was run; the total number of constituents processed; and how many constituents processed successfully and how many were exceptions.

View Duplicate Search Process History

On the History tab, you can view the history for each run of the search process. The details provided in the grid include the status of the process; the start time, end time and duration of the process; the person who last started the process; and the name of the server on which the process was run.

Because this information is recorded each time you run a process, it is likely that you have multiple rows of information in the grid. As the history list grows over time, it may be difficult to find a particular process run. To narrow the list, click **Filter** on the action bar. A **Status** field appears so you can narrow the list by “Completed,” “Running,” or “Did not finish.” Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again. To make sure you have the latest process information, click **Refresh List**.

Tip: To subscribe to a Really Simple Syndication (RSS) feed, click the orange RSS button on the action bar. Use this to receive a notification when a process completes. For more information about RSS, see the *General Features Guide*.

Depending on your system role, you can perform functions to manage the processes from the action bar. To delete a single instance of the process, select the process in the **History** grid and click **Delete** on the action bar. A message appears to ask whether to delete the merge process history. To delete the instance, click **Yes**.

Configure Duplicate Search Process Job Schedules

If you have the required system role, you can access the Job Schedules tab to schedule the duplicate search processes to run automatically. This tab appears only for users who are assigned the required system role. The Job schedules tab shows all scheduled jobs that currently exist for the search process. Depending on your system role, you can add new scheduled jobs, edit existing jobs, and delete scheduled jobs on this tab. To make sure you have the latest job schedule information, click **Refresh List**.

Add a Job Schedule for a Duplicate Constituent Search Process

To automate a search process, you can use the Create job screen. The Job Schedule feature is built on Microsoft’s *SQL Server Agent* functionality. You can use *SQL Server Agent* jobs to automatically run processes and, optionally, run the task on a recurring basis. When you schedule jobs, you define the condition or conditions that cause the job to begin.

Note: The system administrator at your organization typically completes this procedure.

► Create a job schedule

1. On the Job schedules tab, click **Create job schedule**. The Create job screen appears.

Create job

Job name:

Schedule type: Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

Occurs once at:

Occurs every: Minutes Starting at: Ending at:

Duration

Start date: End date: No end date

2. In the **Job name** field, enter a name for the job schedule.
3. By default, the Enabled checkbox makes the process active. To suspend the process, clear this checkbox.
4. In the **Schedule type** field, select how often to run the process. Your selection in this field determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Create Job Screen

This table explains the items on the Create job screen. Options on this screen vary depending on your selection in the **Schedule Type** field. The **Schedule Type** field determines the options available in the **Frequency** and **Daily Frequency** frames.

| Screen Item | Description |
|----------------------------|--|
| Job name | Enter a name for the job schedule. |
| Schedule type | Select how often to run the job schedule. You can run a process just once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> . |
| Enabled | To suspend the scheduled process, clear this checkbox. By default, the Enabled checkbox makes the process active. |
| One-time occurrence | For a process that runs just once, select the date and time to run it. |
| Frequency | For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. |
| Daily frequency | For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time. |
| Start date | For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date . |

Edit a Job Schedule for a Duplicate Constituent Search Process

After you add scheduled jobs, you can edit settings such as the type of schedule and frequency. The items on the edit screen are the same as those on the Create job screen. For more information, see “Add a Job Schedule for a Duplicate Constituent Search Process” on page 13 and “Create Job Screen” on page 14.

▶ Edit a job schedule

1. On the Job schedules tab, select the job and click **Edit**. The Edit schedule screen appears.
2. Make changes as necessary. For example, in the **Schedule type** field you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Delete a Job Schedule for a Duplicate Constituent Search Process

If you decide you no longer need a scheduled job, you can delete it.

▶ Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

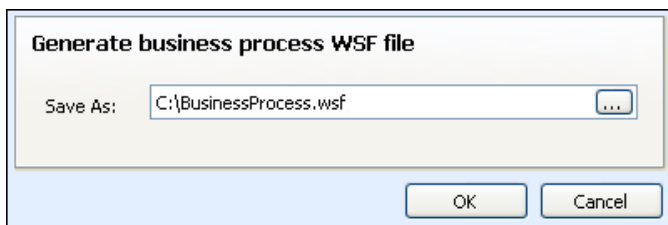
Generate a Windows Scripting File for a Duplicate Constituent Search Process

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. On the full and incremental search process pages, you can generate a *.wsf to automate process runs. You can use this file along with *Windows Task Scheduler* or another automated launcher to start the search process without launching the program client. This allows you to schedule process to run at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this procedure.

► Generate a Windows Scripting File

1. Go to the process that requires a Windows Scripting File.
2. Under **Tasks**, click **Generate WSF**. The Generate business process WSF file screen appears.



3. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
4. Click **OK**. The program saves the WSF file.

Create a User Task for Duplicate Constituent Search Processes

To specify security permissions for a selected search process, click **Create Task** on the explorer bar. You can give other users rights to run a process without allowing them full access to the process functional area.

For more information about how to create and edit tasks, see the *Page Designer Guide*.

Run the Duplicate Constituents Report

The Duplicate Constituents Report provides a list of constituent records identified as potential duplicates by the SSIS package or full or incremental search processes you have previously run. When you run the report, you select whether to view results for the last SSIS process run or the last full or incremental search process run.

The Duplicate Constituents Report provides a list of constituent records identified as potential duplicates by the full or incremental search processes you have previously run. When you run the report, you select whether to view results for the last full or incremental search process run.

| Duplicates of | % Match | Name | Address |
|-----------------------|---------|---|--|
| 4N Healthcare Limited | 100% | 4N Healthcare Limited | 4N Home Marley Street LONGWOOD, SC 84917 |
| | 93.99% | 4N Healthcare | 4N Home Marley Street Longwood, SC 84917 |
| | 85.72% | 4 N Health Care Limited | Home Marley Street LONGWOOD, SC 84917 |
| A.A. Harbor | 100% | A.A. Harbor | Coaley Street Darley, AR 91556 |
| | 100% | A.A. Harbor | Coaley Street Darley, AR 91556 |
| ACCI Associates | 100% | ACCI Associates | |
| | 100% | ACCI Associates | |
| Arthur Frederick | 100% | Arthur Frederick | 1220 Main Street Mobile, AL 38751 |
| | 100% | Arthur Frederick | 1220 Main Street Mobile, AL 38751 |
| | 100% | Arthur Frederick | 1220 Main Street Mobile, AL 38751 |
| Ben Alexandrow | 100% | Ben Alexandrow | 194 Church Lane Loudon, NJ 56123 |
| | 98.41% | Ben Alexandrou | 194 Church Lane Loudon, NJ 56123 |

Note: Search results are not available in the report until you run the search process at least once. You can search for duplicates by running the **Full duplicate search** and **Incremental duplicate search** tasks provided on the Duplicates page or you can use the SSIS package to identify duplicates. To use the SSIS package to search for duplicates, you must run the ConfigureDedupeSSISPackages task in the Blackbaud AppFx Configuration Manager. For more information, see the *Installation Guide*.

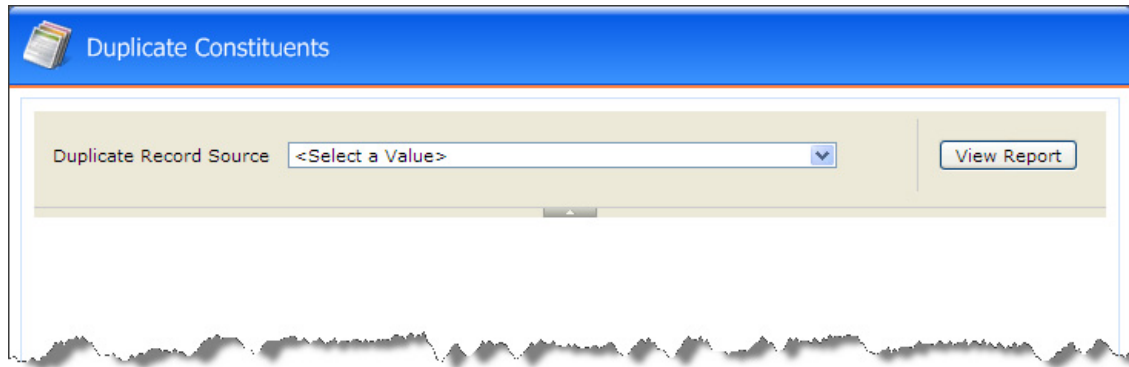
When a search process runs, it identifies potential duplicate constituents and divides them into target and source constituents. The target record is the main constituent that will be retained after the merge. Source constituents are the records that will be merged into the target record when a merge process is run. The duplicate constituent report displays the target constituents along with their associated duplicate source records for you to review.

The report lists the target constituents in the **Duplicates of** column. In the **% Match** column, the report displays the percentage rating for each potential duplicate constituent. The higher the percentage, the greater the similarity between the constituents. The constituent merge process uses the percentage as a cutoff for the constituents to merge. The cutoff percentage threshold is configured when you add or edit the merge process. The **Name** and **Address** columns display the name and address of the potential source constituents in your database.

► Run the Duplicate Constituents Report

1. From *Constituents*, click **Duplicates**. The Duplicates page appears.

2. Click **Duplicate constituent report**. The Duplicate Constituents page appears.



3. In the **Duplicate Record Source** field, select the search process to use as the source for the report.
 - To view the potential duplicates identified by the last SSIS package run, select “Full Duplicate Search Results. This option appears only after the SSIS package has been run.”
 - To view the potential duplicates identified by the last full search process run, select “Full Duplicate Constituent Search Process Results.”
 - To view the potential duplicates identified by the last incremental search process run, select “Incremental Duplicate Constituent Search Process Results.”
4. After you select the search process source, click **View Report**. The Duplicate Constituent Report appears.

| Duplicates of | % Match | Name | Address |
|-----------------------|---------|---|--|
| 4N Healthcare Limited | 100% | 4N Healthcare Limited | 4N Home Marley Street LONGWOOD, SC 84917 |
| | 93.99% | 4N Healthcare | 4N Home Marley Street Longwood, SC 84917 |
| | 85.72% | 4 N Health Care Limited | Home Marley Street LONGWOOD, SC 84917 |
| A.A. Harbor | 100% | A.A. Harbor | Coaley Street Darley, AR 91556 |
| | 100% | A.A. Harbor | Coaley Street Darley, AR 91556 |
| ACCI Associates | 100% | ACCI Associates | |
| | 100% | ACCI Associates | |
| Arthur Frederick | 100% | Arthur Frederick | 1220 Main Street Mobile, AL 38751 |
| | 100% | Arthur Frederick | 1220 Main Street Mobile, AL 38751 |
| | 100% | Arthur Frederick | 1220 Main Street Mobile, AL 38751 |
| Ben Alexandrow | 100% | Ben Alexandrow | 194 Church Lane Loudon, NJ 56123 |
| | 98.41% | Ben Alexandrou | 194 Church Lane Loudon, NJ 56123 |

The **Duplicates of** column lists the target constituents that will be retained after the merge process is run. The **% Match** column displays the percentage rating for each potential duplicate constituent. The higher the percentage, the greater the similarity between the constituents. The constituent merge process uses the percentage as a cutoff for the constituents to merge. The cutoff percentage threshold is configured when you add or edit the merge process. The **Name** and **Address** columns display the name and address of the potential source constituents that will be merged in the associated targets.

5. Carefully view the report and verify that the records identified as duplicates are indeed duplicates that should be merged. If records are found that are not duplicates, take appropriate steps to correct or clarify information on the respective constituent records.

For example, if relationships have not been configured for family members with the same last name and address, they may be identified as duplicates. To correct this, access their constituent records and add the appropriate relationships. After the relationships are added, they will no longer be identified as duplicates.

Note: If you make changes to constituent records after viewing the Duplicate Constituents Report, you should run the duplicate search or SSIS process again. After that, run the Duplicate Constituents Report again and verify the constituents listed are duplicates.

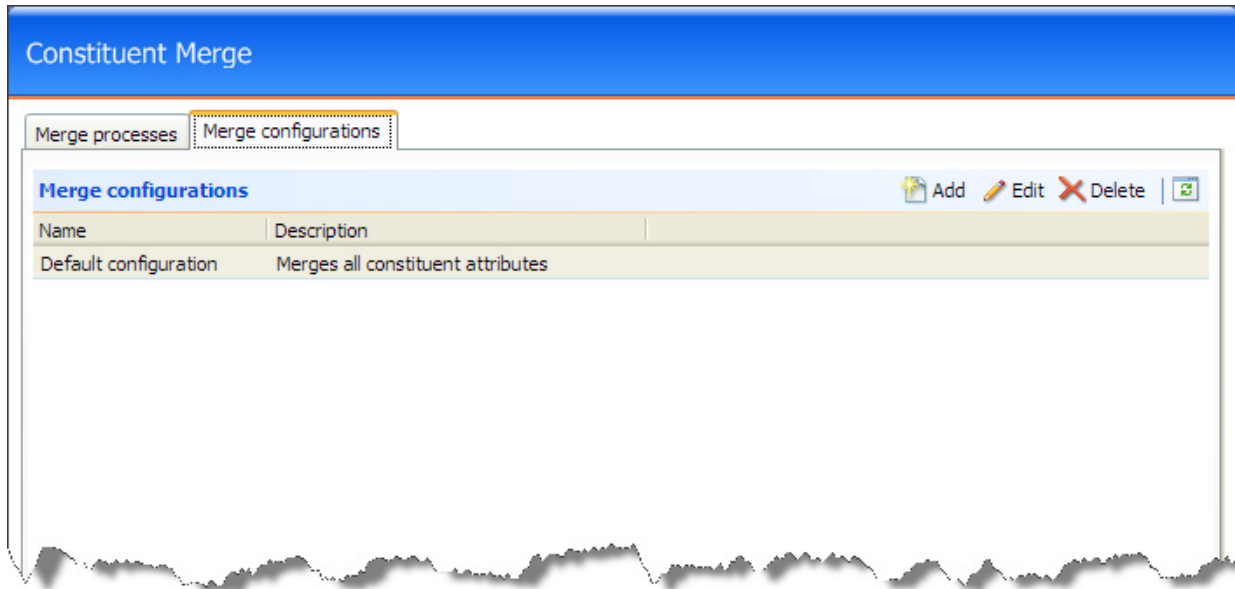
Manage Constituent Merge Configurations

Before you can run a merge process you must add a constituent merge configuration or use the default configuration provided. Merge configurations determine the data that is merged from source records to target records when a merge process runs.

Merge configurations allow you to specify the “merge tasks” for a respective merge processes. For example, you can add a merge configuration to merge only demographic data and another configuration to merge only gift data. In this case, you would add a configuration and select only the demographic-related merge tasks. Additionally, you would add a second configuration and select only the gift-related tasks. For information about each merge task you can select, see “Merge Tasks” on page 21.

Note: Social Security Numbers are not merged as part of a duplicate constituent merge process. If a source record and a target record have different Social Security Numbers, the number on the target constituent is retained. If the target constituent record has no Social Security Number, the **Social Security Number** field stays blank after the merge. The program does not retain Social Security Number of the source constituent.

To view the merge configurations for your organization, select the Merge configurations tab on the Constituent Merge page. A default configuration is provided. You can add a new configuration or use the default. If you want to use the default, you can edit it as needed to meet your needs.



Under **Merge configurations**, the names and descriptions appear for each configuration that has been added. To update the information in the grid, click **Refresh List** on the action bar. Depending on your security rights, you can add, edit, and delete merge configurations from the grid.

Add Constituent Merge Configurations

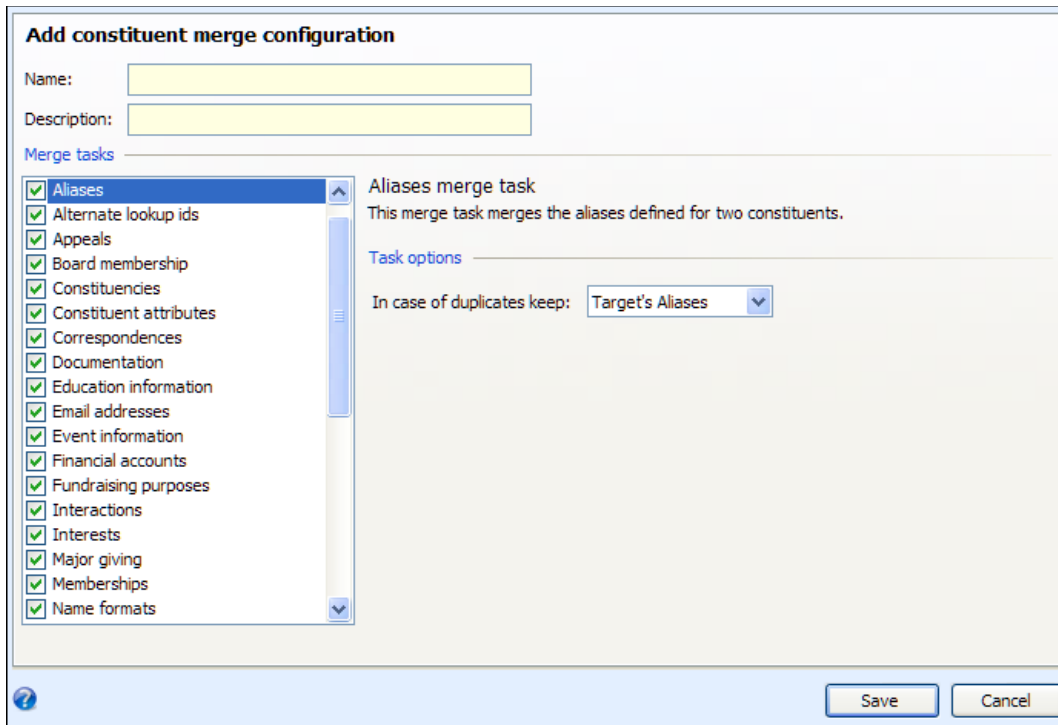
Merge configurations determine the data that is merged from source constituent records to target constituent records when a merge process is run. When you add or edit a configuration, you can specify the type of information that is merged by a process.

To merge different types of constituent information, you can add multiple merge configurations and select different “merge tasks” for each. For example, you can add a merge configuration to merge only demographic data and another configuration to merge only gift data. In this case, you would add a configuration and select only the demographic-related merge tasks. Additionally, you would add a second configuration and select only the gift-related tasks. For information about each merge task you can select, see “Merge Tasks” on page 21.

► Add a constituent merge configuration

1. From *Constituents*, click **Duplicates**. The Duplicates page appears.
2. Click **Constituent merge**. The Constituent Merge page appears.

3. On the Merge configurations tab, click **Add**. The Add constituent merge configuration screen appears.



4. Enter a name and description for the merge configuration.
5. Under **Merge tasks**, select the constituent information to merge with processes that use the configuration. For information about each merge task you can select, see “Merge Tasks” on page 21.
6. For each merge task included in the configuration, highlight the task under **Merge tasks** and, under **Task options**, select how to handle the duplicate information during the merge. For example, select **Aliases** and select whether to retain the aliases of the source constituent or the target constituent after the merge.
7. Click **Save**. You return to the Constituent Merge page.

Merge Tasks

This table explains the merge tasks you can select for a merge configuration. For additional information, see “Constituent Merge Tasks” on page 45.

| Merge Task | Description |
|------------|--|
| Addresses | Merges the address information of the source and target constituents. Select whether to retain the address of the source constituent or the target constituent as the primary and whether to exclude duplicate addresses and include mail preferences. If you select Include mail preferences , select whether to retain the preferences of the source constituent or target constituent if duplicate information exists. |

| Merge Task | Description |
|-------------------------------|--|
| Aliases | Merges the aliases of the source and target constituents. Select whether to retain the aliases of the source constituent or target constituent if duplicate information exists. |
| Alternate lookup IDs | Merges the alternate lookup IDs of the source and target constituents. Select whether to retain the alternate lookup IDs of the source constituent or target constituent if duplicate information exists. |
| Appeals | Merges the appeals associated with the source and target constituents. Select whether to delete duplicate appeals during the merge. |
| Board membership | Merges the board membership information of the source and target constituents. |
| Committees | Merges the committee records of the source and target constituents. |
| Constituencies | Merges the user-defined constituencies of the source and target constituents. |
| Constituent attributes | Merges the attributes associated with the source and target constituents. |
| Correspondences | Merges the correspondences of the source and target constituents. Select whether to delete duplicate correspondences during the merge. |
| Demographic | Merges the demographic information, such as target giving level and income or, for individual constituents, ethnicity and religious preference, of the source and target constituents. |
| Documentation | Merges all associated documentation, such as notes, media links, and attachments associated with the source and target constituents. |
| Email addresses | Merges the email addresses of the source and target constituents. Select whether to retain the address of the source constituent or the target constituent as the primary and whether to exclude duplicate email addresses and include mail preferences. If you select Include mail preferences , select whether to retain the preferences of the source constituent or target constituent if duplicate information exists. |
| Event information | Merges the event information of the source and target constituents. |
| Financial accounts | Merges all the financial accounts of the source and target constituents. |
| Fundraising purposes | Merges administration and recipient information on fundraising purposes associated with the source and target constituents. |
| Interactions | Merges the interactions associated with the source and target constituents. Select whether to delete duplicate interactions during the merge. |
| Interests | Merges the interests associated with the source and target constituents. Select whether to delete duplicate interests during the merge. |
| Lookup ID | Merges the lookup IDs of the source and target constituents into an alternate lookup ID. Select the type of alternate lookup ID to create from the merged lookup IDs. |
| Major giving | Merges the major giving prospect and fundraiser information associated with the source and target constituents. |
| Memberships | Merges the memberships associated with the source and target constituents. Select whether to delete duplicate memberships during the merge. |
| Name formats | Merges the name formats associated with the source and target constituents. Select whether to retain the name formats of the source constituent or target constituent if duplicate information exists. |

| Merge Task | Description |
|---------------------------------------|--|
| Naming opportunity recognition | Merges the naming opportunity recognitions associated with the source and target constituents. |
| Personal information | Merges the personal information of the source and target constituents. Select whether to retain the name formats of the source constituent, the target constituent, or the most complete name. The most complete name is determined by which name has the most characters. Under Groups/Households , select how to merge contact information for duplicate constituent groups and households. Select whether to retain the contact information of the source constituent or the target constituent as the primary and whether to include mail preferences for preferences that send mail to members of the group or household. If you select Include mail preferences , select whether to retain the preferences of the source constituent or target constituent if duplicate information exists. |
| Phone numbers | Merges the phone numbers of the source and target constituents. Select whether to retain the primary phone number of the source constituent or the target constituent as the primary. |
| Recognition defaults | Merges the recognition defaults associated with the source and target constituents. |
| Recognition programs | Merges the recognition programs associated with the source and target constituents. Select whether to retain the recognition programs of the source constituent or target constituent if duplicate information exists. |
| Relationships | Merges the relationships associated with the source and target constituents. Select whether to retain the target or source's primary business or spouse relationships and whether to include mail preferences for the spouse relationship. If you select Include mail preferences , select whether to retain the preferences of the source constituent or target constituent if duplicate information exists. |
| Revenue | Merges the revenue records of the source and target constituents. |

| Merge Task | Description |
|------------------------------|---|
| Sales order | <p>Merges the sales orders associated with the source and target constituents. To completely merge all sales order data to the target record, you must also select Revenue, Memberships, and Event information along with Sales order. For example, if you select Sales order but not Event information, no event registrations on the source record that were processed through a sales order are moved to the target record. If the source is selected to delete after the merge, you get an error message.</p> <p>If the Sales order merge task is included in the merge configuration and sales orders exist for the merging constituents, the following occurs as a result of the merge:</p> <ul style="list-style-type: none"> • If the source constituent is the patron on an order, the target constituent becomes the order's patron. • If the source constituent is the patron on a group order, then the target constituent becomes the group order's patron. • The target constituent will have a constituency of "Patron." <p>Regardless of whether the merge configuration includes the Sales order merge task, the following occurs as a result of the merge:</p> <ul style="list-style-type: none"> • If the source constituent is the recipient on an order, the target constituent becomes the order's recipient. • The target constituent's primary contact information is evaluated based on delivery method requirements. If the target constituent is missing required information for the order's delivery method then the merge fails. • If the source constituent is a leader on an itinerary for a group order, then the target constituent becomes the leader on the itinerary. • If the source constituent is the staffing resource on a group order, then the target constituent becomes the group order's staffing resource. |
| Security groups | Merges the security groups associated with the source and target constituents. |
| Sites | Merges the sites associated with the source and target constituents. |
| Solicit codes | Merges the solicit codes associated with the source and target constituents. |
| Sponsorships | Merges the sponsorships associated with the source and target constituents. |
| Staff records | Merges the staff records of the source and target constituents. |
| Stewardship plans | Merges the stewardship plans associated with the source and target constituents. |
| Surveys | Merges the surveys associated with the source and target constituents. |
| Team fundraising | Merges the team fundraising information associated with the source and target constituents. |
| Tributes | Merges the tributes associated with the source and target constituents. |
| Volunteer information | Merges the volunteer information associated the source and target constituents. |

Edit a Constituent Merge Configuration

Merge configurations determine the data that is merged from source constituent records to target constituent records when a merge process is run. When you edit a configuration, you can specify the type of information that is merged by a process.

▶ Edit a merge configuration

1. From *Duplicate constituents*, click **Constituent merge**. The Constituent Merge page appears.
2. Select the Merge configurations tab.
3. Under **Merge configurations**, select the configuration to edit.
4. On the action bar, click **Edit**. The Edit constituent merge configuration screen appears. The items on this screen are the same as the Add constituent merge configuration screen. For information about the items on this screen, see the “Add Constituent Merge Configurations” on page 20.
5. Edit the name and description for the merge configuration as needed.
6. Under **Merge tasks**, edit the constituent information to merge with processes that use the configuration. For information about each merge task you can select, see “Merge Tasks” on page 21.
7. For each merge task included in the configuration, highlight the task under **Merge tasks** and, under **Task options**, select how to handle the duplicate information during the merge. For example, select **Aliases** and select whether to retain the aliases of the source constituent or the target constituent after the merge.
8. Click **Save**. You return to the Constituent Merge page.

Delete Constituent Merge Configuration

Merge configurations determine the data that is merged from source constituent records to target constituent records when a merge process is run. If you no longer need a configuration or you created one in error, you can delete it permanently.

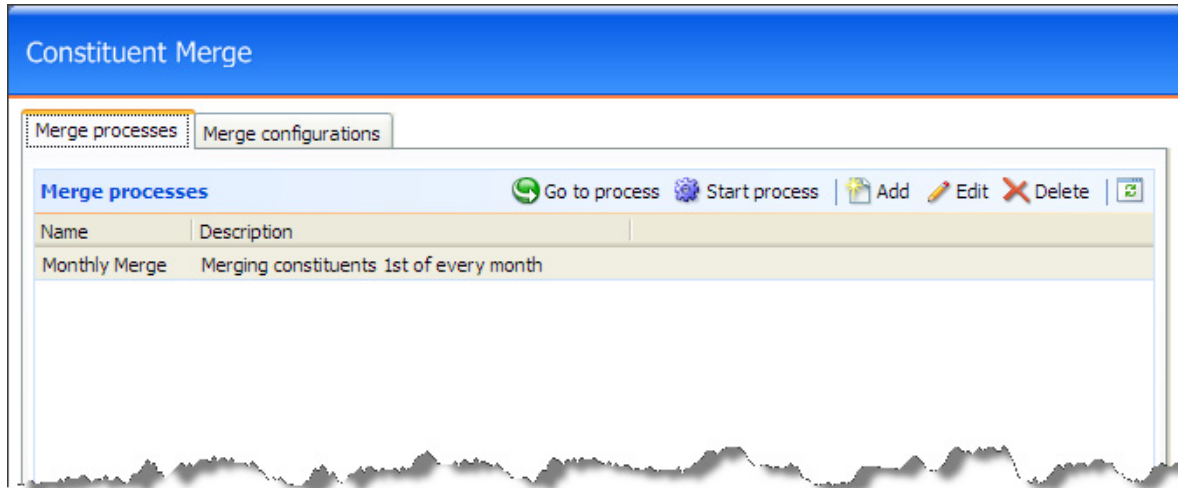
▶ Delete a merge configuration

1. From *Duplicate constituents*, click **Constituent merge**. The Constituent Merge page appears.
2. Select the Merge configurations tab.
3. Under **Merge configurations**, select the configuration to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the configuration.
5. Click **Yes**. You return to the Constituent Merge page.

Manage Constituent Merge Processes

A constituent merge process merges duplicate constituent records by moving data from a source record to a target record. Each process you add uses a merge configuration you select to determine which data is moved from source to target records. The source and target records are determined by a duplicate record source you select. The record sources are generated when you run a search process.

You can add multiple processes as needed to merge records in different ways. Additionally, you can run a constituent merge process manually or schedule them to run automatically. To view and manage the constituent merge processes for your organization, select the Merge Processes tab on the Constituent Merge page.



Under **Merge processes**, the names and descriptions appear for your constituent merge processes. Depending on your system role, you can add, edit, delete, and start merge processes from this page. To update the grid, click **Refresh List**.

To view additional information about a process, including the status of the most recent run or to preview and edit the constituents to be merged in the next run, select a process in the grid and process and click **Go to process**. The merge process page appears. For information about this page, see “Constituent Merge Process Page” on page 33.

Add Constituent Merge Processes

A constituent merge process merges duplicate constituent records by moving data from a source record to a target record. The process uses the merge configuration you select to determine which data is moved from source to target records. The source and target records are determined by the record source you select. The record source is generated when you run a search process.

You can use the default process included with the system or create your own. Before you can add and start a merge process, you must run the SSIS package or the full or incremental search process to identify potential duplicates. This provides the record source that the process uses to merge constituents. For more information about the workflow and steps to take before you add and start a merge process, see “Duplicate Constituent Workflow” on page 1.

Note: Social Security Numbers are not merged as part of a duplicate constituent merge process. If a source record and a target record have different Social Security Numbers, the number on the target constituent is retained. If the target constituent record has no Social Security Number, the **Social Security Number** field stays blank after the merge. The program does not retain Social Security Number of the source constituent.

► Add a constituent merge process

1. From *Constituents*, click **Duplicates**. The Duplicates page appears.
2. Click **Constituent merge**. The Constituent Merge page appears.

3. On the Merge processes tab, click **Add**. The Add constituent merge process screen appears. For information about the items on this screen, see “Add Constituent Merge Process Screen” on page 29.

Add constituent merge process

Name:

Description:

Criteria

Merge configuration:

Duplicate record source:

Target constituent criteria:

Excluded constituents:

Minimum match %:

Only merge individuals

Omit individual/organization matches

Delete source constituent

Mark source constituent inactive

Inactive reason:

Inactive details:

Results

Create selection from results

Selection name:

Overwrite existing selection

4. Enter a name and description for the merge process.
5. In the **Merge configuration** field, select a merge configuration for the process. The merge configuration determines the information to merge from the source constituent to the target constituent. For information about merge configurations, see “Manage Constituent Merge Configurations” on page 19.
6. Next, select the source and target to include.
 - a. In the **Duplicate record source** field, select whether to use the duplicate constituents identified by the last SSIS package run, or the last full or incremental duplicate search process run.
 - b. In the **Target constituent criteria**, select the criteria to determine the target constituents. To include constituents with a match percentage of 100 percent, select “Automatic.” You can also include target constituents based on when they were added to the database or last updated, or based on the number of gifts.
 - c. To exclude constituents from the process, enter a selection in the **Excluded constituents** field. To search for a selection, click the binoculars. A search screen appears.

- d. In the **Minimum match %** field, enter the minimum match percentage to include source constituents in the process.
- e. To merge individuals only, select **Only merge individuals**.
- f. To exclude individuals matched with organizations, select **Omit individual/organization matches**.
- g. To delete source constituents after the merge, select **Delete source constituent**.
- h. To mark source constituents as inactive after the merge, select **Mark source constituent inactive**. If you select this checkbox, in the **Inactive reason** field, select a reason code to explain why you mark constituents inactive. In the **Inactive details** field, enter any additional information about the inactive status.

For information about how to configure reason codes for inactive constituents, see the *Administration Guide*.

- 7. Under **Results**, to create a selection of target constituents in the process, select **Create selection from results**. In the **Selection name** field, enter a name for the selection. To replace any existing selection with the same name, select **Overwrite existing selection**.
- 8. Click **Save**. You return to the Constituent Merge page.

Add Constituent Merge Process Screen

| Screen Item | Description |
|---|---|
| Name and Description | Enter a name to identify the process and a description to explain when to use the process. |
| Merge configuration | Select a merge configuration for the merge process. The configuration determines the information to merge from the source to the target constituent. For information about configurations, see “Manage Constituent Merge Configurations” on page 19. |
| Duplicate record source | Select whether to use the duplicate constituents identified by the last SSIS package run, or the last full or incremental duplicate search process run. For information about the report, see “Run the Duplicate Constituents Report” on page 16. |
| Target constituent criteria | Select the criteria to determine the target constituents. Target constituents receive data from source constituents during the merge. To include constituents with a match percentage of 100 percent, select “Automatic.” If multiple constituents have a 100 percent match, the program uses the top, most relevant match. To view the percentages for the potential duplicates found by the search process, view the % Match column in the Duplicate Constituents Report. For information about the report, see “Run the Duplicate Constituents Report” on page 16. You can also include target constituents based on when they were added to the database or last updated, or based on the number of gifts. |
| Excluded constituents | To exclude constituents from the process, click the binoculars. A search screen appears. Select the selection of constituents to exclude. For information about selections, see the <i>Query and Export Guide</i> . |
| Minimum match % | Enter the minimum match percentage required to include constituents in the merge process. To view the percentages for the potential duplicates found by the search process, view the % Match column in the Duplicate Constituents Report. For information about the report, see “Run the Duplicate Constituents Report” on page 16. The program excludes constituents with match percentages below this value. By default, the minimum match percentage is 80 percent. |
| Only merge individuals | To include only individual constituents, select this checkbox. |
| Omit individual/organization matches | To exclude individuals matched to organizations, select this checkbox. |
| Delete source constituent | To delete source constituents after a merge, select this option. |
| Mark source constituent inactive | To mark source constituents as inactive after a merge, select this option. |
| Inactive reason | If you select Mark source constituent inactive , select a reason code to explain the inactive status. For information about how to configure reason codes for inactive constituents, see the <i>Administration Guide</i> . |
| Inactive details | If you select Mark source constituent inactive , enter any additional information about the inactive status of source constituents. |
| Create selection from results | To create a selection of target constituents in the process, select this checkbox. In the Selection name field enter a name for the selection. To replace any existing selection with the same name, select Overwrite existing selection . |

Edit a Constituent Merge Process

You can edit a constituent merge process as necessary. A constituent merge process merges duplicate constituent records by moving data from a source record to a target record. The process uses the merge configuration you select to determine which data is moved from source to target records. The source and target records are determined by the record source you select. The record source is generated when you run a search process.

You can use the default process included with the system or create your own. Before you can add and start a merge process, you must run the SSIS package or the full or incremental search process to identify potential duplicates. This provides the record source that the process uses to merge constituents. For more information about the workflow and steps to take before you add and start a merge process, see “Duplicate Constituent Workflow” on page 1.

Note: Social Security Numbers are not merged as part of a duplicate constituent merge process. If a source record and a target record have different Social Security Numbers, the number on the target constituent is retained. If the target constituent record has no Social Security Number, the **Social Security Number** field stays blank after the merge. The program does not retain Social Security Number of the source constituent.

► Edit a merge process

1. On the Constituent Merge page, select the Merge processes tab.
2. Select a process and click **Edit**. The Edit constituent merge process screen appears. The items on this screen are the same as on the Add constituent merge process screen. For a detailed explanation of the options, see “Add Constituent Merge Processes” on page 26.
3. In the **Merge configuration** field, select a merge configuration for the process. The merge configuration determines the information to merge from the source constituent to the target constituent. For information about merge configurations, see “Manage Constituent Merge Configurations” on page 19.
4. Next, you can edit the source and target to include.
 - a. In the **Duplicate record source** field, select whether to use the duplicate constituents identified by the last SSIS package run, or the last full or incremental duplicate search process run.
 - b. In the **Target constituent criteria**, select the criteria to determine the target constituents. To include constituents with a match percentage of 100 percent, select “Automatic.” You can also include target constituents based on when they were added to the database or last updated, or based on the number of gifts.
 - c. To exclude constituents from the process, enter a selection in the **Excluded constituents** field. To search for a selection, click the binoculars. A search screen appears.
 - d. In the **Minimum match %** field, enter the minimum match percentage to include source constituents in the process.
 - e. To merge individuals only, select **Only merge individuals**.
 - f. To exclude individuals matched with organizations, select **Omit individual/organization matches**.
 - g. To delete source constituents after the merge, select **Delete source constituent**.

- h. To mark source constituents as inactive after the merge, select **Mark source constituent inactive**. If you select this checkbox, in the **Inactive reason** field, select a reason code to explain why you mark constituents inactive. In the **Inactive details** field, enter any additional information about the inactive status.

For information about how to configure reason codes for inactive constituents, see the *Administration Guide*.

5. Click **Save**. You return to the Constituent Merge page.

Delete a Constituent Merge Process

Constituent merge processes merges duplicate constituent records by moving data from a source record to a target record. If you no longer need a process or you created one in error, you can delete it permanently.

▶ Delete a merge process

1. On the Constituent Merge page, select the Merge processes tab.
2. Select a process and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Constituent Merge page.

Start a Constituent Merge Process

To merge source and target constituents, you can manually start a constituent merge process. However, before you start a merge process, make sure you have reviewed the Duplicate Constituent Report for the selected duplicate record source and verified that the source and target records that will be merged are indeed duplicates. For more information about using the report, see “Run the Duplicate Constituents Report” on page 16.

You can also access the Preview merge tab on the process page to verify and edit the duplicate matches that will be merged. For more information about previewing the records to be merged, see “Preview Constituents to Merge” on page 34.

Warning: The duplicate merge process can take an extended period of time to run depending on the number of records being merged.

▶ Manually start a constituent merge process

1. From *Constituents*, click **Duplicates**. The Duplicates page appears.
2. Click **Constituent merge**. The Constituent Merge page appears.

3. On the Merge processes tab, select a process and click **Start process**. The Run constituent merge process screen appears.

4. The information displayed on this screen defaults in from the options configured when the process was added or last edited. Make changes as necessary.
 - a. In the **Duplicate record source** field, select whether to use the duplicate constituents identified by the last SSIS package run, or the last full or incremental duplicate search process run.
 - b. In the **Target constituent criteria**, select the criteria to determine the target constituents. To include constituents with a match percentage of 100 percent, select “Automatic.” You can also include target constituents based on when they were added to the database or last updated, or based on the number of gifts.
 - c. To exclude constituents from the process, enter a selection in the **Excluded constituents** field. To search for a selection, click the binoculars. A search screen appears.
 - d. In the **Minimum match %** field, enter the minimum match percentage to include source constituents in the process.
 - e. To merge individuals only, select **Only merge individuals**.
 - f. To exclude individuals matched with organizations, select **Omit individual/organization matches**.
 - g. To delete source constituents after the merge, select **Delete source constituent**.
 - h. To mark source constituents as inactive after the merge, select **Mark source constituent inactive**. If you select this checkbox, in the **Inactive reason** field, select a reason code to explain why you mark constituents inactive. In the **Inactive details** field, enter any additional information about the inactive status.

For information about how to configure reason codes for inactive constituents, see the *Administration Guide*.

5. Before you continue, it is important to that the duplicate merge process can take an extended period of time to run depending on the number of records being merged. When you are ready to begin the merge, click **Start**. The program runs the process. Once complete, the merge process page appears.
6. After the merge process completes, you should confirm that the duplicates have been merged. To do this, run the constituent search or SSIS process again, then run the Duplicate Constituents Report again. View the report and verify that the duplicate records have been merged. Some duplicates may not have been merged due to settings on the merge configuration. In this case, you can access the Preview Merge tab on the process record and manually merge these.

Constituent Merge Process Page

Each merge process you add to the system has a page you can access to manage the process and view status. Each page contains multiple tabs on which you can preview the source and target constituents to be merged during the next run, view the status of the most recent process run, and view the history of previous process runs. Additionally, if you have the required system role, you can access the Job Schedules tab to schedule the duplicate search processes to run automatically.

To access a merge process page, from *Constituents*, click **Constituent merge**. On the Merge processes tab, select the process to view and click **Go to process**. The selected merge process page appears. The top half of the page contains the parameters and properties for the constituent merge process while the bottom half contains tabs you can access.

Preview Constituents to Merge

On the Preview Merge tab of a process record, you can view the constituents that will be merged when the process runs. You can view the target and source constituent of each merge and specify exceptions for the current merge process.

Constituent merge process list

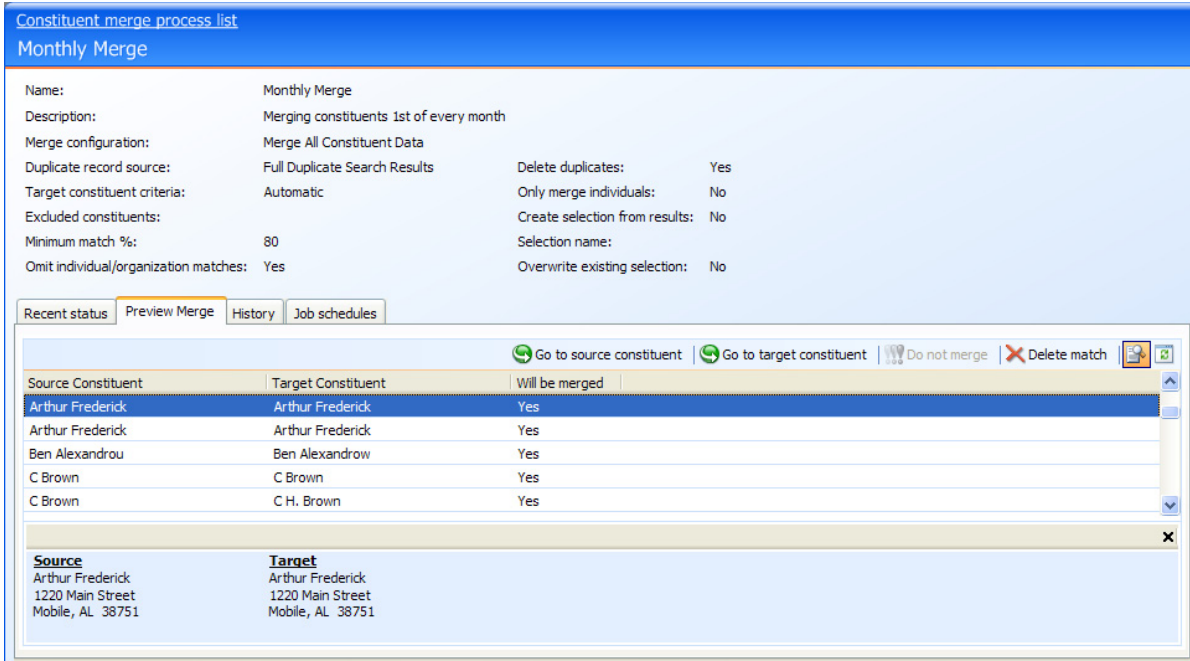
Monthly Merge

Name: Monthly Merge
 Description: Merging constituents 1st of every month
 Merge configuration: Merge All Constituent Data
 Duplicate record source: Full Duplicate Search Results Delete duplicates: Yes
 Target constituent criteria: Automatic Only merge individuals: No
 Excluded constituents: Create selection from results: No
 Minimum match %: 80 Selection name:
 Omit individual/organization matches: Yes Overwrite existing selection: No

Recent status | **Preview Merge** | History | Job schedules

| Source | Target | Go to source constituent | Go to target constituent | Do not merge | Delete match |
|---|---|--------------------------|--------------------------|--------------|--------------|
| Eric G. Bennett 111 Mill Lane Pueblo, NM 41721 | Eric G. Bennett 111 Mill Lane Apt. 5 Pueblo, NM 41721 | | | | |
| Ersly 20 Clinton Terrace Hartford, CT 24861 | E R. Sly 20 Clinton Terrace Hartford, CT 24861 | | | | |
| Fred Grigsby 1 White Ark Plaza Philadelphia, PA 67544 | Fred Grigsbey 1 White Ark Plz. Philadelphia, PA 67544 | | | | |

Depending upon the number of duplicate constituents found, the Preview merge tab displays the pairs of constituents as a list. A detail pane appears at the bottom of the tab to show the details of each source and target match pair you select. To hide the detail pane, on the action bar, click the **Hide Details** button.



Note: By default, the number of constituent matches required for the Preview Merge tab to display the records as a list is 60. If less than 60 matches are returned, the standard non-list view of constituent matches is displayed. Your system administrator can change this number with Page Designer. For more information about Page Designer, see the *Page Designer Guide* or the Page Designer section of the help file.

If you are assigned the required system role, from the Preview Merge tab, you can open and view source and target records, mark record matches as “Do not merge” and remove matches from the merge. These actions allow you to fine tune the constituents included in the merge process before you merge the records. The following table provides details about each action you can take when viewing the Preview Merge tab.

| Preview merge action | Description |
|---------------------------------|---|
| Go to source constituent | To view a selected merge’s source constituent, click Go to source constituent on the action bar. The source constituent page appears. A source constituent is the constituent record from which data merges. If you question whether a record is a duplicate, viewing the source record directly and comparing it with the target can sometimes provide clarification. |
| Go to target constituent | To view a selected merge’s target constituent, click Go to target constituent on the action bar. The target constituent page appears. A target constituent is the constituent record into which data merges. If you question whether a record is a duplicate, viewing the target record directly and comparing it with the source can sometimes provide clarification. |
| Do not merge or Merge | To specify that selected constituents must not be merged during the merge process, click Do not merge on the action bar. When the merge process runs, the match is removed from the duplicate search results. If you later decide to merge the constituents, click Merge on the action bar. |

| Preview merge action | Description |
|----------------------|---|
| Delete match | To remove the selected merge from the process, click Delete match on the action bar. When this process runs, the source and target pair of constituents are not merged. They will, however, be picked up in the next duplicate search. |

View Merge Process Status

On the Recent status tab of a process record, you can view the details of the most recent merge process run. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of constituents processed; and how many constituents processed successfully and how many were exceptions.

Tip: To save a copy of the output file in comma separated values (*.csv) format, click **Download output file**. The Save as screen appears so you can name and save your file.

View Merge Process History

On the History tab of a process record, you can view the history for each run of the merge process. The details provided in the grid include the status of the process; the start time, end time and duration of the process; the person who last started the process; and the name of the server on which the process was run.

Because this information is recorded each time you run a process, it is likely that you have multiple rows of information in the grid. As the history list grows over time, it may be difficult to find a particular merge process. To narrow the list, click **Filter** on the action bar. A **Status** field appears so you can narrow the list by “Completed,” “Running,” or “Did not finish.” Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again. To make sure you have the latest process information, click **Refresh List**.

Tip: To subscribe to a Really Simple Syndication (RSS) feed, click the orange RSS button on the action bar. Use this to receive a notification when a process completes. For more information about RSS, see the *General Features Guide*.

Depending on your system role, you can perform functions to manage the processes from the action bar. To delete a single instance of the process, select the process in the **History** grid and click **Delete** on the action bar. A message appears to ask whether to delete the merge process. To delete the instance, click **Yes**.

Tip: To save a copy of the output file, in a comma separated values (*.csv) format, select a process from the **History** grid and click **Download output file** on the action bar. The Save as screen appears so you can name and save the file.

Configure Merge Process Job Schedules

If you have the required system role, you can access the Job Schedules tab to schedule the merge process to run automatically. This tab appears only for users who are assigned the required system role. The Job schedules tab shows all scheduled jobs that currently exist for the merge process. Depending on your system role, you can add new scheduled jobs, edit existing jobs, and delete scheduled jobs on this tab. To make sure you have the latest job schedule information, click **Refresh List**.

Add a Job Schedule for a Constituent Merge Process

To automate a merge process, you can use the Create job screen. The Job Schedule feature is built on Microsoft's *SQL Server Agent* functionality. You can use *SQL Server Agent* jobs to automatically run processes and, optionally, run the task on a recurring basis. When you schedule jobs, you define the condition or conditions that cause the job to begin.

Note: The system administrator at your organization typically completes this procedure.

► Create a job schedule

1. On the Job schedules tab, click **Create job schedule**. The Create job screen appears.

Create job

Job name:

Schedule type: Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

Occurs once at:

Occurs every: Minutes Starting at: Ending at:

Duration

Start date: End date: No end date

2. In the **Job name** field, enter a name for the job schedule.
3. By default, the Enabled checkbox makes the process active. To suspend the process, clear this checkbox.
4. In the **Schedule type** field, select how often to run the process. Your selection in this field determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Create Job Screen

This table explains the items on the Create job screen. Options on this screen vary depending on your selection in the **Schedule Type** field. The **Schedule Type** field determines the options available in the **Frequency** and **Daily Frequency** frames.

| Screen Item | Description |
|----------------------------|--|
| Job name | Enter a name for the job schedule. |
| Schedule type | Select how often to run the job schedule. You can run a process just once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> . |
| Enabled | To suspend the scheduled process, clear this checkbox. By default, the Enabled checkbox makes the process active. |
| One-time occurrence | For a process that runs just once, select the date and time to run it. |
| Frequency | For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. |
| Daily frequency | For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time. |
| Start date | For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date . |

Edit a Job Schedule for a Constituent Merge Process

After you add scheduled jobs, you can edit settings such as the type of schedule and frequency. The items on the edit screen are the same as those on the Create job screen. For more information, see “Add a Job Schedule for a Constituent Merge Process” on page 37 and “Create Job Screen” on page 38.

► Edit a job schedule

1. On the Job schedules tab, select the job and click **Edit**. The Edit schedule screen appears.
2. Make changes as necessary. For example, in the **Schedule type** field you can change how often to run the process.

3. Click **Save**. You return to the Job schedules tab.

Delete a Job Schedule for a Constituent Merge Process

If you decide you no longer need a scheduled job, you can delete it.

▶ Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

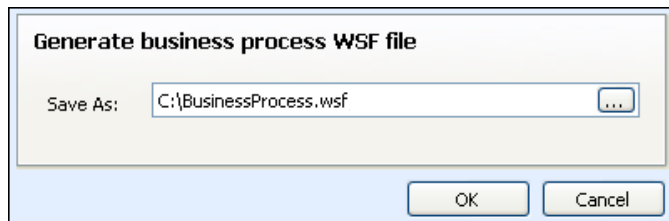
Generate a Windows Scripting File for a Constituent Merge Process

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. From each merge process page, you can generate a *.wsf to automate process runs. You can use this file along with *Windows Task Scheduler* or another automated launcher to start the merge process without launching the program client. This allows you to schedule merge processes to run at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this procedure.

▶ Generate a Windows Scripting File

1. Go to the process that requires a Windows Scripting File.
2. Under **Tasks**, click **Generate WSF**. The Generate business process WSF file screen appears.



3. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
4. Click **OK**. The program saves the WSF file.

Create a Task for a Constituent Merge Process

To specify security permissions for a selected merge process, click **Create Task** on the explorer bar. You can give other users rights to run a process without allowing them full access to the process functional area.

For more information about how to create and edit tasks, see the *Page Designer Guide*.

Merge Two Constituents

To merge only two duplicate constituents, you can manually merge the source and target constituents and not run an entire merge process.

▶ Manually merge two constituents

1. From *Duplicate constituents*, click **Merge two constituents**. The Merge two constituents screen appears.

2. In the **Source constituent** field, click the binoculars and use the Constituent Search screen to select the constituent record from which to merge data.
3. In the **Target constituent** field, click the binoculars and use the Constituent Search screen to select the constituent record into which to merge data.
4. In the **Merge configuration** field, select the configuration to use with the merge. The merge configuration determines which information on the target and source constituent records to merge. For information about configurations, see “Manage Constituent Merge Configurations” on page 19.
5. Select whether to delete the source constituent after the merge. If you do not select **Delete source constituent**, the program automatically marks the source constituent as inactive after the merge.
6. Select whether to delete the source constituents or mark them as inactive after the merge.

If you select **Mark source constituent inactive**, in the **Inactive reason** field, select the reason code to explain the need to mark the constituent as inactive. In the **Inactive details** field, enter any additional information about the inactive status of the constituent. For information about how to configure reason codes for inactive constituents, see the *Administration Guide*.
7. Click **Merge**. The program merges the information from the source constituent record with the target constituent record. After the merge is complete, the target constituent record appears.

Merged Constituent Search

On the Merged Constituent Search screen, you can use the lookup ID to trace a merged constituent to the target constituent record into which it merged. If your organization reuses lookup IDs, you can limit the search dates to avoid old matches in the search results.

► Search for a merged constituent

1. From *Duplicate constituents*, click **Merged constituent search**. The Merged Constituent Search screen appears.

Merged Constituent Search

Lookup ID:

Minimum Date:

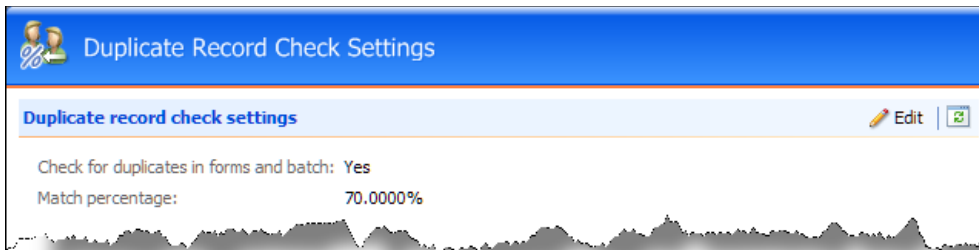
Results (1 record found)

| Name | Lookup ID |
|----------------|------------|
| Dianne D. Cone | 8-10000412 |

2. In the **Lookup ID** field, enter the lookup ID of the merged source constituent to find.
3. If your organization reuses lookup IDs, in the **Minimum Date** field, enter a cutoff date for the search to avoid reused IDs.
4. Click **Search**. In the **Results** grid, any merged constituents with the entered lookup ID appear.
5. In the **Results** grid, select the constituent and click **Select**. The target constituent record appears.

Duplicate Record Check Settings

From *Constituents*, you can select whether to enable the duplicate record check. With the duplicate record check, when users add an individual or organization constituent or validate a constituent batch or revenue batch that adds an individual constituent, the program automatically uses the name, address, and ZIP Code to verify the constituent does not already exist in the database. To view or configure the duplicate record check settings for your organization, go to *Constituents* and click **Duplicates**. On the Duplicates page, click **Duplicate record check settings**. The Duplicate Record Check Settings page appears.



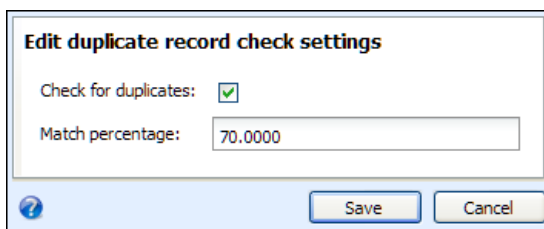
Note: In *Batch entry*, if you select to check for duplicate constituents when you commit batches, the program uses this match percentage during the duplicate record check as well.

By default, the program uses a match percentage of 70 percent to determine whether a constituent is a potential duplicate. You can increase or decrease the match percentage as necessary. For example, to require a greater similarity between constituents to identify them as potential duplicates, increase the percentage.

Note: The match percentage in the Edit duplicate record check settings applies to individual matches. For mass duplicate detection, you can adjust the similarity thresholds that SQL Server Integration Services (SSIS) uses to find duplicates. For more information about the SSIS package, see the *Installation Guide*.

► Edit the duplicate record check settings


1. From *Constituents*, click **Duplicates**. The Duplicates page appears.
2. Click **Duplicate record check settings**. The Duplicate Record Check Settings page appears.
3. Click **Edit**. The Edit duplicate record check settings screen appears.



4. To enable the duplicate record check, select **Check for duplicates**.

5. By default, the program uses a match percentage of 70 percent to determine whether a constituent is a potential duplicate. In the **Match percentage** field, edit the match percentage as necessary.
6. Click **Save**. You return to the Duplicate Record Check Settings page.

Constituent Merge Tasks



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When you run a constituent merge process to merge records in your database, the process uses a merge configuration to determine what data to merge from source constituent records to target constituent records. In turn, the merge configuration uses constituent merge tasks to select the fields and records to include in the merge process, how to handle duplicate data, and what to do with source records after the merge.

When you create a merge configuration, you select merge tasks to include. Each merge task handles data associated with constituent records, such as phone numbers and sales orders. If you do not include a merge task in the merge configuration, you exclude the data that the task handles from the merge process. For some merge tasks, you can edit how the task merges data. For example, with the **Addresses** merge task, you can select whether to retain duplicate addresses and whether to maintain the primary indicator on the source or target's address.

Merge Logic

Constituent merge tasks follow some patterns for logical flow. However each merge task has unique patterns.

In general, merge tasks compare source constituent records to target constituent records. If the source includes data that the target does not, the merge task associates the data with target and removes it from the source. Otherwise, the merge task does not change either record.

However, some merge tasks follow additional rules or allow you to edit the behavior. For records with primary indicators, such as addresses and education history, the merge tasks allow you to select whether to keep the primary indicator from the source target.

When merge tasks encounter duplicate records, they can handle them according to program constraints on duplicate records, allow you to keep the source or target constituent's record, or allow you to exclude duplicate records. How a merge task handles duplicate records depends on the type of data it processes. For example, the program allows duplicate address records but does not allow duplicate registrant records for an event.

Records with date ranges can create situations where source and target records have dates that overlap. For example, constituency records have start and end dates. In many cases, the program does not allow these dates to overlap. When this happens, merge tasks defer to one record and determine the record that remains active for the constituent.

After you run a merge task, data can remain on source constituent records. On the merge process, you can select **Delete source constituent** to remove source constituents after the merge task. This removes the source constituent records and any information that was not removed from the source during the merge tasks.

Addresses Merge Task

The **Addresses** merge task associates the source constituent's addresses with the target constituent. You can use three fields to edit the behavior of the merge task: **Primary address criteria**, **Exclude duplicate addresses**, and **Include mail preferences**. A fourth field, **In case of duplicates, keep**, is available when you select **Include mail preferences**.

Note: The **Addresses** merge task does not update contact addresses.

Note: If a source has any changes in a change of address batch, the **Addresses** merge task updates the batch to point to the target.

Primary Address Criteria

A constituent can only have one primary address. In the **Primary address criteria** field, you select whether to preserve the primary indicator for the source or target's primary address. If you select "Target's Primary Address," the task associates the source's address with the target, but preserves the primary indicator on the target's primary address. If you select "Source's Primary Address," the merge task preserves the primary indicator on the source's primary address.

Warning: If you select "Source's Primary Address" in the **Primary address criteria** field and select **Exclude duplicate addresses**, the merge task preserves the target's primary address when the source's primary address is a duplicate of a target's address. In this case, the target's primary address keeps its primary indicator.

Exclude Duplicate Addresses

The program allows duplicate addresses for constituents. Select **Exclude duplicate addresses** to prevent duplicate addresses during a merge.

Note: If you select **Exclude duplicate addresses**, the **Addresses** merge task runs slower because it compares each source address to each target address.

The **Addresses** merge task regards addresses as duplicates when they have the same values in each of the following fields:

- **Type**
- **Country**
- **Address**
- **City**
- **State**
- **ZIP Code**
- **DPC**
- **CART**
- **LOT**

If a field is blank on the source and target address, the merge task ignores it. If the merge task excludes a source address, the merge task does not delete it. Instead, the **Addresses** merge task does not associate it with the target. The excluded address remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the address along with the source.

Note: The merge task also updates any sales order addresses if the merge task deletes duplicates that appear on sales orders.

Include Mail Preferences

If you select **Include mail preferences**, you select whether to preserve the source or target's mail preferences. In the **In case of duplicates, keep** field, if you select "Target's Mail Preference," the merge task deletes the source's mail preference if it is a duplicate. When you select "Source's Mail Preference," the merge task deletes the target's mail preference when it is a duplicate. The mail preferences fields include:

- Mail type
- **Send** or **Do not send**
- **Send by**
- **Selected address**
- **Send to seasonal address when valid**

- **Comments**

Note: The merge task does not handle all mail preferences. You must also run the **Personal information** merge task to merge mail preferences.

Aliases Merge Task

The **Aliases** merge task associates the source constituent's aliases with the target constituent. You can use the **In case of duplicates keep** field to edit the behavior of the merge task.

In Case of Duplicates Keep

In the **In case of duplicates keep** field, you select whether to preserve the source or target's alias. The program does not allow constituent's to have duplicate aliases. The program regards aliases as duplicates when they have the same values in the following fields:

- **Last name**
- **First name**
- **Middle name**
- **Title**
- **Title 2**
- **Suffix**
- **Suffix 2**

Note: The merge task regards aliases as duplicates even if they have different values in the **Alias Type** fields.

If a source alias is a duplicate of a target alias and you select "Source's Aliases" in the **In case of duplicates keep** field, the **Aliases** merge task removes the target alias and associates the source alias with the target. If you select "Target's Aliases," the **Aliases** merge task preserves the target alias and excludes the source alias.

If the merge task excludes a source alias, the merge task does not delete it. Instead, the **Aliases** merge task does not associate it with the target. The excluded alias remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the alias along with the source.

Alternate Lookup IDs Merge Task

The **Alternate lookup IDs** merge task associates the source constituent's alternate lookup IDs with the target constituent. You can use the **In case of duplicates keep** field to edit the behavior of the merge task.

In Case of Duplicates Keep

The program allows duplicate alternate lookup IDs for constituents. In the **In case of duplicates keep** field, you select how to handle duplicate alternate lookup IDs. You can preserve the source's alternate lookup IDs, the target's alternate lookup IDs, or both.

Target's Alternate Lookup IDs. This option associates the source's alternate lookup IDs with the target unless the target already has an alternate lookup ID of the same type. If the merge task excludes a source alternate lookup ID, the merge task does not delete it. Instead, the **Alternate lookup IDs** merge task does not associate it with the target. The excluded alternate lookup ID remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge task, the merge removes the alternate lookup ID along with the source constituent.

Source's Alternate Lookup IDs. This option associates the source's alternate lookup IDs with the target. If the target and source have alternate lookup IDs of the same type, this option deletes the target's alternate lookup IDs.

Target and Source's Alternate Lookup IDs. This option associates the source's alternate lookup IDs with the target, even if the target has alternate lookup IDs of the same type.

Appeals Merge Task

The **Appeals** merge task associates the source constituent's appeals with the target constituent. You can use the **Exclude duplicate appeals** field to edit the behavior of the merge task.

Exclude Duplicate Appeals

The program allows duplicate appeals for constituents. To prevent duplicate appeals during the merge task, select **Exclude duplicate appeals**.

Note: If you select **Exclude duplicate appeals**, the **Appeals** merge task runs slower because it compares each source appeal to each target appeal.

The Appeals merge task considers appeals records as duplicates if they have the same values for the **Appeal** and **Segment** fields.

If a field is blank on the source and target appeal, the merge task ignores it. If the merge task excludes a source appeal, the merge task does not delete it. Instead, the **Appeals** merge task does not associate it with the target. The excluded appeal remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the appeal along with the source constituent.

Board Membership Merge Task

The **Board membership** merge task associates the source constituent's board member constituencies with the target constituent.

Note: The merge task only handles board member constituencies. Other merge tasks handle user-defined constituencies and other program-defined constituencies such as staff, fundraiser, and volunteer.

Overlapping Board Member Constituencies

The program does not allow constituents to have board member constituencies with date ranges that overlap. If the source and target have board member constituencies with date ranges that overlap, the merge task excludes the source's constituency. If the merge task excludes a source board member constituency, the merge task does not delete it. Instead, the **Board membership** merge task does not associate it with the target. The excluded constituency remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the board member constituency along with the source.

Active Board Member Constituencies

An active board member constituency has no end date. If the source has an active board member constituency that overlaps a target's board member constituency, the merge task does not associate it with the target due to the program's constraint against constituencies that overlap. However, it is important to preserve the fact that the constituent is an active member of the board. To preserve the active status, the merge task makes the target's most recent board member constituency active. In other words, remove the end date. This is because the source's board member constituency, as an active constituency, must overlap the target's most recent board member constituency. Furthermore, the presence of an overlapping active board member constituency for the source indicates the constituent was an active board member prior to the target board member constituency's end date.

Committees Merge Task

The **Committees** merge task associates the source constituent's committees with the target constituent. It also adds group goals that do not exist on the target record.

Overlapping Records

The program does not allow constituents to have committee records with date ranges that overlap. If the source and target both committee records with date ranges overlap, the merge task excludes the source's committee. If the merge task excludes a source committee, it does not delete it. Instead, the **Committees** merge task does not associate it with the target. The excluded record remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the committee record with the source constituent.

Active Records

An active committee record has no end date. If the source has an active committee record that overlaps with a target committee record, the merge task does not associate it with the target due to the program's constraint against committee records that overlap. However, it is important to preserve the fact that the constituent is an active committee member. To preserve the active status, the merge task makes the target's most recent committee record active. In other words, it removes the end date. This is because the source's committee record, as an active record, must overlap the target's most recent committee record. Furthermore, the presence of an overlapping active committee record for the source indicates the constituent was an active committee member prior to the target committee record's end date.

Other Committees Information

The **Committees** merge task associates the source constituent's committees information such as attributes and group goals with the target constituent. If the source and target are members of the same committee, the merge task performs the following actions:

Committee Attributes

If the source or target have committee attributes that the other does not, the **Committees** merge task sets the target's committee attribute. For example, if the following are true before the merge:

- Source can coordinate events
- Target cannot coordinate events
- Source cannot solicit revenue
- Target can solicit revenue

After the merge, the target can coordinate events and solicit revenue.

Group Goals

If the source has a group goals for fundraising that do not have the same name as a goal on the target, the program copies those to the target. If the source has other group goals that do not have the same name as a goal on the target, the program copies those to the target.

Campaign Fundraisers

The program considers campaign fundraisers as duplicates if they have the same name, are associated with the same campaign, and do not have date ranges that overlap. If the source has campaign fundraisers that are not duplicates, the merge task copies them to the target. If the merge task excludes a campaign fundraiser, the merge task does not delete it. Instead, the **Committees** merge task does not copy it to the target. The excluded campaign fundraiser remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the board member constituency along with the source.

Constituencies Merge Task

The **Constituencies** merge task associates the source constituent's user-defined constituencies with the target constituent.

Note: The merge task only handles user-defined constituencies. Other merge tasks handle program-defined constituencies such as staff, fundraiser, and volunteer.

Overlapping Constituencies

The program does not allow constituents to have user-defined constituencies of the same type with date ranges that overlap. If the source and target have user-defined constituencies of the same type with date ranges overlap, the merge task excludes the source's constituency. If the merge task excludes a source user-defined constituency, the merge task does not delete it. Instead, the **Constituencies** merge task does not associate it with the target. The excluded constituency remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the user-defined constituency along with the source.

Active Constituencies

An active constituency has no end date. If the source has an active constituency that overlaps with a target constituency, the merge task does not associate it with the target due to the program's constraint against constituencies that overlap. However, it is important to preserve the fact that the constituency is active. To preserve the constituency's active status, the merge task makes the target's most recent user-defined constituency of the same type active. In other words, it removes the end date. This is because the source's constituency, as an active constituency, must overlap the target's most recent constituency of the same type. Furthermore, the presence of an overlapping active constituency for the source indicates the constituency was active prior to the target constituency's end date.

Constituent Attributes Merge Task

The **Constituent attributes** merge task copies the source constituent's attributes to the target constituent.

One-per-Record Attributes

If the target does not have a one-per-record attribute and the source constituent does have one of that type, the program copies the source's one-per-record attribute to the target.

Duplicate One-per-Record Attributes

The program does not allow constituents to have one-per-record attributes of the same type. If the source and target have attributes of the same type that only support one attribute per record, the merge task excludes the source's attribute. If the merge task excludes a source's attribute, it does not delete it from the source.

Constituent Record Attributes

Constituent record attributes are attributes whose data type is a constituent record. Do not confuse them with constituent attributes, which are attributes that belong to a constituent. If any constituent record attributes reference the source constituent, the **Constituent attributes** merge task edits them to reference the target constituent instead.

Correspondences Merge Task

The **Correspondences** merge task associates the source constituent's correspondences with the target constituent. You can use the **Exclude duplicate correspondences** field to edit the behavior of the merge task.

Exclude Duplicate Correspondences

The program allows duplicate correspondence records for constituents. To prevent duplicate correspondence records during a merge, select, **Exclude duplicate correspondences**.

Note: If you select **Exclude duplicate correspondences**, the **Correspondences** merge task runs slower because it compares each source correspondence to each target correspondence.

The **Correspondences** merge task regards correspondences as duplicates when they have the same values in each of the following fields:

- Correspondence code
- Date sent
- **Comments**

If a field is blank on the source and target, the merge task ignores it. If the merge task excludes a source correspondence, the merge task does not delete it. Instead, the **Correspondences** merge task does not associate it with the target. The excluded correspondence remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the correspondence along with the source.

Demographic Merge Task

The **Demographic** merge task associates the source constituent's demographics with the target constituent. If the target includes demographic information, the task maintains the target values except where blank or null. For blank or null values, the task updates the target with the source values. If the target includes no demographics, the task updates the target with the source values. Here is a list of fields that the **Demographic** merge task updates:

- **Target**
- **Income**
- **Birthplace**
- **Ethnicity**

- Religion

Note: The **Demographic** merge task deviates from the standard logic for merge tasks. Demographics always remain on the source constituent after the merge task.

Documentation Merge Task

The **Documentation** merge task associates the source's constituent documentation with the target constituent. This merge task only handles constituent documentation. Other merge tasks handle other types of documentation. Constituent documentation records include notes, media links, and attachments.

If the source is the author of any constituent documentation, the **Documentation** merge task edits the documentation to list the target as the author.

Donor Challenge Merge Task

The **Donor challenge** merge task associates all of the source constituent's donor challenge records with the target constituent. After the merge, those records are no longer associated with the source.

Email Addresses Merge Task

The **Email addresses** merge task associates the source constituent's email addresses with the target constituent. You can use the **Primary email criteria**, **Exclude duplicate email addresses**, **Include mail preferences**, and **In case of duplicates, keep** fields to edit the behavior of the merge task.

Primary Address Criteria

A constituent can only have one primary email address. In the **Primary email criteria** field, you select whether to preserve the primary indicator on the source or target's primary email address. If you select "Target's Primary Address," the merge task associates the source's primary email address with the target but preserves the primary indicator on the target's primary email address. If you select "Source's Primary Address," the merge task preserves the primary indicator on the source's primary email address.

Warning: If you select "Source's Primary Address" in the **Primary email criteria** field and select **Exclude duplicate email addresses** and the source's primary email address is a duplicate of a target email address, the merge task preserves the target's primary email address. In this case, the target's primary email address keeps its primary indicator.

Exclude Duplicate Email Addresses

The program allows duplicate email addresses for constituents. To prevent duplicate email addresses during a merge task, select **Exclude duplicate email addresses**.

Note: If you select **Exclude duplicate email addresses**, the **Email addresses** merge task runs slower because it compares each source email address to each target email address.

The **Email addresses** merge task regards email addresses as duplicates when they have the same values in the **Type** and **Email address** fields.

If a field is blank on the source and the target email address, the merge task ignores it. If the merge task excludes a source email address, the merge task does not delete it. Instead, the **Email addresses** merge task does not associate it with the target. The excluded email address remains in the program until the you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the email address along with the source.

Note: The merge task also updates sales order email addresses if the merge task deletes duplicates that appear on sales orders.

Include Email Preferences

If you select **Include mail preferences**, you select whether to preserve the source or target's email preferences. In the **In case of duplicates, keep** field, select "Target's Mail Preference," the merge task deletes the source's mail preference if it is a duplicate. When you select "Source's Mail Preference," the merge task deletes the target's mail preference if it is a duplicate. The following are mail preferences for email:

- **Set as primary email address**
- **Do not send email to this address**

Note: The merge task does not handle all email preferences. You must also run the **Personal information** merge task to merge for mail preferences.

Event Information Merge Task

The **Event information** merge task associates the source constituent's events with the target constituent. You can associate several aspects of events with constituents and so the merge task performs several operations.

Event Registrants

The **Event information** merge task associates the source constituent's event registrant records with the target constituent.

Duplicate Event Registrants

The program does not allow constituents to have multiple registrant records for an event. If the source and target are registrants for the same event, the **Event information** merge task merges the values of the fields on the registrant records and associates records that are associated with the source's registrant record with the target registrant record. If the target and the source are registrants for the same event, the merge task performs the following actions:

Will Not Attend. If the **Will not attend** field is set to "No" on the source or target registrant record, the merge task sets the target registrant record's field to "No."

Attended. If the **Attended** field is set to "Yes" on the source or the target registrant record, the target registrant record's field is set to "Yes."

Host. If the target registrant record has no value for its **Host** field, the merge task sets the field to the value in the source registrant record. The program does not allow registrants to be guests of a registrant and hosts for other registrants. So if a target is a host, the merge task saves the value of the source registrant record's **Host** field.

Guests. The merge task adds any guests of the source registrant to the target registrant. However, if the target is a guest and the source is a host, the merge task does not associate the source's guests with the target.

Payments. The merge task associates the source registrant's payment records with the target registrant. Since payment records are tied to revenue, the merge task associates the source registrant's payment records with the target registrant without exception.

Batch Revenue Applications. The merge task associates the source registrant's batch revenue application records with the target registrant.

Registration Options. If the target registrant is not associated with any registration options, the merge task associates the source registrant's registration options with the target registrant. The program does not allow guests to be associated with registration options. If the target is a guest of another registrant, the merge task does not associate the source's registration options with the target registrant.

Registrant Benefits. The merge task associates the source registrant's benefits with the target. However, if the target has benefits, the merge task does not associate the source registrant's benefits with the target.

Registrant Preferences. If the target registrant has no preferences, the merge task associates the source registrant's preferences with the target registrant. However, if the target has preferences, the merge task does not associate the source's preferences with the target.

Registrant Packages. The merge task associates the source registrant's packages with the target registrant.

Event Seating. If the target registrant has no assigned seat, the merge task assigns the source registrant's seat to the target. However, if the target has a seat, the merge task does not associate the source's seats with the target.

Group Membership. If the target registrant is not a member of a group, the merge task associates the source registrant's group membership with the target. However, if the target has a group membership, the merge task doesn't associate the source's membership with the target.

Sales Order Registrants. The merge task associates the source's sales order registrants with the target registrant.

Registrant Attributes. The merge task associates the source registrant's attributes with the target registrant.

Duplicate One-per-Record Attributes. The program does not allow registrants to have one-per-record attributes of the same type. If the source and the target registrant have attributes of the same type that only support one attribute per record, the merge task excludes the source's attribute.

Deletion of Source Registrants. The merge task deletes the source's registrant record after it merges its data with the target's registrant record.

Constituent Record Attributes

Constituent record attributes are attributes whose data type is a constituent record. Do not confuse these with constituent attributes, which are attributes that belong to a constituent. If any registrant constituent record attributes reference the source, the **Event information** merge task edits them to reference the target.

Event Invitees

The **Event information** merge task associates the source constituent's event invitee records with the target constituent.

Duplicate Event Invitees

The program does not allow a constituent to have two invitee records for an event. If the source and target are invitees for the same event, the **Event information** merge task merges the fields on the invitee records and associates records that are associated with the source's invitee record with the target invitee record. If the source and target are invitees for the same event, the merge task performs the following actions:

Declined. If the **Declined** field is set to "Yes" on the source or target invitee record, the merge task sets the target invitee record's **Declined** field to "Yes."

Sent On. The merge task sets the target invitee record's **Sent on** field to the most recent value in the source and target invitees' **Sent on** fields.

Include in Next Send. If the source invitee is flagged to receive the next send of invitations and the target invitee is not, the merge task associates the source invitee's **Include in next send** field with the target invitee. However, if the target is flagged to receive an invitation, the merge task does not associate the source's field with the target.

Deletion of Source Invitees. The merge task deletes the source's invitee record after it merges with the target's invitee record.

Invitee History

The **Event information** merge task associates source constituent's invitee history with the target constituent.

Other Information

Event Coordinator. If the source is the coordinator of an event, the **Event information** merge task edits the event to list the target as the coordinator.

Event Instructor. If the source is an instructor at an event, the **Event information** merge task edits the event to list the target as the instructor.

Event Notes. If the source is the author of an event note, the **Event information** merge task edits the event note to list the target as the author.

Event Tasks. If the source is the owner of an event task, the **Event information** merge task edits the event task to list the target as the owner.

Event Location Contact. If the source is the contact for an event location, the **Event information** merge task edits the event to list the target as the contact.

Event Expense Vendor. If the source is the vendor for an event expense, the **Event information** merge task updates the event expense record to list the target as the vendor.

Financial Accounts Merge Task

The **Financial accounts** merge task associates the source constituent's financial accounts with the target constituent.

Duplicate Accounts

The program does not allow constituents to have duplicate financial accounts. The program regards accounts as duplicates when they have the same values in the **Financial institution** and **Account number** fields.

If the source has a financial account that is a duplicate of a target financial account, the merge task excludes it. If the merge task excludes a source's financial account, the merge task does not delete it. Instead, the **Financial accounts** merge task does not associate it with the target. The excluded financial account remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the financial account record along with the source.

Revenue Payment Records

If the merge task excludes a financial account record, payments tied to the account should not be lost. Therefore, if the merge task excludes a source financial account because it is a duplicate a target financial account, the merge task associates the excluded account's revenue payments with the target. Revenue payment records include following types:

- Check payment
- Direct debit payment
- Scheduled direct debit payment

For example, if the source and target have financial account records for the same account and each record is tied to several payments, the **Financial accounts** merge task preserves the target financial account and associates it with all payments from the source financial account. The merge task also associates any source financial accounts that are not duplicates with the target.

Fundraising Purposes Merge Task

The **Fundraising purposes** merge task associates the source constituent's fundraising purposes with the target constituent. Although constituents are not directly tied to fundraising purposes, they can be administrators, documentation authors, and recipients for fundraising purposes.

Fundraising Purpose Administration

If the source is the administrator of a fundraising purpose, the **Fundraising purposes** merge task edits the fundraising purpose to list the target as the administrator.

Fundraising Purposes Documentation

If the source is the author of a fundraising purpose note, attachment, or media link, the **Fundraising purposes** merge task edits the fundraising purpose note, attachment, or media link to list the target as the author.

Fundraising Purpose Receipt

If the source is the recipient of a fundraising purpose, the **Fundraising purposes** merge task edits the fundraising purpose to list the target as the recipient.

Interactions Merge Task

The **Interactions** merge task associates the source constituent's interactions with the target constituent. You can use the **Exclude duplicate interactions** to edit the behavior of the merge task.

Exclude Duplicate Interactions

The program allows duplicate interactions for constituents. Select **Exclude duplicate interactions** to prevent duplicate interactions during a merge.

Note: If you select **Exclude duplicate interactions**, the **Interactions** merge task runs slower because it compares each source interaction to each target interaction.

The **Interactions** merge task regards interactions as duplicates when they have the same values in each of the following fields:

- **Contact method**
- **Expected date**
- **Actual date**
- **Event** (if it applies to the constituent)

If a field is blank on the source and target interaction, the merge task ignores it. If the merge task excludes a source interactions, the merge task does not delete it. Instead, the **Interactions** merge task does not associate it with the target. The excluded interaction remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the interaction along with the source.

Interaction Owners

If the source is the owner of an interaction, then the **Interactions** merge task edits the interaction to list the target as the owner.

Interaction Documentation

If the source is the author of an interaction documentation, the **Interactions** merge task edits the documentation to list the target as the author. Documentation includes notes, media links, and attachments.

Interaction Participants

If the source is a participant on an interaction, the **Interactions** merge task edits the participant record to list the target as the participant, unless the target is already a participant. If the target is a participant, the merge task does not edit the interaction participant record.

Interests Merge Task

The **Interests** merge task associates the source constituent's interests with the target constituent. You can use the **Exclude duplicate interests** field to edit the behavior of the merge task.

Exclude Duplicate Interests

The program allows duplicate interests for constituents. Select **Exclude duplicate interests** to prevent duplicate interests during the merge task.

Note: If you select **Exclude duplicate interests**, the **Interests** merge task runs slower because it compares each source interest to each target interests records.

The **Interests** merge task considers interests records as duplicates if they have the same values as the **Interest type** field.

If a field is blank on a source and target interest, the merge task ignores it. If the merge task excludes a source interest from the merge, the merge task does not delete it. Instead, the **Interests** merge task does not associate it with the target. The excluded interest remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the interest along with the source.

Lookup IDs Merge Task

The **Lookup IDs** merge task associates the source constituent's lookup ID with the alternate lookup IDs for the target constituent. In the **Alternate lookup ID type** field, select the alternate lookup ID type to merge. If you do not select an alternate lookup ID type, the task throws an error. The task also throws an error if a target has an alternate lookup ID is the same as the source lookup ID.

The **Lookup IDs** merge task does not delete the lookup ID from the source's record. The lookup ID remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the lookup ID along with the source.

Major Giving Merge Task

The **Major giving** merge task associates the source constituent's major giving records with the target constituent. You can associate several aspects of major giving with constituents, so the merge task must perform several operations.

Prospects

The **Major giving** merge task associates the source constituent's prospect record with the target constituent.

Duplicate Prospects

The program does not allow two prospect records for constituents. If the source and target are prospects, the **Major giving** merge task merges the fields on the prospect records and associates the source's prospect constituency records with the target.

Prospect Record Fields. The Major giving merge task merges the following prospect record fields:

- **Prospect manager**
- **Prospect status**
- **Annual gift likelihood**
- **Annuity likelihood**
- **Bequest likelihood**
- **CRT likelihood**
- **Major gift likelihood**
- **Planned gift likelihood**
- **Target ask month**
- **Past giver type**

If a target prospect's field has a non default value, the merge task preserves it and ignores the source's field. Otherwise, the merge task assigns the source prospect's field's value to the target prospect's field.

Deletion of Source Prospects. The merge task deletes the source prospect record after it assigns its data to the target prospect record.

Prospect Constituency Records

The **Major giving** merge task associates the source's prospect constituencies with the target.

Overlapping Prospect Constituencies. The program does not allow constituents to have prospect constituencies with date ranges that overlap. If the source and target have prospect constituencies with date ranges overlap, the merge task excludes the source's prospect constituency.

Active Prospect Constituencies. An active prospect constituency has no end date. If the source has an active prospect constituency that overlaps with a target prospect constituency, the merge task does not associate it with the target due to the program's constraint against constituencies that overlap. However, it is important to preserve the fact that the constituent is an active prospect. To preserve the active status, the merge task makes the target's most recent prospect constituency active. In other words, the task removes the end date. This is because the source's prospect constituency, as an active constituency, must overlap the target's most recent prospect constituency. Furthermore, the presence of an overlapping active prospect constituency for the source indicates the constituent was an active prospect prior to the target prospect constituency's end date.

Deletion of Source Prospect Constituency Records. After the merge task associates the source's prospect constituency records with the target, the merge task deletes any remaining source prospect constituency records.

Prospect Plans

The **Major giving** merge task associates the source's prospect plans with the target.

Duplicate Prospect Plans. The program does not allow prospects to have multiple prospect plans of the same type. If the source and target have prospect plans with the same name and type, the **Major giving** merge task throws an error. Prospect plans are typically too valuable to delete without review, and there is no effective way to preserve the source's prospect plan and delete the source prospect. If you encounter this scenario, you must resolve the conflicting plans and rerun the merge.

Prospect Plan Manager Assignments

The **Major giving** merge task associates the source's prospect plan manager assignments with the target.

Prospect Team Members

The **Major giving** merge task associates the source's team members with the target unless they have the same role, start date, and end date. The task deletes the teams from the source.

Planned Gifts

The **Major giving** merge task associates the source's planned gifts with the target.

Fundraisers

The **Major giving** merge task associates the source constituent's fundraiser records with the target constituent.

Fundraiser Constituencies

The **Major giving** merge task associates the source's fundraiser constituencies with the target.

Overlapping Fundraiser Constituencies. The program does not allow constituents to have fundraiser constituencies with date ranges that overlap. If the source and target have fundraiser constituencies with date ranges overlap, the merge task excludes the source's fundraiser constituency. If the merge task excludes a source fundraiser constituency, the merge task does not delete it. Instead, the **Major giving** merge task does not associate it with the target. The excluded constituency remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the constituency record along with the source.

Active Fundraiser Constituencies. An active Fundraiser constituency has no end date. If the source has an active fundraiser constituency that overlaps a target fundraiser constituency, the merge task does not associate it with the target due to the program's constraint against constituencies that overlap. However, it is important to preserve the fact that the constituent is an active fundraiser. To preserve the active status, the merge task makes the target's most recent fundraiser constituency active. In other words, the merge task removes the end date. This is because the source's fundraiser constituency, as an active constituency, must overlap the target's most recent fundraiser constituency. Furthermore, the presence of an overlapping active fundraiser constituency for the source indicates that the constituent was an active fundraiser prior to the target fundraiser constituency's end date.

Prospect Plan Fundraiser Assignment

If the source is a fundraiser for a prospect plan, the **Major giving** merge task edits the source's prospect to list the target as the fundraiser. Three different types of fundraiser records can associate a constituent with prospect plans: Primary manager, Secondary manager, and Secondary fundraiser.

Prospect Plan Step Owners

The **Major giving** merge task edits the source's prospect plan steps to list the target as the owner.

Other Major Giving Information

The **Major giving** merge task associates the source constituent's major giving information such as documentation and relationships with the target constituent.

Prospect Plan Step Documentation

If the source is the author of prospect plan step documentation, the **Major giving** merge task edits the documentation to list the target as the author. Documentation includes notes, media links, and attachments.

Planned Gift Documentation Authorship

If the source is the author of planned gift documentation, the **Major giving** merge task edits the documentation to list the target as the author. Documentation includes notes, media links, and attachments.

Planned Gift Relationships

The **Major giving** merge task associates the source's planned gift relationships with the target.

Beneficiary Relationship Assignment

The **Major giving** merge task associates the source's beneficiary relationships with the target constituent.

Plan Participants

If the source is a participant on a plan but the target is not, the **Major giving** merge task edits the participant record to list the target constituent as the participant. If the target is a participant on the plan, the merge ignores the source's plan participant record.

Opportunity Designations

If the source is a constituent on an opportunity designation, the **Major giving** merge task associates the opportunity designation with the target unless the target is already a constituent on the opportunity designation.

Memberships Merge Task

The **Memberships** merge task associates the source constituent's memberships with the target constituent. You can use the **Exclude duplicate memberships** field to edit the behavior of the merge task.

Warning: The task cannot merge constituents with memberships in the same program. If you do not select **Exclude duplicate memberships**, the merge task throws an error when constituents have memberships in the same program.

Exclude Duplicate Memberships

The system allows duplicate memberships for constituents. Select **Exclude duplicate memberships** to prevent duplicate memberships during the merge task.

Note: If you select **Exclude duplicate memberships**, the **Memberships** merge task runs slower because it compares each source membership with each target membership.

If a field is blank on the source and target membership, the merge task ignores it. If the merge task excludes a source membership, the merge task does not delete it. Instead, the **Memberships** merge task does not associate it with the target. The excluded membership remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the membership along with the source.

Name Formats Merge Task

The **Name formats** merge task associates the source constituent's name formats with the target constituent. You can use the **In case of duplicates keep** field to edit the behavior of the merge task.

Note: The **Name formats** merge task preserves the target's primary salutation and primary address.

In Case of Duplicates Keep

In the **In case of duplicates keep** field, you select whether to preserve the source or target's name format. The program does not allow constituents to have duplicate name formats. The program regards name formats as duplicates if they have the same values in the **Name format type** field.

If a source name format is a duplicate of a target name format and you select "Source's Name Formats" in the **In case of duplicates keep** field, the **Name formats** merge task removes the target name format and associates the source name format with the target. If you select "Target's Name Formats," the merge task preserves the target name format and excludes the source name format.

If the merge task excludes a source name format, the merge task does not delete it. Instead, the **Name formats** merge task does not associate it with the target. The excluded name format remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the name format along with the source.

Naming Opportunity Recognition Merge Task

The **Naming opportunity recognition** merge associates all of the source constituent's naming opportunity recognitions with the target constituent.

Personal Information Merge Task

The **Personal information** merge task merges fields in the CONSTITUENT table in the database and will probably be included in most merge configurations. The task is named after the Personal tab on the constituent record, where most of the fields appear.

These fields can only have one value, so the merge task uses criteria to decide whether to preserve the source or target value for each field.

Name Fields

In the Names to keep field, you select whether to preserve the source's name field, the target's name field, the most complete of the two. For example, if you select "Source's Name," the merge task preserves the values of all of the source's name fields on the target record.

- **First name**
- **Last name/Org. name**
- Key name **Prefix**
- **Middle name**
- **Title**
- **Suffix**
- **Nickname**
- **Maiden name**

Indicators

Indicators have “Yes” or “No” values. The merge task prefers “Yes” values on the source or target. For example, if the source Is inactive indicator has a value of “Yes” but the target has a value of “No,” the merge task preserves the “Yes” value on the target record.

- Is inactive
- Gives anonymously
- Do not mail
- Do not email
- Do not phone

Other Fields

For these fields, the merge task preserves the target’s value, but if the target has no value in a field, the merge task preserves the source’s value. For example, if the target does not have a value in the **Birth date** field and the source does, the merge task preserves the source’s birth date target record. However, if the source and target have birth dates, the merge task preserves the target’s value.

- **Marital status**
- **Image**
- **Gender**
- **Birth date**
- **Website**
- **Lookup ID**

Omitted Fields

The merge task does not merge the **Social Security Number** field or the **NetCommunity ID** fields.

Other Information

In addition to fields on the target and source constituent records, the **Personal information** merge task merges some other data as well.

Origination Information Source

The **Personal information** merge task is separate from the **Revenue** merge task. Whether the process merges revenue information is outside **Personal information** merge task’s scope. However, if the target has no origination data and the source has no revenue ID, the merge task adds origination data from the source to target.

Documentation Authorship

If the source is the author of documentation for constituent, interaction, job, planned gift, revenue, or volunteer records, the merge task edits the documentation to list the target constituent as the author. Documentation includes notes, media links, and attachments.

Volunteer Sponsorship

If the source is the sponsor for any volunteers, the merge task edits the volunteer records to list the target as the sponsor.

Constituent Record Attributes

If any constituent record attributes reference the source, the **Personal information** merge task edits them to reference the target. Do not confuse them with constituent attributes, which are attributes that belong to a constituent. Constituent record attributes are attributes whose data type is a constituent record.

Constituent Group Memberships

If the source is a member of constituent groups, the merge task associates the group member information with the target, unless the target is already a current member of the same group. If the source is a current member and the target is a former member of the same group, the target becomes a current member. If the source is the primary member of a group, the target becomes the primary member.

Constituent Groups

If the source and target are constituent groups of the same type, the merge task associates the members of the source group with the target group. If the source and target are not groups of the same type, the merge task throws an error. The merge task also throws an error if only one constituent is a group.

Phone Numbers Merge Task

The **Phone numbers** merge task associates the source constituent's phone numbers with the target constituent. You can use the **Primary phone criteria** field to edit the behavior of the merge task.

Duplicate Phone Numbers

The program does not allow a constituents to have duplicate phone numbers. The program regards phone numbers as duplicates when they have the same values for the **Type** and **Number** fields.

If a source phone number is a duplicate of a target phone numbers, the merge task excludes it. If the merge task excludes a source phone numbers, the merge task does not delete it. Instead, the **Phone numbers** merge task does not associate it with the target. The excluded phone number remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the phone number record along with the source.

Primary Phone Criteria

A constituent can only have one primary phone number. In the **Primary phone criteria** field, you select whether to preserve the primary indicator on the source or target's primary phone number. If you select "Target's Primary Phone," the merge task associates the source's primary phone number with the target but preserves the primary indicator on the target's primary phone number. If you select "Source's Primary Phone," the merge task preserves the primary indicator on the source's primary phone number.

Other Items

The merge task also updates sales order phone numbers if the merge task deletes duplicates that appear on sales orders.

Recognition Defaults Merge Task

The **Recognition defaults** merge task associates the source constituent's recognition defaults with the target constituent.

Duplicate Recognition Defaults

The program does not allow constituents to have duplicate recognition defaults. The program regards recognition defaults as duplicates when they have the same values in the following fields:

- **Source constituent:** This is the recognition default's source constituent. It is not the merge task's source constituent.
- **Recipient constituent**

If a source recognition default is a duplicate of a target recognition default, the merge task excludes the source recognition default.

If the recognition default's source constituent is the merge task's source constituent and the recipient constituent is the target constituent or vice-versa, the merge task excludes the recognition default.

If the merge task excludes a source recognition default, the merge task does not delete it. Instead, the **Recognition defaults** merge task does not associate it with the target. The excluded recognition default remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the recognition default along with the source.

Recognition Programs Merge Task

The **Recognition programs** merge task associates the source constituent's recognition programs with the target constituent. You can use the **Exclude duplicate memberships** to edit the behavior of the merge task.

Warning: The task cannot merge constituents with recognition programs at the same level. If you do not select **Exclude duplicate recognition programs**, the merge task throws an error when constituents have recognition programs at the same level.

Exclude Duplicate Recognitions

The program allows duplicate recognitions for constituents. To prevent duplicate recognitions during a merge, select **Exclude duplicate recognitions**.

Note: If you select **Exclude duplicate recognitions**, the **Recognition programs** merge task runs slower because it compares each source recognition to each target recognition.

If a field is blank on the source and target recognition, the merge task ignores it. If the merge task excludes a source recognitions, the merge task does not delete it. Instead, the **Recognition programs** merge task does not associate it with the target. The excluded recognition remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the recognition along with the source.

Relationships Merge Task

The **Relationships** merge task associates the source constituent's relationships with the target constituent. You can use the **Primary business relationship criteria** and **Spouse relationship criteria** fields to edit the behavior of the merge task.

Primary Business Relationship Criteria

A constituent can only have one primary business relationship record. In the **Primary business relationship criteria** field, you select whether to preserve the primary indicator on the source or target's primary business relationship. If you select "Target's Primary Business," the merge task associates the source's primary business relationship with the target but preserves the primary indicator on the target's primary business relationship. If you select "Source's Primary Business," the merge task preserves the primary indicator on the source's primary business relationship.

If the target or source, but not both, have a primary business relationship, the merge task preserves that primary indicator regardless of the selection in the **Primary business relationship criteria** field.

Warning: If you select "Source's Primary Business" from **Primary business relationship criteria** and the source's primary business relationship is a duplicate of a target business relationship, the target's primary business relationship is preserved. In this case, the target's business relationship keeps its primary indicator.

Spouse Relationship Criteria

A constituent can only have one spouse relationship. In the **Spouse relationship criteria** field, you select whether to preserve the source or target's spouse. If you select "Target's Spouse," the merge task preserves the spouse indicator on the target's spouse relationship after the task associates the source's spouse relationship with the target. If you select "Source's Spouse," the merge task preserves the spouse indicator on the source's spouse relationship.

If the source or target, but not both, has a spouse relationship, the merge task preserves that spouse relationship regardless of the selection in the **Spouse relationship criteria** field.

Note: If you select “Source’s Spouse” from **Spouse relationship criteria** field and the source’s spouse relationship is a duplicate of one of the target’s spouse relationships, the target’s spouse relationship is preserved.

Duplicate Relationships

The program does not allow constituents to have duplicate relationships. The program regards relationships as duplicates if they have the same values for the reciprocal relationship fields.

If a source relationship is a duplicate of a target relationship, the merge task excludes the source relationship. If the merge task excludes a source relationship, the merge task does not delete it. Instead, the **Relationships** merge task does not associate it with the target. The excluded relationship remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the relationship along with the source.

Include Mail Preferences

If you select **Include mail preferences**, you select whether to preserve the source or target’s mail preferences. In the **In case of duplicates, keep** field, if you select “Target’s Mail Preference,” the merge task deletes the source’s mail preference if it is a duplicate. When you select “Source’s Mail Preference,” the merge task deletes the target’s mail preference when it is a duplicate. The mail preferences fields include:

- Mail type
- **Send** or **Do not send**
- **Send by**
- **Selected address**
- **Send to seasonal address when valid**
- **Comments**

Note: The merge task does not handle all mail preferences. You must also run the **Personal information** merge task to merge mail preferences.

Revenue Merge Task

The **Revenue** merge task associates the source constituent’s revenue with the target constituent. The merge task includes all of the source’s revenue records.

Recognition Credits

The **Revenue** merge task associates the source’s recognition credits with the target.

Solicitors

If the source is associated with revenue solicitor records, which means the source is a solicitor for a piece of revenue, the merge task associates the source's revenue solicitor records with the target.

Acknowledgement Letters

The **Revenue** merge task associates the source's acknowledgment letters with the target.

Origination Data

If the target has no origination data, the **Revenue** merge task associates the source's origination data with the target. In this case, the program deletes the source's origination data. If the target has origination data, the merge task ignores the source's origination data.

Security Groups Merge Task

The **Security groups** merge task associates the source constituent's security group attributes with the target constituent.

Duplicate Security Group Attributes

The program does not allow constituents to have duplicate security group attributes. The program regards security group attributes as duplicates when they have the same values in the **Group** field. If a source security group attribute is a duplicate of a target security group attribute, the merge task excludes the source security group attribute. If the merge task excludes a source security group attribute, the merge task does not delete it. Instead, the **Security groups** merge task does not associate it with the target. The excluded security group attribute remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the security group attribute along with the source.

Sites Merge Task

The **Sites** merge task associates the source constituent's sites with the target constituent. After the merge, those records are no longer associated with the source. If the site records are already associated with the target, the sites remain associated with both the source and target.

Solicit Codes Merge Task

The **Solicit codes** merge task associates the source constituent's solicit codes with the target constituent. After the merge, those records are no longer associated with the source. The merge task preserves the active status for the most recent target solicit code.

Overlapping Solicit Codes

The program does not allow constituents to have solicit codes with date ranges that overlap. If the source and target have solicit codes with date ranges overlap, the merge task excludes the source's solicit code from the merge. If the merge task excludes that source solicit code, the merge task does not delete it. Instead, the **Solicit codes** merge task does not associate it with the target. The excluded solicit code remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the solicit code record along with the source.

Active Solicit Codes

An active solicit code has no end date. If the source has an active solicit code that overlaps with a target solicit code, the merge task does not associate it with the target due to the program's constraint against solicit codes that overlap. However, it is important to preserve the fact that the solicit code is active. To preserve the active status, the merge task makes the target's most recent solicit code active. In other words, it removes the end date from the solicit code. This is because the source's solicit code, as an active solicit code, must overlap the target's most recent solicit code. Furthermore, the presence of an overlapping solicit code for the source indicates the solicit code record was active prior to the target solicit code record's end date.

Sponsorship Merge Task

The **Sponsorship** merge task associates the source constituent's sponsorships with the target constituent.

Active or Pending Sponsorships

The program does allow constituents to have multiple active or pending sponsorships to the same sponsorship opportunity. If the source constituent and the target constituent have active or pending sponsorships to the same opportunity, the merge task throws an error.

Gifts and Non Gifts

The **Sponsorship** merge task associates the source constituent's gifts and non gifts with the target constituent.

Commitments

The **Sponsorship** merge task associates the source constituent's commitments with the target constituent. The task also renumbers the commitments.

Gift Financial Sponsors

The **Sponsorship** merge task associates the source constituent's gift financial sponsor records with the target constituent. If the this causes the corresponding and gift financial sponsors to be the same constituent, the task clears the gift financial sponsor.

Sponsor Records

The **Sponsorship** merge task copies the source constituent's sponsor records to the target sponsor's sponsor records and deletes the source's sponsor records. The merge task also updates sponsor date ranges.

Documentation

If the source is the author of opportunity documentation, the **Sponsorship** merge task edits the source's opportunity notes, media links, attachments, and affiliated programs to list the target as the author.

Staff Record Merge Task

The **Staff records** merge task associates the source constituent's staff records with the target constituent. After the merge, those records are no longer associated with the source. The merge task preserves the active status for the most recent target's staff record.

Overlapping Staff Records

The program does not allow constituents to have staff records with date ranges that overlap. If the source and target have staff records with date ranges that overlap, the merge task excludes the source's staff record. If the merge task excludes a source staff record, the merge task does not delete it. Instead, the **Staff records** merge task does not associate it with the target. The excluded staff record remains in the program until you delete the source constituent. If you select **Delete source constituent** when you configure the merge process, the merge removes the staff record along with the source.

Active Staff Records

An active staff record has no end date. If the source has an active staff record that overlaps a target staff record, the merge task does not associate it with the target due to the program's constraint against staff records that overlap. However, it is important to preserve the fact that the staff record is active. To preserve the active status, the merge task makes the target's most recent staff record active. In other words, the merge task removes the end date. This is reasonable since the source's staff record, as an active staff record, must overlap the target's most recent staff record. Furthermore, the presence of an overlapping staff record for the source indicates the staff record was active prior to the target staff record's end date.

Stewardship Plans Merge Task

The **Stewardship plans** merge task associates the source constituent's stewardship plans with the target constituent. The merge task updates the stewardship plans to list the target as manager and constituent. If the target does not have a stewardship plan, the task adds one and updates the plan manager.

Surveys Merge Task

The **Surveys** merge task associates all of the source constituent's surveys with the target constituent. After the merge, those records are no longer associated with the source.

Team Fundraising Merge Task

The **Team fundraising** merge task associates the source constituent's team fundraisers with the target constituent.

Duplicate Team Fundraiser Records

The program does not allow constituents to have duplicate team fundraiser records for the same appeal. If the target and source are team fundraisers for the same appeal, the **Team fundraising** merge task merges the fields on the team fundraising records and associates the source team fundraising record with the target team fundraising record. If the source and target are team fundraisers for the same appeal, the merge task performs the following steps:

Goal. The merge task sets the target team fundraiser record's **Goal** field to the greater values between the source and the target **Goal** fields.

Team Membership. The merge task assigns the source team membership records to the target team fundraiser record.

Deletion of Source Team Fundraiser Records. The merge task deletes the source team fundraiser record after it merges the data with the target team fundraiser record.

Team Fundraising Captains

If the source is the captain of a fundraising team, the merge task updates team records to list the target constituent as the team captain.

Duplicate Team Captain Records. The program does not allow constituents to have multiple team captain records for the same team. If the source and target are captains of the same team, the merge task deletes the source's team captain record.

Tributes Merge Task

The **Tributes** merge task associates the source constituent's tributes and acknowledgements with the target constituent. The merge task updates the source's records to list the target as the tributee or acknowledgee. After the merge, those records are no longer associated with the source.

Volunteer Information Merge Task

The **Volunteer information** merge task associates the source constituent's volunteer records with the target constituent.

Duplicate Volunteers

The program does not allow constituents to have multiple volunteer records. If the source and target are volunteers, the **Volunteer information** merge task merges the values of the fields on the volunteer records and associates source volunteer's records with the target volunteer record. If the target and the source are volunteers, the merge tasks performs the following actions:

Sponsor. If the target volunteer has no value in the **Sponsor** field, the merge task sets it to the value in the source's **Sponsor** field.

Emergency Contact Name and Phone. If the target does not have a value in the **Emergency contact name** or **Phone** fields, the merge task sets the target volunteer record's **Emergency contact name** and **Phone** fields to the respective values of the source volunteer record's fields.

Availability Comment. If the target does not have a value for its **Availability comment** field, the merge task sets the target volunteer record's **Availability comment** field to the value of the source volunteer record's **Availability comment** field.

Unavailable From and To. If the target does not have a value in either the **Unavailable from** or **to** fields, the merge task sets the target volunteer record's **Unavailable from** and **to** fields to the respective values of the source volunteer record's **Unavailable from** and **to** fields.

Deletion of the Source Volunteer. After the merge task merges all of the data from the source volunteer record to the target volunteer record, the merge task deletes the source volunteer record.

Volunteer Constituency Records

The **Volunteer information** merge task associates the source constituent's volunteer constituencies with the target constituent.

Overlapping Volunteer Constituencies. The program does not allow constituents to have volunteer constituencies with date ranges that overlap. If the source and target have volunteer constituencies with date ranges that overlap, the merge task excludes the source's volunteer constituency.

Active Volunteer Constituencies. An active volunteer constituency has no end date. If the source has an active volunteer constituency that overlaps a target volunteer constituency, the merge task does not associate it with the target due to the program's constraint against constituencies that overlap. However, it is important to preserve the fact that the constituent is an active volunteer. To preserve the active status, the merge task makes the target's most recent volunteer constituency active. In other words, the merge task removes the constituency's end date. This is because the source's volunteer constituency, as an active constituency, must overlap the target's most recent volunteer constituency. Furthermore, the presence of an overlapping active volunteer constituency for the source indicates the constituent was an active volunteer prior to the target volunteer constituency's end date.

Deletion of Source Volunteer Constituencies. After the merge task associates the source's volunteer constituencies with the target, the merge task deletes any remaining source volunteer constituencies.

Volunteer Administrative Traits

The **Volunteer information** merge task associates the source constituent's volunteer administrative traits with the target volunteer.

Duplicate Administrative Traits. The program does not allow volunteers to have administrative traits of the same type. If the source and target have volunteer administrative traits of the same type, the merge task does not associate the source's administrative trait with the target. However, if the source's administrative trait has a later expiration date, the merge task updates the target's administrative trait with that date.

Volunteer Certification Traits

The **Volunteer information** merge task associates the source constituent's volunteer certification traits with the target constituent.

Duplicate Certification Traits. The program does not allow volunteers to have certification traits of the same type. If the source and target have volunteer certification traits of the same type, the merge task does not associate the source's certification trait with the target. However, if the source's certification trait has a later expiration date, the merge task updates the target's certification trait with that date.

Volunteer Course Traits

The **Volunteer information** merge task associates the source constituent's volunteer course traits with the target constituent.

Duplicate Course Traits. The program does not allow volunteers to have course traits of the same type. If the source and target have volunteer course traits of the same type, the merge task does not associate the source's course trait with the target. However, if the source's course trait has a later expiration date, the merge task update the target's certification trait with that date.

Volunteer Interest Traits

The **Volunteer information** merge task associates the source constituent's volunteer interest traits with the target constituent.

Duplicate Interest Traits. The program does not allow volunteers to have interest traits of the same type. If the source and target have volunteer interest traits of the same type, the merge task does not associate the source's interest trait with the target.

Volunteer License Traits

The **Volunteer information** merge task associates the source constituent's volunteer license traits with the target constituent.

Duplicate License Traits. The program does not allow volunteers to have license traits of the same type. If source and target have volunteer license traits of the same type, the merge task does not associate the source's license trait with the target. However, if the source's course trait has a later expiration date, the merge task updates the target's course trait with that date.

Volunteer Medical Traits

The **Volunteer information** merge task associates the source constituent's volunteer medical traits with the target constituent.

Duplicate Medical Traits. The program does not allow volunteers to have medical traits of the same type. If the source and target have volunteer medical traits of the same type, the merge task does not associate the source's medical trait with the target. However, if the source's medical trait has a later expiration date, the merge task updates the target's medical trait with that date.

Volunteer Special Need Traits

The **Volunteer information** merge task associates the source constituent's special need traits with the target constituent.

Duplicate Special Need Traits. The program does not allow volunteers record to have special need traits of the same type. If the source and target have volunteer special need traits of the same type, the merge task does not associate the source's special need trait with the target.

Volunteer Skill Traits

The **Volunteer information** merge task associates the source constituent's volunteer skill traits with the target constituent.

Duplicate Skill Traits. The program does not allow volunteers to have skill traits of the same type. If the source and target have volunteer skill traits of the same type, the merge task does not associate the source's skill trait with the target. However, if the source's skill trait has a higher level, the merge task updates the target's skill trait with that level.

Volunteer Job Assignments

The **Volunteer information** merge task associates the source volunteer's volunteer job assignments with the target volunteer.

Duplicate Job Assignments. The program does not allow volunteers have the same job assignment twice. If the source and target have volunteer job assignments for the same job, the merge task does not associate the source's job assignment with the target.

Volunteer Screening Plans

The **Volunteer information** merge task associates the source constituent's screening plans with the target constituent.

Duplicate Screening Plans. The program does not allow volunteers to have screening plans of the same type. If source and target have volunteer screening plans of the same type, the merge task does not associate the source's screening plan with the target.

Volunteer Timesheets

The **Volunteer information** merge task associates all of the source constituent's volunteer timesheets with the target constituent.

Volunteer Types

The **Volunteer information** merge task associates the source constituent's volunteer types with the target constituent.

Duplicate Volunteer Types. The program does not allow volunteers to have duplicate volunteer types. If the source and target have duplicate volunteer types, the merge task does not associate the source's volunteer type with the target. The program regards volunteer types as duplicates when they have the same values in the following fields:

- **Volunteer type**
- **Start date**
- **End date**

Volunteer Location Records

The **Volunteer information** merge task associates the source constituent's volunteer locations with the target constituent.

Duplicate Locations. The program does not allow volunteers to have the same location twice. If the source and target have the same volunteer location, the merge task associates the source's location with the target.

Volunteer Documentation

The **Volunteer information** merge task associates the source constituent's volunteer documentation with the target constituent. Documentation includes notes, media links, and attachments.

If the source is the author of any documentation, the merge task edits the records to list the target constituent as the author.

Volunteer Awards

The **Volunteer information** merge task associates the source constituent's volunteer awards with the target constituent. After this, the merge task deletes the source constituent's volunteer award records. This does not delete the source constituent. To delete the source constituent after the merge, select **Delete source constituent** from the merge process.

Duplicate Awards. If the source volunteer has the same award on the same date as the target volunteer, the merge task deletes the source volunteer's duplicate award. Awards without dates are not considered duplicates. For example, if both the source and target volunteer have one of the same award with no date, after the merge, the target will have two of that award with no date. Also, the merge task only compares duplicates between source and constituent. Multiples of the same award on the source only or the target only convey.

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