Table of Contents

Overview ................................................................................................................................................................................................... 2
Purpose..................................................................................................................................................................................................... 3
Installation ................................................................................................................................................................................................ 4
Usage ........................................................................................................................................................................................................ 7
   Items to Note ..................................................................................................................................................................................... 7
   Decisions to Make Before Starting .................................................................................................................................................... 7
   Running the Merge Process.............................................................................................................................................................. 8
   Deleting Child Constituent Records................................................................................................................................................. 16
Frequently Asked Questions ................................................................................................................................................................. 20
Overview

The Mass Merge plug-in allows Raiser’s Edge users to merge duplicate constituent records more efficiently than the out-of-the-box functionality provided by The Raiser’s Edge 7.

The requirements for running this utility are:
- An installed copy of The Raiser's Edge 7.61 or greater
- SQL 2008 or greater
Purpose

The mass merge tool is a way to remove duplicate data from a database. Of course, the duplicated data is not simply removed from the database, since that could harm accountability. With this custom module, the user has control over purging records from the database, which records will be merged from and to, and the assurance that the integrity of all data is protected. If you opt to delete duplicated constituents after the merge, only the duplicated constituents are removed and any related data, such as pledges, gifts, and appeals will be associated with the constituent record you opt to keep.

The purpose of the module is to assist you in examining your database, or a subset of your database as defined by a query, and provide a facility for merging any duplicated constituents. You have the ability to view groups of records that are duplicates of each other and exercise control over which records are kept as the master and which records are marked as the duplicate child. You also have the option of deleting duplicate constituents from your database following a merge of all associated data.

The module is configurable using the criteria grid that will be displayed during the process. Note that identifying duplicates is not an exact science and you may need to adjust the criteria settings before you are satisfied with the results. For example, two of the settings you have available to you for identifying duplicates are the number of characters in the first name and number of characters in the last name. Setting these values too high may not accurately identify duplicates, but setting them too low may result in “false positives,” or records that are not duplicates at all.

Because it uses this standard functionality, any exceptions that you experience when using the Merge Constituents will still occur in this module.

The Raiser’s Edge does have a built-in facility for generating a report of duplicate constituents based on your settings. This report can be accessed from Admin>Duplicate Constituent Management Tool.

There are some subtle differences in how the Admin report and the module report duplicates in your database. If you have constituents in your database with only a last name, the Admin report will only use the last name when identifying other duplicates. For example, if you have a constituent in your database with a last name of “Smith” and no first name, the admin report will always show this constituent as a duplicate with other constituents whose last name is “Smith” even if they have a first name. The module will always use your configuration settings as they are specified. Thus, there are occasions where the report could show more duplicates than actually exist based on the settings.

The comparison engine used to identify duplicates will also perform some intelligent comparisons, even if they may seem to contradict the configuration settings. For example, if your configuration is set to identify duplicates based on 10 characters in the first name and 10 characters in the last name, the utility will identify “Jane Smith” and “Janet Smith” as duplicates of one another. This is because the Duplicate Merge Custom Module uses the fewest number of characters to match duplicates for each field.

Once you have your configuration set to your liking, you can have the utility run automatically, identifying the record to keep as defined by the criteria you provide, or you can navigate through each group of duplicates and select which record to keep as the master and which to mark as the child. If you choose to delete child records after the merge, the duplicated constituent record is all that will be removed from the database. Any related records, such as Pledges, Gifts, Attributes, etc., will all be re-associated with the record you had marked as the master.
Installation

1. Begin the install by double-clicking the Setup application that is bundled with this document.
2. When the Setup application opens, click **Next**.

3. Agree to the license terms and conditions by clicking **I Agree**.
4. Confirm that the provided path for the folder for your Raiser’s Edge 7 Installation is correct.

5. Click **Install** to continue with the installation and click **Finish** when the installation is complete.
Usage

Items to Note

Before running the module, there are a few things to note about the mass merge process:

- Running the merge process could take a significant amount of time, depending on the number of constituents you have and the options you select. Your best bet is to run the merge process when you have time to run through it in its entirety.
- If you opt to use a query when processing duplicates, that query defines the set of constituents you want to check for duplication in your database. It is possible that a constituent who meets the criteria of the query is a duplicate of a constituent who does not. The mass merge utility will only examine records included in the query when determining duplicates.
- Constituents that are marked as inactive in your database are included when searching for duplicates, unless you have created a query that excludes inactive records.
- If you have the event module installed in your Raiser's Edge installation, how event registration is handled for duplicated constituents is dependent on your configuration for that module. For example, if your event module is configured to “allow multiple constituent registrations” and you merge two records that both have registrations for a single event, the constituent that remains following the merge will have two registrations for that event. Otherwise, the Mass Merge Tool will not create a duplicate registration.
- If you have any uncommitted batches, it is recommended that you commit them before beginning the merge process. Any batch gifts tied to a child record that will be merged into a master record will lose their link to a constituent following the merge and the deletion of the child records.

Decisions to Make Before Starting

Before you start processing the duplicates in your database, you will need to make a few decisions:

- Constituents to check: If you want to check and merge duplicates for your entire constituent base, there is no pre-requisite step to starting the process. However, if you want to check a specific subset of constituents in your database, you will need to define a query that returns the subset of constituents you want to check. Refer to your Raiser’s Edge help files for information on creating queries in The Raiser’s Edge.
- Do you have enough time to process the merge? You can run through the first few steps of this mass merge tool to see how many duplicates your criteria settings will return before actually merging any records.
- Do I want the utility to run and automatically determine which records to keep and which to remove? Remember that you have the option of starting the process and walking away while it runs. The downside to this is that you rely on the settings you provide to determine which record to keep. While you may want to keep the record that has the latest donation, that record may not have the most complete demographic information. The other option you have is to run the process and manually navigate through the groups of records to determine which one to keep and which to purge.
Note: Identifying duplicates is not an exact science. Allowing the utility to automatically identify duplicates could result in the merging or removal of constituents that were, in fact, not duplicates.

Running the Merge Process

Once you know you are ready to run the merge process, the first thing you should do is have everyone log out of The Raiser’s Edge and back up your database (refer to your Raiser’s Edge documentation for information on backing up your database). In addition, you should take some time to verify the backup and run through an actual restoration of the backup.

Now that you have a known valid backup, let’s get started:

1. Sign in to The Raiser’s Edge and navigate your way to Plug-Ins.
2. From the list of plug-ins, select the Mass Merge Utility. The welcome screen is displayed.

Note: From the welcome screen, you may follow the link to view your merge history. From that screen, you will be able to view a history of all records merged through the mass merge utility. You can also filter those results for specific time periods, using the filter dropdown.

3. Click Next Step.
4. If you would like to search your entire database for duplicate constituents, select the “Search my entire database” from the drop down

5. If you decided to use a query to identify the constituents you wish to check for duplication, select the “Limit the search to a specific Constituent query” option. Use the binoculars to select the appropriate constituent query.

Note: You must select a constituent type query for use with the mass merge. You should not choose a different type of query, such as a membership query or a gift query.
Select Constituent Query: Last Name Begins with “W”

Note: If you select a query and then decide not to base your merge on a query, you can simply click the binoculars again, then click the Cancel button to remove the selected query.

6. You may also use a CSV file containing the duplicate pairs you wish to merge by selecting the “Import a CSV file for merging” option. For file format requirements for this option, click on the “Click here for information on file format” link next to the Read CSV file radio button. Once you have a file ready for use, select the Choose File button and browse out to your formatted CSV file.

7. If you would like to include inactive records in your search for duplicates, check the “Include Inactive Records” checkbox.

8. If you wish to change the criteria, make the appropriate modifications to the grid. Individual criteria appears in the grid by default. To make changes to organization criteria, click the organization’s radio button. If you have made changes to the criteria but wish to return it to the default criteria, click the Reset to Default button. Choose which criteria you would like to reset to the default. Click Reset Criteria. If you have clicked the Reset to Default button but have decided not to reset any criteria, simply press the Cancel button.

9. Click Next Step.

10. Select the option for determining which record to keep. The module will automatically select one constituent from each group of duplicated constituents as the record to keep. This selection is made based on the criteria provided in the “Master Record Criteria” option:
As you can see, you have a few options to select from. The utility will apply the following criteria based on the option you select:

- **Record With Oldest Gift:** The constituent in the database that has the earliest donation will be selected as the master record.
- **Record With Newest Gift:** The constituent in the database that has the latest donation will be selected as the master record.
- **Oldest Record:** Regardless of when donations were made, the constituent that was added to the database first will be selected as the master record.
- **Newest Record:** Regardless of when donations were made, the constituent that was added to the database last will be selected as the master record.
- **Most Recently Modified:** The constituent in the database that has the most recent modification date will be selected as the master record.
- **Record with greatest number of Gifts:** The constituent with the highest number of gifts will be selected as the master record regardless of the date of the gifts or the date the constituent was added.
- **Record with active Membership:** The constituent with a membership (active or inactive) will be selected as the master record.

*Note: When selecting this option, you need to consider if you will be reviewing the selections made by the utility or if you will let it merge immediately. Remember that within a group of identified duplicates you may get records that are not duplicates at all. Your selection in this option will determine which record will remain, and inherit all of the related information from all deleted records. You also need to keep in mind whether you will be reviewing the utilities selections or not.*

11. If you have a group of records that should always be considered a master record if it is part of a duplicate group, you may select a query of those records in the options section. Simply click the **Apply A Master Record Query** button and browse out to the query containing the master records.

12. Choose if you would like to view individual duplicates or organization duplicates by selecting the appropriate radio button.

13. The datagrid at the bottom of the page fills with the duplicate constituent data based on your criteria in the previous screen and provides the ability to navigate through the groups of duplicated records.
14. Within each group of duplicates, you have the ability to:
   - Select which record you want to maintain as the master by checking the **Make Master** button.
   - Specify that a given record is not a duplicate and it should be excluded from the processing by selecting the **Exclude Record** button.

15. Using the data grid, you can:
   - Jump to a specific group of duplicates:
     
     Viewing Group 1 of 12 Total Individual Duplicate Groups
     
     Jump To Group #:  

   - Navigate through the groups of duplicates using the navigation buttons:
     - Previous Group
     - Next Group
     - Exclude Group
     - Export Full Report To CSV
     - Change Displayed Fields

   Please note that if you select more than 10 fields here, some of the fields may not be seen in the grid, due to the grid size. To remedy this, return to the Change Displayed fields screen and remove some of your selected fields.
• Browse to a constituent record by clicking the constituent name in the data grid.

Note: If you choose to exclude a group of records, you will be notified of your changes. You can undo this change by clicking the new Include Group button. If you navigate away from the record you have chosen to exclude but now wish to include it, you can go back to that record using the navigation buttons and choose to include it.

16. Once you have completed your review of the records, click Next Step.
17. From this screen you may opt to delete duplicate constituent codes or duplicate attributes from final merged records. Check or uncheck the boxes according to your preferences.

18. There is also an option to promote the Requests No Email flag to the master. To see what would happen during various scenarios, click on the question mark next to that option.
19. Here you may also choose to mark the child record as inactive or active. Marking the children as inactive is the default setting. If you wish to leave your child records active, you would simply uncheck that box.
20. From this screen you may also opt to exclude certain objects from the merge. For example, if you do not wish to merge Constituent Notepads from the child record onto the master Record, you can manage that setting from this screen. To do so, click the Configure Merged Objects button. On the window that pops up, uncheck any objects that you do not wish to be copied from the child record to the master record. When you have finished with this, click OK to return to the merge screen.
21. If you are prepared to begin your merge, click **Start Merge**.

*Note: You will see a count of duplicate pairs to merge at the top of the report. The higher the number, the longer the merge process will take to complete.*

22. You will see a progress dialogue appear showing the status of the merge process.

23. When processing is complete, the progress meter will disappear and you will see a merge complete pop-up.
24. Click **OK**. You will be returned to the mass merge screen, where a summary of the merge will now appear.

25. If you wish to save a detailed report of records merged during the process and criteria used, click the **Save Detailed Report** button.
26. When prompted, choose a location to save the document and click **Save**. Once the document has been saved, you will be returned to the mass merge screen.
27. If you wish to view a history of merges completed using the mass merge utility, click the View Merge History button.

28. If you wish to begin a new merge, select the Start a New Merge button. If you are done merging duplicates, simply navigate away from the mass merge screen.

Deleting Child Constituent Records

As stated in the beginning of this document, the mass merge will not delete any constituent records. Instead, records identified as children (i.e. not the master record), will be marked as inactive, and will be loaded into a static query. The static query naming convention will be Mass Merge Duplicates <Date><Time>. These child constituents will also receive a constituent attribute with a category of BBCS MassMerge Master Record. If you wish to delete these child records after the merge is complete, you can do so by completing a Global Constituent Delete. You may access global delete from the final merge summary screen, or you may later navigate to it through the standard process in The Raiser's Edge.

1. Sign in to The Raiser’s Edge and navigate your way to Admin.
2. Select Globally Delete Records.
3. Select Constituents from the Record type dropdown.
4. Click the **Include** button and choose **Selected constituents**.
5. When the query screen appears type Mass* in the query name field and click **Find Now**.
6. Select the mass merge query containing the records you wish to delete.
7. Set the remaining criteria as indicated below:

8. Click **Next**.
9. Click on one of the rows in the left hand pane.

10. Click the double arrows to move all criteria to the right hand pane.
11. Click **Delete Now**. You will be prompted to confirm your deletion. Click **OK**.

12. Click **Save** on the pop-up query screen to save a query of exceptions.
13. A progress bar will appear indicating the progress of the delete. Once the records are deleted, a control report will appear, indicating the records deleted. Export the report as necessary. When complete, close the report and continue using The Raiser's Edge.
Frequently Asked Questions

How long will it take to merge the records in my database?

This is a difficult question to answer as it depends on a number of factors. For example, if you have a Raiser’s Edge database with a large number of constituents and opt to run the de-duping for all of the constituents, it could take a significant amount of time. However, if you have a smaller number of constituents or opt to run the process for groups of constituents at a time, such as breaking down your list by last names beginning with a range of characters, you can reduce the amount of time it takes to process a mass merge run.\(^1\)

What if I need to cancel the merge once I have started running it?

If you have started merging records and for some reason need to stop the process, you can do so by hitting the **Stop Merge** button on the processing window. Stopping the merge will not rollback any already merged records. Records that the merge has processed before you chose to stop will remain merged. You should continue with the Deleting Child Records process for those merged records after stopping the merge.

Who can I contact if I have future questions about the Mass Merge Plug-In Utility?

Should you have questions about using the Mass Merge Plug-in after your initial training, please send an email to GMPSTechConsulting@blackbaud.com.

---

\(^1\) Breaking down your constituent base into groups of constituents will reduce the amount of time to process that individual group of constituents, but not necessarily the entire process of de-duping your data.