

Parish Duplicate Checker

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Agenda

- ✓ **What is Duplicate Checker?**
- ✓ **Merge Process Overview**
- ✓ **Demonstration of Merge Process**
- ✓ **Questions**



What is Duplicate Checker?

- A utility that helps consolidate duplicate families and members into a single record
- Initial database clean up
- Periodic maintenance "Spring and Fall Cleaning"



Merge Process



- Backup your database!
 - During merge process records are deleted
- Master Record vs. Duplicate Record
 - Data in master always wins
 - If field in master is empty, data from duplicate fills in field



Find vs. Known Duplicates

- Parish duplicate checker allows the user two different ways to identify and resolve duplicate records
 - Find duplicate records within the parish database
 - Resolve known duplicate records



Synchronizing Parishes

- Watch for administrative messages
- Two types
 - Registered/Unregistered
 - Registered/Registered



Registered/Unregistered

- Two family records
 - One record shows registered at “St Mary”
 - One record shows unregistered at “St Joseph”

Whose responsibility is it
to “clean up”?



Cleaning Up Registered/Unregistered

- “St Joseph” must import the Registered Record (as unregistered) into their database.
- Now both of the family records are in the database. Both marked as unregistered.
- Designate the newly imported record as Master and run the duplicate checker to resolve



Registered/Registered

- Two family records exist
 - One record at “St Mary” shows registered
 - One record at “St Joseph” shows registered

One parish must change the
registration status to
unregistered



Cleaning Up Registered/Registered

- The parish that owns the Unregistered family (St Joseph) must import the Registered record (St Mary) into their database.
- Designate the Registered record (from St Mary) as Master and run the duplicate checker to resolve.



Restrictions When Merging

- All records to and from the server for this parish must be synchronized before using the merging utility.
- If a family has any outstanding Electronic Giving/ACH transaction the program will prevent the merge until transactions have been processed/cleared.
- If two families have the same diuniqueid (including zero or null), the application will notify you and prevent the merge.



Running Duplicate Checker

- Let's login and start working with Duplicate Checker
- Exclusive_Admin
 - This means no one else can be in the database
 - Password-will be provided by the Archdiocese when they are ready for merging to begin.
- Utilities, Duplicate Checker



Resources

Parish Duplicate Checker user guide:

http://www.parishsoft.com/support/guides_parish.asp

Video demonstration available from:

www.parishsoft.com/support/howtovideos.asp

Parishsoft support

support@parishsoft.com

866-930-4774 ext 2



Questions

