

Merge Duplicate Family Records

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Occasionally you may find a duplicated family record in your database. Jackrabbit attempts to prevent possible duplications with a detection utility, however, there may be instances where a duplicate family is produced. These duplicate records can be combined using *Merge Families* under the *Families* menu.



A User must have the Merge Families/Accounts permission in the Families category to see this option.

A user with the Merge Families/Accounts permission can merge duplicate family records.



Caution should be used when merging families; there may be a fee involved to have the families restored.

Merge Families moves information from one family record to another family record. Not all information is moved so the designation of which family record to move information **FROM** and the family record to move the information **TO** is very important.

This information in the FROM family will be merged into the TO family:

- Students and Contacts - *Note: if the same student/contact exists in both families (same first and last name) the **TO** Student/Contact record is kept and is*

not updated*. Any information in the **FROM** Student/Contact record that is not in the **TO** family Student/Contact record must be manually added to the **TO** family Student/Contact record before the merge is done. Example: If the **FROM** Contact record has a Portal User ID and the **TO** Contact record does not it must be manually added into the **TO** family Contact record before the merge or it will be lost.

* with the exception of enrollment

- Class Enrollment - Current, Past, Future and Waitlist
- Event Enrollment
- Transaction History
- Web Registrations

This information in the FROM family will NOT be merged into the TO family (these fields in the TO family are NOT updated):



The **FROM family will be deleted after their information is merged into the **TO** family. All information that does not merge should be manually copied into the **TO** family prior to doing the merge.**

- Summary tab: Registration date, Home Phone, Address, Neighborhood, Problem Account status
 - Billing Info tab: Credit card/Bank account information, Membership Type, ePayment Schedule, Family Discount, Fixed Fees, Billing Instructions
 - Misc tab: Email history, Family User-defined fields, Contract dates, Booster, Referral, Emergency Contact, Enrollment Form, Notes, Source, Prospect, Portal messages
-

Family: Harris

Return Save Changes Delete

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Lead File Family Name Email Merge Family

Summary Contacts Enrollment Transactions Billing Info Misc

Primary Contacts

Contacts	Type	Home Phone	Work Phone	Cell Phone	Email	Bill	Login	Portal UserID	Last Login
Darlene Harris	Mother	(704) 555-2024		(704) 555-6194	darleneh@email.com	Yes	Yes		

Students

First Name	Last Name	Enroll	Active	Gender	Birth Date	Age	Grade	Fixed Fee	Enrolled Classes	F. Enroll	Wait
Barb	Harris		Y	Female	11/17/2000	15 yrs			Intermediate Tumbling for Teens - Wed - 7:45pm(Stephanie J)(76)	1	Y

Location: HELP

Registration Date: 12/21/2016 Status: Active (auto-updated based on enrolled students) Account#: []

Home Phone: (704) 555-2024

Address 1: 5875 20th Avenue Addr 2: []

City: Rabbitfoote State: NC Zip: 28078

Neighborhood: Southside Family ID: [] (for Imported Data)

Problem Account: Yes (See Notes, Misc. tab=red)

Balance Date: 1/4/2016 (Valid when Balance > 0)

Balance: 197.00

Family: Harris

Return Save Changes Delete

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Lead File Family Name Email Merge Family

Summary Contacts Enrollment Transactions Billing Info Misc

Billing Delivery: Email Membership Type: Monthly

ePayment Method: Credit Card ePayment Schedule: Auto Pay (credit card)

Credit Cards

Primary Card	Nickname	Name on Card	Card Number	Card Type	Expiration Date	Card Billing Address	Email Address	Vault ID	Last Updated By	Edit	Delete
●	Visa 8886	David E. Harris	4*****8886	Visa	12/2020	28078	dharris@email.com	1174636357	HELPCENTER		

Bank Name: [] Bank Routing #: [] (9 digits)

Bank Account #: [] Edit Bank Account Info Account Type: [] Account Name: [] (Name on the Account)

Billing Contact Address: [] (taken from Billing Contact)

Name: Darlene Harris

Address 1: 5875 20th Avenue

Address 2: []

City: Rabbitfoote State: NC 28078: 28078

Family Discount: 5.00 (deducted each period) Note: Military Discount

Discount Type: Percent (discount is in addition to multi-class and multi-student discounts, does not apply if there are Family Fixed Fees)

Family Fixed Fee: [] (overrides tuition fees and discounts) Note: []

Fixed Fee Category 1: [] (assoc. this fee revenue with Category 1)

Billing Instructions: []

More...

Family: Harris

Return Save Changes Delete

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Lead File Family Name Email Merge Family

Summary Contacts Enrollment Transactions Billing Info Misc

View Registrations View Sent Emails

Contract Start Date: [] Contract End Date: []

Booster: No Referral: Yes

Emergency Contact Form Completed: Yes Enrollment Form Received: No

Requires follow up for payments/amounts due

Notes: []

Source: Friend (How they heard about us) Referral Name: Sarah Abernathy

Prospect: No (Not automatically Updated)

Customer Portal Login Message: []

Portal Message Expiration Date: []

Last Policy Agreement Date: []

Will travel to compete Y/N: Yes

Field2: []

Field3: []

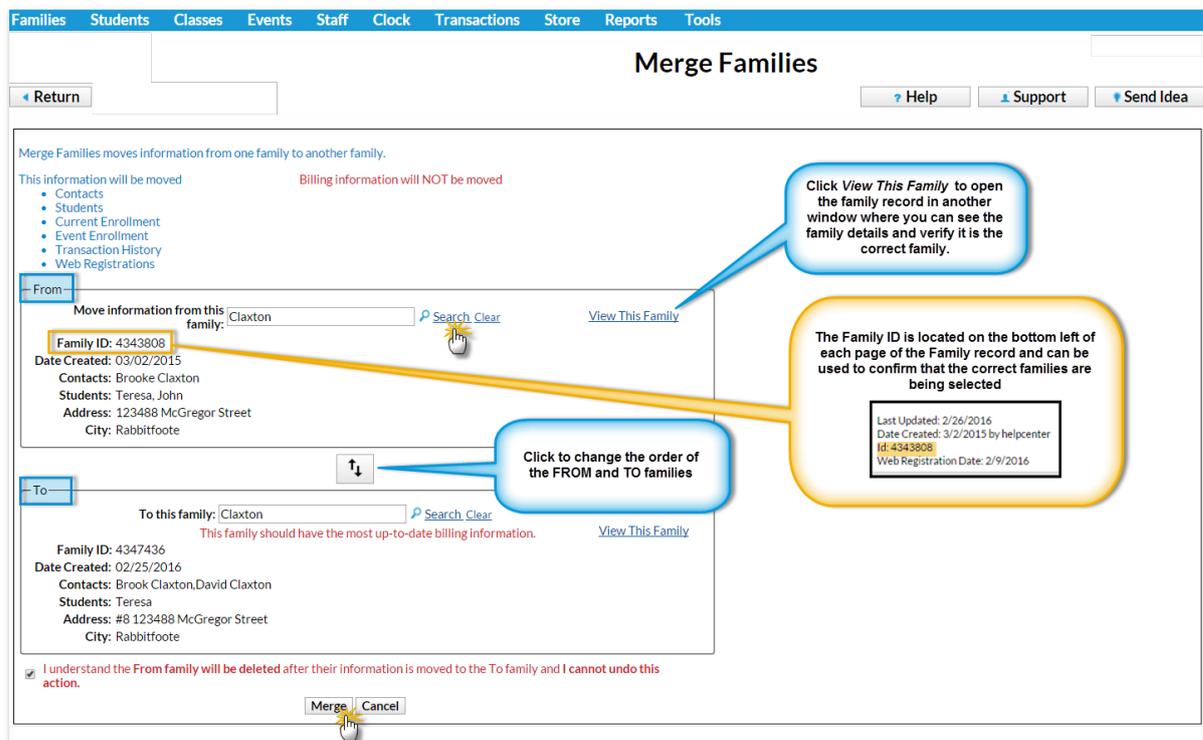
Field4: []

Field5: []

} Family User-defined fields

Follow these steps to merge 2 family records

1. Point to **Families** in the menu bar and click **Merge Families** or click the **Merge Families** button from within a family record.
2. Click the **Search** link in the *From* section to open the Family/Account Search pop-up. If the *Merge Families* button was used to start the merge, that family will be populated into the *From* section.
3. Enter the first few letters of the **Family/Account Name** and click **Search**
4. Click to select the family record that you want to move the information **FROM**.
5. In the *To* section click the **Search** link and select the family record that you want to move the information **TO**.



6. Confirm your selections and check the box to indicate that you

understand that the FROM family will be deleted after the merge.

7. Click **Merge**.

8. Click **Ok** in the warning pop-up window to complete the merge or click **Ok & View Merged Family** to be taken to the newly merged family record.
