# TOOLS TO GET YOUR DATA TIDY

Managing Duplicates

# DUPLICATES HAPPEN

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#1 Reason - Bad data entry - either via Platform, Check-in, portal, etc
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#2 Reason - Bad data - old phone stored in system, so new phone doesn't match

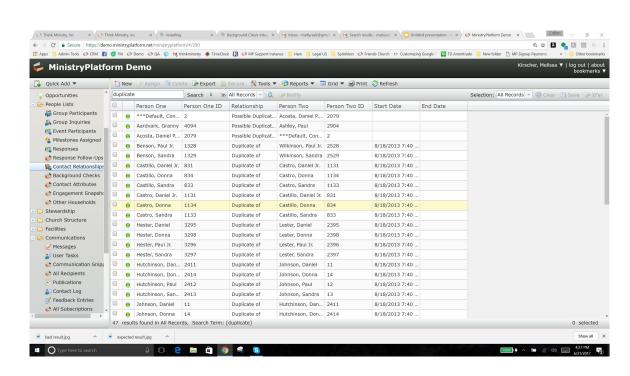
#3 Reason - Migration left-overs (aka: bad data entry in old system)

### VIEWING ALL THE DUPLICATES

People Lists folder - Contact Relationships

Use one of the duplicate views

From here you can determine exactly how many duplicates you have



### UNDERSTANDING THE DUPLICATE FINDER ROUTINE

#### Requires ALL FIVE of the following:

- First 4 characters or last 4 characters of Last Name must match
- First Name or Nickname must match
- Genders cannot be different
- DOB cannot be different
- Household ID cannot be the same.
  - This routine does not look for duplicates within the same Household as it is common for family members to have the same last name, email and/or first name.

PLUS it Requires ONE of the following:

- same Email Address,
- same Mobile Phone,
- same Home Phone,
- Home Phone of record # 1 matches Mobile
   Phone of record # 2,
- Home Phone of record # 2 matches Mobile Phone of record # 1,
- same Address Line 1 AND City, or
- same Donor ID AND Routing# AND Account#

# WORKING WITH THE COMBINE CONTACTS TOOL:

### Launching:

- To work through all duplicates
   ensure there is no active
   selection
- To work through specific duplicates - launch from the appropriate selection.

### Which record are you merging?

 Select and unselect the various records until you have selected the appropriate records to "keep" and "merge"

### To Merge or not to Merge: Do the research

- Look at Contact and participant audit logs
- Look at Activity Logs
- Look at Family and "Other relationships"

### Not Duplicates???

 Add a "relationship" either of a family member or "similar records"

# COMBINE CONTACTS - UNDERSTANDING WHAT I AM KEEPING

Combine Contacts Tool - Google Chrome § Secure | https://demo.ministryplatform.net/mpcoretools/ContactMerge.aspx?dg=11004462-840a-41d4-a26c-0bfdedaa52ea&ug=8f9d8409-24c4-4ca6-89€ € Combine Contacts Tool Hester, Donna (3298) 2 Records ✓ Lester, Donna ✓ Hester, Donna Will be kept Will be Merged Contact to Keep: Contact #2398 Contact #3298 Prefix: Donna First Name: Donna Nickname: Donna Donna Middle Name: Last Name: Lester Hester Suffix: Date of Birth: 04-22-1991 04-22-1991 (Age): (26)(26)Contact Status: Inactive Inactive Fmail: Mobile Phone: 555-836-6836 • 555-736-7736 Gender: Female Female Household Position: Marital Status: Single Single Household ID: #619 #840 Household Name: Lester (4) Hester (4) Home Phone: Address: 840 Lester Way 619 Hester Way Add Relationship Merge Close

# COMBINE CONTACTS - ADD RELATIONSHIP

Secure https://demo.ministryplatfor	m.net/mpcoretools/ContactMerge.aspx?d	dg=11004462-840a-41d4-a26c-0bfdedaa5	!ea&ug=8f9d8409-24c4-4ca6-8	90
Combine Contacts	Tool			
Hester, Donna (3298) 2 Records	•			
	✓ Lester, Donna Will be kept			
Contact to Keep:	Contact #2398	Contact #3298		^
Prefix:				ı
First Name:	<ul><li>Donna</li></ul>	Opnna		ı
Nickname:	<ul><li>Donna</li></ul>	ODonna		ı
Middle Name:				ı
Last Name:	Lester	Hester		ı
Suffix:				ı
Date of Birth:	• 04-22-1991	04-22-1991		ı
(Age):	(26)	(26)		ı
Contact Status:	Inactive	○ Inactive		ı
Email:	odonna2392@thinkministry	y. Odonna3292@thinkministry.		
Mobile Phone:	O 555-836-6836	• 555-736-7736		
Gender:	Female	○ Female		
Household Position:				
Marital Status:	Single	Single		
Household ID:	#840	#619		
Household Name:	• Lester (4)	Hester (4)		
Home Phone:				
Address:	840 Lester Way	619 Hester Way		J

# COMBINE CONTACTS - ADD RELATIONSHIP



# COMBINE CONTACTS TIPS AND TRICKS

### Use your views:

- Fix 2 Donor records (Contacts)
- Fix 2 User Records (Contacts)
- Fix 2 Participant Records (Contacts)
- Fix Same Email no relationship (Contacts)
- Review Same Name (Contacts)

BONUS: Set up view notifications for these views to remind you to go in and fix them.

### Multiple Duplicates?

Did you somehow create ten
Johnny Appleseeds? Select all
ten and launch the tool, select
all of the records you want to
combine and combine them all at
once.

# COMBINE CONTACTS TIPS AND TRICKS

#### Find and Transfer

As you are reviewing data for other things, create a "combine contacts" selection and continue to transfer suspect records into the selection later you can launch the combine contacts tool from the selection and select the records you want to combine (one pair at a time) and combine them. Then continue until no duplicates are left in the tool window.

#### Use Caution!

 Using the combine contacts tool is the equivalent of deleting the duplicate record(s). So be careful.

# REMEMBER THE HOUSEHOLDS

### Duplicate Households

Compare and Combine Selected
 Households Report - use to
 combine households (Helpful
 when there are multiple members
 and/or there are Household Care
 records.

# FINAL THOUGHTS:

# QUESTIONS?

- Set a calendar entry for weekly
   MP duplicate cleaning
- Watch the audit log for "repeat offenders" and provide more training/guidelines (or less rights)
- Teach your users how to use the "My User Account" snippet to invite their ministry participants to update their user account (rather than try to create a new one).