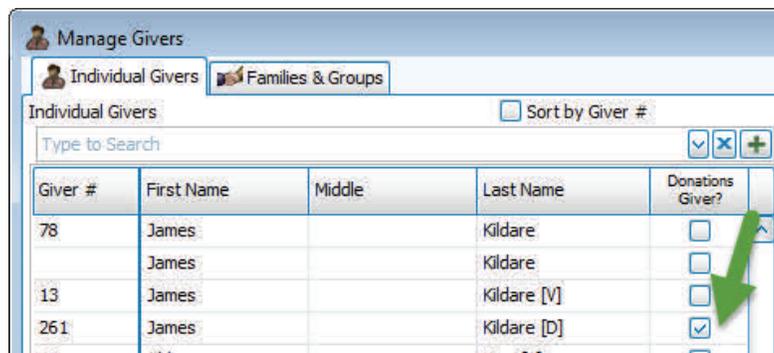**churchwindows**
MANAGEMENT SOFTWARE

If a person appears in the Donation module more than once, there are duplicate individuals that could have giving on each record. It is important to figure out which record is the GOOD record. Typically, the Membership record with the most information is the GOOD record. In our example, James Kildare with Giver #78 is the GOOD record that we wish to keep. Below are the steps to consolidate to one Giver.

Reminder: People entered as Donation's Givers only appear in Donations, but people entered through Membership; appear in BOTH Membership and Donations.

To begin, go to *Donations>Manage Givers* and identify duplicates. James Kildare is entered multiple times. There are two records with a *Members category,* one with a *Visitors category* and one from *Donations.* Visitors records have a (V) and Donations records have a (D) after the last name. Donations Givers also have a check mark in the *Donations Giver?* column.
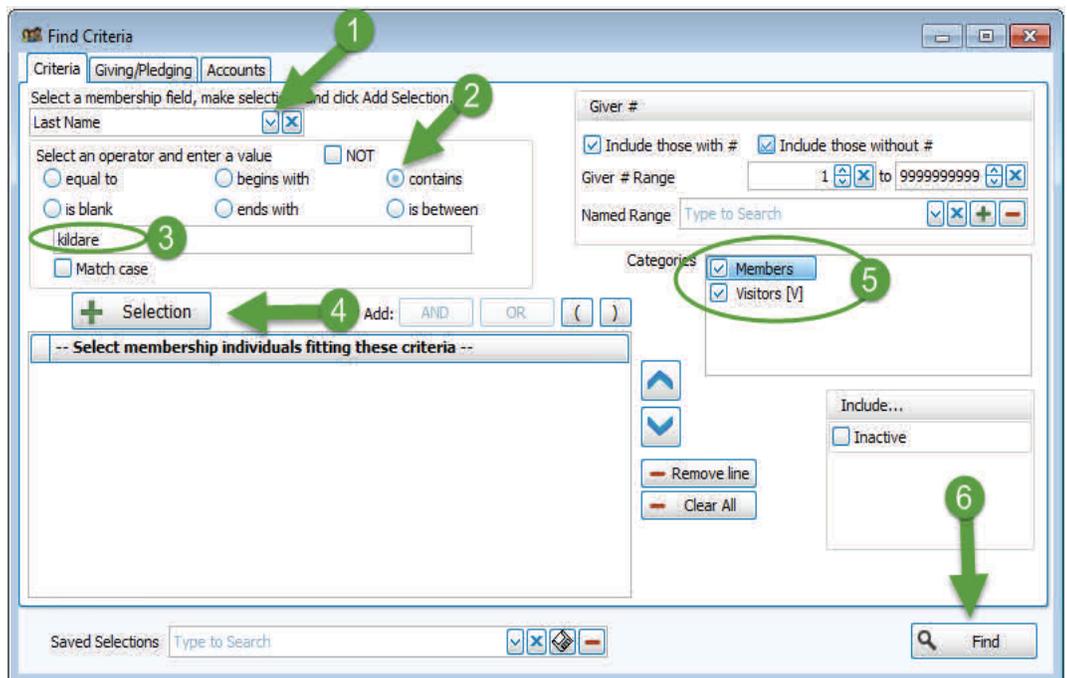

To find the records in Membership
Go to *Membership>Find*
1. Under *Select a membership field…* choose *Last* Name
2. Click *contains*
3. Enter the last name *Kildare*
4. Click + *Selection*
5. Categories - *Include All*
6. Click *Find*

*All records that meet the Find criteria will appear on the Grid.*
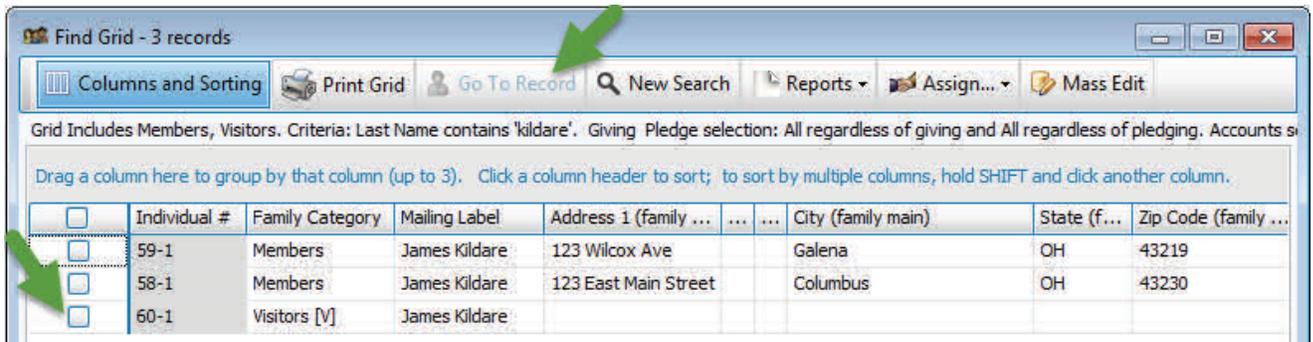
Review the record(s). Determine the GOOD record. Check the *Select box* and click *Go to record* to view the individual's information.

- Inactivate the duplicate record(s) by checking the *Inactive box* on the Individual's record. Add the Inactive reason of *Duplicate*. If Duplicate does not exist, you may create the new code by clicking the *pencil icon..* Also, add an *inactive date.*
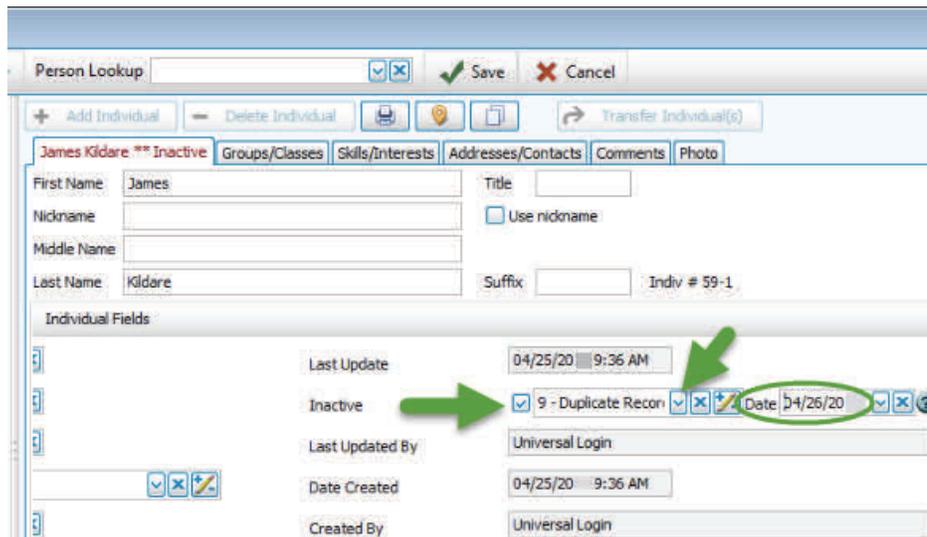
If there are duplicates in Donations to be removed, go to *Donations>Manage Givers*. Find that Donations Giver, highlight it, and put a check mark in the *Inactive* box.
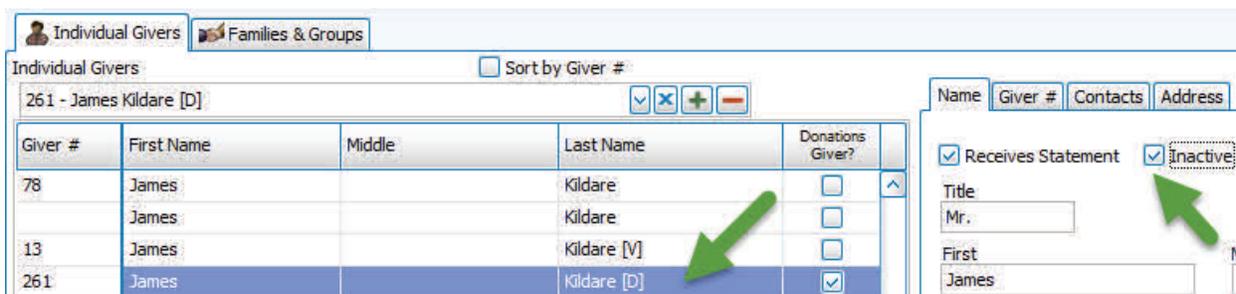
Transfer the giving.
- Click *Donations>Givers>Transfer Donations.*
- In the *From Giver* box, find the first duplicate record to transfer the giving.
  - ***Please Note:*** If you cannot find the record in the From Giver list, there is no giving to transfer.
- In the *To Giver* box, find the name of the GOOD record.
- Clic*k Transfer Selecte*d. The system will reverse the donations and re-post them to the correct Individual's record. You will be asked to verify the transfer. Click th*e Yes* button.
- Repeat for all duplicates.

Note: Adjust Date range to include all giving. The date range can cross more than one year.

Inactive individuals will appear in red in search boxes.
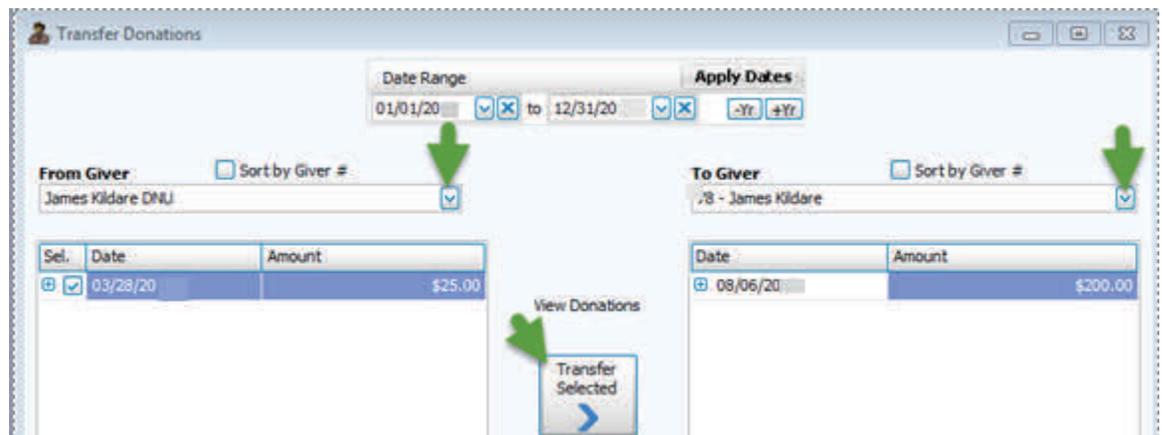
Giver #s may need to be removed from the inactive records. In our example, James Kildare with Giver # 78 is the record we wish to keep. So, Giver #s 13 and 261 need to be deleted.
- Go to *Donations>Givers>Manage #'s*
- Find and click *to highlight* the duplicate Giver # to be removed
- Click the *minus (-)* at the end of the row
- Choose the *Delete Giver number* option.
- Repeat for all duplicates.
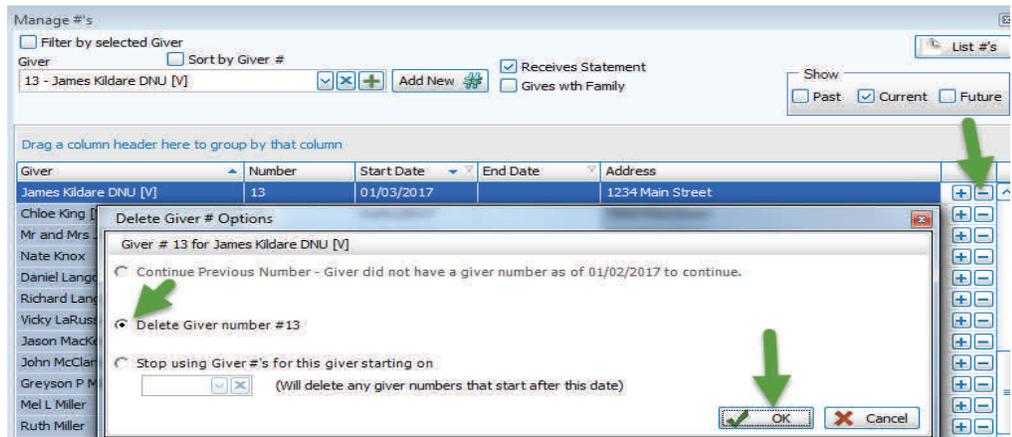
You may need to reassign a Giver #,
- Go to *Donations>Givers>Manage #s*
- Use the Giver search box (top left) to locate the GOOD Giver
- After selecting the Giver, click on the *Add New # button*
- Enter the Giver #
- Enter *Start Date* (for the Start Date to apply, the Giver # must be available on that date)

In *Donations>Manage Givers* - scroll to the last name, you will see only the GOOD record.
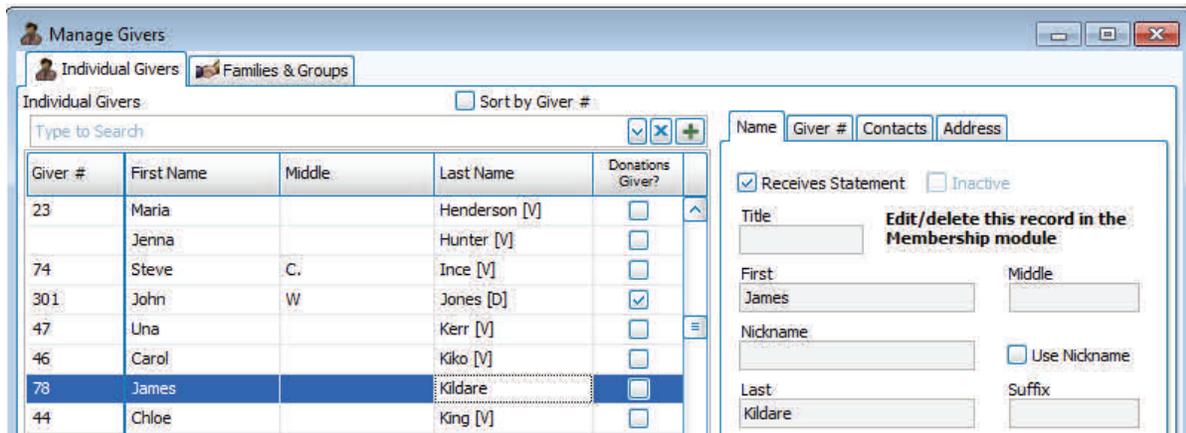
**If you are a pledging church, verify the pledges are recorded on the GOOD record.