

Duplicate Constituent Merge™ for The Raiser's Edge®

Does your database need a clean-up? Are you worried about duplicate constituent records in **The Raiser's Edge**? Would you like to be able to process multiple merges at once?

Because data management is so time consuming, it often falls to last place on an organization's priority list. Merging is prone to human error — especially in large databases.

Duplicate Constituent Merge can help clean up your database and save you time and money by removing troublesome duplicate records from your system.



WHY DO YOU NEED DUPLICATE CONSTITUENT MERGE?

- A database with duplicate records can have far-reaching, damaging results
- Mailings to duplicate records cost money to produce, prepare, and distribute
- Valuable work time can be wasted trying to find the “right” record
- Inaccurate data, such as a “do not solicit” requests that are added to the wrong record, can cause undesirable interactions with your constituents
- Keeping accurate records prevents your job from being more difficult than necessary

Use it to:

- Improve the integrity of the data you store in **The Raiser's Edge**
- Free up valuable work time that can be better spent on other activities
- Avoid embarrassing situations caused by inaccurate data
- Save money on mailings and solicitation efforts
- Simplify your job

With **Duplicate Constituent Merge**, you can:

- Quickly create a list of potential duplicates
- Easily choose which duplicates you would like to merge and which you would not (or you can use basic logic to avoid manual review of potential duplicates)
- Merge hundreds or thousands of duplicates at the push of a button — without having to manually configure each pair to be merged
- Remove only duplicate records; any related data, such as pledges, gifts, and appeals, will be associated with the constituent record you opt to keep



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Duplicate Constituent Merge works by:

- Identifying duplicate records and allowing you to indicate which record(s) should be merged into one record (or run in auto-merge mode, further speeding the process)
- Pushing data from the “merge from” records into the “merge to” record so that all history is available
- In auto-merge mode, setting the “merge to” record based on the following criteria: newest gift, oldest gift, newest constituent, oldest constituent, greatest number of gifts

To ensure that you get the most out of **Duplicate Constituent Merge**, training is provided as part of the implementation, which can be completed remotely within four-to-six weeks.



The screenshot shows the 'Duplicate Constituent Merge Utility' window. It features a 'Manually manage duplicate records' table with the following data:

Master Record	Merge Record	Last Name	First Name	Address	City	State	ZIP	Last Gift	ID	Import ID
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hernandez	Robert, Carlos	410 17th Street	Denver	CO	80202-4402	03-Mar-2010	96	00001-079-0000280
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Hernandez	Robert, C.	410 17th Street	Denver	CO	80202-4402	No Gifts	252	00001-993-00000...

Below the table, there are checkboxes for: 'Merge Records in Unattended Mode', 'Delete merged records', 'Generate control report', and 'Remove duplicate attributes and constituent codes' (which is checked). An 'About' link is also present.



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