

Objective: Merging Records for Duplicated People

Scenario: You have just realized that your database contains records for John Smith, John E. Smith, JOHN SMITH, and John Edward Smith. All of which are the same person. You would like to delete the three duplicate records and combine all of the prior registrations into one complete record, John E. Smith. (Fig. A)

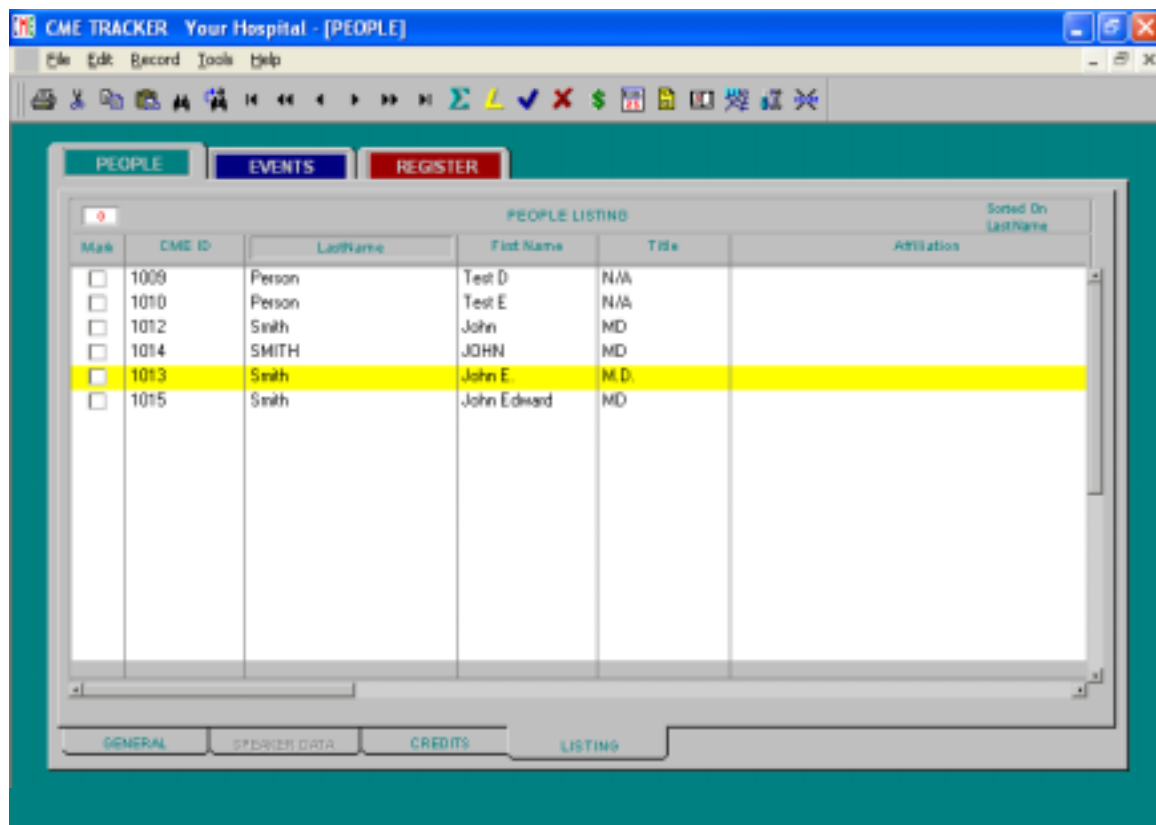


Fig. A

Step1: Deleting a Person. In the PEOPLE/GENERAL tab, click on the red X located in the toolbar. Click in the check box next to Delete Current Record (the default setting). Click on OK. (Fig. A)

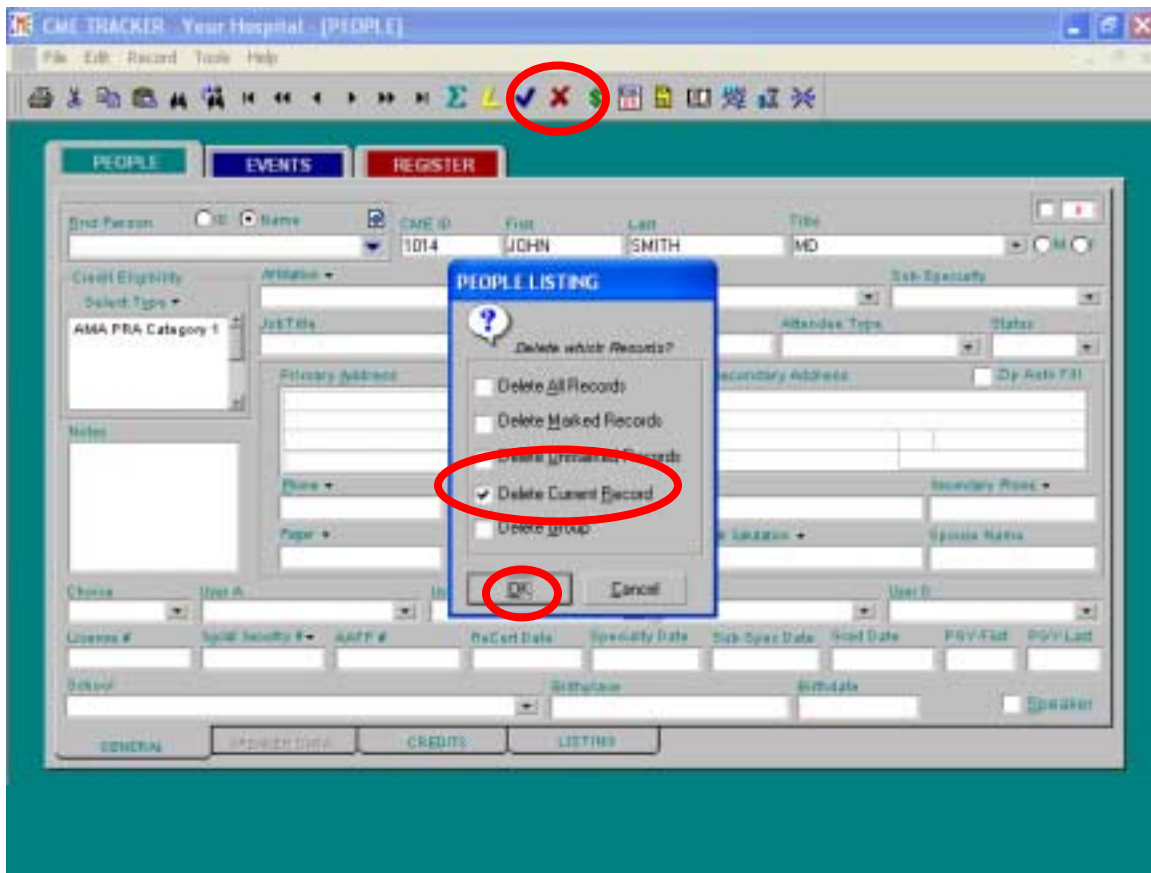


Fig. A

Step3: You will now be able to select the person you would like to transfer the past registrations to by typing in the last name and choosing the desired person from the list. Click on "OK" to complete the process. (Fig. C)

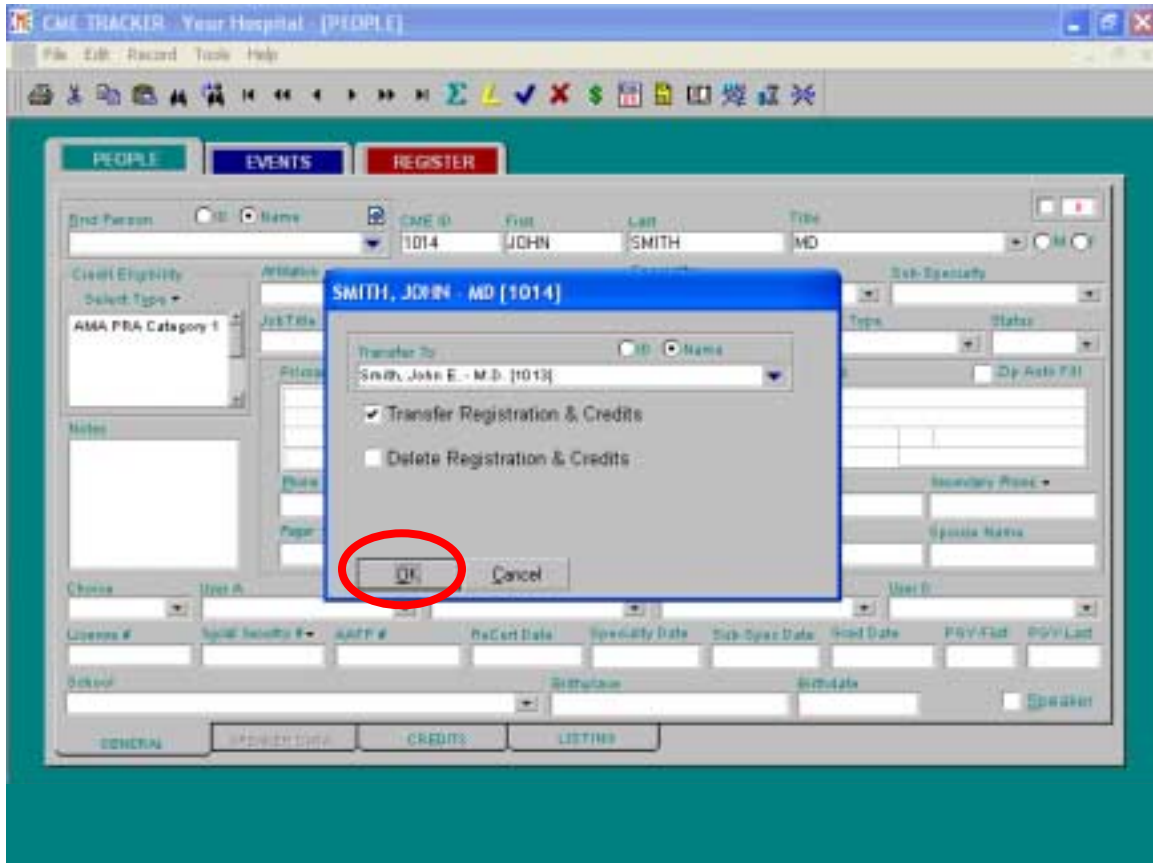


Fig. C

Step4: To complete the process, repeat Steps 1 thru 4 for each of the duplicate entries, which will transfer the attached registrations to one person. You may view the complete Credit Summary by clicking on the PEOPLE/CREDIT Tab. (Fig. D)

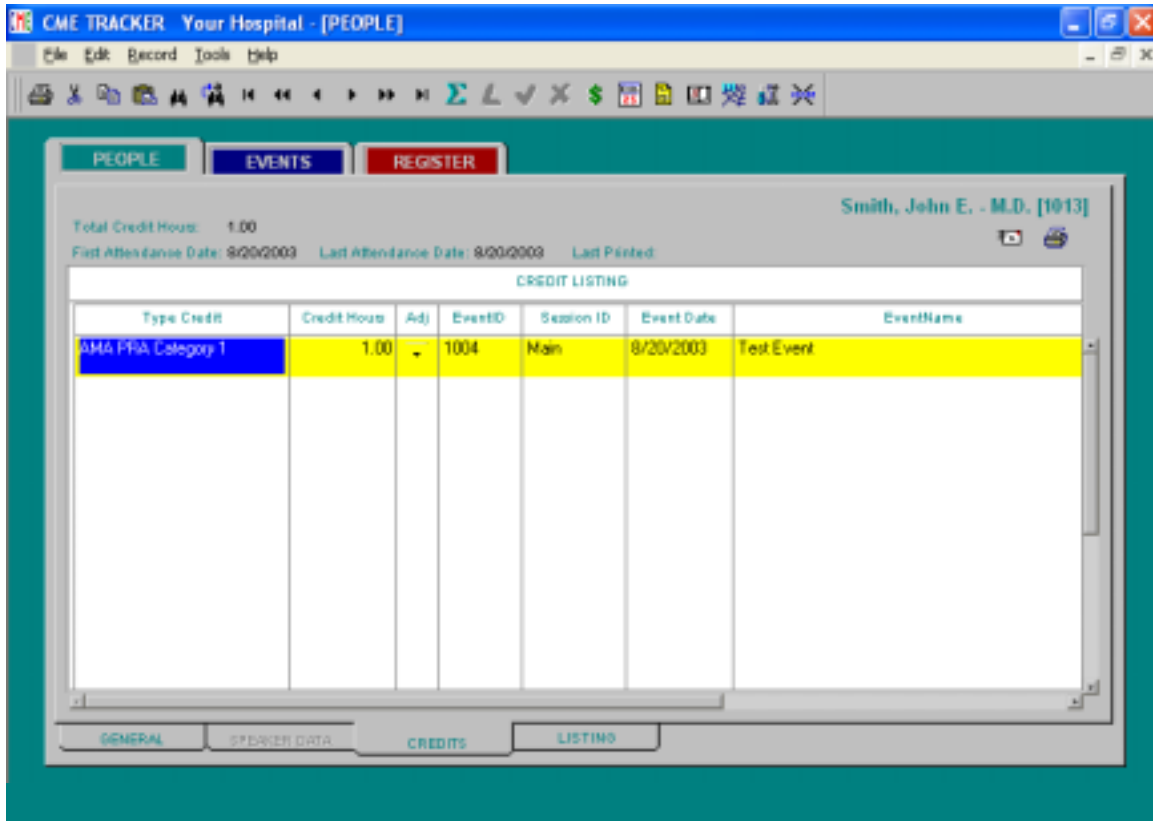


Fig. D