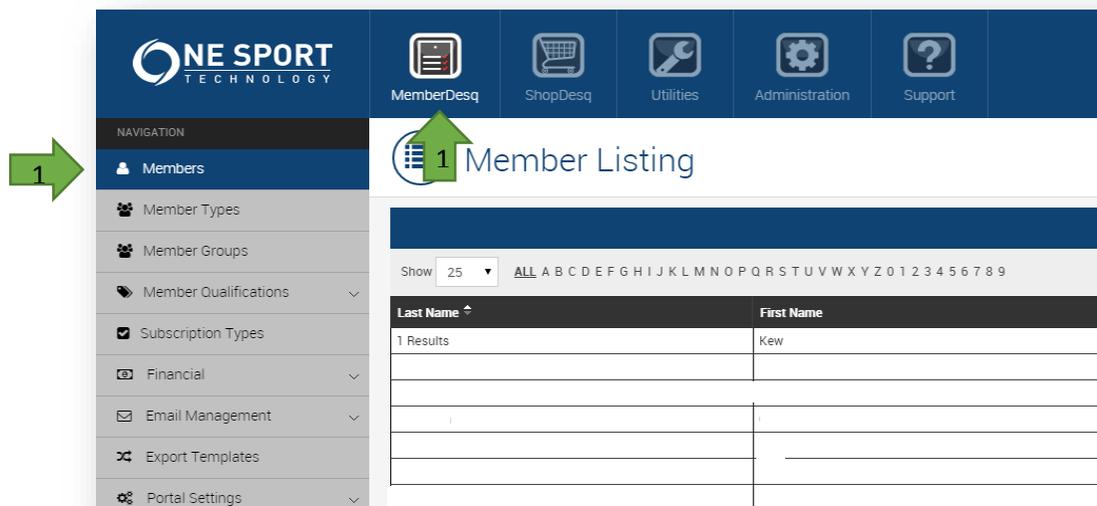


## Duplicate Records – Merging

Despite the best endeavours of clubs and participants alike, duplicate records will be created in the database from time to time. A feature is now available which enables club administrators to remove duplicate records by merging them together, ensuring no important financial information or playing history is lost in the process.

**Step 1:** Login to your administration console, click on **MemberDesq**, select **Members** then **Members Listing** from the sidebar menu.

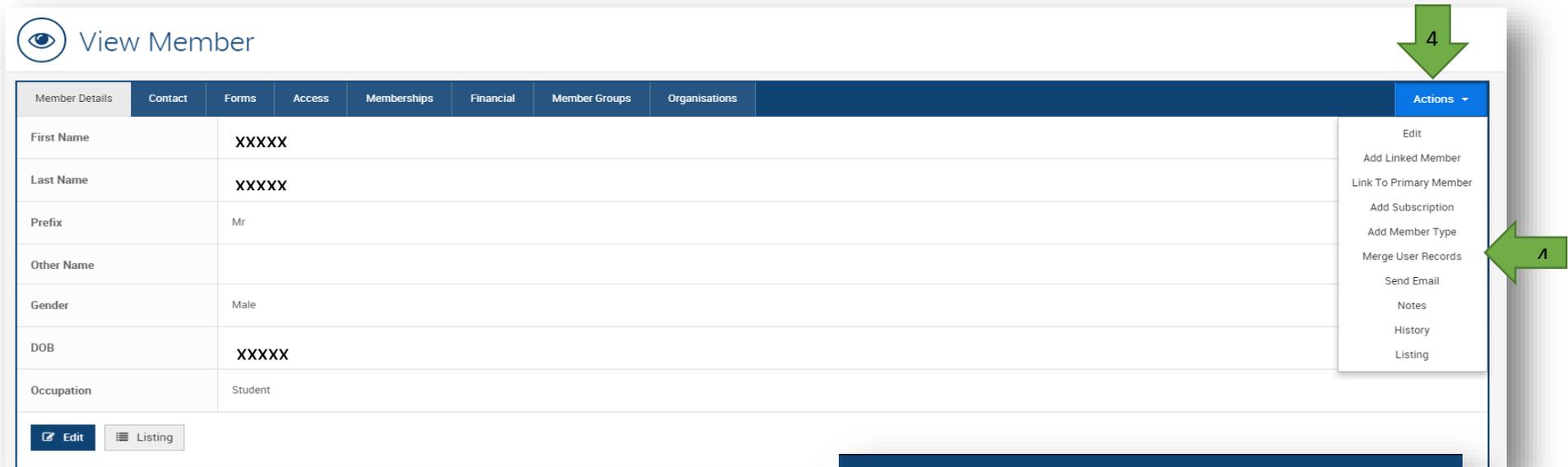


**Step 2:** Search for the member that is currently active and financial that you want to merge the inactive or unfinancial record into.

**Step 3:** Click the **Actions** drop down menu then select **View**.

1			Active ▾	Yes	Actions ▾
			Inactive ▾	No	View
			Active ▾	Yes	Edit
			Active ▾	Yes	
			Active ▾	Yes	Actions ▾
			Active ▾	Yes	Actions ▾

**Step 4:** Once the member's profile is displayed click on the **Actions** drop down menu in the top-right corner.

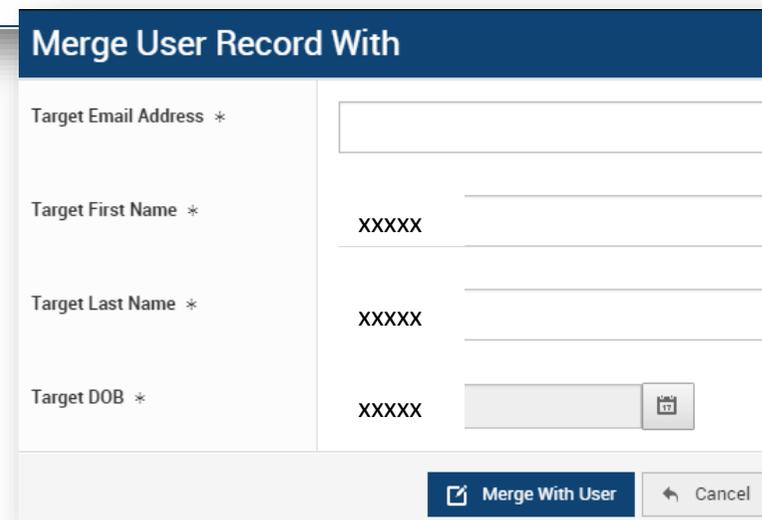


The screenshot shows the 'View Member' interface. The 'Actions' dropdown menu is open, displaying the following options: Edit, Add Linked Member, Link To Primary Member, Add Subscription, Add Member Type, Merge User Records, Send Email, Notes, History, and Listing. A green arrow labeled '4' points to the 'Actions' dropdown, and another green arrow labeled '1' points to the 'Merge User Records' option.

Member Details	Contact	Forms	Access	Memberships	Financial	Member Groups	Organisations	Actions
First Name	XXXXX							<ul style="list-style-type: none"> <li>Edit</li> <li>Add Linked Member</li> <li>Link To Primary Member</li> <li>Add Subscription</li> <li>Add Member Type</li> <li>Merge User Records</li> <li>Send Email</li> <li>Notes</li> <li>History</li> <li>Listing</li> </ul>
Last Name	XXXXX							
Prefix	Mr							
Other Name								
Gender	Male							
DOB	XXXXX							
Occupation	Student							
<input type="button" value="Edit"/> <input type="button" value="Listing"/>								

**Step 5:** A pop-up window will display where you will be prompted to enter the **Target Email Address** and some further contact details. This will automatically merge the details into the single record.

**Note:** Always make sure that you're merging the **unfinancial** record into the **financial** record to ensure that your member maintains their financial status and their ability to access their membership. Once profiles are merged the changes are finalised.



The screenshot shows the 'Merge User Record With' pop-up window. It contains the following fields and buttons:

- Target Email Address \* (empty text input)
- Target First Name \* (text input containing 'XXXXX')
- Target Last Name \* (text input containing 'XXXXX')
- Target DOB \* (text input containing 'XXXXX' and a calendar icon)
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