

TOOLS TO GET YOUR DATA TIDY

Managing Duplicates

DUPLICATES HAPPEN

#1 Reason - Bad data entry - either via Platform, Check-in, portal, etc

#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

The screenshot shows the MinistryPlatform Demo interface. The left sidebar contains a navigation menu with categories like 'People Lists', 'Event Participants', 'Responses', 'Contact Relationships', and 'Stewardship'. The 'Contact Relationships' category is selected, and the 'duplicate' view is active. The main area displays a table with the following columns: 'Person One', 'Person One ID', 'Relationship', 'Person Two', 'Person Two ID', 'Start Date', and 'End Date'. The table contains 20 rows of data, with the row for 'Castro, Donna' (Person One ID 1134, Person Two ID 834) highlighted in yellow. The bottom of the interface shows '47 results found in All Records, Search Term: [duplicate]' and '0 selected'.

Person One	Person One ID	Relationship	Person Two	Person Two ID	Start Date	End Date
***Default, Con...	2	Possible Duplicat...	Acosta, Daniel P...	2079		
Aardvark, Granny	4094	Possible Duplicat...	Ashley, Paul	2904		
Acosta, Daniel P...	2079	Possible Duplicat...	***Default, Con...	2		
Benson, Paul Jr.	1328	Duplicate of	Wilkinson, Paul Jr.	2528	8/18/2013 7:40 ...	
Benson, Sandra	1329	Duplicate of	Wilkinson, Sandra	2529	8/18/2013 7:40 ...	
Castillo, Daniel Jr.	831	Duplicate of	Castro, Daniel Jr.	1131	8/18/2013 7:40 ...	
Castillo, Donna	834	Duplicate of	Castro, Donna	1134	8/18/2013 7:40 ...	
Castillo, Sandra	833	Duplicate of	Castro, Sandra	1133	8/18/2013 7:40 ...	
Castro, Daniel Jr.	1131	Duplicate of	Castillo, Daniel Jr.	831	8/18/2013 7:40 ...	
Castro, Donna	1134	Duplicate of	Castillo, Donna	834	8/18/2013 7:40 ...	
Castro, Sandra	1133	Duplicate of	Castillo, Sandra	833	8/18/2013 7:40 ...	
Hester, Daniel	3295	Duplicate of	Lester, Daniel	2395	8/18/2013 7:40 ...	
Hester, Donna	3298	Duplicate of	Lester, Donna	2398	8/18/2013 7:40 ...	
Hester, Paul Jr.	3296	Duplicate of	Lester, Paul Jr.	2396	8/18/2013 7:40 ...	
Hester, Sandra	3297	Duplicate of	Lester, Sandra	2397	8/18/2013 7:40 ...	
Hutchinson, Dan...	2411	Duplicate of	Johnson, Daniel	11	8/18/2013 7:40 ...	
Hutchinson, Don...	2414	Duplicate of	Johnson, Donna	14	8/18/2013 7:40 ...	
Hutchinson, Paul	2412	Duplicate of	Johnson, Paul	12	8/18/2013 7:40 ...	
Hutchinson, San...	2413	Duplicate of	Johnson, Sandra	13	8/18/2013 7:40 ...	
Johnson, Daniel	11	Duplicate of	Hutchinson, Dan...	2411	8/18/2013 7:40 ...	
Johnson, Donna	14	Duplicate of	Hutchinson, Don...	2414	8/18/2013 7:40 ...	

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=8f9d8409-24c4-4ca6-89c

Combine Contacts Tool

Hester, Donna (3298) 2 Records ▾

	<input checked="" type="checkbox"/> Lester, Donna Will be kept	<input checked="" type="checkbox"/> Hester, Donna Will be Merged
Contact to Keep:	<input checked="" type="radio"/> Contact #2398	<input type="radio"/> Contact #3298
Prefix:		
First Name:	<input checked="" type="radio"/> Donna	<input type="radio"/> Donna
Nickname:	<input checked="" type="radio"/> Donna	<input type="radio"/> Donna
Middle Name:		
Last Name:	<input type="radio"/> Lester	<input checked="" type="radio"/> Hester
Suffix:		
Date of Birth:	<input checked="" type="radio"/> 04-22-1991	<input type="radio"/> 04-22-1991
(Age):	(26)	(26)
Contact Status:	<input checked="" type="radio"/> Inactive	<input type="radio"/> Inactive
Email:	<input checked="" type="radio"/> donna2392@thinkministry.	<input type="radio"/> donna3292@thinkministry.
Mobile Phone:	<input type="radio"/> 555-836-6836	<input checked="" type="radio"/> 555-736-7736
Gender:	<input checked="" type="radio"/> Female	<input type="radio"/> Female
Household Position:		
Marital Status:	<input type="radio"/> Single	<input checked="" type="radio"/> Single
Household ID:	#840	#619
Household Name:	<input checked="" type="radio"/> Lester (4)	<input type="radio"/> Hester (4)
Home Phone:		
Address:	840 Lester Way	619 Hester Way

COMBINE CONTACTS - ADD RELATIONSHIP

Combine Contacts Tool - Google Chrome
Secure | https://demo.ministryplatform.net/mpcoretools/ContactMerge.aspx?dg=11004462-840a-41d4-a26c-0bfdedaa52ea&ug=8f9d8409-24c4-4ca6-89c

Combine Contacts Tool

Hester, Donna (3298) 2 Records ▾

	<input checked="" type="checkbox"/> Lester, Donna Will be kept	<input checked="" type="checkbox"/> Hester, Donna Will be Merged
Contact to Keep:	<input type="radio"/> Contact #2398	<input type="radio"/> Contact #3298
Prefix:		
First Name:	<input type="radio"/> Donna	<input type="radio"/> Donna
Nickname:	<input type="radio"/> Donna	<input type="radio"/> Donna
Middle Name:		
Last Name:	<input type="radio"/> Lester	<input checked="" type="radio"/> Hester
Suffix:		
Date of Birth:	<input type="radio"/> 04-22-1991	<input type="radio"/> 04-22-1991
(Age):	(26)	(26)
Contact Status:	<input type="radio"/> Inactive	<input type="radio"/> Inactive
Email:	<input type="radio"/> donna2392@thinkministry.	<input type="radio"/> donna3292@thinkministry.
Mobile Phone:	<input type="radio"/> 555-836-6836	<input checked="" type="radio"/> 555-736-7736
Gender:	<input type="radio"/> Female	<input type="radio"/> Female
Household Position:		
Marital Status:	<input type="radio"/> Single	<input checked="" type="radio"/> Single
Household ID:	#840	#619
Household Name:	<input type="radio"/> Lester (4)	<input type="radio"/> Hester (4)
Home Phone:		
Address:	840 Lester Way	619 Hester Way

COMBINE CONTACTS - ADD RELATIONSHIP

Combine Contacts Tool

Hester, Donna (3298) 2 Records ▾

Add Contact Relationship

Contact 1:
Lester, Donna (2398) ▾
Relationship:
Similar Records ▾

Contact 2:
Hester, Donna (3298) ▾

Cancel Add Relationship

Add Relationship Close

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:

- 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).

QUESTIONS?