

Merge Duplicate Family Records

Occasionally you may find a duplicated family record in your database. Jackrabbit attempts to prevent possible duplications with a detection utility; however, there may be instances where a duplicate family is produced. These duplicate records can be combined using *Merge Families under the Families (menu)*.

Note: A user must have the Merge Families/Accounts permission in the Families category to have the ability to merge duplicate family records.



Caution should be used when merging families; there may be a fee involved to have the families restored.

Merge Families moves information from one family record to another family record. Not all information is moved, so the designation of which family record to move information **FROM** and the family record to move the information **TO** is very important.

This information in the FROM family will be merged into the TO family:

- *Students and Contacts - **Note:** If the same student/contact exists in both families (same first and last name), the **TO** Student/Contact record is kept and is **not updated***. Any information in the **FROM** Student/Contact record that is not in the **TO** family Student/Contact record must be manually added to the **TO** family Student/Contact record before the merge is done. Example: If the **FROM** Contact record has a Portal User ID and the **TO** Contact record does not, it must be manually added to the **TO** family Contact record before the merge, or it will be lost.*

** with the exception of enrollment*

- *Class Enrollment - Current, Past, Future, and Waitlist*
- *Event Enrollment*
- *Transaction History*
- *Web Registrations*

This information in the FROM family will NOT be merged into the TO family (these fields in the TO family are NOT updated):

- *Summary tab: Registration date, Primary Phone, Address, Neighborhood, Problem Account status.*

- *Billing Info tab*: Credit card/Bank account information, Membership Type, ePayment Schedule, Family Discount, Fixed Fees, Billing Instructions.
- *Misc tab*: Email history, Family User-defined fields, Contract dates, Booster, Referral, Emergency Contact, Enrollment Form, Notes, Source, Prospect, Portal messages.



*The **FROM** family will be deleted after their information is merged into the**TO** family. All information that does not merge should be manually copied into the **TO** family prior to doing the merge.*

Merge Two Family Accounts

1. Point to the **Families** (menu) > **Merge Families** or click the **Merge Family** button from within a family record.
2. Click the **Search** link in the *From* section to open the Family/Account Search pop-up. If the *Merge Families* button was used to start the merge, that family will be populated into the *From* section.
3. Enter the first few letters of the **Family/Account Name** and click **Search**
4. Click to select the family record that you want to move the information **FROM**.
5. In the *To* section, click the **Search** link and select the family record that you want to move the information **TO**.

Merge Families

← RETURN

Merge Families moves information from one family to another family.

This information will be moved

- Contacts
- Students
- Current Enrollment
- Event Enrollment
- Transaction History
- Online Registrations

Billing information will NOT be moved, Last Policy Agreement Date will NOT be moved

From

Move information from this family: [Search](#) [Clear](#)

Family ID: 20608430

Date Created: 08/03/2020

Contacts:

Students:

Address:

City: Huntersville

The Family ID is located on the bottom left of each page of the Family record and can be used to confirm the correct families are being selected.

[View This Family](#)

Click **View This Family** to open the Family record in another window where you can view the family details and verify it is the correct family.



Click to change the order of the FROM and TO families.

To

To this family: [Search](#) [Clear](#)

Family ID: 18964418

Date Created: 09/03/2019

Contacts: Samantha Zackmann

Students: Cindy

Address: 385 Great Lakes Blvd

City: Huntersville

This family should have the most up-to-date billing information.

[View This Family](#)

I understand the From family will be deleted after their information is moved to the To family and I cannot undo this action.

6. Confirm your selections and check the box to indicate that you understand that the FROM family will be deleted after the merge.
7. Click **Merge**.
8. Click **Ok** in the warning pop-up window to complete the merge or click **Ok & View Merged Family** to be taken to the newly merged family record.

📄 Frequently Asked Questions

Expand/Collapse All