Duplicate People Records

KeepnTrack provides an easy way to manage and resolve any duplicate People records and Applications.

When a person is selected in People Management, an automatic duplicate check is performed. If there is a potential duplicate, an alert icon will display next to the name. This utility can be initiated through the ✾▾ Actions menu in People Management or Volunteer Application Management.

Most commonly, the Duplicate Resolution utility will be used to merge an Application with an existing Record or the merging of two Applications, though it may be necessary to merge two records. If there are no duplicates being displayed, the Operator can also initiate the Resolve Duplicate by ID utility, also through the Actions menu. This option allows the Operator to manually identify a duplicate.

Once one record has been merged into another, the final record, containing the most complete and up to date information will be retained and the merged record will be removed.

> ⓘ Records that have been removed during the merge procedure will be saved in your rejected applications and be available for reference. These applications can be identified, as **DUP** will be added to the User ID and "This record was merged with <Person ID #> on <date>" will be listed in the Notes field.

Resolve Duplicates

This is the Duplicate Resolution window.

- The left hand portion is the Keep & Update screen. This is the record *you want to keep*.
- The right hand side is the Merge & Remove screen. This is the record that *will be removed*.

KeepnTrack will automatically update the individual fields based upon various rules. For instance, a field *with* data will never been overwritten by a field that is blank. If there are more than one potential duplicates, KeepnTrack will present the next record for review.

For each record reviewed, the Operator will have the opportunity to Skip, Cancel or Merge. If you choose to skip a record, it'll stay in queue so you can get back to it later.

Once you initiate the merge, you'll be asked to confirm the action: *"Are you sure you want to merge these records? There is no "Undo" for this operation."* If you're sure, click Merge.

Resolve Duplicate by ID

If you believe there to be a duplicate entry but it has not been found by **KeepnTrack**, you can manually search for duplicates by ID.

This utility allows the Operator to manually search for duplicates using a person's ID. If any possible duplicates are found, they will be displayed in the Duplicate Resolution window.

✓ **Remove Rejected Duplicates**

When a duplicate record is rejected, it gets hidden away in Volunteer Management so you don't see it anymore. Rejected duplicates can pile up, so it's a good idea to clear those out every one in a while. Use the Remove Rejected Duplicates utility to permanently remove all rejected duplicate person records.