

Merge Duplicate Family Records

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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 into 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, Home 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](#) [View This Family](#)

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.

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](#) [View This Family](#)

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.

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](#)

Q. I merged the wrong 2 family accounts, how can I fix this error?

A. If you made an error when merging two family accounts, please submit a [Support Ticket](#) through Jackrabbit with the account names and IDs for the records affected. Our Support Team will be able to un-merge the records for you.

The family ID is located at the bottom left in the *Family* record:

Family: Ager

[SAVE CHANGES](#) [DELETE](#)

Make Sale/Post Fees | Payment/Credit | Refund | Statement | Add Student | Add Contact | Archive Family | Family Name | Email

Summary | Contacts | Classes | Events | Transactions | Billing Info | Misc | Notes (2) | Res

Enrollment

No Data Available | [Print](#) | [Refresh](#)

Student	Event Type	Date	Time
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Past Enrollment

View 1 - 1 of 1 | [Print](#) | [Refresh](#)

Student	Event Type	Date	Time
Barbie Ager	Parent's Night Out	2/22/2020	6:00pm-9:00pm

Last Updated: 9/1/2020
Date Created: 11/28/2016 by helpcenter
Id: 12574863