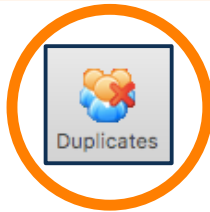




FINDING POSSIBLE DUPLICATE PATRONS

FROM PATRON SEARCH OR A MAIL LIST:

Contact List for Proctors Mail List Criteria for



Step 1: Select Method to find Duplicates

Select the method used to find duplicates and one or more fields to be used to search for duplicates.

1 Scan Existing list of patrons The existing patron list will be sorted by the selected fields. Any rows found to match will be highlighted. This option works on data that you already have displayed in the list.
 You will be given an option of only displaying only those patrons in the list and hiding the ones that are not potential duplicates.

Database using fields Searches the entire database looking for possible duplicate records based on one or more fields that you select and shows them in the list.
 Any search by address also scans secondary addresses for comparison even though only the primary address will be displayed in the list.

For duplicate emails Searches the entire database looking for patrons that use the same email address but are in different households.
 If they are the same person, they will need to be merged, or one will need the email removed from their account before either can use web sales (which requires unique email addresses for patrons across households)

Step 2: Select 'Matching' Fields

The fields highlighted below will be compared for each patron in the database and if two or more then each patron record will be selected and displayed in the list.

Matching Field Names	Field Meaning
Address City	The city for the address
Address Country	Country
Address County	County of address
Address Line 1	The first line of the address
Address Line 2	The second line of the address
Address State	The State for the address
Address Zip Code (Abbreviated)	An abbreviated Zip Code used to count
Address Zip Code (Full)	The Zip Code for the address
Patron Date Of Birth	The date of birth of the Patron. Usually
Patron External Search Field	You can designate an external number
Patron Name-Combined Search	A special search field used to search for
Patron Name-First	The first name of the Patron
Patron Name-Formal	The formal name of the Patron (including
Patron Name-Last	The last name of the Patron
Patron Name-Middle Initial	The middle initial of the Patron
Patron Title	The title the Patron uses at his company
Patron Type	Type of Patron CodeTable #
Primary Phone	Primary phone for a Patron

Step 3: Automatic Merge of Results

Indicate how to merge patron records that are found and cannot be merged into other records.

3 Merge Manual Automatic Merge

1. SELECT A SUBSET TO SEARCH WITHIN

2. CHOOSE FIELDS TO COMPARE ACROSS PATRONS

3. PICK HOW TO MERGE THE RESULTS

(ONLY USE "AUTOMATIC MERGE" AFTER EXTENSIVE "MANUAL" TESTING)

4. VERIFY YOUR CRITERIA

5. REVIEW COLOR-CODED RESULTS

(ADJUST CRITERIA AS NEEDED BEFORE MANUALLY MERGING)

Icon	Patron # ²	Type	First Name	Last Name	Company	Addr-Line 1 ¹	Primary Phone
	928389	Individual	Ann-Ma...	Rodriguez		106 Lindley Terrace	(413) 458-5051
	198082	Individual	AnnMarie	Rodriguez		106 Lindley Terrace	(413) 458-5051
	910671	Individual	Catherine	Rodriguez		17 Snowberry Road	(607) 341-3023
	921599	Individual	Catherine	Rodriguez		17 Snowberry Road	(607) 341-3023
	369483	Individual	Judith	Rodriguez		1879 State Route ...	(518) 209-5422
	924546	Individual	Judith	Rodriguez		1879 State Route ...	(518) 209-5422
	843354	Individual	Simone	Rodriguez		65 Point Of Wood...	(518) 610-2756
	918100	Individual	Simone	Rodriguez		65 Point Of Wood...	(518) 610-2756

MORE DETAILS AND EXAMPLES AT
[HTTP://HELP.THEATREMANAGER.COM/THEATRE-MANAGER-HELP/FINDING-DUPPLICATES-AND-MERGING](http://help.theatremanager.com/theatre-manager-help/finding-duplicates-and-merging)

Want to Share a TM Tip or Cool Feature? E-Mail Sophia:

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