

Adjutant Software Customer Support Tech Notes

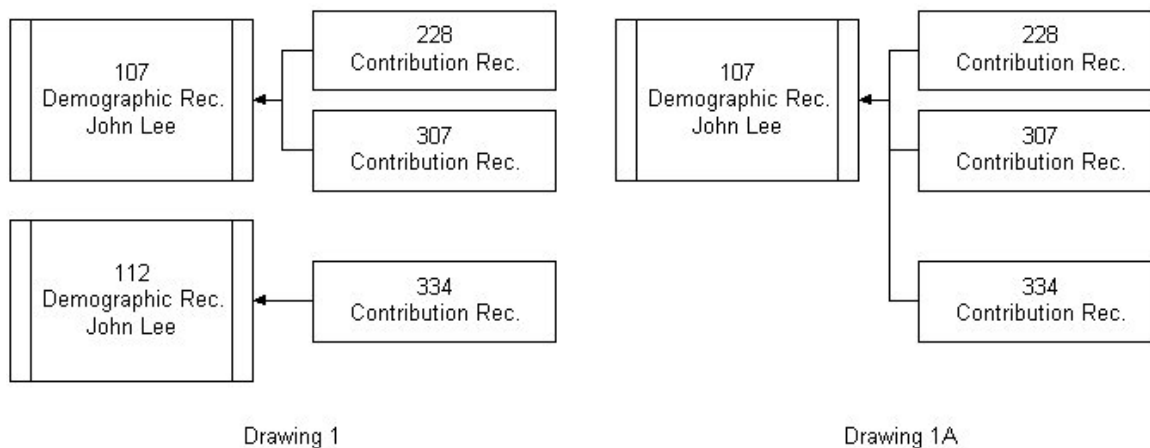
Document Title: Record linking problems
Document Number: 012
Applies to: Campaign ToolBox (all states except PA)

SUMMARY

The program uses a fully-relational database which assumes that for each person or organization entered, there will be one and only one Demographic record. This Demographic record may have any number of transaction records (contributions, expenses, etc.) linked to it. This document describes how to correct linking problems when a record has been incorrectly entered.

You will need to know the Demographic ID number for this operation. This can be found on a transaction record by clicking on the menu item "More Info.", then selecting "Other record info." Also, some of the Internal Staff Reports include the Demographic ID number of a record.

Situation 1: Two or more Demographic records for the same entity



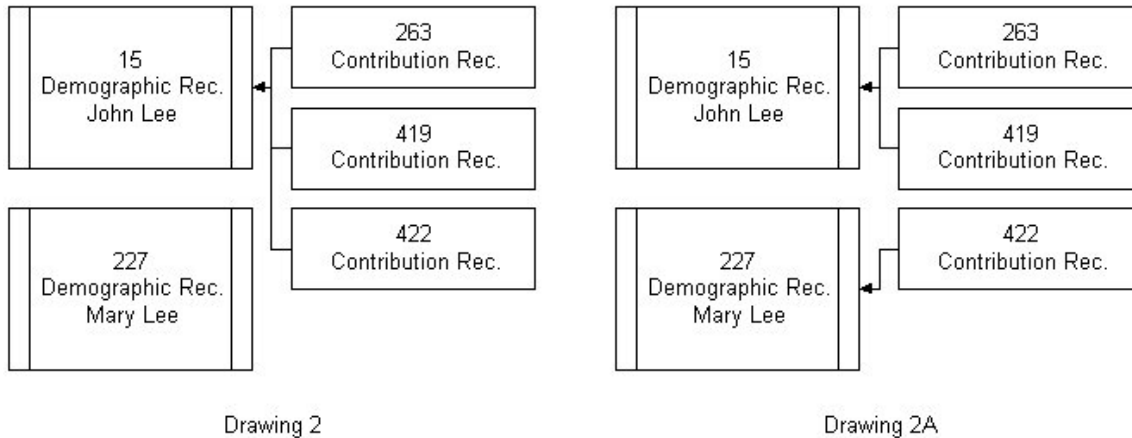
Drawing 1 shows a condition where 2 Demographic records exist for "John Lee". In this case, the objective is to link the three contribution records (228, 307, and 334) to one of the Demographic records as shown in Drawing 1A. For this example, we will be keeping record 107 and deleting record 112.

PROCEDURE

1. Click on the menu item "Tools" and select "Merge Duplicates".
2. In the field "Enter number of Demographic to receive records:", enter "107"
3. In the field "Enter number of Demographic TO BE DELETED:", enter "112"
4. Click the "Show Details" button to verify that you have selected the correct records.
5. Click on the "Merge" button to complete the operation. You will then be asked if you want to delete the old record (112); you should answer "Yes" to this.

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Situation 2: Two or more transaction records linked to the wrong entity



Drawing 2 shows a condition where 3 contribution records are linked to "John Lee", but one of them (422) should have been linked to his wife, Mary. This is often caused by not selecting the correct record when using an existing Demographic record when adding a new record. In this case, the objective is to link contribution record 422 to the Demographic record for Mary Lee as shown in Drawing 2A. There is no "reverse merge" function available, so the record will need to be deleted and then re-entered.

PROCEDURE

1. Delete record 422 by going to that record and clicking on the "Delete" button.
2. Click the "Add" button.
3. Tab over to the "Last Name" field and begin typing "Lee" to bring up existing Demographic records. The spreadsheet view will highlight the closest match.
4. Scroll up or down the list to find the Demographic record for Mary Lee. If one does not already exist, press the Escape key, then click on "Add" to create a new record.
5. When all the information has been added, click the "Save" button.

NOTES

1. Be very careful when linking records to avoid record linking problems. Paying attention to the data entry form and selecting the existing demographic record (if available) will prevent these problems from occurring.
2. There are a number of reasons why this type of record linking is used, but the major reasons are to eliminate duplicates when retrieving data from the Demographic table, being able to update address changes with a single record change, and maintaining an orderly database file.