

# Membership 2.0.1: Dealing with Duplicates

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JANUARY 2020



The computer application that compiles our membership count contains a series of algorithms to detect potential duplicate members in your country and make sure only one is counted. The global IT Team regularly checks these.

Sometimes, though, these people are not duplicates, but members who happen to share the same or similar name. Other times the program fails to detect records that really are duplicates.

Your job is to check these people, merging duplicate records AND identifying false duplicates so that both people will be counted.



# Finding duplicates in the Membership Count File

In the membership count files, all the members in your country are listed in the People tab.

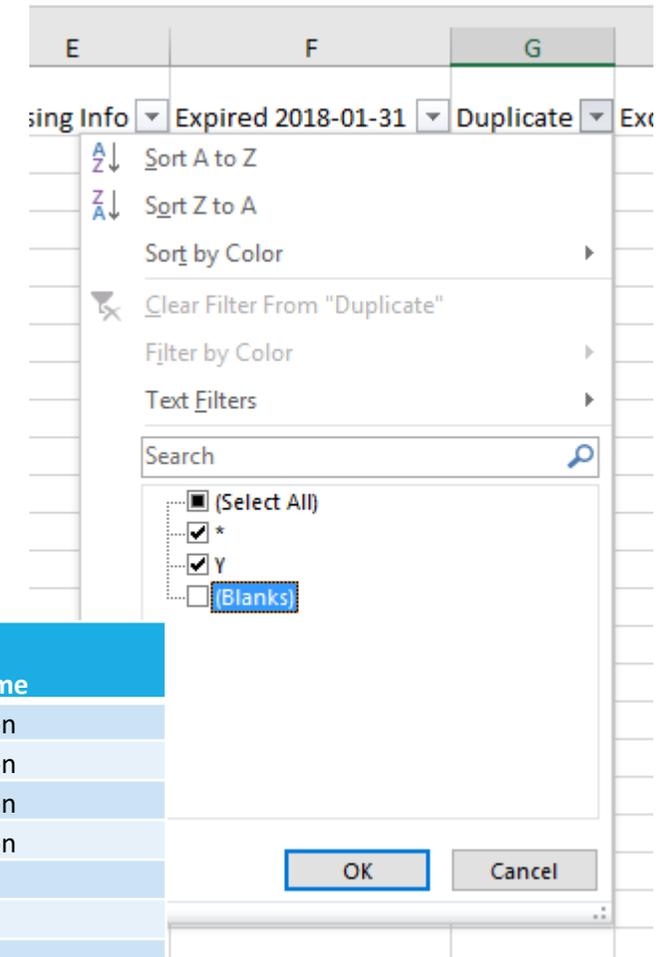
In the Duplicate column (G) you will find an Y by each member deemed to be a duplicate and excluded from the membership count. In this same column you will find an \* for the duplicate who will be counted.

To find all your potential duplicates sort Column G by the two values \* and Y.

**Note:** you can also do this in the database with both records open.

See instructions on page 6.

Duplicate	Excluded	id	first name	middle_name	last name
*		1...	Bill		Anderson
Y	Y	1...	Bill		Anderson
*		1...	Kathy	Lynn	Anderson
Y	Y	1...	Kathy		Anderson
*		1...	Robert	Leo	Craig
Y	Y	1...	Robert		Craig
*		1...	Linda		Last
Y	Y	1...	Linda		Last



# Analysing the duplicates – 1.

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**Case 1** – same name, same address and phone number, different email addresses but the one email address is opted out. Verdict: Same person Task: merge the two records (see pages 7-8)

Duplicate	Excluded	nationbuilder_id	first_name	middle_name	last_name	full_name	email	email_opt_in
*		111333	Linda		Last		<a href="mailto:email.last@gmail.com">email.last@gmail.com</a>	false
Y	Y	111222	Linda		Last		<a href="mailto:llast@email.com">llast@email.com</a>	true

**Case 2** – same name, different email addresses, only 1 record with a phone number and DOB, different street addresses in the same region. Verdict: Most likely the same person. Task: merge the two records, but possibly send an email to both addresses just to check (see pages 7-8)

Duplicate	Excluded	nationbuilder_id	first_name	middle_name	last_name	full_name	email	email_opt_in
*		111334	Bill		Anderson		<a href="mailto:BAnderson@gmail.com">BAnderson@gmail.com</a>	TRUE
Y	Y	122222	Bill	Thomas	Anderson		<a href="mailto:WTAnderson@email.com">WTAnderson@email.com</a>	true



# Analysing the duplicates – 2.

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**Case 3** – same first and last name, different middle name, same address and phone number, but different email AND the DOB is given in only one record or none. Verdict: Father and son. Task: identify them as 2 separate people (see page 9)

Duplicate	Excluded	nationbuilder_id	first_name	middle_name	last_name	full_name	email	email_opt_in
*		111333	Robert	Leo	Craig		<a href="mailto:leocraig@alice.it">leocraig@alice.it</a>	true
Y	Y	111222	Robert	James	Craig		<a href="mailto:bobcraig@email.com">bobcraig@email.com</a>	true

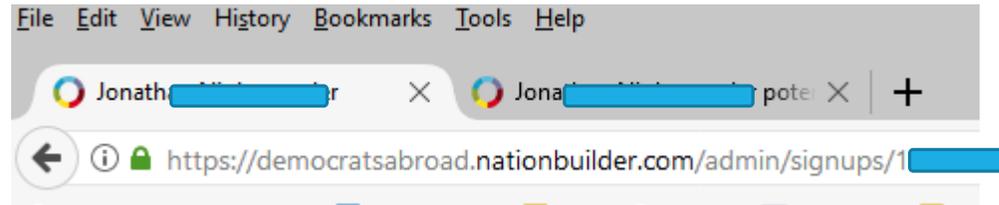
**Case 4** – same first and last name, one has a different middle name, different email addresses, only 1 record with a phone number and DOB, different street addresses. Verdict: Probably 2 different people. Task: identify them as 2 separate people (see page 9) after writing to confirm

Duplicate	Excluded	nationbuilder_id	first_name	middle_name	last_name	full_name	Email	email_opt_in
*		111334	Kathy	Lee	Anderson		<a href="mailto:KLAnderson@gmail.com">KLAnderson@gmail.com</a>	TRUE
Y	Y	122222	Kathy		Anderson		<a href="mailto:KatAnderson@email.com">KatAnderson@email.com</a>	true



# Open and study both records in 2 different tabs

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**Note: Open each record in a different window so you can compare the member data.**

**- To do this: hold down the Shift key when you click the person's name, then you can minimize both windows and view side by side.)**

## **Compare the data:**

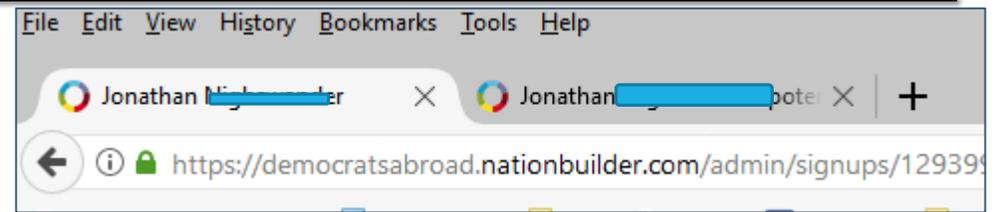
- Check if an email address is opted out or marked as bad
- Open the Location tab to see which abroad address (in your country) is the most recent and most complete,
- Look at the registered addresses to see if there's a different address in the most recent record

## **Decide whether:**

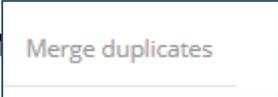
- **the records are duplicates** and need to be merged (see pages 7-8)
- **they are 2 different people** who need to be identified as distinct (see page 9)

# Merging Duplicate records – 1.

1. You should ***always*** merge the newest record (the one with the highest id number) into the older record (lower id).



**To do this:**

Open the record to be merged into the other record, taking note of the data (addresses, email addresses, etc.) in both records. Click the button 

In some cases the ***program will already suggest a duplicate***. If this is the right person, simply click “Yes, this is the same person” and see page 8 for the rest.

***If not, choose Manual Merge*** and enter the first and last name of the other record (the one to be merged into, thus the final record) and see page 8 for the rest.



# Merging Duplicate records – 2.

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## Things to look for:

During the actual merging, depending on the data in the member's records ***you may be prompted to choose which data*** to use in the newly merged record.

This may be a **name** - mostly when one name has been written in lowercase and the other not, or an **address – remember to use the most recent and complete** address both for the abroad address and for the US registered address.

The ***email address of the record being merged into will become the primary email address*** (email1), that of the record being merged will be the second address. Check to make sure the primary email is not opted out or bad. If so choose another email address.



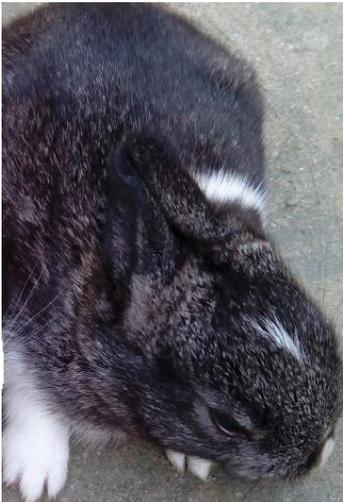
# Identifying records that are NOT duplicates

In the cases 3 and 4 (see page 5) the members had identical first and last names and possibly addresses but were actually two different people.

To make sure they are both counted, open each record and ***tag them both*** with:

**Valid Same Name – Same Country**

Tip: You can also do this if you come across names that are not exactly alike (Ann and Mary Ann, Bill and William for example) more as a reminder to yourself that you've already checked them.





# When to contact a global admin

Contact the Global Admin mailbox [helpdesk@democratsabroad.org](mailto:helpdesk@democratsabroad.org) if you

- Have forgotten your info-\* login password – do not change it yourself – this is being done centrally
- Need a data extract (Excel spreadsheet)
- Need an import of data (must have had an export first since need the member ID in the file)
- Are a country officer who wishes to have someone's admin access removed or need to have a login password changed.\*\*
- Have questions not covered in anything on the [wiki training page](#) – you are expected to look there before asking.

\*\* If you are a country chair wishing to **request membership, emailing and/or web access rights**, use our wiki page:

<https://wiki.democratsabroad.org/display/ZORA/New+Admin+Access+Request+Form>