

Duplicate Individual records can now be automatically located and merged. In this session, we will use custom searching criteria to locate and create an interactive list of duplicate records. From this list, we will see how to perform by-record merges followed by a fully automated one.

For clients using VISTA's Membership module, the utility also provides a process to cleanup duplicate Membership data.

Minimum Requirements	Description
VISTA Version	Version 6.02 or later
Security Access	Your user group must have rights under Setup & View Options->Administration
Database Backup	<u>This is a non-reversible process.</u> It is your responsibility to have made a valid backup of your data prior to running this utility.

## Individual Cleanup Process:

1. From Administration, select Individual Data Cleanup Utility
2. Select which **fields** might contain duplicate data.
3. Optionally, set the **number of characters** to match on.
4. Click the **Process** button
5. Review **groupings** and associated **records**.
6. Choose **action** merge record(s)

## Cleanup Membership Data

1. Run the **Individual Cleanup** first.
2. Select **additional data** to clean.
3. Click the **Process** button