

Name Merging

Questions? From your BS&A program, go to **Help>Contact Customer Support** and select **Request Support Phone Call** or **Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support department. Questions for our I.T. department may be submitted by phone (same number), or by emailing tech@bsasoftware.com.

In the course of entering data, it's possible that a name record will be added when one already exists. If you encounter a "bad" name record, you cannot delete it if it contains references to other data, such as permits, fees, etc. Instead, you will need to use the Merge Name tool. The Merge Name tool transfers all of those references - with the exception of transactions - to the name record you want to keep, and it deletes the "bad" name record. A name record that has transaction references (invoices/payments) cannot be merged into another name record. You will need to go to the linked transactions in the bad record and change their name references to the "good" record before you can use this tool.

As some general rules, merge the "first name first" record into the "last name first" record; if one address ends in AVE, and the other address does not include the street suffix, retain the record with the suffix.

Pictured is an example of three name records for one contractor, all of which have references to permits, inspections, and invoices:

| Name | Address | Contact | Phone | Phone Extension | Mobile |
|------|-----------------------|---------|--------------|-----------------|--------|
| Go | | | | | |
| Go | AIM CONSTRUCTION | | 248-476-1310 | | |
| Go | AIM CONSTRUCTION INC | | 810-476-1310 | | |
| Go | AIM CONSTRUCTION, INC | | 248-476-1310 | | |
| Go | | | | | |

Pictured is an example post-merge. One name record is left, and the errant records have been deleted. Their references were moved to the record that was retained:

The screenshot shows a software interface with a table of name records and a detailed view of a selected record. The table has columns for Name, Address, Contact, Phone, Phone Extension, and Mobile. The selected record is 'AIM CONSTRUCTION' with address '31805 W EIGHT MILE ROAD' and phone '248-476-1310'. A red arrow points to this record in the table. Below the table is a 'Contact Information' window for 'AIM CONSTRUCTION', last modified on 12/26/2012. This window has a 'References to 'AIM CONSTRUCTION'' sub-window open, which contains a table of references. A red arrow points to this sub-window.

| Name | Address | Contact | Phone | Phone Extension | Mobile |
|------|-------------------|-------------------------|---------------|-----------------|--------|
| Go | | | | | |
| Go | | | | | |
| Go | | | | | |
| Go | AIG HTG & COOLING | 5982 TALL OAK WAY | 810-986-0160 | | |
| Go | AIM CONSTRUCTION | 31805 W EIGHT MILE ROAD | 248-476-1310 | | |
| Go | AIMEE KAY | 8843 ACORNE AVE | 734-709--7333 | | |

| Record Type | Description | Detail |
|-------------|-------------------|----------------------|
| Contractor | Contractor | AIM CONSTRUC... |
| Inspection | Name Contact Guid | CO - CO ISSUANCE |
| Inspection | Name Contact Guid | Building Final |
| Inspection | Name Contact Guid | Building Plan Rev... |
| Inspection | Name Contact Guid | Building Rough |
| Inspection | Name Contact Guid | BLDG - MICROFI... |
| Inspection | Name Contact Guid | BLDG - MICROFI... |
| Inspection | Name Contact Guid | BLDG - MICROFI... |
| Permit | Applicant | PB08-0573 |
| Permit | Applicant | PB11-0014 |
| Permit | Applicant | PB96-0458 |
| Permit | Applicant | PD96-0011 |
| Permit | Applicant | PST03-0013 |
| Permit | Applicant | PTUP03-038 |
| Permit | Contractor | PB08-0573 |
| Invoice | Bill to Name | 00011797 |
| Invoice | Bill to Name | 00013085 |
| Invoice | Bill to Name | 00021760 |
| Invoice | Bill to Name | 00028969 |
| Invoice | Bill to Name | 00157795 |
| Invoice | Bill to Name | 00158450 |

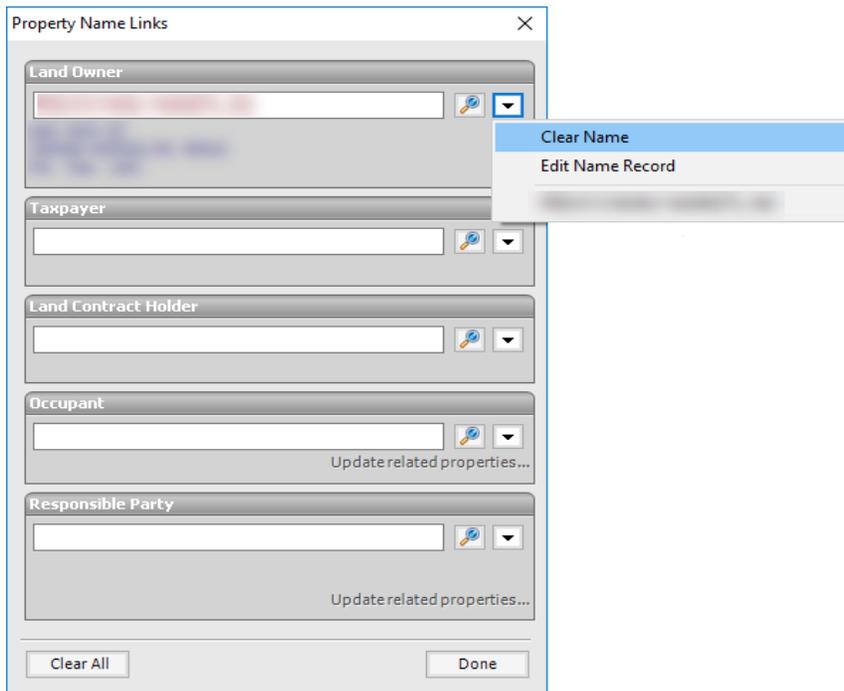
Merging names is permanent. This action cannot be undone other than by restoring a backup.

When Merging is Problematic

For customers who import names and addresses from BS&A Assessing, it is important to understand that Assessing does not store names separately from parcel records, as Building Department does. As an example, your Assessing database might have two parcel records that have the same owner, Jennifer Cooper (hereafter referred to as "Cooper Jennifer," in keeping with the last-name-first recommendation). One property address is 704 N Rainbow Drive, the other property address is 1008 Maple Street. In your Building Department database, both properties show Jennifer's address as 1008 Maple Street. The reason for this discrepancy is two-fold.

Originally, there were two name records for Cooper Jennifer - one for each property address - in Building Department's name file. At some point, these two name records were merged. Now the properties share the name reference. However, each time you import from Assessing, the address on Jennifer's name record reverts back to 1008 Maple Street, because Assessing's parcel record for that address is processed after the record for 704 N Rainbow Drive. For a few moments during the import, Jennifer's name record holds 704 as the address, but when the import hits 1008, it reverts back. So while a Building Department user may edit Jennifer's address to 704 in between imports, it will revert back to 1008 every time. Several options are available to fix this problem:

- a. Add another "Cooper Jennifer" name record with 704 N Rainbow Drive as the address.
- b. Clear the name references on the 704 property and wait for the next import to link it with the name.



- c. Open the Cooper Jennifer name record and turn off the Import Controlled setting.

The screenshot shows a software window titled "Name" with a close button (X) in the top right corner. Below the title bar is a menu bar with "Audit" and "Tools" options. The main content area is titled "Contact Information" and contains various fields for contact details. A red arrow points to the "Import Controlled" checkbox, which is currently unchecked. Other fields include "Filed As:", "Contact:", "Contact 2:", "Address:", "Address 2:", "City:", "State:", "Is International", "Email:", "Web Username:", "Web PIN:", "Last Modified:", "Phone:", "Fax:", "Mobile:", "Mobile Carrier:", "Other Phone:", "User Field:", "View Bonds...", "View References...", "View Transaction History...", "View Miscellaneous Information...", "View Comments...", "View Attachments...", and "Overpayment: \$0.00". At the bottom right, there are "Discard Changes" and "Close" buttons.

Merge Name Tool

1. It is highly recommended that you make a backup immediately prior to running this tool.
2. Open the Name table and sort by Name or Address.
3. Highlight the record you want to keep.
4. Click the Tools button and select Merge Name. A screen appears with all records the program finds similar. Carefully review these records; there may be an errant one you didn't catch. For example: you've indexed by Address, which lists numeric addresses first (1 Crocker Blvd), and alpha addresses next (One Crocker Blvd).
5. Click the record you want to merge into the "good" record and click Merge.
6. If applicable, continue merging.
7. Click Done when you are finished.