

# 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](mailto:tech@bsasoftware.com).

In the course of entering data, it's possible that a name record will be added when one already exists. It's good practice to periodically review your Names table\* for records where the name or address may be slightly off. When this happens, you can merge the records.

\*Merging names from the Names table is beneficial, as you can sort by "Name" or by "Address" to easily find differences. Merging names can also be done while viewing a Name Reference.

## When Merging is Bad...

Assessing does not store names separately from parcel records. Building Department .NET does.

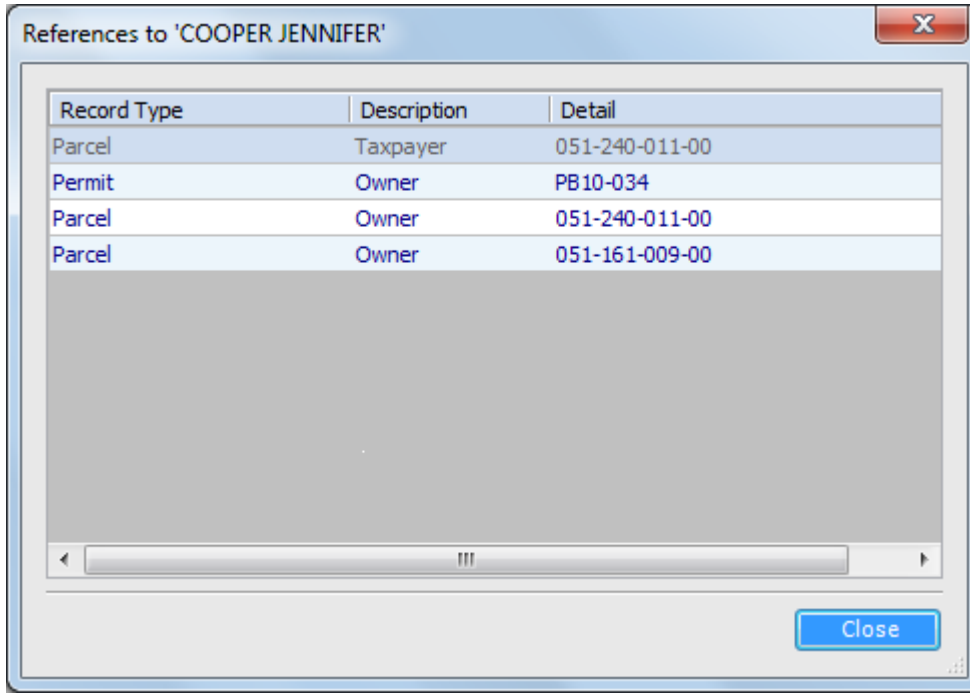
Assessing has two parcel records with the same Owner: Jennifer Cooper is the owner of 704 N Rainbow Drive and 1008 Maple Street:

The image displays two overlapping screenshots of the BS&A software interface, showing property and owner information for two different parcels. The left screenshot shows a property at 704 N Rainbow Drive, owned by Jennifer Cooper. The right screenshot shows a property at 1008 Maple Street, also owned by Jennifer Cooper. Both screenshots show the 'Owner Information' section with the owner's name, address, city, state, and zip code. The right screenshot also includes a 'Taxpayer Information' section with a 'Clear' button.

Property Address	Owner Information	Taxpayer Information
704 N RAINBOW DR CLARE MI 48617	COOPER JENNIFER 704 N RAINBOW DR CLARE MI 48617	
1008 MAPLE ST CLARE MI 48617	COOPER JENNIFER 1008 MAPLE ST CLARE MI 48617	

In your Building Department .NET database, both properties show Jennifer's address as 1008 Maple Street. The reason for this discrepancy is twofold:

1. Originally, there were two name records for Jennifer Cooper (one for each address) in the Name file. At some point, these two names were merged and now the properties share the name. Pictured are the references to this name record:



2. Every time the import is run, the address on Jennifer's name record reverts back to 1008 Maple St, because Assessing's parcel record for that address is processed after the record for 704 N Rainbow Drive. During the import, for a few moments anyway, 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 in between imports to 704, it will revert back to 1008 every time.

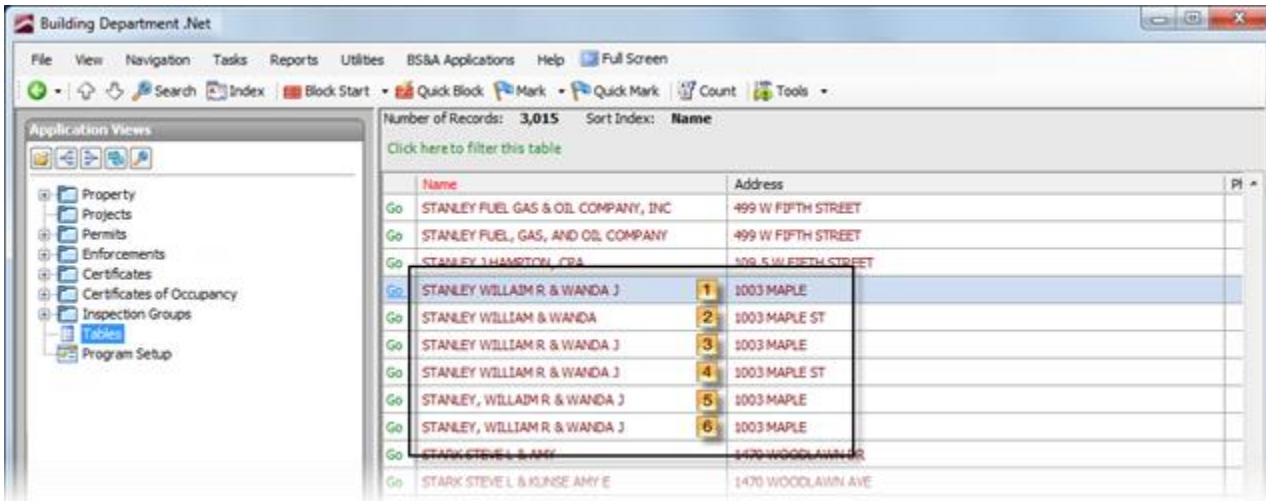
You have several options in how to fix this problem:

- a. Clear the name references on 704's record and wait for the next import to link the name to the correct.
- b. Add another "Cooper Jennifer" name record using 704 N Rainbow Drive.
- c. Open Jennifer's name record and uncheck the Import Controlled box.

## When Merging is Good...

If the "wrong" name record contains any references to permits, fees, etc., those references will transfer to the "correct" name record during the merge; the wrong name record will be deleted. Having said that, you cannot directly delete a name record if it contains references. You will need to merge it.

Pictured is an example of six separate name records, each of which has its own references to different record types:



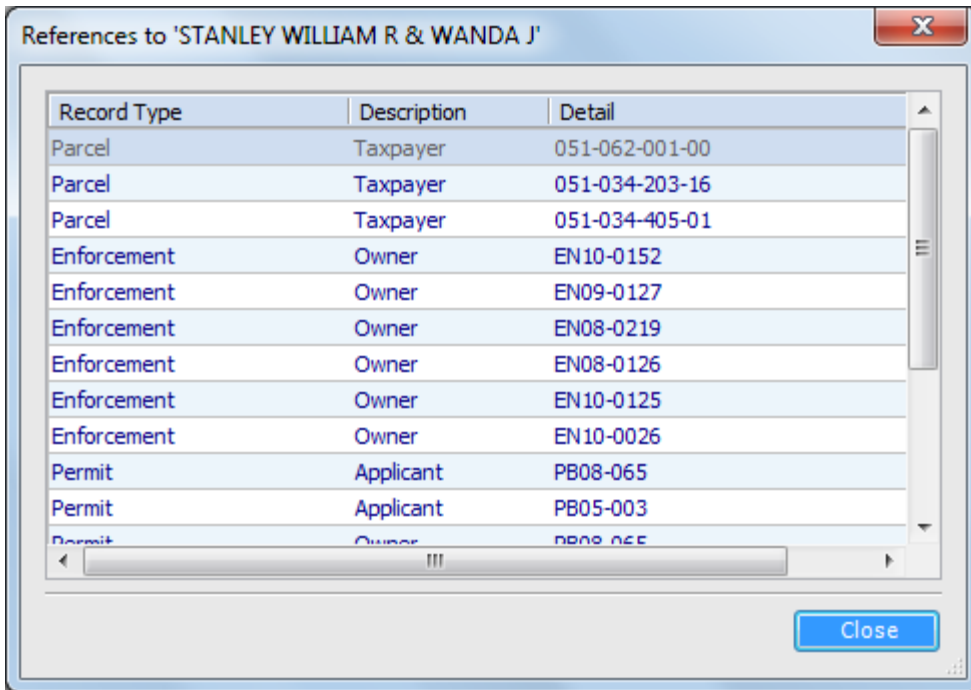
The screenshot shows a web application window titled "Building Department .Net". The interface includes a menu bar (File, View, Navigation, Tasks, Reports, Utilities, BS&A Applications, Help, Full Screen) and a toolbar with various icons. On the left, there is a tree view for "Application Views" with categories like Property, Projects, Permits, Enforcements, Certificates, Certificates of Occupancy, Inspection Groups, Tables, and Program Setup. The main area displays a table with columns for "Name", "Address", and "PI". The table contains several records, with a box highlighting six specific records. Each record has a "Go" link and a small yellow box with a number indicating the count of references.

Name	Address	PI
Go STANLEY FUEL GAS & OIL COMPANY, INC	499 W FIFTH STREET	
Go STANLEY FUEL, GAS, AND OIL COMPANY	499 W FIFTH STREET	
Go STANLEY J HANPTON, CPA	109.5 W FIFTH STREET	
Go STANLEY WILLIAM R & WANDA J	1003 MAPLE	1
Go STANLEY WILLIAM & WANDA	1003 MAPLE ST	2
Go STANLEY WILLIAM R & WANDA J	1003 MAPLE	3
Go STANLEY WILLIAM R & WANDA J	1003 MAPLE ST	4
Go STANLEY, WILLIAM R & WANDA J	1003 MAPLE	5
Go STANLEY, WILLIAM R & WANDA J	1003 MAPLE	6
Go STARK STEVE L & AMY	1470 WOODLAWN AVE	
Go STARK STEVE L & KUNSE AMY E	1470 WOODLAWN AVE	

In viewing the References (double-click a name record, then click the [View References...](#) command link):

- 1 - no references
- 2 - one reference to a parcel as the Taxpayer
- 3 - numerous references to parcel, permit, and enforcement records
- 4 - one reference to a parcel as the Owner
- 5 - numerous references to permit and invoice records, but none to properties
- 6 - one reference to a parcel as the Taxpayer

Pictured is an example of this name record post-merge. All references are now on one name record:



Record Type	Description	Detail
Parcel	Taxpayer	051-062-001-00
Parcel	Taxpayer	051-034-203-16
Parcel	Taxpayer	051-034-405-01
Enforcement	Owner	EN10-0152
Enforcement	Owner	EN09-0127
Enforcement	Owner	EN08-0219
Enforcement	Owner	EN08-0126
Enforcement	Owner	EN10-0125
Enforcement	Owner	EN10-0026
Permit	Applicant	PB08-065
Permit	Applicant	PB05-003
Permit	Owner	none see

## Tips for Merging

- o A name record with financial references (invoices/payments) cannot be merged into another name record - you will receive an error. You will need to go to the linked records of the "bad" name and change the name reference to the good one.
- o As a general rule, merge the "first name first" record into the "last name first" record.
- o If one address ends in AVE, and the other doesn't end with the street type, the record with the street type should be the one you keep.



## Merge Names from the Names Table

It is highly recommended you make a backup before proceeding with the instructions in this topic.

1. Open the Names table.
2. Sort the records by Name or by Address.
3. Highlight the record you want to keep.

4. Click  > **Merge Name**.

A dialog 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 record selected in step 3.
6. Click .
7. If applicable, continue merging.
8. When finished, click .



## Merge Names from a Name Reference

It is highly recommended you make a backup before proceeding with the instructions in this topic. This example uses a name reference on a property; the same principle applies on permit name references, certificate name references, etc.

1. Locate the property.
2. Double-click the **Property** folder to open it.
3. Click the name reference.

4. Click  > **Merge Name**.

A dialog 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 record selected in step 3.
6. Click .
7. If applicable, continue merging.
8. When finished, click .