Name Merging

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						
Go						
Go						
Go	AIM CONSTRUCTION	31805 W EIGHT MILE ROAD		248-476-1310		
Go	AIM CONSTRUCTION INC	31805 W EIGHT MILE RD		810-476-1310		
Go	AIM CONSTRUCTION, INC	31805 WEST 8 MILE ROAD, LIVONIA		248-476-1310		
Go						
Go						
Go						
Go						
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:
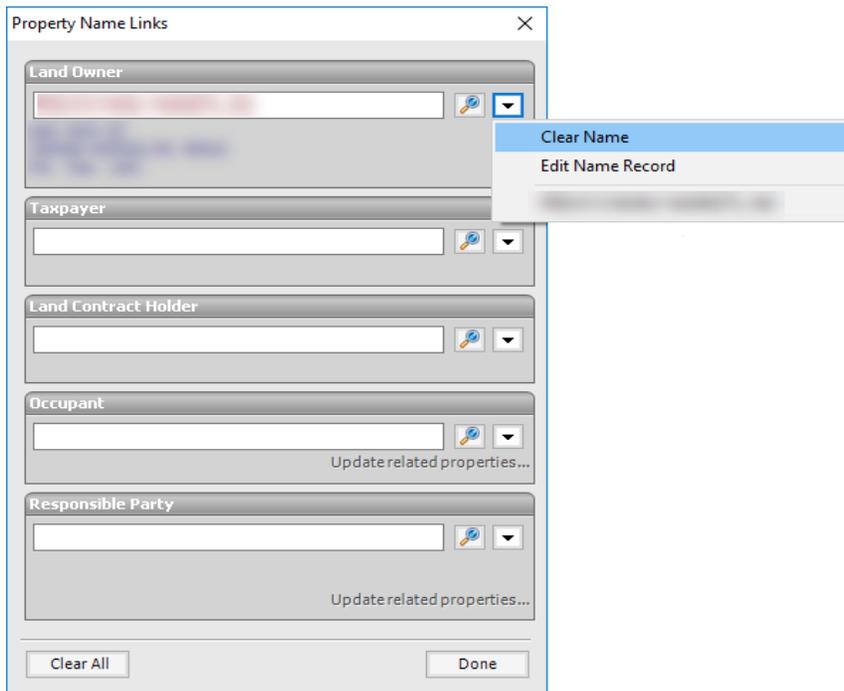

Merging names is permanent. This action cannot be undone other than by restoring a backup.

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.

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.