2012 Summer Release

Duplicate Detection in Batch Gift Entry & Ad Hoc Contact Merge

Platform Luminate CRM

Configuration Feature is available, but requires some setup.

Our team is committed to helping you get the most out of every relationship and inspire your creativity to deliver engaging experiences for your constituents so you can do even more for your mission. The Summer 2012 release of Convio Luminate™ is packed with enhancements designed to connect more people to your cause, enhance the user's experience, allow you to better measure and test your strategies, and offer new ways to deliver web-based content and leverage our open platform – all while making optimal use of your staff's valuable time.

This document describes the feature "Duplicate Detection in Batch Gift Entry & Ad Hoc Contact Merge", explains how to configure and use it, and offers tips for taking full advantage of its benefits. Please visit the release resource center to read more about the exciting features in this release.

OVERVIEW

Luminate CRM serves as the primary tool for duplicate management and resolution in the Convio Luminate suite. This release improves the ability to detect duplicate records when entering gifts in batch processing. Previously, only exact name matches were found when you entered a new gift, now Luminate CRM can also search for similar matches, such as "John" and "Johnny" or "Joe" and "Joseph". This release also adds the ability to manually assign a duplicate to a contact using the new **Assign Duplicate** button in the contact record.

FEATURES AND BENEFITS

In this release of Luminate CRM, we have added tools to help manage and resolve these duplicate management needs.

Features

- ✓ Merge known duplicates that do not meet system match algorithm criteria
- ✓ Detect potential duplicates in batch prior to creating transactions in the batch

Benefits

- ✓ Enables organizations to quickly and easily merge known duplicate contacts

- ✓ Identify existing contacts in the system during batch entry to prevent the creation of duplicate contacts
- ✓ Connect donors to their appropriate transaction schedule by selecting an existing donor prior to entering in payment details

COMMON SCENARIOS

The following scenarios illustrate how these new features will benefit users:

- **Ad hoc Duplicate Match:** Jane Doe calls because she received two pieces of the same mail from your organization. Jane Doe got married and changed her name to Jane Smith. She also moved and has her mail forwarded to the new address. Today, she received two of the same donation solicitations in the mail – one to the new address and one from the old address with her maiden name. Because both the name and address have changed, the system will not detect her as a potential duplicate. You would like to be able to merge Jane's records into one without manually re-entering the old information into the new, Master record.
- **Batch Gift Entry duplicate detection:** While entering in a stack of gifts in batch, you have a stack of reply devices that contain transactions from new and existing donors. The reply devices contain the contact information and transaction information for the donor. The user would like to be able to enter basic contact information to check for existing contacts in the system during batch gift entry. The system should present the user with a list of exact contact matches, and build a list of potential other matches. You must then be able to select a match and enter the appropriate transaction information.

CONSIDERATIONS

Administrators must be assigned the Duplicate Management permission set in order to manage duplicates.

GETTING STARTED

This section contains the following procedures:

- Assigning Duplicate Management Permissions
- Manually Assigning a Duplicate
- Searching for Matches when Entering Gifts in Batch

Assigning Duplicate Management Permissions

If you are only assigning duplicate management permissions to one or two users, follow the procedure, to assign the Duplicate Management Permissions Set. If you are assigning permissions to a large group of users, follow the procedure, to create a Duplicate Management User Profile.

To assign the Duplicate Management permissions set:

This procedure is recommended if you are assigning duplicate management permissions to only a few users as you have to assign the permissions one-by-one.

1. Click your user name in the upper, right-hand corner of the screen and select **Setup** from the drop-down menu. The **Setup** page displays.
2. Click **Manage Users** and select **Users** from the sub-menu in the left-hand panel of the screen. The list of users displays.
3. Click on the user's name. The **User Detail** page displays.
4. Click **Permission Set Assignments** at top of page.
5. Click **Edit Assignments**. The **Permission Set Assignments** screen displays.
6. Select the Duplicate Management permission set in the Available Permission Sets column and click the Add arrow.
7. Click **Save** when you are done.

To create a Duplicate Management User Profile:

This procedure is recommended if you are assigning duplicate management permissions to a large group of users.

1. Create a new profile based on the Standard User profile and name it something like "DupMgtAdmin".
2. In the **Custom App Settings** section, check the box next to the Luminate CRM app to mark it as "Visible". Select the **Default** radio button. Clear all of the other Custom Apps in this section.
3. In the **Tab Settings** section, look at the Custom Tab Settings subsection. Make sure that **Duplicate Management** is set to **Default On**.
4. In the following sections, clear all the following options:
    a. Administrative Permissions
    b. General User Permisssions
    c. Standard Object Permissions
    d. Custom Object Permissions
5. In the **Standard Object Permissions** section, select the option to allow Read access on Accounts and Contacts.
6. In the **Custom Object Permissions** section, select the option to allow Read access on Match Groups.
7. Under **Desktop Integration Clients**, select "Off (access denied)" for all the items in this section.
8. Click **Save**.

9. Scroll to the **Enabled Apex Class Access** section of the profile, and click **Edit**. Remove all Apex Classes from the "Enabled Apex Classes" box and click **Save**.

10. Scroll to the **Enabled Visualforce Page Access** section of the profile, and click **Edit**. Remove all Visualforce Pages from the "Enabled Visualforce Pages" box. Then, find the following pages and add them back into the box:

    - cv.DupeManager
    - cv.Duplicate_Merge_Accounts
    - cv.Duplicate_Merge_Fields

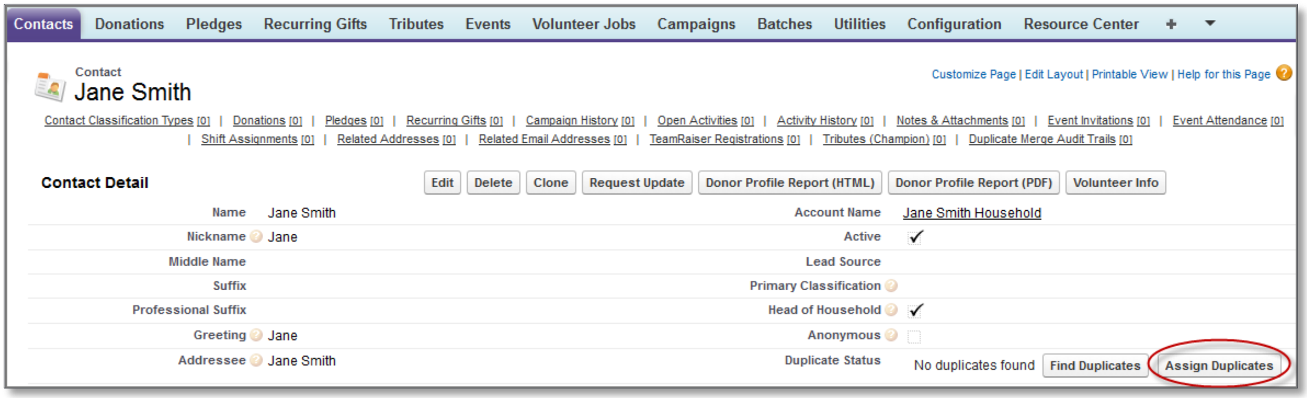
11. Click **Save**.

Ad hoc Duplicate management

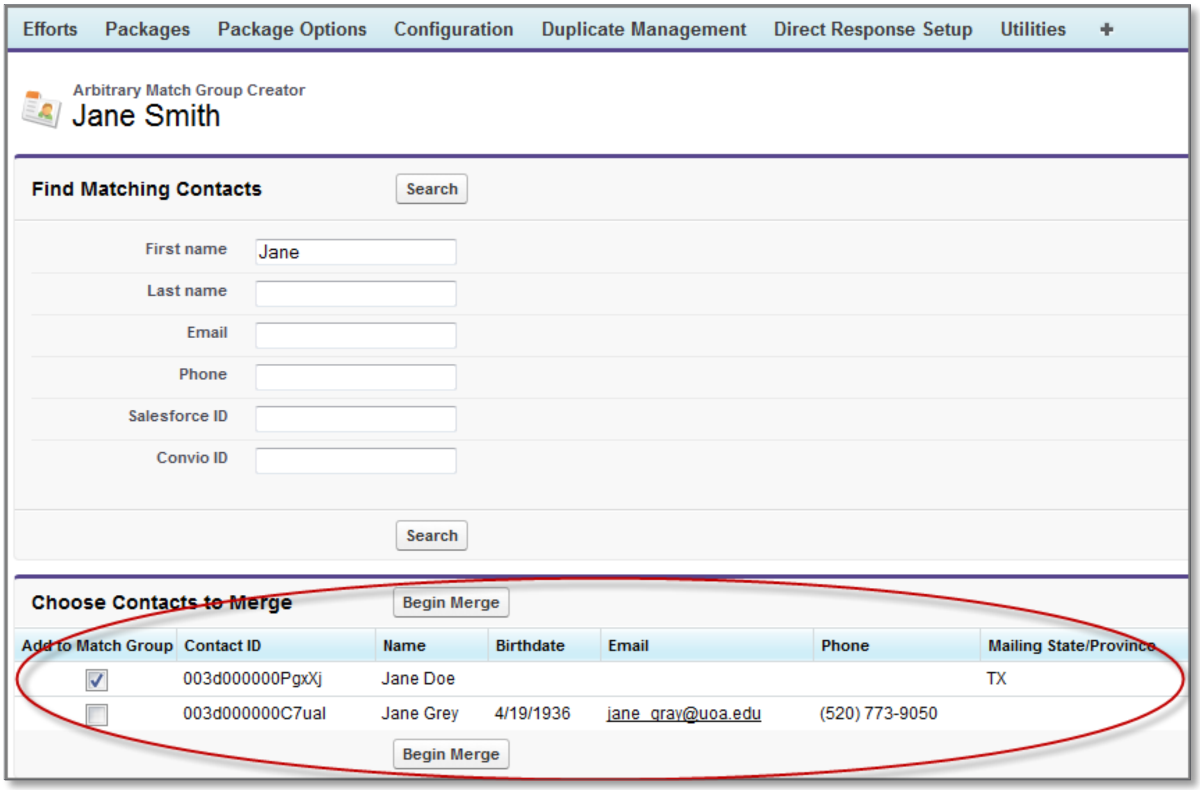
In the scenario mentioned in the Common Scenarios section, you would like to merge Jane Smith's record with Jane Doe's record. Her current name is Jane Smith, so you will make that record the Master record.

To assign a duplicate ad hoc:

1. Open one of the duplicate contact records.
2. Click **Assign Duplicates**. The **Find Matching Contacts** page displays.

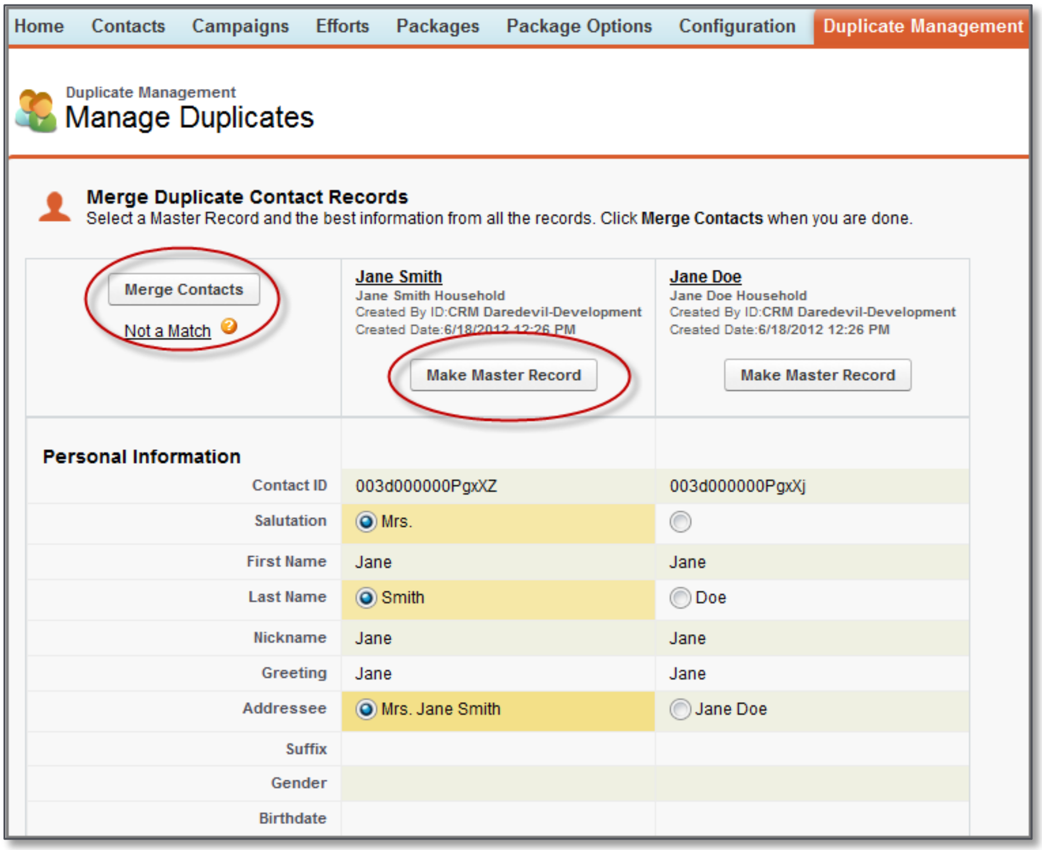


3. Enter **Jane** in the the **First Name** field and click **Search**. Any matching contact displays at the bottom of the screen.



4. Select the duplicate record in the **Add to Match Group** column and click **Begin Merge**. The Duplicate Management page displays.

5. Select a record to be the **Master Record**, select the most recent information from the two records, and click **Merge Contacts**. You have successfully merged the contacts.

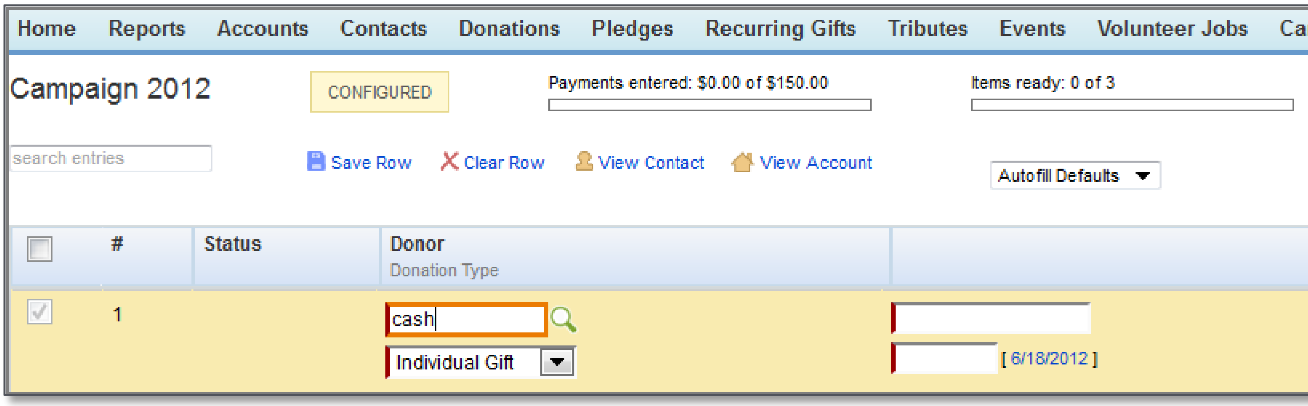


Searching for Matches when Entering Gifts in Batch

When you enter a donor name in the batch entry form, the Duplicate Management tool can now search for similar as well as exact match, thus avoiding the creation of duplicate records. There are no extra steps you need to take to look for duplicates when entering gifts in batch, they are automatically detected when you enter the donor name and click **Search**. If a match is discovered you can select that record, or create a new one if it is not a match.

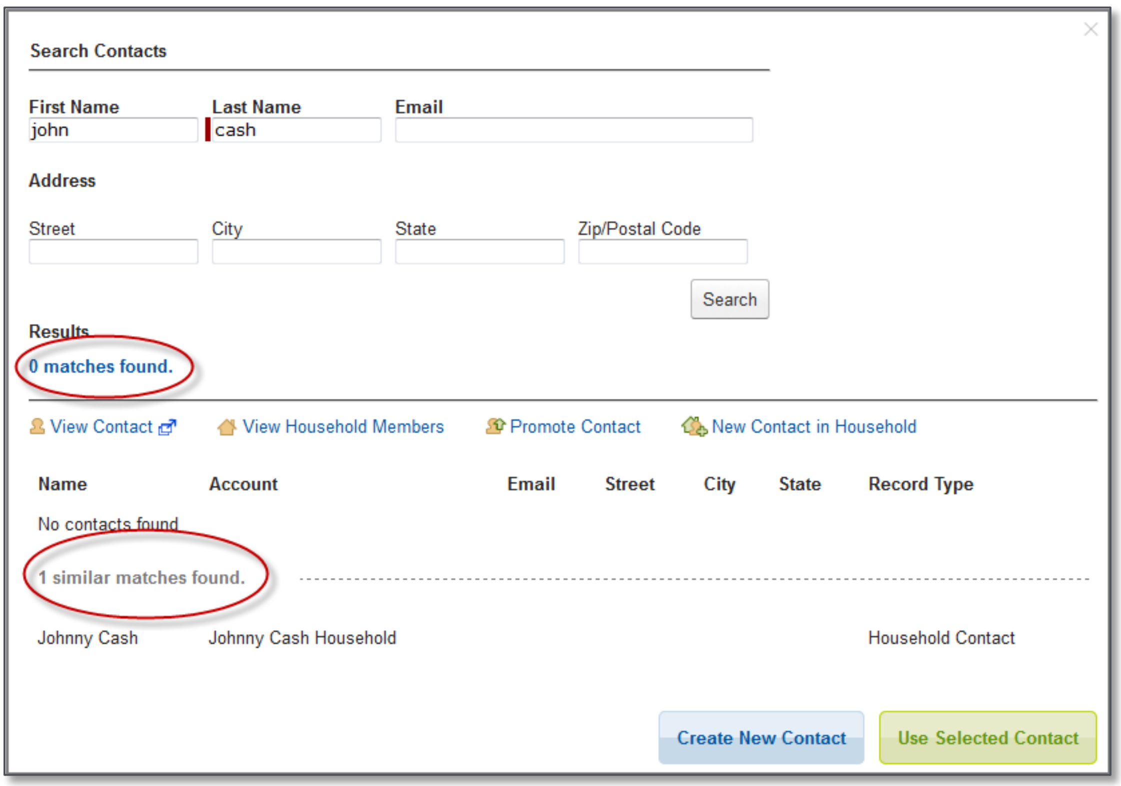
To check for duplicates during batch entry:

1. In the Gift Entry page, enter the contact name in the **Donor** field and click the **Search** icon. The Search contacts screen displays.



2. Click the **Search** button located under the **Zip/Postal Code** field.

3. If a match is found, they are listed at the bottom of the screen. In the example below, no exact match was found, but a similar match was found – John and Johnny. If the record is a duplicate, click **Use Selected Contact**. If it is a new contact, click **Create New Contact**.



ADDITIONAL RESOURCES

We understand that our solutions are an integral part of your organization's success, and so we offers several ways for you to get the help and information you need:

Learn More »

Summer 2012 Release – The community is a one-stop-shop containing everything you need to know about the release, including an overview of all the new functionality, summaries of other features, and links to release-specific training and help resources.

Get Support »

Support – Our Client Care team strives to provide you with the best possible support experience by promptly responding to questions and resolving issues submitted via the method that's most convenient for you. In addition to contacting us via a case or phone, you also have the option to chat with us live to get a quick answer for your quick questions.

Training – We offer a diverse set of training options to meet a variety of roles, learning styles, and situations. Track your learning path and history, view upcoming classes, download documentation and best practices, and browse other resources – via a web browser, at no extra charge, no matter where you are.

Get Started »

Release Calendar – For Luminate Online products, review our Release Planning Calendar to determine when this update will be available to you. For Luminate CRM, please contact your Account Representative.

GIVE US YOUR FEEDBACK

Have a suggestion for a future release? "Ideas" is a tool used by our Product Management team to determine which enhancements are most popular among our clients. You can help shape the future of our roadmap by entering a nominee and voting for ideas submitted by other clients. To participate, visit the Customer Center and click "Support". Once you are in the Support portal, click the "Ideas" tab to begin using the feedback tool.
