

Merge Patron Records

If you discover that a patron has multiple patron records, you can merge them into one. This is handy if a patron has moved to a new community.

- 1. Open the patron record you wish to keep. This should be the record with the correct address and contact information.
- 2. Click the REGISTRATION button located at the top of the patron record.
- 3. Then select the MERGE button on the right side of the registration form.
- 4. You will see a pop-up with all the primary record information on the left side and the second record (to be deleted) will be blank. Click the SELECT RECORD TO DELETE button.



- 5. Then use the find toolbox to locate the duplicate record you wish to delete. When you find the appropriate record, double-click to open it.
- 6. The record "to be deleted" will display on the right side of the merge work form. Click the MERGE button.
- 7. You will be prompted to confirm the action, click CONTINUE.

Merge Patron Records	×
Primary record Albus Dumbledore 5404 56 Avenue Lacombe AB Patron 21000007618734	Secondary record (to be deleted)
barcode: Patron Borrow by Mail- allowed code: Address: 5404 56 Avenue Lacombe, AB T4L 1G1 Email TheGreatestWizardOfAllTime@Hogwarts.org address: eReceipt: No Expiration 8/20/2025 date: Notification Email Address	Patron code: Address: Email address: eReceipt: Expiration date: Notification option: Phone 1: Statistical class: Acct charges:
MERGE	CANCEL