

Import Non-Member Merge File

Article Number

000087154

Information

Identity Checkpoint must be activated on your site in order to have access to the Import Non-Member Merge File option. Please contact your Encompass representative or attend the Identity Checkpoint modular training to have this activated for your site.

This import capability gives you the ability to import a list of non-member IDs with the corresponding constituent IDs, and specify how you want them handled. The .csv file is limited to 10,000 rows of data. The records can go into the Member Merge grid for a final review or can be merged automatically in the Encompass database.

You will use the appropriate column headers for your Constituent ID# and the Encompass Member ID (usually member_id). The specific column names for your community are displayed on the file upload page.

To create the import file you must include the following 3 columns:

- **CONSTITUENT_ID** (varies by community) - This column contains your community's ID number (for the constituent record).
- **MEMBER_ID** - This column contains the Encompass member ID number (for the non-member record).
- **REVIEW** - This column must contain either review or merge. This column name is the same for all communities.
 - **Review** will put the records in the Identity Checkpoint Merge Data grid for you to review before merging the records.
 - **Merge** will merge the non-member record into the member record in overnight processing, and the non-member record will be deleted.

Import a Non-Member Merge File

- To begin, navigate to the **Identity Checkpoint Merge Grid**.
- Click **Import Non-Member Merge File**.
- Click **Browse** to select the file you created.
- Click **Import File** to process the file.

The **Import History** tab in the **Import Member Data** area will show information on your import, including an Error Log and a Success Log.

Business Rules

- It will not be possible to import and merge a Primary Registrant and a Guest Record into the same constituent record when both are registered for the same event. If an Admin attempts to complete such a merge, they will receive the following error: "The baseMemberId is already a registrant of an event where the mergeMemberId is a registrant or guest."
- New merges will not be allowed if a constituent has existing/incomplete merges. Existing/incomplete merges mean that the constituent is already flagged to be merged to another guest record and is in the Identity Check Point – Merge Data grid pending Admin review and approval, or that the Admin has

recently merged the record to the same or another nonmember and the merge process has not completed.

- When an Admin attempts to upload an import file and the constituent record or non-member record is associated with a pending/incomplete merge the following error will be returned: “New merges into member accounts with pending merges are not allowed”.
- Merges for the same constituent in the same file will also be disallowed. If attempted, this error will result: “The baseMemberId is already flagged to be merged into another record”.
- Using "merge" will cause any data for fields that are contained in the Merge Grid to be ignored since you're not reviewing them. To have data overwrite, you should use "review" and then merge from the grid once it populates. The default data fields/columns contained in the Merge Grid are:

NOTE: your fields/columns could be different if someone at your institution has requested fields to be added or removed.

- **Best practices for admins:**

- Ensure the import file does not contain multiple non-member records that are to be merged into one constituent account.
- Check the Identity Checkpoint – Merge Data grid to see if the constituent record is associated with pending merges and merge those first.
- If the constituent record is not in the merge data grid, then wait for the merge process to complete before attempting another import and try again the next day.

KB Product

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Title

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