

Districts with Contact Types already at the District level

Edit Contact Types at Building level. If any inactive contact type has a # other than zero in the "Count" column, then reactivate the contact type and once the contact type is active use the "District Codes" column to map the building level code to the district level contact code equivalent. When you are finished all of the building level codes should be inactive and should have zero in the "Count" column value.

Go to Contact Types at the district level and map any district level contacts, such as Dr. DDS, Hospital, etc to Professional Contacts

Use Family Groups Wizard to create Family Groups for the district.

Go to Contacts tab of Family Group and consolidate contacts

After Contact Consolidation page is released, cleanup Professional Contacts

