



Release Notes

Family Merge Enhancements

General Overview

The current process for merging family accounts is not user-friendly and can result in staff members improperly merging family and/or student records. This results in requiring the account owner to submit a support request to reverse the merge. If staff members have already performed actions with the newly merged families (such as creating enrollments, charges, or payments), then this can require pulling a backup and may incur a cost.

The purpose of this task is to replace the existing Family Merge Tool with the "Merge Families Wizard", which will make the merge process more user-friendly. This interface will walk staff members step-by-step through selecting relevant data to be kept and allows them a chance to review the final record before completing the merge process.

How will this benefit me?

Replacing the existing Family Merge Tool with the "Merge Families Wizard" will result in a better user experience for staff members and help prevent issues where an improper merge can require assistance from iClassPro's team to reverse the merge.

Where will I see these changes?

These changes will affect the Office Portal, namely the Family Merge Tool that is accessible from the FAMILIES page.

What is being changed/added?

We are updating and improving the family merge process to utilize the "Merge Families Wizard." This interface will walk staff members step-by-step through selecting relevant data to be kept and allows them a chance to review the final record before completing the merge process.

How does this work with existing settings?

The "Merge Families Wizard" will completely replace the current Family Merge tool.

Relevant Knowledgebase Article Links

[How Do I Merge Family/Student Accounts?](#)