BROLIN CORPORATION

Enterprise Software Solutions

MCS Data Consolidation Guide

MCS Data Consolidation Guide

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MCS Data Consolidation Guide

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Overview

Data Consolidation is an MCS feature allowing the user to handle duplicate database records and consolidate them in a single record. The feature is available for contacts records, companies records and property records. Consolidation is performed as a step-by-step process and there is a separate consolidation screen for every step. There are three sets of step-by-step consolidation screens depending on their calling data entry screen - Companies Consolidation screens (called from the Companies screen), Contacts Consolidation screens (called from the Contacts screen), and Properties Consolidation screens (called from the Property Maintenance screen). Each of these is explained in detail in the Consolidation Screens Definitions section.

The user has the options to start the consolidation procedure before or after finding duplicate records. If the user has already marked the duplicate records when starting the consolidation (the latter case), the consolidation process begins with opening the Step 1 consolidation screen of the sequence. Otherwise, the consolidation starts from a preliminary consolidation screen to search for and retrieve duplicate records. The Step 1 consolidation screens display the main, most basic data fields for the record and is the point at which the user decides which one of the records to keep in the database. The other record is physically deleted from the database. The rest of the data, typically in the form of related child records, is displayed on the screens that follow the Step 1 screen for both of the records being consolidated. The user reviews the data and selects what to keep for the consolidated record and what to discard. An option to go back to any screen and correct the choices made, if necessary, is available, as long as the consolidation is not implemented.

The outcome of a consolidation procedure is a database record with ID # and main data values as selected in the Step 1 consolidation screen and related (child) data as set in the consolidation screens for the next steps.

Consolidation Screens Definitions

Consolidation Screens Common Option Buttons

The following option buttons are common for all Consolidation screens. They are located at the bottom of the screens.

Previous	Returns to the previous step (screen) of the consolidation step-by-step process.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.

Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Preliminary Consolidation Screens

The preliminary consolidation screens are used for finding records to be merged. If the user has already selected the records to be merged, this screen (step) is skipped. There are three preliminary consolidation screens, one for each set of consolidation screens (Companies Consolidation, Contacts Consolidation, and Properties Consolidation screens). They are explained in detail in the respective chapters of this guide. The current chapter deals with the common features of the preliminary consolidation screens and the way they work.

Each preliminary consolidation screens is comprised of:

- Select By/Find Similar radio buttons;
- A Source and Destination Fields;
- Find Similar checkboxes;
- A Find Similar grid (matches grid);
- A Find button.

Select By/Find Similar Radio Buttons

These buttons switch the filter type used to retrieve duplicate records. The Select By radio button switches to filtering by ID #s. This filter matches the database records against their unique identifying #s (Company ID, Contact ID, or PSA# depending on the records' type). The Find Similar radio button switches to automatic retrieval of duplicate records. The user can determine which fields should be checked in the database by selecting the appropriate Find Similar checkboxes.

Source and Destination Fields

These fields are used for entering the unique identifying # (Company ID, Contact ID, or PSA# depending on the type of records retrieved) for the record to be retrieved for consolidation.

Find Similar Checkboxes

These checkboxes indicate the fields that are going to be checked for duplicate values when the filter is applied.

Matches Grid

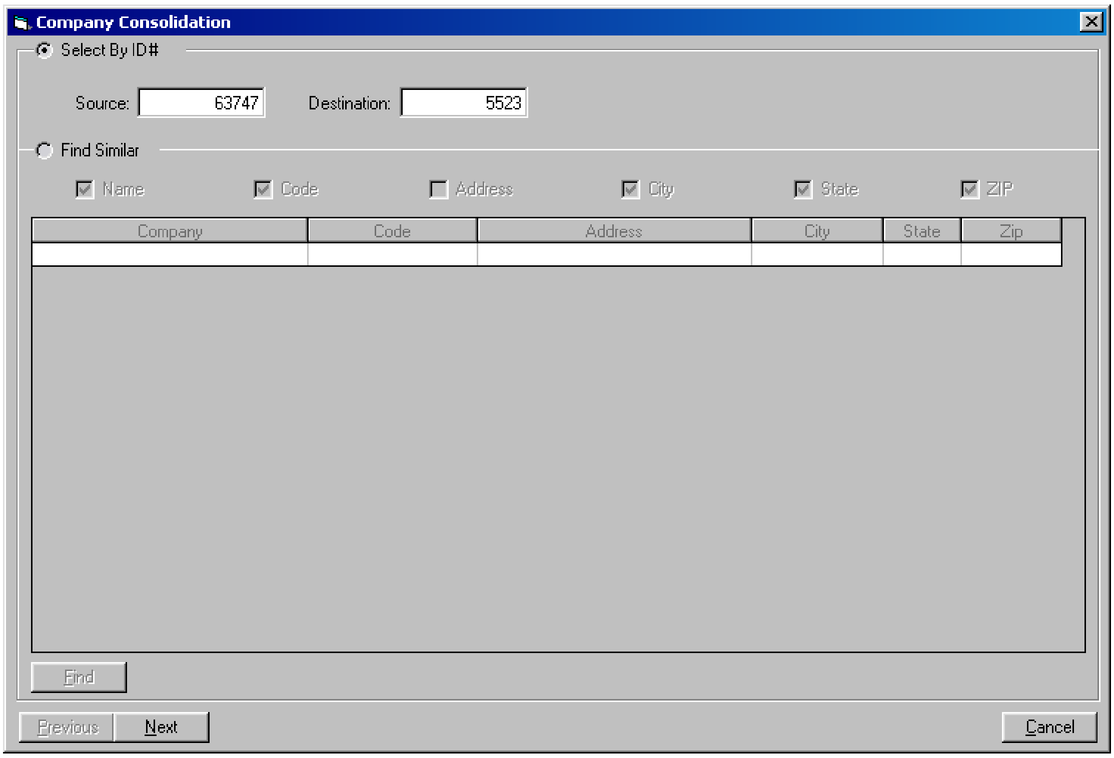
When the search for duplicate records is done, the duplicate records found are listed the Find Similar grid. The Find Similar grid of the preliminary consolidation screen corresponds to the Matches tab grid of the calling data entry screen. The user can click on the column headers to sort records.

Find Button

The Find button applies the selected filter criteria. The button is available only when the Find Similar radio button is selected.

Company Consolidation Screens

Preliminary Company Consolidation Screen



Select by ID# frame

Select by ID# radio button	When selected, enables the Source and Destination fields and disables the Find Similar frame.
Source	The ID # of the first duplicate record to be retrieved for consolidation. In the next step of the consolidation procedure, this record is going to be kept by default, but the user will have the option to select the record they want to keep. Apart from this, it does not matter which one of the duplicate records will be entered in this field.
Destination	The ID # of the second duplicate record to be retrieved for consolidation. In the next step of the consolidation procedure, this record is going to be deleted by default, but the user will have the option to select the record they want to keep. Apart from this, it does not matter which one of the duplicate records will be entered in this field.

Find Similar frame

Find Similar radio button	When selected, enables the Find Similar frame and disables the Source and Destination fields.

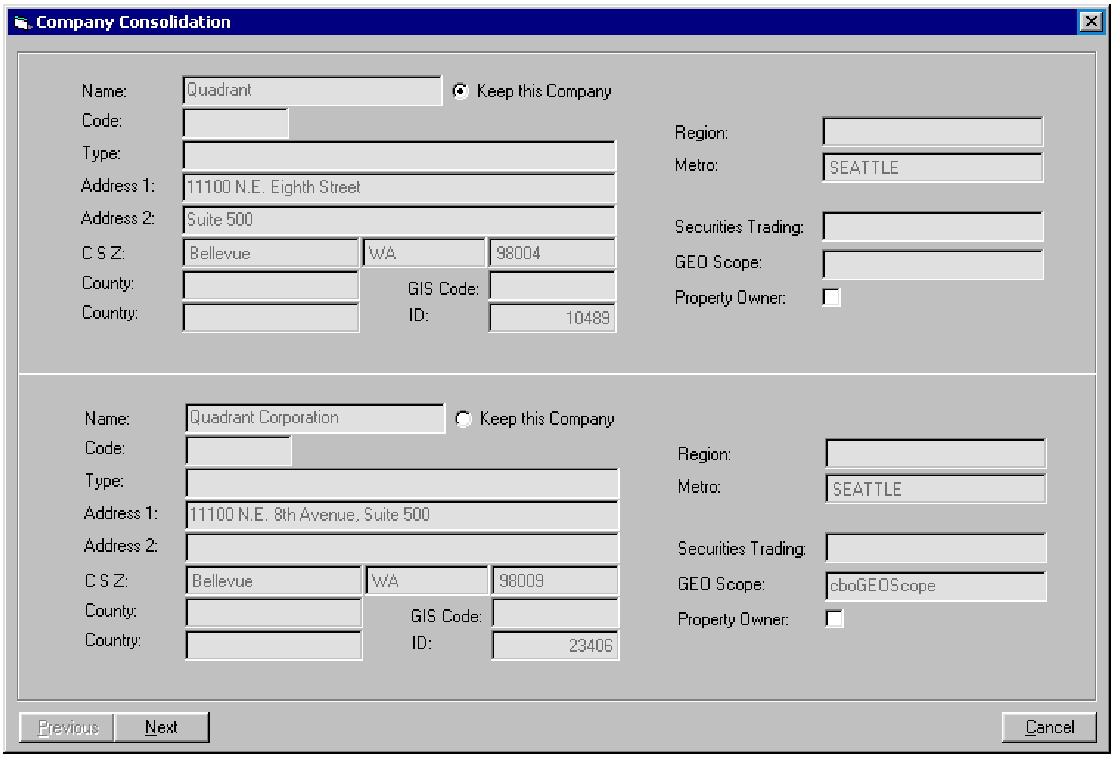
Find Similar checkboxes:

Name checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Name field.
Code checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Code field.
Address checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Address field.
City checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the City field.
State checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the State field.
Zip checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Zip field.
Find Similar grid	Displays the returned matches upon pressing the "Find" button.
Find button	Applies the filter defined by the current settings of the Find Similar checkboxes. The returned matches are displayed in the Matches tab grid.

Option Buttons:

Previous	This button has no application for this step and is disabled.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Company Consolidation Screen - Step 1 (Select the Record to Keep)



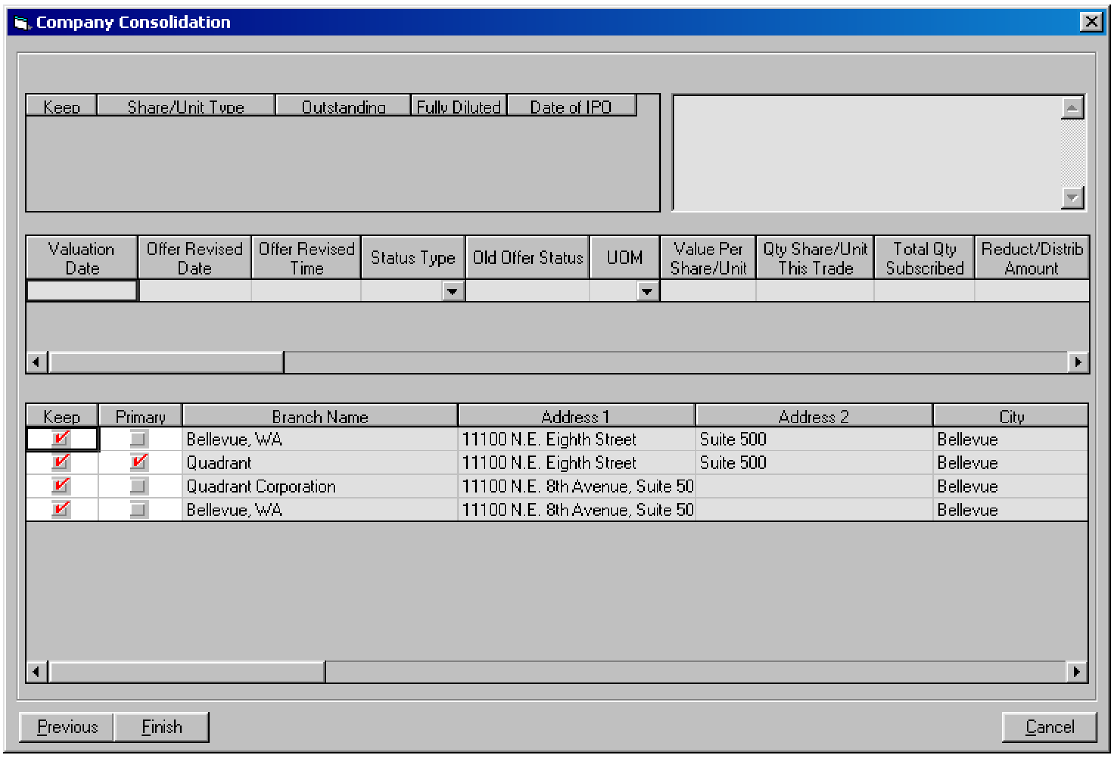
Name	The name of the company.
Keep This Company radio buttons	The selected one indicates the company record to be kept after the consolidation. Refers to the Name field to the left.
Code	The common code of the company.
Type	The company type (REIT, RELP, etc.).
Address 1	Address line 1 for the company's street address.
Address 2	Address line 2 for the company's street address.
CZS	City, Zip code and State of the company's address.
County	The county the company is located in.
GIS Code	The GIS Code of the company.
Country	The country the company is located in.
ID	Company ID
Region	The region the company is located in.
Metro	The metro the company is located in.
Securities Trading	The company's securities trading symbol.
Geo Scope	GEO Scope of the Profile – Global, Country, Regional, State, Market.

Property Owner checkbox	When checked, indicates that the Company owns properties.

Option Buttons:

Previous	Returns to the previous step (screen) of the consolidation step-by-step process. If the user has entered the Step1 screen from the calling data entry screen and not from the Preliminary Consolidation screen, this button has no application for this step and is disabled.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Company Consolidation Screen - Step 2 (Select Share Status Tab Grid Records and Branches)



The grid on the upper-left hand-side:

With the exception of the Keep checkbox, these grid fields are the grid fields on the upper-left hand-side of the Share Status tab (in grid view). If the company has no Share Status tab form records, this grid's fields are not available. When a row of this grid is selected (i.e. has the focus placed on any of its fields), the child records for this row are displayed in the grid in the middle.

Keep checkbox	When checked, indicates that the row will be kept in the consolidated record.
Share/Unit Type	The type or class stock shares or units, e.g. A, B, CA, etc. MCS will not allow the user to consolidate the record if there are rows with duplicate Share/Unit Type values.
Outstanding	The total number of shares or units issued.
Fully Diluted	Checked if the shares or units are fully diluted.
Date of IPO	The date of the original public offering.

The memo field on the upper-right hand-side:

This field is the Notes field of the Share Status tab. Used to enter general notes related to the trading of the company's share/units. The value in this field always relates to the current record of the grid to the left.

The grid in the middle:

This grid's fields are the grid fields of the main grid in the Share Status tab form (in grid view). If the company has no Share Status tab form records, this grid's fields are not available. The grid displays the child records for the current row in the upper-left hand-side grid.

Valuation Date	The date the share/unit was made.
Offer Revised Date	The as of date used for offers/trades.
Offer Revised Time	The as of time used for offers/trades.
Status Type	The type of status, e.g. Valuation, Actual Pending Trade, etc.
Old Offer Status	The old type of status that was used in the Alpha Micro system.
UOM	The unit of measure. Accepts # for units or % for percentage.
Value Per Share/Unit	The $ value per share or unit.
Qty Share/Unit This Trade	The number of shares or the percentage for the trade.
Total Qty Subscribed	The total quantity of share /units sold as of this status record.
Reduct/Distrib Amount	The $ amount of the reduction or distribution per share / unit that is associated with this status record.
Benchmark Offer Price	The benchmark $ amount per share /unit.
Maximum Offer Price	The maximum $ amount per share /unit offered.
Folders	
Ask Company	For actual offers or trades, the name of the Company offering to sell.

Ask Contact	For actual offers or trades, the name of the name of the Contact at the Company offering to sell.
Bid Company	For actual offers or trades, the name of the Company offering to buy.
Bid Contact	For actual offers or trades, the name of the name of the Contact at the Company offering to buy.
Closed/Sold Date	For actual trades, the date the deal was closed.
Closed/Sold Time	For actual trades, the time on the date the deal was closed.
Distribution Date	The as of date of Distributions that are included in the deal.
Distribution Time	The as of time for the date of Distributions that are included in the deal.
Offer Status	The status of the offer, e.g. Discount fee, Price Fixed, Closed/Liquidated, etc.
Ask Qualified Dealer	Checked if the ask offer is from a qualified dealer.
Bid Qualified Dealer	Checked if the bid offer is from a qualified dealer.
Ask Unit Limit	The number of share/units the ask offer is limited to.
Ask Type	For offers, it designates the type of Ask.
Ask Distrib Guarantee	Checked if the ask offer guarantees distributions.
Bid Unit Limit	The number of share/units the bid offer is limited to.
Bid Type:	For offers, it designates the type of Bid. Only accepts valid values from Available Ask & Bid Types table.
Bid Distrib Guarantee	Checked if the bid offer guarantees distributions.
Message #	Link to message file.
Trade Invest Ask Price	
Transfer Fee	The $ fee for the offer/trade.
Limited Partners #	
Auto Chits Flag	
LFs Available	
Date to Call RELP	Call back date for Real Estate Limited Partnership for offer / trade.
Property Name	If limited partnership for a single property, the name of that property.
Comment	Short note related to status record.

Bottom Grid

With the exception of the Keep and Primary checkboxes, these grid fields are from the Branches tab.

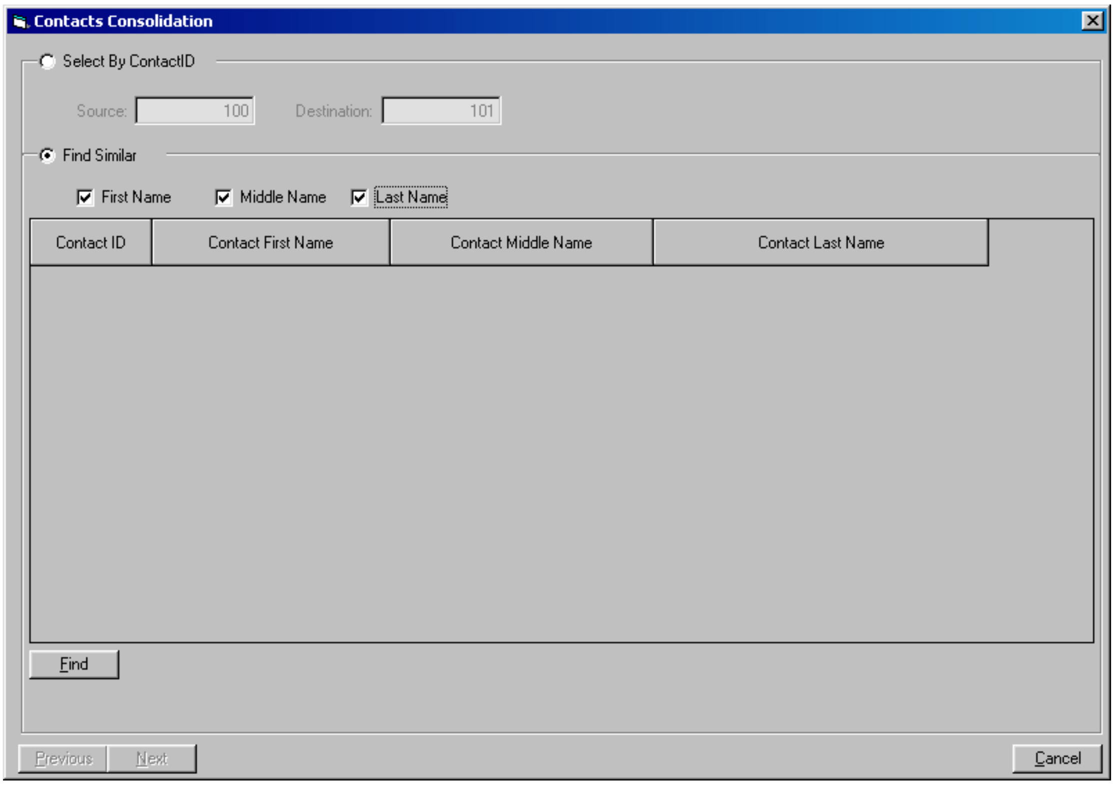
Keep checkbox	When checked, indicates that the row will be kept in the consolidated record. The Keep checkbox next to the checked Primary box must be checked too, otherwise MCS will return an error message upon pressing the Next button.
Primary checkbox	When checked, indicates that the selected branch record will be set as the primary branch for the company. The system does not allow the user to perform consolidation with more than one Primary box checked or with unchecked Keep box for the primary branch.
Branch Name	The name for the branch.
Address 1	The first line of the street address for the branch.
Address 2	The second line of the street address. Used when the address does not all fit in 'Address 1' field.
City	The city the branch is located in.
State	The state the branch is located in.
Zip	The zip the branch is located in.
County	The county the company is located in.
GIS Code	The GIS Code of the company.
Country	The country the company is located in.
Phone	The phone # for the company's branch.
Fax	The fax # for the company's branch.
Web Site	The URL for the company's branch web site or the home page of the company's web site.

Option Buttons:

Finish	Implements the consolidation according to the options set in Step 1 and Step 2 screens.
Previous	Returns to the previous step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Contacts Consolidation Screens

Preliminary Contacts Consolidation Screen



Select by Contact ID# frame

Select by Contact ID# radio button	When selected, enables the Source and Destination fields and disables the Find Similar frame.
Source	The ID # of the first duplicate record to be retrieved for consolidation. In the next step of the consolidation procedure, this record is going to be kept by default, but the user will have the option to select the record they want to keep. Apart from this, it does not matter which one of the duplicate records will be entered in this field.
Destination	The ID # of the second duplicate record to be retrieved for consolidation. In the next step of the consolidation procedure, this record is going to be deleted by default, but the user will have the option to select the record they want to keep. Apart from this, it does not matter which one of the duplicate records will be entered in this field.

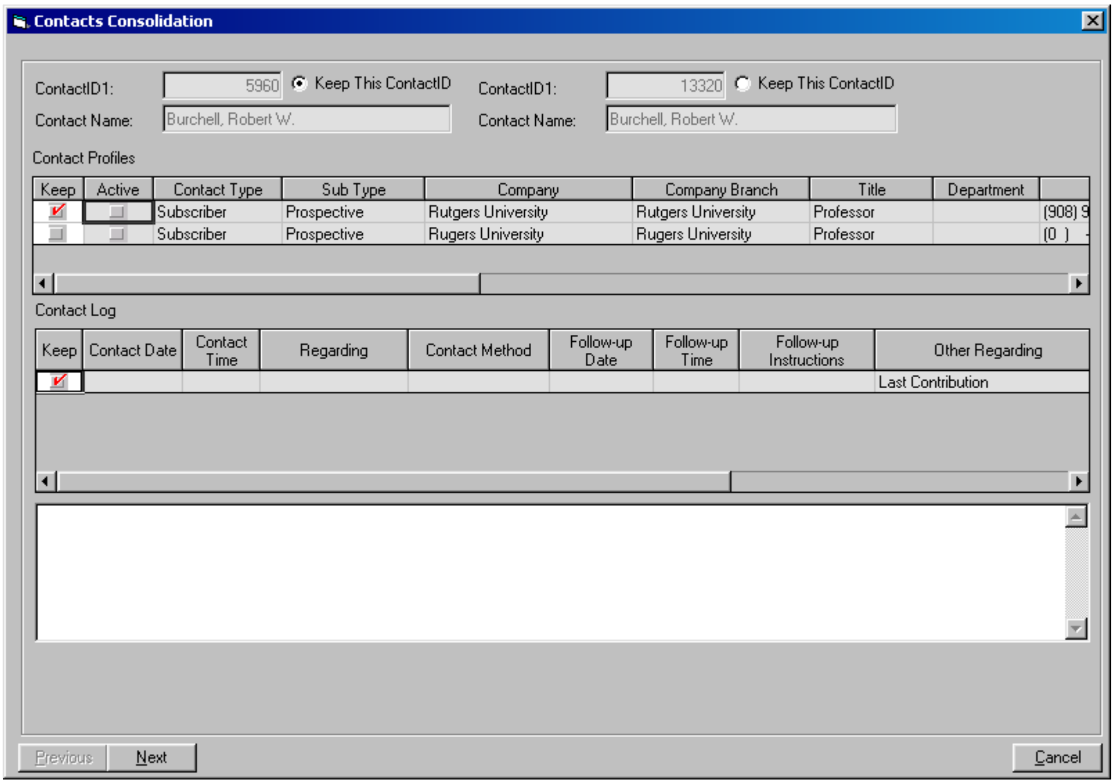
Find Similar frame

Find Similar radio button	When selected, enables the Find Similar frame and disables the Source and Destination fields and.
Find Similar checkboxes:	
First Name checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the First Name field.
Middle Name checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Middle Name field.
Last Name checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Last Name field.
Matches grid	Displays the returned matches upon pressing the "Find" button.
Find button	Applies the filter defined by the current settings of the Find Similar checkboxes. The returned matches are displayed in the Matches tab grid.

Option Buttons:

Previous	This button has no application for this step and is disabled.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Contacts Consolidation Screen - Step 1 (Select the Record to Keep)



Contact ID 1: The ID # of the first contact record.

Contact ID 2: The ID # of the second contact record.

Keep this Contact ID radio buttons The selected one indicates the contact record to be kept after the consolidation. Refers to the Contact ID field to the left.

<u>Contact Profiles grid:</u>

With the exception of the Keep checkbox and ID field, all fields in this grid are from the Profiles tab form.

Keep checkbox When checked, indicates that the row will be kept in the consolidated record.

Active Checked if the profile is an active record. If not checked, the record is considered logically deleted.

Type Describes the relationship with the company using MCS (i.e. CB or Summit), e.g. Broker, Contributor, Investor, Subscriber, etc.

Subtype A sub-classification of Contact Type, e.g. 1, 2, 3, 4, 5, 6.

Company The name of the company that the contact has a relation with (usually the contacts employer). Note that MCS allows a

	contact to have relations with more than one company. When this is the case, the contact will have a different Contact Profile record for each the companies.
Company Branch	A branch name assigned to the company address. It helps to identify multiple addresses. MCS automatically assigns a Branch Name to all company addresses, assigning the City and State from the address, e.g. "Los Angeles, CA". This is the Name field in the Branches tab.
Title	The contact's job title or position in this company.
Department	The contact's department in this company.
Phone 1	The contact's primary phone number for this profile.
Phone 2	The contact's secondary phone number for this profile.
Pager	The contact's pager number for this profile.
Fax	The contact's fax number for this profile.
Email	The contact's e-mail address for this profile.
Source Type	A rating of the source of the contact profile, e.g. Cold, Cold Partial, Qlf. Partial, Qualified.
Source Name	The name of the source medium or source person for the contact profile, e.g. CB Broker Database, Standard & Poor's, Phone Book, John Smith, etc.
Status	The contact's sales status, e.g. "Prospect" or "Subscriber".
Source Med	The category of source medium for the profile, e.g. List, Internet, Referral, Advertisement, Mailer, etc.
Web Site	The contact's web site for this profile.
ID	The ID # of the contact record.

<u>Contact Log grid:</u>

With the exception of the Keep checkbox and Contact ID field, all fields in this grid are from the Contact Log tab form. If there is no contact log for the contact, the Contact Log grid fields are not available.

Keep checkbox	When checked, indicates that the row will be kept in the consolidated record.
Contact Date	The date on which the communication has taken place.
Contact Time	The time when the communication has taken place.
Regarding	The topic group to which the communication relates. E.g. Company, Investment, Metro, REIT, etc.
Contact Method	The contact method of the communication, e.g. Faxed letter, LF Visit, Phone, etc.
Follow-up Date	The date of the appointment or follow-up call.
Follow-up Time	The time of the appointment or follow-up call.

Follow-up Instructions	The contact method for the follow-up date or some other instruction such as to mail a letter.
Other Regarding	Short note to describe the topic discussed.
Notes	Memo note to describe content of the communication.
Contact ID	The ID # of the contact record.

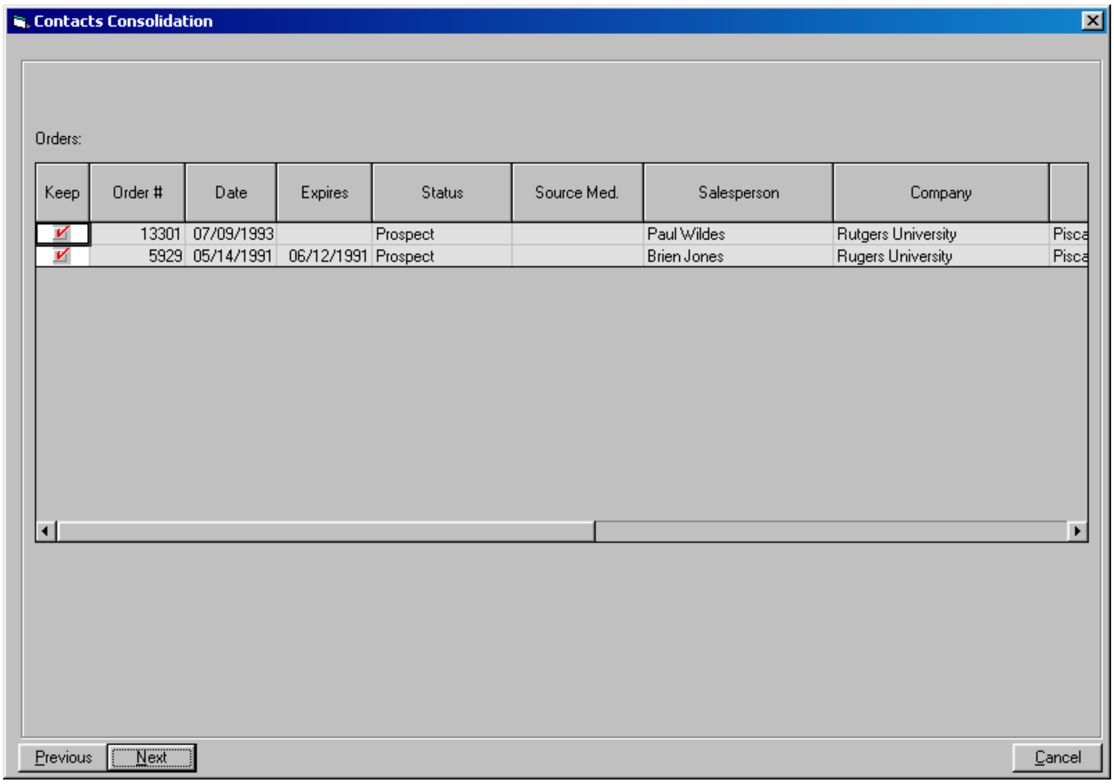
Other field:

Notes	Memo note to describe content of the communication. This is the Notes field in the Contact Log grid.

Option Buttons:

Previous	Returns to the previous step (screen) of the consolidation step-by-step process. If the user has entered the Step1 screen from the calling data entry screen and not from the Preliminary Consolidation screen, this button has no application for this step and is disabled.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Contacts Consolidation Screen - Step 2 (Select the Orders to Keep)



<u>Orders grid:</u>

With the exception of the Keep checkbox, all fields in this grid are from the Orders tab of the Subscriptions screen. If the contact is not of Subscriber type, the Orders grid fields are not available.

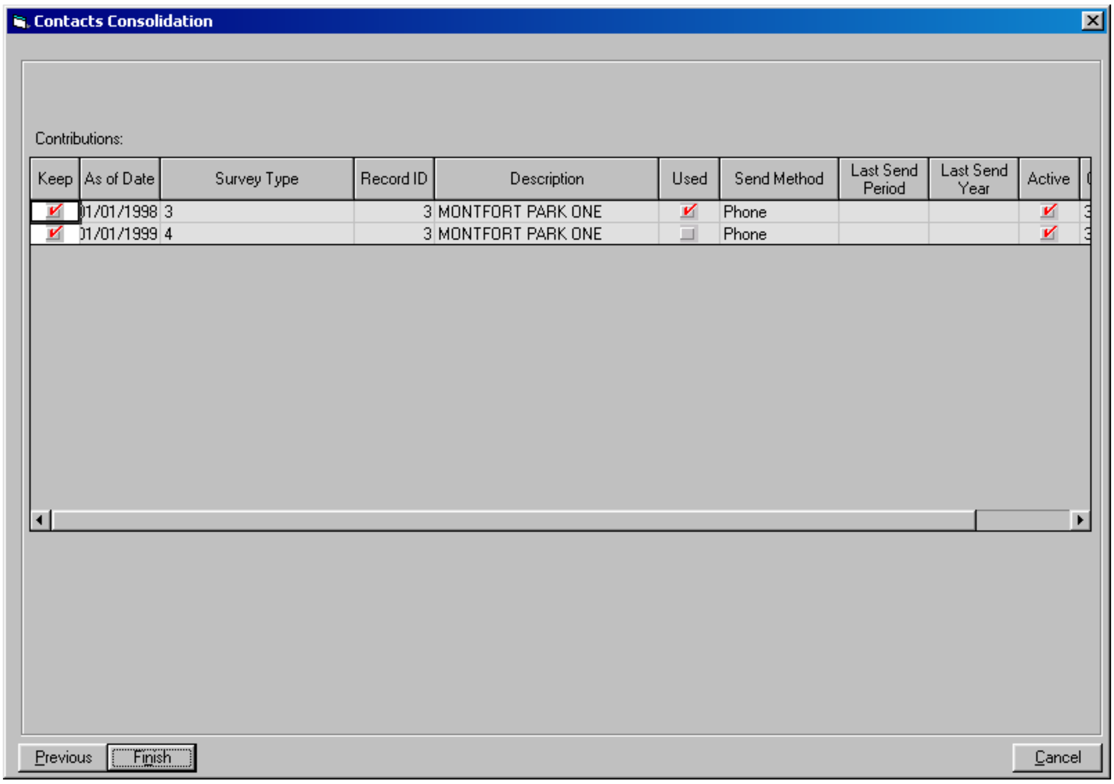
Keep checkbox	When checked, indicates that the row will be kept in the consolidated record.
Order #	The unique ID assigned to an order. This is the ID field in the Orders tab of the Subscriptions screen.
Date	Date the order is placed.
Expires	Date the order expires.
Status	The order's status, e.g. "Paid", "Trial", etc.
Source Med.	Indicates the source for the order, such as flyer or advertisement.
Salesperson	The salesperson for the order.
Company	The name of the ordering company.
Branch	The branch of the ordering company.
Payment Method	The form of payment, e.g. "Cash", "Check", "MasterCard", "Visa", etc.

Payment Account #	The check # or credit card account #.
Payment Expires	The expiration date of the credit card.
Payment Day	The date the payment was made. This field is from the Payments screen.
Renewal Date	The renewal date. This is entered automatically by MCS when if the order is renewed. It may also be manually entered.
Active	When checked, indicates the order is currently active. Normally it should be checked. Unchecked status signifies that the order is logically deleted.

Option Buttons:

Previous	Returns to the previous step (screen) of the consolidation step-by-step process.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep)



Contributions grid:

With the exception of the Keep checkbox and Contribution ID field, all fields in this grid are from the Contributions tab of the Contacts screen. If the contact has no contributions, the Contributions grid fields are not available.

Keep checkbox	When checked, indicates that the row will be kept in the consolidated record.
As of Date	For a survey, this is the date the contact's commitment to contribute the survey began. This date is used to determine the date range for different contributors.
Survey Type	The type of the Survey – Apartment, Prototype, Storage, etc.
Record ID	The ID of the item surveyed (PropertyID, etc.)
Description	The name of the item surveyed (PropertyName, etc.)
Used checkbox	Checked if the contribution is used.
Send Method	The method of sending the survey (e-mail, fax, phone, print).
Last Send Period	The last period a contribution/survey was received from the contact.
Last Send Year	The last year a contribution/survey was received from the contact.

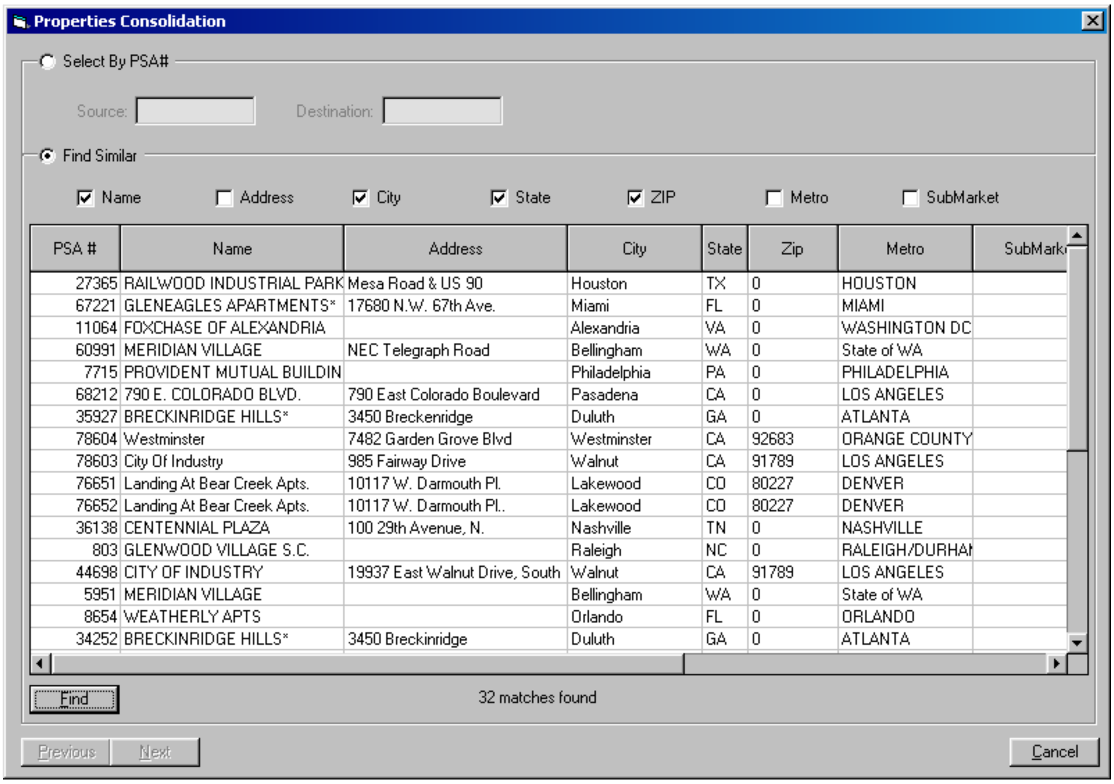
Active	Checked if the contribution record is active.
Contribution ID	The survey ID#.

Option Buttons:

Finish	Performs the consolidation according to the options set in Step 1, Step 2, and Step 3 screens.
Previous	Returns to the previous step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Properties Consolidation Screens

Preliminary Properties Consolidation Screen



<u>Select by PSA# frame</u>

Select by PSA# radio button	When selected, enables the Source and Destination fields and disables the Find Similar frame.
Source	The PSA # of the first duplicate property record to be retrieved for consolidation. In the next step of the consolidation procedure, this record is going to be kept by default, but the user will have the option to select the record they want to keep. Apart from this, it does not matter which one of the duplicate records will be entered in this field.
Destination	The PSA # of the second duplicate record to be retrieved for consolidation. In the next step of the consolidation procedure, this record is going to be deleted by default, but the user will have the option to select the record they want to keep. Apart from this, it does not matter which one of the duplicate records will be entered in this field.

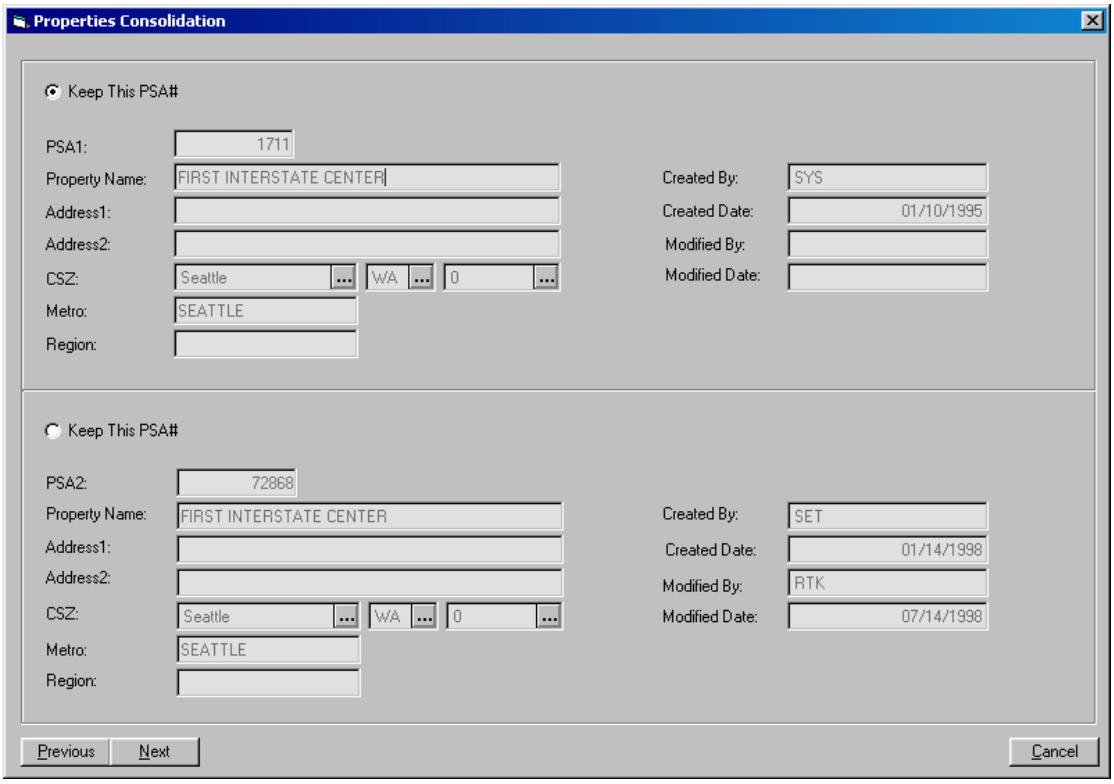
Find Similar frame

Find Similar radio button	When selected, enables the Find Similar frame and disables the Source and Destination fields.
Find Similar checkboxes:	
Name checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Property Name field.
Address checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Property Address field.
City checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Property City field.
ZIP checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Property ZIP field.
Metro checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Metro field.
SubMarket checkbox	When checked, the check for duplicate records will be based on searching for duplicate values in the Sub-Market field.
Matches grid	Displays the returned matches upon pressing the "Find" button. This grid has the same fields as the Matches tab grid of the Properties Screen.
Find button	Applies the filter defined by the current settings of the Find Similar checkboxes. The returned matches are displayed in the Matches tab grid.

Option Buttons:

Previous	This button has no application for this step and is disabled.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Properties Consolidation Screen - Step 1 (Select the Record to Keep)



With the exception of the Region field, all fields in this consolidation screen are from the header of the Property Maintenance screen. The Region field is from the Names tab of the Property Maintenance screen. The fields to the right contain system-generated information about the property record.

<u>Fields to the left:</u>

Keep This PSA# radio buttons	The selected one indicates the property record to be kept after the consolidation. Refers to the PSA field beneath it.
PSA1 and PSA2	The PSA# of the property. (The unique ID assigned to the property record. MCS automatically assigns a unique ID when the new Property record is saved.)
Property Name	The common name for the property. The most current name for the property is always displayed in this field.
Address 1 and Address 2	The street address.
CSZ	City, State, and Zip code the property is located in.
Metro	The metro area the property is located in.
Region	The geographical region within the country that the property is located within. This field's value is stored in the Property record (not the Name record).

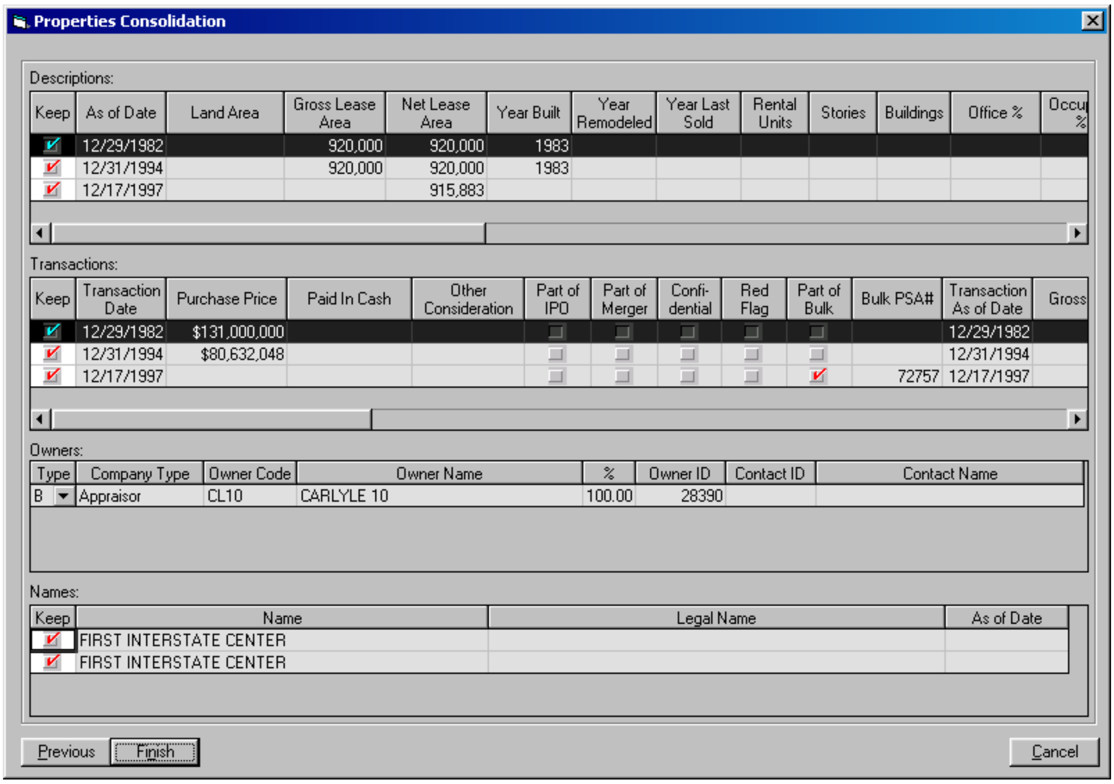
Fields to the right:

Created By	The user that created the property record. The user has been determined from login. The value is automatically inserted by MCS and cannot be edited.
Created Date	The date the property record was created. The value has been automatically inserted by MCS and cannot be edited.
Modified By	The user that lasted modified the property record. The user is determined from login. The value has been automatically inserted by MCS and cannot be edited.
Modified Date	The date the property record was last modified. The value has been automatically inserted by MCS and cannot be edited.

Option Buttons:

Previous	Returns to the previous step (screen) of the consolidation step-by-step process. If the user has entered the Step1 screen from the calling data entry screen and not from the Preliminary Consolidation screen, this button has no application for this step and is disabled.
Next	Accepts the values in the current consolidation screen and moves on to the next step (screen) of the consolidation step-by-step process.
Cancel	Cancels the consolidation process, exits consolidation mode and returns to the calling data entry screen.

Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep)



Descriptions grid:

With the exception of the Keep checkbox, all fields in this grid are from the Descriptions tab of the Property Maintenance screen. Clicking a record (row) in this grid selects (highlights) the record and the related record in the Transactions grid.

Keep checkbox	When checked, indicates that the row will be kept in the consolidated record. Double clicking this checkbox enters it in edit mode. In edit mode, every click either checks or unchecks the Keep checkbox. Clicking another row exits edit mode and selects the row.
As of Date	This date is used by MCS to determine the most recent description for the Property. This field is required to perform the consolidation. This field is necessary because MCS retains and tracks the history of Property descriptions. Note that this field determines the order of the descriptions and affects all reports and extracts that use the Description data. Also note that the MCS feature to only include Most Recent records is based on this 'As of Date'. MCS will not allow duplicate As of Date values for property description records. Unlike most other fields in the Consolidation screens, this field can be edited.
Land Area	The land size in acres.

Gross Lease Area	Gross leaseable square footage.
Net Lease Area	Net leaseable square footage.
Year Built	The four digit year the main building was built.
Year Remodeled	The four digit year the property was last remodeled.
Year Last Sold	The four digit year the property was last sold.
Rental Units	The total number of rental units from all buildings that are part of the property.
Stories	The total number of floors in the tallest building that is part of the property.
Buildings	The total number of buildings that are part of the property.
Office %	The percentage of the rental unit space that is categorized as office space.
Occupied %	The total percentage of the rental space that is currently occupied (not vacant).
Under Development	Checked if the property is being developed (under construction and not completed).
Expected Completion	If the property is under development, the date the property development is expected to be completed.
Special Circumstances	
Developed by REIT	Checked if the property was originally developed by REIT.
Ownership Type	The legal ownership type.
Property Type Code	A two character code that represents the property type. E.g. "1A". Accepts only valid values from Available Property Types table.
Property Type	A short description of the main property type. E.g. "Office". Accepts only valid values from Available Property Types table. The value is automatically retrieved when the Code is entered.
Property Sub-Type	The property classification. E.g. "A". Accepts only valid values from Available Property Types table. The value is automatically retrieved when the Code is entered.
Planned Renovation Cost	An estimate of the dollar amount that is currently planned (announced) to be spent on renovations.
Estimated Develop Cost	If the property is developed, this is an estimate of the dollar amount spent to develop it, excluding land cost; otherwise, it is the amount for the current development.
Property Managed By:	The name of the Property Management Company.
Property Management ID	The Company ID for the Property Manager.

Transactions grid:

With the exception of the Keep checkbox, all fields in this grid are from the Transactions tab of the Property Maintenance screen. Clicking a record (row) in this grid selects the record and the related record in the Descriptions grid.

Keep checkbox	When checked, indicates that the row will be kept in the consolidated record. Double clicking this checkbox enters it in edit mode. In edit mode, every click either checks or unchecks the box. Clicking another row exits edit mode and selects the row.
Transaction Date	Date of the transaction.
Purchase Price	Total recorded purchase price.
Paid in Cash	The amount of the Purchase Price paid in cash as opposed to stock, debt, or trade.
Other Consideration	The value of any other consideration not included in the Purchase Price.
Part of IPO checkbox	Checked if the transaction is part of an initial public offering for the REIT (purchaser).
Part of Merger	Checked if the transaction is a result of a merger.
Confidential	Checked if this transaction is not to be made public.
Red Flag	Checked if the transaction is questionable or there is some doubt as to the accuracy of the reported data.
Bulk PSA#	If this property was transacted as part of a Bulk Deal then this is the PSA# for the Bulk Master record.
Transaction As of Date	This date is used by MCS to determine the most recent transaction for the Property. This field is required to perform the consolidation. This field is necessary because MCS retains and tracks the history of a properties transactions and the buyers and sellers for each transaction. MCS uses the As of Date to determine who owns/owned the property during any specified time period. The user may think of the As of Date as an informal Transaction Date. It is informal because often the actual Transaction Date is unknown and the user will use the As of Date to enter their estimate for the Transaction Date. The MCS feature to only include Most Recent records is based on this As of Date. MCS will not allow duplicate As of Date values for transaction records.
Gross Income	The most recently available actual annual gross rent for total rentable space at the time of the transaction.
Pro Forma Potential Gross Income	The most recently available pro forma annual gross rent for total rentable space at the time of the transaction.
Actual Vacancy & Collection Loss	The most recently available actual annual amount for rentable space not rented and for rented space written off as uncollectable at the time of the transaction.
Pro Forma Vacancy & Collection Loss	

	The most recently available pro forma annual amount for rentable space not rented and for rented space written off as uncollectable at the time of the transaction.
Actual Effective Gross Income	Calculated as Actual Potential Gross Income minus Actual Vacancy & Collection Loss.
Pro Forma Effective Gross Income	Calculated as Pro Forma Potential Gross Income minus Pro Forma Vacancy & Collection Loss.
Actual Expenses	The most recently available Actual annual amount for total operating expense at the time of the transaction.
Pro Forma Expenses	The most recently available pro forma annual amounts for total operating expense at the time of the transaction.
Actual Net Operating Income	Calculated as Actual Effective Gross Income minus Actual Expenses.
Pro Forma Net Operating Income	Calculated as Pro Forma Effective Gross Income minus Pro Forma Expenses.
Estimated Value	The interpreted value of the property (determined by CB) at the time of the Transaction.
Estimated Valuation Data	The date the estimated value was made.
Source Type	Designates the type of source that reported the transaction.
Source ID	If Source Type is "Contributor" or "Contact" this field contains the MCS Contact record ID.

Owners grid:

All fields in this grid are from the Transactions tab of the Property Maintenance screen.

Type	Designates owner as buyer or seller for the transaction.
Company Type	Designates the owner as a REIT, RELP, Private Investor, etc.
Owner Code	The Company Code of the owner.
Owner Name	The Company Name of the owner.
%	The percentage of the property owned by this owner .
Owner ID	The Company ID for the owner.
Contact ID	The Contact ID for the person to contact in the owner company. The ID is automatically retrieved when the Contact Name is entered.
Contact Name	The name of the person to contact in the owner company. The Contact Name is automatically retrieved when the Contact ID is entered.

Names grid:

With the exception of the Keep checkbox, all fields in this grid are from the Transactions tab of the Property Maintenance screen.

Name	The common name that the property is known as.
Legal Name	The legally recorded name for the property.
As of Date	This date is used by MCS to determine the most recent name for the Property. This field is required to perform the consolidation. This field is necessary because MCS retains and tracks the history of a Property's names. This field determines the order of the names and affects all reports and extracts that use the Name data. The MCS feature to only include Most Recent records is based on this 'As of Date'. MCS will not allow duplicate As of Date values for property names. Unlike most other fields in the Consolidation screens, this field can be edited.

How to...

Perform Consolidation - Overview

Consolidation is started from the respective data entry screen - Companies screen for companies consolidation, Contacts screen for contacts consolidation, and Property Maintenance for properties consolidation. **The user has to close all other screens before starting the consolidation process.** To perform consolidation, MSC goes into a special working mode called "consolidation mode".

When consolidation mode is set and there are matches found in the Matches tab grid, it behaves somewhat differently compared to its behavior in standard mode. First, in consolidation mode, the style of the default focus (the focus when there are matching records but none of them is selected by user) is frame instead of highlight. Second, and more important, clicking a record in the Matches tab grid selects the record but does not deselect the previously selected one unless there are two records already selected (i.e. the user can select up to two records selected). Clicking a selected record deselects it. Clicking a third record when there are two records already selected selects it and deselects the second record.

Consolidation mode is entered by selecting "Set Consolidation Mode" from the Edit menu or pressing Alt+E, T, T, Enter. Consolidation mode is exited by selecting "Stop Consolidation Mode" from the Edit menu (or pressing Alt+E, T, T, Enter) or by canceling the consolidation procedure from the current Consolidation screen, if opened. The consolidation procedure is started by selecting "Consolidate" from the Edit menu (or pressing Alt+T, O) in consolidation mode. Consolidation screens are navigated by pressing the Next (or left Alt+N) and Previuos (or left Alt+P) buttons to move forward and backward, respectively. The user can cancel the consolidation procedure with automatic return to standard mode by clicking the Cancel button (or pressing left Alt+C) in the current consolidation screen. After performing the consolidation, the calling data entry screen (Companies, Contacts or Property Maintenance) is closed and the system is returned to the calling menu (it may vary depending on the user's settings).

When there have been Matches tab records selected and the user exits consolidation mode and re-enters it without having performed consolidation or cleared the Matches grid, the records that have been selected upon exiting are automatically selected again. In such cases it may be necessary for the user to scroll up and down the records in order to find the currently selected records.

MSC offers three different methods to consolidate records:

1. **By using the records ID #s** (Company ID for companies consolidation, Contact ID for contacts consolidation, and Property PSA for properties consolidation). This is the most direct method. The user needs however to know or to have the records ID#s at hand.
2. **By selecting the records in the Matches tab grid**.
3. **By using the Consolidation screen filter options**.

Each of these methods is covered in detail for every one of the three consolidation types (companies consolidation, contacts consolidation, and properties consolidation).

Consolidate Companies

Using Company ID

1. Make sure there are no other screens open except the Companies screen.
2. **Set consolidation mode**. (For more information, refer to the Perform Consolidation - Overview chapter.)
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Preliminary Company Consolidation screen.
4. **Retrieve the records you want to consolidate:**
   A. Enter the appropriate company ID #s in the Source and Destination fields.
   B. Click the Next button or press left Alt+N. MCS opens the Company Consolidation Screen - Step 1 (Select the Record to Keep).
5. **Select the record to keep:**
   A. Review the records and select the record to keep by choosing the appropriate "Keep This Record" radio button.
   B. Click the Next button or press left Alt+N. MCS opens Company Consolidation Screen - Step 2 (Select Share Status Tab Grid Records and Branches).
6. **Select the share status records and branches** to be kept for the consolidated record:
   A. Select the Share Status records to keep:
      i. In the grid on the upper-left hand-side, select the appropriate Share Status record (row) to keep by checking the Keep box for the appropriate record (row). Make sure you have not duplicate Share/Unit Type values in the rows to keep.
      ii. In the bottom grid, select the child records (rows) to keep by checking the Keep box for the appropriate record (row).
      iii. Repeat steps "i"-"ii" for every Share Status record you want to keep.
   B. Set the primary branch for the company by checking the Primary box for the appropriate branch record (in the bottom grid). If there are other Primary boxes checked, uncheck them.

C. Select the branches to keep by checking the relevant Keep boxes in the bottom grid. Make sure the Keep box next to the selected Primary branch is checked.

7. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Companies screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Company Consolidation screen and takes you directly to Company Consolidation Screen - Step 1 (Select the Record to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Companies screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)
2. In **Step "4"**: Tip: You can move the consolidation screen apart from your sight (by dragging it by the window header) if you need to see the ID #s of the records you have to enter in the Source and Destination fields. This will reveal the underlying Matches tab of the calling data entry screen (i.e. Companies screen) if it had been selected when you opened the consolidation screen.
3. In **Step "5"**: The Keep This Company radio button of the Source record is selected by default. The Source record is the one the ID # of which has been entered in the Source field of the Preliminary Company Consolidation screen.
4. In **Step "6"**: If the company has no Share Status tab form records, the upper-left hand-side grid fields and the middle grid fields are not available.
5. In **Step "6"**: When a row of the upper-left hand-side grid is selected (i.e. has the focus placed on any of its fields), the child records for this row are displayed in the grid in the middle.
6. In **Step "6"**: If you have chosen to discard any of the companies' branches, MSC will display a message (upon pressing the Finish button) warning you that the information for that (those) branch(es) will be lost. You will be given the option to implement the consolidation (the OK button) or to return to the consolidation screen to edit your selection again (the Cancel button).
7. In **Step "6"**: Though the grid allows you to have rows with duplicate Share/Unit Type values checked for keeping, MCS will not consolidate such a record and will return an error message upon pressing the Next button.
8. In **Step "6"**: There should be only one Primary field checked when going to the next step of the consolidation procedure. This is

because a company can have only one primary (main or headquarter) branch. The grid allows you to check more than one Primary box, however, MCS will return an error message if you click the Next button with more than one Primary boxes checked.

9. In **Step "6"**: MCS will not perform the consolidation with the Keep box unchecked for the primary branch record (row) (bottom grid). It will return an error message upon pressing the Next button if there is an unchecked Keep box for the checked Primary one.

By Selecting Company Records from the Matches tab

1. Make sure there are no other screens open except the Companies screen.
2. **Select the records to consolidate:**
   A. In the Matches tab form, apply a filter that will retrieve the records you want to consolidate. (For more information on retrieving records, refer to MCS User's Manual, MCS Companies Guide, or MCS Filters Guide.)
   B. Set consolidation mode. (For more information, refer to the Perform Consolidation - Overview chapter.)
   C. Select the records you want to consolidate. (For more information, refer to the Perform Consolidation - Overview chapter.) Scroll up and down the form to locate the desired records, if necessary.
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Company Consolidation Screen - Step 1 (Select the Record to Keep).
4. **Select the record to keep:**
   A. Review the records and select the record to keep by choosing the appropriate "Keep This Record" radio button.
   B. Click the Next button or press left Alt+N. MCS opens Company Consolidation Screen - Step 2 (Select Share Status Tab Grid Records and Branches).
5. **Select the share status and branches records** to be kept for the consolidated record:
   A. Select the Share Status records to keep:
      i. In the grid on the upper-left hand-side, select the appropriate Share Status record (row) to keep by checking the Keep box for the appropriate record (row). Make sure you have not duplicate Share/Unit Type values in the rows to keep.
      ii. In the bottom grid, select the child records (rows) to keep by checking the Keep box for the appropriate record (row).
      iii. Repeat steps "i"-"ii" for every Share Status record you want to keep

B. Set the primary branch for the company by checking the Primary box for the appropriate branch record (in the bottom grid). If there are other Primary boxes checked, uncheck them.

C. Select the branches to keep by checking the relevant Keep boxes in the bottom grid. Make sure the Keep box next to the selected Primary branch is checked.

6. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Companies screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS goes to the Preliminary Company Consolidation screen instead of Company Consolidation Screen - Step 1 (Select the Record to Keep), this means that there are either one or no records selected in the Matches tab of the calling data entry screen (Companies screen). In this case, you need to cancel the consolidation procedure, select the records properly and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)

2. In **Step "4"**: The Keep This Company radio button of the upper record is selected by default. Upper record becomes the one that has been first selected in the Matches tab of the calling data entry screen. (Companies screen)

3. In **Step "5"**: If the company has no Share Status tab form records, the upper-left hand-side grid fields and the middle grid fields are not available.

4. In **Step "5"**: When a row of the upper-left hand-side grid is selected (i.e. has the focus placed on any of its fields), the child records for this row are displayed in the grid in the middle.

5. In **Step "5"**: Though the grid allows you to have rows with duplicate Share/Unit Type values checked for keeping, MCS will not consolidate such a record and will return an error message upon pressing the Next button.

6. In **Step "5"**: There should be only one Primary field checked when going to the next step of the consolidation procedure. This is because a company can have only one primary (main or headquarter) branch. The grid allows you to check more than one Primary box, however, MCS will return an error message if you click the Next button with more than one Primary box checked.

7. In **Step "5"**: MCS will not perform the consolidation with the Keep box unchecked for the primary branch record (row) (bottom grid). It will return an error message upon clicking the Next button with an unchecked Keep box next for the checked Primary one.

8. **In Step "6"**: If you have chosen to discard any of the companies' branches MSC will display a message (upon pressing the Finish button) warning you that the information for that branch(es) will be lost. You will be given the option to implement the consolidation (the OK button) or to return to the consolidation screen to edit your selection again (the Cancel button).

Using the Company Consolidation Screen Filter Options

1. Make sure there are no other screens open except the Companies screen.
2. **Set consolidation mode.** (For more information, refer to the Perform Consolidation - Overview chapter.)
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Preliminary Company Consolidation screen.
4. **Retrieve the records you want to consolidate:**
   A. Click the Find Similar checkbox. This will enable all fields in the Find Similar frame.
   B. Select the appropriate Find Similar checkboxes. MSC will search for duplicate values in all checked boxes. The more fields checked, the more restricted the filter is.
   C. Click the Find button or press left Alt+F to apply the filter. MCS displays the returned matches in the Find Similar grid.
   D. In the Find Similar grid, select the records to consolidate. (For more information, refer to the Perform Consolidation - Overview chapter.) You may need to scroll up and down the records in the grid using the slide bar to the right in order to locate the records you need.
   E. Click the Next button or press left Alt+N. MCS goes on to the Company Consolidation Screen - Step 1 (Select the Record to Keep).
5. **Select the record to keep:**
   A. Review the records and select the record to keep by choosing the appropriate "Keep This Record" radio button.
   B. Click the Next button or press left Alt+N. MCS opens Company Consolidation Screen - Step 2 (Select Share Status Tab Grid Records and Branches).
6. **Select the share status and branches records** to be kept for the consolidated record:

A. Select the Share Status records to keep:

i. In the grid on the upper-left hand-side, select the appropriate Share Status record (row) to keep by checking the Keep box for the appropriate record (row). Make sure you have not duplicate Share/Unit Type values in the rows to keep.

ii. In the bottom grid, select the child records (rows) to keep by checking the Keep box for the appropriate record (row).

iii. Repeat steps "i"-"ii" for every Share Status record you want to keep

B. Set the primary branch for the company by checking the Primary box for the appropriate branch record (in the bottom grid). If there are other Primary boxes checked, uncheck them.

C. Select the branches to keep by checking the relevant Keep boxes in the bottom grid. Make sure the Keep box next to the selected Primary branch is checked.

7. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Companies screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Company Consolidation screen and takes you directly to Company Consolidation Screen - Step 1 (Select the Record to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Companies screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)

2. records, go back to step "B" to change the filter settings or use the other consolidation options (using records ID #s or selecting the records from the Matches tab of the calling data entry screen.)

3. the records in the grid using the slide bar to the right in order to locate the records you need.

4. ": The Keep This Company radio button of the Source record is selected by default. The Source record is the one the ID # of which has been entered in the Source field of the Preliminary Company Consolidation screen.

5. no Share Status tab form records, the upper-left hand-side grid fields and the middle grid fields are not available.

6. In **Step "6"**: When a row of the upper-left hand-side grid is selected (i.e. has the focus placed on any of its fields), the child records for this row are displayed in the grid in the middle.

7. ck for keeping rows with duplicate Share/Unit Type values, MCS will not allow you to consolidate such a record and will return an error message upon pressing the Next button.

8. be only one Primary field checked when going to the next step of the consolidation procedure. This is because a company can have only one primary (main or headquarter) branch. The grid allows you to check more than one Primary box, however, MCS will return an error message if you click the Next button with more than one Primary box checked.

9. olidation with an unchecked Keep box for the primary branch record (row) (bottom grid). It will return an error message if you click the Next button with an unchecked Keep box for the selected primary branch

10. panies' branches MSC will display a message (upon pressing the Finish button) warning you that the information for that (those) branch(es) will be lost. You will be given the option to implement the consolidation (the OK button) or to return to the consolidation screen to edit your selection again (the Cancel button).

Consolidate Contacts

Using Contact ID

1. Make sure there are no other screens open except the Contacts screen.
2. **Set consolidation mode.** (For more information, refer to the Perform Consolidation - Overview chapter.)
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Preliminary Contacts Consolidation screen with the ID# of the current record (if there is a current record) displayed and selected in the Source field (The current record is the one that had the focus in the Matches tab of the Contacts screen when the Consolidate command was executed).
4. **Retrieve the records you want to consolidate:**

A. Enter the appropriate contact ID #s in the Source and Destination fields.

B. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 1 (Select the Record to Keep).

5. **Select the record to keep:**

A. Review the records and select the record to remain in the database by choosing the appropriate "Keep This Contact ID" radio button. The radio button refers to the Contact ID field to the right.

B. Select the Profile and Contact Log records to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Contact Profiles and Contact Log grids.

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 2 (Select the Orders to Keep).

6. **Select the orders** to be kept for the consolidated record:

A. Select the orders to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Orders grid.

B. In the bottom grid, select the records (rows) to keep by checking the Keep box for the appropriate record (row).

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep).

7. **Select the contributions** to be kept for the consolidated record:
Select the contributions to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Contributions grid.

8. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Companies screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Company Consolidation screen and takes you directly to Contacts Consolidation Screen - Step 1 (Select the Record to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Contacts screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)

2. he records to be consolidated (preferably the one to be kept) in the Matches tab, the Contact ID # for this record will appear automatically in the Source field of the Preliminary Contacts Consolidation screen.

3. In **Step "4"**: Tip: You can move the consolidation screen apart from your sight (by dragging it by the window header) if you need to see the ID #s of the records you have to enter in the Source and Destination fields. This will reveal the underlying Matches tab of the calling data entry screen (i.e. Contacts screen) if it had been selected when you opened the consolidation screen.

4. radio button of the Contact ID 1 record is selected by default. The Contact ID 1 record is the one the Contact ID # of which has been entered in the Source field of the Preliminary Contacts Consolidation screen.

5. m records in the Companies screen, the Contact Log grid fields are not available.

6. Subscriptions screen, the Orders grid fields are not available.

7. le if the contact has no records in the Contributions tab of the Contacts screen.

By Selecting Contact Records from the Matches tab

1. Make sure there are no other screens open except the Contacts screen.
2. **Select the records to consolidate:**
   A. In the Matches tab form, apply a filter that will retrieve the records you want to consolidate. (For more information on retrieving records, refer to MCS User's Manual, MCS Contacts Guide, or MCS Filters Guide.)
   B. Set consolidation mode. (For more information, refer to the Perform Consolidation - Overview chapter.)
   C. Select the records you want to consolidate. (For more information, refer to the Perform Consolidation - Overview chapter.) Scroll up and down the form to locate the desired records, if necessary.
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Contacts Consolidation Screen - Step 1 (Select the Record to Keep).
4. **Select the record to keep:**
   A. Review the records and select the record to remain in the database by choosing the appropriate "Keep This Contact ID" radio button. The radio button refers to the Contact ID field to the right.

B. Select the Profile and Contact Log records to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Contact Profiles and Contact Log grids.

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 2 (Select the Orders to Keep).

5. **Select the orders** to be kept for the consolidated record:

A. Select the orders to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Orders grid.

B. In the bottom grid, select the records (rows) to keep by checking the Keep box for the appropriate record (row).

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep).

6. **Select the contributions** to be kept for the consolidated record:
Select the contributions to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Contributions grid.

7. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Companies screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS goes to the Preliminary Contacts Consolidation screen instead of Contacts Consolidation Screen - Step 1 (Select the Record to Keep), this means that there are either one or no records selected in the Matches tab of the calling data entry screen (Contacts screen). In this case, you need to cancel the consolidation procedure, select the records properly and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)

2. Contact ID 1 record is selected by default. Contact ID 1 record becomes the one that has been first selected in the Matches tab of the calling data entry screen. (Contacts screen).

3. Contact Log tab form the Companies (or Contacts) screen, the Contact Log grid fields are not available.

4. In **Step "5"**: If the contact has no orders in the Orders tab form of the Subscriptions screen, the Orders grid fields are not available.

5. s will not be available if the contact has no contribution records in the Contributions tab of the Contacts screen.

Using the Contacts Consolidation Screen Filter Options

1. Make sure there are no other screens open except the Contacts screen.
2. **Set consolidation mode.** (For more information, refer to the Perform Consolidation - Overview chapter.)
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Preliminary Contacts Consolidation screen.
4. **Retrieve the records you want to consolidate:**
   A. Click the Find Similar checkbox. This will enable all fields in the Find Similar frame.
   B. Select the appropriate Find Similar checkboxes. MSC will search for duplicate values in all checked boxes. The more fields checked, the more restricted the filter is.
   C. Click the Find button or press left Alt+F to apply the filter. MCS displays the returned matches in the Find Similar grid.
   D. In the Find Similar grid, select the records to consolidate. (For more information, refer to the Perform Consolidation - Overview chapter.) You may need to scroll up and down the records in the grid using the slide bar to the right in order to locate the records you need.
   E. Click the Next button or press left Alt+N. MCS goes on to the Contacts Consolidation Screen - Step 1 (Select the Record to Keep).
5. **Select the record to keep:**
   A. Review the records and select the record to remain in the database by choosing the appropriate "Keep This Contact ID" radio button. Each radio button refers to the Contact ID field to the left of it.
   B. Select the Profile and Contact Log records to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Contact Profiles and Contact Log grids.
   C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 2 (Select the Orders to Keep).
6. **Select the orders** to be kept for the consolidated record:
   A. Select the orders to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Orders grid.
   B. In the bottom grid, select the records (rows) to keep by checking the Keep box for the appropriate record (row).

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep).

7. **Select the contributions** to be kept for the consolidated record:
Select the contributions to keep for the consolidated record by checking and unchecking the appropriate Keep boxes in the Contributions grid.

8. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Companies screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Contacts Consolidation screen and takes you directly to Contacts Consolidation Screen - Step 1 (Select the Record to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Contacts screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)

2.
from your sight (by dragging it by the window header) if you need to see the ID #s of the records you have to enter in the Source and Destination fields. This will reveal the underlying Matches tab of the calling data entry screen (i.e. Contacts screen) if it had been selected when you opened the consolidation screen.

3.
back to step "B" to change the filter settings or use the other consolidation options (using records ID #s or selecting the records from the Matches tab of the calling data entry screen.)

4. In **Step "4D"**: You may need to scroll up and down the records in the grid using the slide bar to the right in order to locate the records you need.

5. utton of the
Contact ID 1 record is selected by default. The Contact ID 1 record is the one the Contact ID # of which has been entered in the Source field of the Preliminary Contacts Consolidation screen.

6. In **Step "5"**: If there is no contact log for the contact in the Contact Log tab form of Companies (or Contacts) screen, the Contact Log grid fields are not available.

7. tab form of
the Subscriptions screen, the Orders grid fields are not available.

8. In **Step "7"**: The Contributions grid fields will not be available if the contact has no records in the Contributions tab of the Contacts screen.

Consolidate Properties

Using Property PSA

1. Make sure there are no other screens open except the Property Maintenance screen.
2. **Set consolidation mode.** (For more information, refer to the Perform Consolidation - Overview chapter.)
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Preliminary Properties Consolidation screen with the PSA # of the current record (if there is a current record) displayed and selected in the Source field (The current record is the one that had the focus in the Matches tab of the Property Maintenance screen when the Consolidate command was executed).
4. **Retrieve the records you want to consolidate:**
   - A. Enter the appropriate Property PSA #s in the Source and Destination fields.
   - B. Click the Next button or press left Alt+N. MCS opens the Properties Consolidation Screen - Step 1 (Select the Record to Keep).
5. **Select the record to keep:**
   - A. Review the records and select the record to keep in the database by choosing the appropriate "Keep This PSA#" radio button. The radio button refers to the PSA field beneath it.
   - B. Click the Next button or press left Alt+N. MCS opens the Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep).
6. **Select the Descriptions, Transactions, and Names** to be kept for the consolidated record:
   - A. Select the property descriptions and transactions to keep for the consolidated record:
     - i. Click on a record in the Descriptions or Transactions grid you want to discard. Clicking a record (row) in this grid selects (highlights) the record and the related record in the other grid.
     - ii. Double-click on the record's Keep ckeckbox to enter edit mode. The row's highlight disappears and the focus is placed on the Keep field.
     - iii. Click the Keep checkbox to uncheck it. The Keep checkbox of the related record in the other grid is unchecked, too. (Clicking the Keep checkbox again will check it back for both records)
     - iv. Repeat steps "i"-"iii" for all descriptions and transactions you want to discard.
   - B. Select the property names you want to keep in the consolidation record by checking the appropriate Keep fields in the Names grid.

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep).

7. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Property Maintenance screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Properties Consolidation screen and takes you directly to Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Property Maintenance screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)
2. In **Steps "2"-"3"**: If you select one of the records to be consolidated (preferably the one to be kept) in the Matches tab, the Property PSA # for this record will appear automatically in the Source field of the Preliminary Properties Consolidation screen.
3. In **Step "4"**: Tip: You can move the consolidation screen apart from your sight (by dragging it by the window header) if you need to see the PSA #s of the records you have to enter in the Source and Destination fields. This will reveal the underlying Matches tab of the calling data entry screen (i.e. Property Maintenance screen) if it had been selected when you opened the consolidation screen.
4. In **Step "5"**: The Keep This PSA # radio button of the PSA 1 record is selected by default. The PSA 1 record is the one the PSA # of which has been entered in the Source field of the Preliminary Properties Consolidation screen.
5. In **Step "6"**: Clicking a record (row) in the Transactions grid selects the record and the related record in the Descriptions grid and vice versa..
6. In **Step "6"**: All As of Date fields are required to perform the consolidation. MCS will not allow duplicate As of Date values in one and the same grid and will not perform the consolidation if there is a blank As of Date field for a row selected for keeping.

By Selecting Property Records from the Matches tab

1. Make sure there are no other screens open except the Property Maintenance screen.
2. **Select the records to consolidate:**
   - A. In the Matches tab form, apply a filter that will retrieve the records you want to consolidate. (For more information on retrieving records, refer to MCS User's Manual, MCS Properties Guide, or MCS Filters Guide.)
   - B. Set consolidation mode. (For more information, refer to the Perform Consolidation - Overview chapter.)
   - C. Select the records you want to consolidate. (For more information, refer to the Perform Consolidation - Overview chapter.) Scroll up and down the form to locate the desired records and change the sort fields and order (by clicking on the field header), if necessary.
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Properties Consolidation Screen - Step 1 (Select the Record to Keep).
4. **Select the record to keep:**
   - A. Review the records and select the record to keep in the database by choosing the appropriate "Keep This PSA#" radio button. The radio button refers to the PSA field beneath it.
   - B. Click the Next button or press left Alt+N. MCS opens the Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep).
5. **Select the Descriptions, Transactions, and Names** to be kept for the consolidated record:
   - A. Select the property descriptions and transactions to keep for the consolidated record:
     - i. Click on a record in the Descriptions or Transactions grid you want to discard. Clicking a record (row) in this grid selects (highlights) the record and the related record in the other grid.
     - ii. Double-click on the record's Keep ckeckbox to enter edit mode. The row's highlight disappears and the focus is placed on the Keep field.
     - iii. Click the Keep checkbox to uncheck it. The Keep checkbox of the related record in the other grid is unchecked, too. (Clicking the Keep checkbox again will check it back for both records)
     - iv. Repeat steps "i"-"iii" for all descriptions and transactions you want to discard.
   - B. Select the property names you want to keep in the consolidation record by checking the appropriate Keep fields in the Names grid.
   - C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep).
6. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Property Maintenance screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Properties Consolidation screen and takes you directly to Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Property Maintenance screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)
2. In **Step "4"**: The Keep This PSA # radio button of the PSA 1 record is selected by default. The PSA 1 record is the one the PSA # of which has been entered in the Source field of the Preliminary Properties Consolidation screen.
3. In **Step "5"**: If the property has no descriptions or transactions records in the Property Maintenance screen, the fields of the related grids (Descriptions or Transactions and Owners, respectively) in the Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep) will not be available.
4. In **Step "5"**: Clicking a record (row) in the Transactions grid selects the record and the related record in the Descriptions grid and vice versa.
5. In **Step "5"**: All As of Date fields are required to perform the consolidation. MCS will not allow duplicate As of Date values in one and the same grid and will not perform the consolidation if there is a blank As of Date field for a row selected for keeping.

Using the Properties Consolidation Screen Filter Options

1. Make sure there are no other screens open except the Property Maintenance screen.
2. **Set consolidation mode.** (For more information, refer to the Perform Consolidation - Overview chapter.)
3. **Start the consolidation procedure.** (For more information, refer to the Perform Consolidation - Overview chapter.) MCS opens the Preliminary Properties Consolidation screen.
4. **Retrieve the records you want to consolidate:**

A. Click the Find Similar checkbox. This will enable all fields in the Find Similar frame.

B. Select the appropriate Find Similar checkboxes. MSC will search for duplicate values in all checked boxes. The more fields checked, the more restricted the filter is.

C. Click the Find button or press left Alt+F to apply the filter. MCS displays the returned matches in the Find Similar grid.

D. In the Find Similar grid, select the records to consolidate. (For more information, refer to the Perform Consolidation - Overview chapter.) You may need to scroll up and down the records in the grid using the slide bar to the right or to sort the grid records (by clicking on the header of the field to sort by) in order to locate the records you need.

E. Click the Next button or press left Alt+N. MCS goes on to the Properties Consolidation Screen - Step 1 (Select the Record to Keep).

5. **Select the record to keep:**

A. Review the records and select the record to keep in the database by choosing the appropriate "Keep This PSA#" radio button. The radio button refers to the PSA field beneath it.

B. Click the Next button or press left Alt+N. MCS opens the Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep).

6. **Select the Descriptions, Transactions, and Names** to be kept for the consolidated record:

A. Select the property descriptions and transactions to keep for the consolidated record:

i. Click on a record in the Descriptions or Transactions grid you want to discard. Clicking a record (row) in this grid selects (highlights) the record and the related record in the other grid.

ii. Double-click on the record's Keep ckeckbox to enter edit mode. The row's highlight disappears and the focus is placed on the Keep field.

iii. Click the Keep checkbox to uncheck it. The Keep checkbox of the related record in the other grid is unchecked, too. (Clicking the Keep checkbox again will check it back for both records)

iv. Repeat steps "i"-"iii" for all descriptions and transactions you want to discard.

B. Select the property names you want to keep in the consolidation record by checking the appropriate Keep fields in the Names grid.

C. Click the Next button or press left Alt+N. MCS opens the Contacts Consolidation Screen - Step 3 (Select the Contributions to Keep).

7. **Implement the consolidation:**

A. Click the Finish button or press left Alt+F. MSC returns a message dialog box saying: "The consolidation finished successfully."

B. Click "OK". MCS exits the Property Maintenance screen and displays the calling menu (depending on your user settings).

Notes:

1. If MCS skips the Preliminary Properties Consolidation screen and takes you directly to Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep), this means that there are two records selected in the Matches tab of the calling data entry screen (Property Maintenance screen). In this case, you need to cancel the consolidation procedure, deselect the records and repeat the process. (For more information, refer to the Perform Consolidation - Overview chapter.)
2. In **Steps "2"-"3"**: If you select one of the records to be consolidated (preferably the one to be kept) in the Matches tab, the Property PSA # for this record will appear automatically in the Source field of the Preliminary Properties Consolidation screen.
3. In **Step "4"**: Tip: You can move the consolidation screen apart from your sight (by dragging it by the window header) if you need to see the PSA #s of the records you have to enter in the Source and Destination fields. This will reveal the underlying Matches tab of the calling data entry screen (i.e. Property Maintenance screen) if it had been selected when you opened the consolidation screen.
4. In **Step "5"**: The Keep This PSA # radio button of the PSA 1 record is selected by default. The PSA 1 record is the one the PSA # of which has been entered in the Source field of the Preliminary Properties Consolidation screen.
5. In **Step "6"**: If the property has no records in the Descriptions or Transactions tabs of the Property Maintenance screen, the fields of the related grids (Descriptions or Transactions and Owners, respectively) in the Properties Consolidation Screen - Step 2 (Select the Descriptions, Transactions, and Names to Keep) will not be available.
6. In **Step "6"**: Clicking a record (row) in the Transactions grid selects the record and the related record in the Descriptions grid and vice versa..
7. In **Step "6"**: <u>All As of Date fields are required to perform the consolidation. MCS will not allow duplicate As of Date values in one and the same grid and will not perform the consolidation if there is a blank As of Date field for a row selected for keeping</u>.

Quick Fix List

In case of problems, please check them against this list before you call us.

Problem: **Cannot select records in the Matches tab of the calling data entry screen in Consolidation Mode.**

Solution: There are some other records already selected. Scroll up and down the grid to locate and deselect them.

Problem: **MSC skips the Preliminary Consolidation screen and goes directly to Step 1 screen.**

Solution: This happens when there are two records selected in the Matches tab of the calling data entry screen. Close the consolidation screen, scroll up and down the Matches tab grid to locate the records and deselect them.

Problem: **When using the consolidation screen filter options (in the Preliminary Consolidation screen) MCS displays the following message: "There are too many records matching the selected criteria. Please restrict your criteria further or use the main screen to select the records to be consolidated.".**

Solution: This may happen if there are too many similar records. There is a system timeout that cannot be overridden. If you have restricted your filter as much as possible (by selecting all Find Similar checkboxes) and you still get this message or if using a more restricted filter cannot find the records you need, you will have to use the other consolidation options (using records ID #s or selecting the records from the Matches tab of the calling data entry screen.).

Problem: **In Companies consolidation: MCS wants me to select a branch record, but there are no branches displayed in the Branches grid (bottom grid) of the Company Consolidation Screen - Step 2 (Select Share Status Tab Grid Records and Branches).**

Solution: This may happen when the both companies have a single branch record created automatically upon creating the company record and all other fields except the Branch Name field are blank. Close the consolidation screen and retrieve the company records (one by one) in the Companies screen, then repeat the consolidation procedure. (For more information on retrieving records refer to MSC Companies Guide).

Problem: **I have selected records and started the consolidation, but instead of opening the Step 1 Consolidation screen (Select the Record to Keep), MCS opens the Preliminary Consolidation screen.**

Solution: You have selected either one or no records, but not two records. Close the consolidation screen and scroll up and down the Matches tab grid to fix your selection.