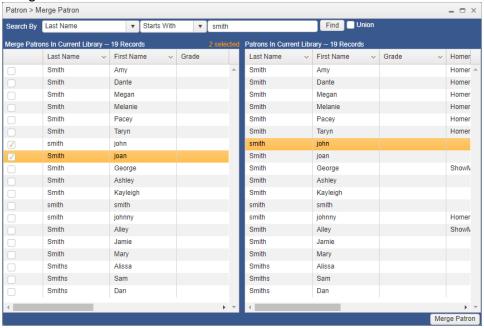#201 2544 Ellwood Drive, Edmonton, Alberta, Canada, T6X 0A9
insigniasupport@insigniasoftware.com
insigniasales@insigniasoftware.com
866-428-3997 or 780-428-3997
www.insigniasoftware.com

MERGE PATRONS

1. Go to **Patron > Merge Patron**.
2. Search for the patron records to be merged.
3. Select the checkboxes of the patrons to be merged on the left grid.
4. Select a patron record from the right grid for the patrons to be merged into.
5. Click **Merge**.

ADDING NEW PATRONS

1. Go to **Patron > Find/Add Patron**.
2. Select the checkbox "All Libraries".

3. Search for the patron by entering criteria and clicking **Find**. If they appear, you can update the information in the existing record.
4. If they do not show up in the search results, create a new patron record:
   4.1. Click **New**.
   4.2. Enter the information for the new patron.
   4.3. Make sure Barcode, Patron ID, and Staff ID all match the staff ID number. This is to ensure the record will be automatically updated if they are updated in the staff management system.
   4.4. Make sure Email Address is entered as well.
   4.5. Click **Save**.