

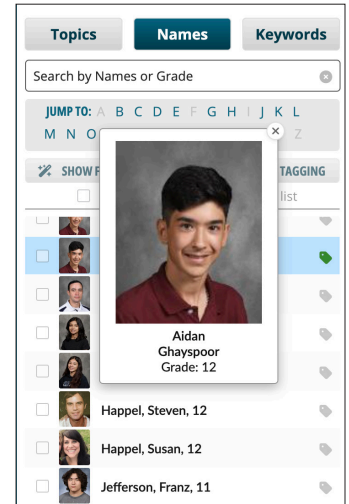
# TAG WIZARD CONNECTIONS

## HOW TAG WIZARD MAKES LINKS BETWEEN PORTRAITS AND THE NAME LIST

### NAME MATCHING MAGIC

The information below explains the automatic matching for portraits and Name List names. **Read over this to familiarize yourself with the automatic matching process.**

1. When a portrait has a first name, last name, and grade, it's eligible to be matched to the Name List.
2. We don't match the portrait if the grade field contains "baby," etc. (details below)
3. When a portrait's first and last name is identical to a Name List name AND there is only one Name List entry with that name, we make an automatic match.
4. When a portrait's first and last name is identical to a Name List name AND there is more than one Name List entry with that name, then we look at the grade to narrow things down. Harry Potter grade 8 will try to find a portrait for Harry Potter grade 8, and Harry Potter grade 10 will try to find Harry Potter grade 10.
5. Our matching process ignores punctuation, capitalization, and accents. Jose o'Tero will match with José Otero.
6. When you add a new Name List name or import an additional Name List, we look in the Portrait Library to see if there are any portraits we can match to your new names.
7. When you upload new portraits, we scan the Name List to see if we can match any of those new portraits to Name List records that don't already have a match.
8. When you upload a new portrait for a person, we update the linked portrait with new one—the newest portrait always "wins." See more information in the following section on Portrait Management.
9. If you see a Name List record with a silhouette in the Names tagging panel, we were unable to make an automatic match. Here are ways to resolve this:
  - If you get a portrait of that person, add it to the Portrait Library with the First Name, Last Name and Grade. Tag Wizard will then create a match.
  - If you already have a portrait, make sure it matches the Name List for First Name, Last Name and Grade. If it does not, you can edit the portrait or name list data so they match—or you can use the Reconcile function in the Name List to connect the portrait to the Name List.



*PRO TIP! Wish those little faces were easier to see? Just click the square and you'll see a larger preview!*

### PORTRAIT MANAGEMENT

Here's how we handle portraits that arrive throughout the year.

1. **FIRST/LAST/GRADE** When you upload a new portrait to the Portrait Library and give it a name and grade, Tag Wizard compares this portrait's first name and last name to the Name List to see if it can make a match.
  - **NEW MATCH** If there is a Name List entry with an exact match to first and last name that doesn't already have a portrait, we make a match.
  - **REPLACE MATCH** If you add new portrait for a Name List entry that already has a match, we update the current portrait to reflect the newest upload. The most recent portrait that matches the name is what we use for Tag Wizard purposes.
  - **GRADES** We use grade field for matching only when there are multiple Name List entries with the same first and last name. The grade field does not have to match exactly. The system recognizes different formats for the same grade (for instance, 09 is the same as 9, and Senior is the same as 12).
2. **BABY PICTURES** We don't try to match portraits with a one of the grade designations below. Please use these terms for the "grade" on portraits we should not use for Tag Wizard purposes. Contact our Tech Support team if you need help with this. **Grade designations we ignore: baby, babies, little kid, throwback, child, skip.**
3. **CHANGING PORTRAIT DATA** This is okay to do! This will not break a match between your portrait and the Name List.
4. **TIMING** When we receive new portraits, it could take **up to 24 hours for us to scan those new faces**. While this is underway, you may see red frames for those people if they are in a candid you scan. Remember this time frame . . . it is not instant!