

Enterprise - How to Merge Contact Records

Last Modified on 02/26/2025 3:26 pm CST

When to merge contacts:

A duplicate contact record has been found. If the same contact exists twice in your database, merge the two together to effectively combine two sets of data.

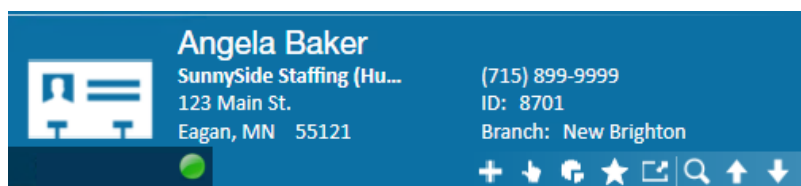
When not to merge contacts:

- A contact was created at the wrong department or customer and a duplicate record has not yet been created.
 - In this example, simply move the contact to the correct customer via the customer information section of the details page of the contact record.
- A contact has moved to a different customer or department.
 - To prevent duplicate contact records for the same contact, if a contact moves to another customer or department, you will want to change the customer/department affiliation of that contact. This will result in updating the contact/customer links. Any new activity will be reflected on the new customer/department. Any old activity will be reflected on the old customer/department. Viewing the contact records will result in seeing all activity regardless of where the contact was at the time of the activity.

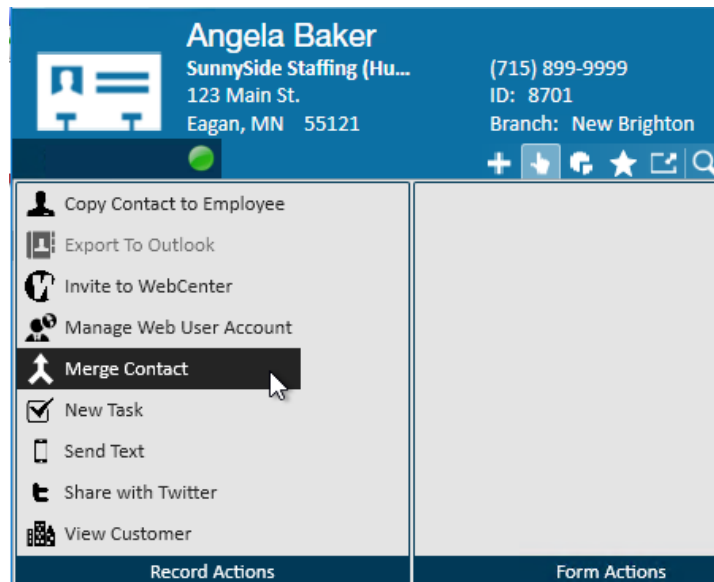
How to Merge Contact Records

Look up the duplicate record (the one determined to be the secondary records which should be merged into the record you would like to keep).

Review contact details from the visifile of the contact record. The avatar will give a great deal of information including the customer & department, contact title, address, phone number, and Enterprise ID:



To merge records, expand the actions menu and select merge contact.



This will open the "merge contact" window. There will be two groups listed - the source and the target:

- **Source:** The duplicate/secondary record. The contact record from which data will be copied and merged. When merging contacts, the source data fields will be moved to the target record.
- **Target:** The original/primary record. The contact record where the data will be merged.

Note Target data trumps source data and thus nothing on the target record will be overwritten.

Find the Target contact you wish to merge this record into by typing first or last name or utilizing the advanced search options under the drop down

ID	Last Name	First Name	Middle	Customer Name	Branch
9001	Lund	Jenna		Jem Furniture	Minneapolis
6367	McGrath	Mark		Juniper Incorporated	Minn
9529	1	KRS 1		BoomTime Inc.	Minneapolis
11213	1	Warden		Holes Construction	Minneapolis
2398	10	10			Memphis NE
2488	100	100		123 Nursing	Memphis NE
2399	11	11			Memphis NE
2400	12	12			Memphis NE
2401	13	13			Memphis NE
2402	14	14			Memphis NE

Options

Before the contact records can be merged, you must select the data to merge from the options area. Contact methods, and items linked to customers and orders can be applied to the target when the corresponding check box is selected.

options

Merge Contact Methods

Merge Customer Links

Merge Order Links

Merge Messages

By selecting any of the options, the information from the source record will be carried over to the target record. For instance, if you want the customer affiliation of the source record to override the customer affiliation on the target record, click to select merge customer links.

Upon selecting save, the source record is immediately deactivated and a "deact" message is automatically logged:

Klay Smith
 Custom Tile Manufacturing (Primary), HR Manager
 4328 1st Ave Little Canada, MN 55109 (651) 884-1547 ID: 9191

Scheduled for: 11/23/2015

tasks appointments social email

visifile

contact snapshot

Title	HR Manager	Status	Deleted/Mistakenly entered
Company Name	Custom Tile Manufacturing	Branch	Memphis SE
Email	klays@customtile.com	Date	9/29/2015 10:30:00 AM

Notes: Easiest to get a hold of by phone before 9 am., otherwise he is on the manufacturing floor all day.

phone/email

- klays@customtile.com
- (651) 884-1547

messages

Date	Action	Message	Rep	Contact	Custom
11/23/2015	Deact	Deactivate	shawna.bradt	Smith, Klay	429501

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