Duplicate Contact Records
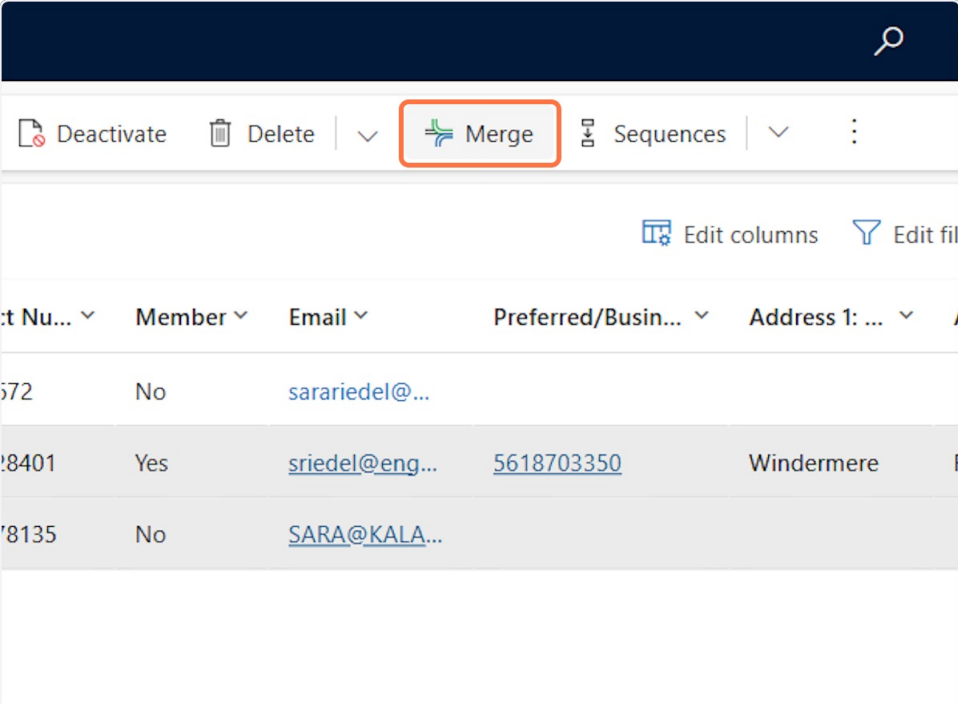
Merge Duplicate Contacts Records

Creation Date: Sep 24, 2025

Created By: Bridget Fairbanks

---

1. CLICK ON THE TWO ACCOUNTS THAT YOU WANT TO MERGE. CLICK ON MERGE

2. UNCHECK VIEW FIELDS WITH CONFLICTING DATA

10084672   No   sarariedel@...
toring   C-20028401   Yes   sriedel@eng...   561870:

cts

the fields to combine the records into a single primary record. Selecting a section
ct any fields in that section. Please review before merging.

rds by choosing fields with data ⓘ   ☑ View fields with conflicting data

ent check ⓘ

ord   ⦿ 🔖 Riedel, Sara ✕   🔍   ○ 🔖 RIEDEL, SARA

              ⦿ Select all fields in this section   ○ Select all fields in th

              ⦿ C-20028401   ○ C-20078135

3. UNCHECK ENABLE PARENT CHECK

✓ Riedel, Sara   KALA Mentoring   C-2002

✓ RIEDEL, SARA   **Merge Contacts**

Choose data from the fields to combine the r
value will also select any fields in that section

☐ Merge records by choosing fields witl

☑ Enable parent check ⓘ

Select Primary record   ⦿ 🔖 Rie

                               ⦿ Select al

Contact Number   ⦿ C-20028

Price Level   ⦿ Membei

4. YOU WILL NOW NEED TO GO THROUGH EACH SECTION AND MAKE SURE THAT THE MOST UP-TO-DATE RECORDS ARE SELECTED. IF ONE ACCOUNT IS A MEMBER ACCOUNT AND ONE ACCOUNT IS A NONMEMBER ACCOUNT MAKE SURE YOU ARE SELECTING THE INFORMATION UNDER THE MEMBER ACCOUNT.

5. CLICK ON OK

s in this section | ⭘ Select all fields in this section

⭘

s in this section | ⭘ Select all fields in this section

⭘ No

OK | Cancel