

How to Merge Duplicate Records

If the same person is added to an account more than once, Administrators can choose to merge these duplicate contacts into a single record. A list of potential duplicates can be found with this process:

- Hover over **My Account** and select **Administration**
- Select **Search Duplicates** from the Data Management section on the left-hand side
- Choose the relevant Contact Type from the sub-menu on the left. For example, choose 'Staff' if you wish to search for duplicated Staff records
- Select the fields that you wish to use as your search criteria. For example, choose 'Forename', 'Surname' and 'Date of Birth' if you wish to find all sets of records that hold the same data for these fields
- Click **Search**
- A table will be displayed that lists a row for each set of duplicated records

To action a set of duplicates:

- Click on the eye icon to the right of one of the sets of duplicates 



- The duplicated records will be displayed in a table
- If you decide that the records displayed are not duplicates, but a unique group of people with similar details, select Mark All in this group as unique and then click the **Set Unique** button
- If you wish to merge the displayed records, first choose the duplicate that you wish to keep as the master record. This record will take priority if there are any conflicts between the merged records (e.g. two different email addresses). It's often logical to choose the most up-to-date and thorough Contact record as the master. In the 'Merger' column on the right-hand side, enter a tick in the Master field for this record
- Choose a record that you wish to merge into the Master record. In the 'Merger' column on the right-hand side, choose the ID number of the Master record in the 'Merge into ID' menu. Repeat this process for any other duplicate records in this set that you wish to merge
- Click **Merge** and then **Ok** to confirm

The duplicates will be merged into a single master record and all related items (e.g. Notes, Outcomes, Session Attendances, Questionnaires), will be added to this record. The process can then be repeated for all further sets of duplicates.