

Merging your Duplicate Records

Introduction

We have added a merge tool so you can merge data from duplicate records into the original records and remove duplicates. This is done by going to the duplicate detection page and selecting a target and a source. At the moment this feature is only available for organisations.

All fields for the source contact/organization and relationships to other modules such as contacts, notes, events, membership, etc will be transferred to the target contact/organisation. However existing information in the target organization will not be overwritten. Once the process has completed the source contact/organization will be expired.

Merging Process

To select the records to merge you must navigate to System>Data Management>Duplicate detection. Then select a module to check for duplicates held in that module. After you have done this a list of records that are potential duplicates appear.

If you cannot see your duplicates here, you can change the name of the duplicate record so it matches the record you want to merge with and the duplicate detector will pick it up.

Duplicate Detection Help

Notes:

- Choose a module and this will check for duplicates held in that module. Any suspicious matches will be shown below.
- Selecting an item from the matches will open a new tab in your browser.

Module:

Duplicates List - 2 Rows, all currently being displayed on this page

<input type="checkbox"/> Organisation Name	Occurrences
<input type="checkbox"/> Duplicate Organisation	3
<input type="checkbox"/> Polymorphic Solutions	2

Click the number of occurrences to show the duplicates.

Occurrences - Organisation
Help

Occurrences List - 3 Rows, all currently being displayed on this page

<< First | 1 | Last >>

Organisation Name ▲	Categorisation	Business Mail Address	Business Physical Address	Source	Target
Duplicate Organisation	Business Partner			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Duplicate Organisation	Business Partner			<input type="checkbox"/>	<input checked="" type="checkbox"/>
Duplicate Organisation	Business Partner			<input type="checkbox"/>	<input type="checkbox"/>

<< First | 1 | Last >>

Merge
Close

Here you can select the record you want to keep (target) and what should merge with it (source). Once merged, the source record will be expired.

Contact Merge Rules

When doing a contact merge, contact references are updated in the following modules

1. Organisation
2. Note
3. Event
4. Membership
5. Case
6. Client admin
7. Survey
8. Asset Register
9. Contract Management
10. Document Register
11. QI
12. Distribution List
13. Group
14. Contact role
15. Quick links
16. Appointments
17. All custom live data type of Org

Below are some rules for what fields can and cannot be transferred. Remember, fields in the target contact cannot be overwritten, new information is only added if the field is empty. You can work around this by manually emptying fields in the target contact if you know the source contact holds the correct data.

Contact Fields	Can Merge?	Rule
Base fields		
Type	No	N/A
Category	No	N/A
Sub category	No	N/A
First Name	No	N/A
Middle Name	No	N/A
Surname	No	N/A
Preferred Name	No	N/A
Title	No	N/A
Job Title	Yes	Copies only when Target field is blank/null
Department	Yes	Copies only when Target field is blank/null
Alternate Contact	Yes	Copies only when Target field is blank/null
Date of Birth	Yes	Copies only when Target field is blank/null
Organisations	Yes	Copies only when Target field is blank/null
Privacy request	Yes	Copies only when Target field is blank/null
Sensitivity	Yes	Copies only when Target field is blank/null
Gender	Yes	Copies only when Target field is blank/null
Flag	Yes	Copies only when Target field is blank/null
Created By	No	N/A
Created Date	No	N/A
Modified By	No	N/A
Modified Date	No	N/A
Expired	No	N/A
Status	Yes	Copies only when Target field is blank/null
Old Contact Key	No	N/A
Photo	Yes	Copies only when Target field is blank/null
Division	Yes	Copies only when Target field is blank/null
Address and Communication info		

		<p>Address will be compared type basis.</p> <p>Ex: If an address of type "Business Physical" is not available in Target, then the whole address row (line 1, line 2, suburb etc) will be copied to Target. Else do not copy</p>
Address Information	Yes	Same applies to rest of the address types
		<p>Communication data will be compared type basis.</p> <p>Ex: If a Phone of type "Business Phone" is not available in Target, then the phone row (type, value) will be copied to Target. Else do not copy</p>
Communication information	Yes	Same applies to rest of the communication types
Custom Sections		
		<p>Base fields will be already handled as part of the above process. Custom fields in base section will follow the process described below.</p>
Base section Fields	Yes	
		<p>Process only the sections that are visible for the Target Contact type. Ignore the rest of the sections.</p>
Sections that are Type visible	Conditional	
		<p>The grid sections will have more than one row of data. For each row, 1. Copy this row to Target only when this row as a whole (include all fields in the row except the instance id) is not available in Target.</p>
Grid Sections	Yes	
Custom fields Type		
Fields that are stored in [Contact] table, like Contact Firstname, date of birth etc.	Yes	Will be copied as part of the process described above.
Text	Yes	Copies only when Target field is blank/null
Whole Number	Yes	Copies only when Target field is blank/null
Decimal	Yes	Copies only when Target field is blank/null
Date	Yes	Copies only when Target field is blank/null
Date & Time	Yes	Copies only when Target field is blank/null
Lookup List / Checkbox List	Yes	Copies only when Target field is blank/null
Currency	Yes	Copies only when Target field is blank/null
File	Yes	Copies only when Target field is blank/null

Yes/No	Yes	Copies only when Target field is blank/null
Hyperlink	Yes	Copies only when Target field is blank/null
Custom List	Yes	Copies only when Target field is blank/null
Identification Number	No	N/A
Label	Yes	Copies only when Target field is blank/null
Time	Yes	Copies only when Target field is blank/null
Statistical Linkage Key (SLK-581)	No	N/A
Link	No	N/A
Formula	No	N/A
Duration	Yes	Copies only when Target field is blank/null
Live data types		
Contact	Yes	Copies only when Target field is blank/null
Organisation	Yes	Copies only when Target field is blank/null
Event	Yes	Copies only when Target field is blank/null
Event Session	Yes	Copies only when Target field is blank/null
Resource	Yes	Copies only when Target field is blank/null
Note	Yes	Copies only when Target field is blank/null
Asset	Yes	Copies only when Target field is blank/null
Quality Improvement	Yes	Copies only when Target field is blank/null
Document	Yes	Copies only when Target field is blank/null
Case	Yes	Copies only when Target field is blank/null
Generic module entities	Yes	Copies only when Target field is blank/null

Organisation Merge Rules

For organisation merges, Organisation references are updated in the following modules:

1. Contact
2. Note
3. Event
4. Membership
5. Case
6. Client admin
7. Survey
8. Asset Register
9. Contract Management
10. Document Register
11. QI
12. Distribution List
13. Group
14. Contact role

- 15. Quick links
- 16. All custom live data type of Org

Below are some rules for what fields can and cannot be transferred. Remember, fields in the target organisation cannot be overwritten, new information is only added if the field is empty. You can work around this by manually emptying fields in the target organisation if you know the source organisation holds the correct data.

Organisation Fields	Can Merge?	Rule
Base fields		
Type	No	N/A
Category	No	N/A
Sub category	No	N/A
Name	No	N/A
Abbreviation	Yes	Copies only when Target field is blank/null
Web Address	Yes	Copies only when Target field is blank/null
ABN	Yes	Copies only when Target field is blank/null. If Copying ABN, also copy Org_ABN_Validated field
Primary contact	No	N/A
Flag	Yes	Copies only when Target field is blank/null
Status	Yes	Copies only when Target field is blank/null
Created By	No	N/A
Created Date	No	N/A
Modified By	No	N/A
Modified Date	No	N/A
Expired	No	N/A
Old Organisation Key	No	N/A
Description	Yes	Copies only when Target field is blank/null
Address and Communication info		
Address Information	Yes	Address will be compared type basis. If an address of type "Business Physical" is not available in Target, then the whole address row (line 1, line 2, suburb etc) will be copied to Target. Else do not copy

Communication information	Yes	<p>Communication data will be compared type basis.</p> <p>If a Phone of type "Business Phone" is not available in Target, then the phone row (type, value) will be copied to Target. Else do not copy</p> <p>Same applies to rest of the communication types</p>
Custom Sections		
Base section Fields	Yes	<p>Base fields will be already handled as part of the above process.</p> <p>Custom fields in base section will follow the process described below.</p>
Sections that are Type visible	Conditional	<p>Process only the sections that are visible for the Target Organisation type.</p> <p>Ignore the rest of the sections.</p>
Grid Sections	Yes	<p>The grid sections will have more than one row of data.</p> <p>For each row,</p> <ol style="list-style-type: none"> 1. Copy this row to Target only when this row as a whole (include all fields in the row except the instance id) is not available in Target.
Custom fields Type		
Fields that are stored in [Organisation] table, like Org Name etc.	Yes	Will be copied as part of the process described above.
Text	Yes	Copies only when Target field is blank/null
Whole Number	Yes	Copies only when Target field is blank/null
Decimal	Yes	Copies only when Target field is blank/null
Date	Yes	Copies only when Target field is blank/null
Date & Time	Yes	Copies only when Target field is blank/null
Lookup List / Checkbox List	Yes	Copies only when Target field is blank/null
Currency	Yes	Copies only when Target field is blank/null
File	Yes	Copies only when Target field is blank/null
Yes/No	Yes	Copies only when Target field is blank/null
Hyperlink	Yes	Copies only when Target field is blank/null
Custom List	Yes	Copies only when Target field is blank/null

Identification Number	no	N/A
Label	Yes	Copies only when Target field is blank/null
Time	Yes	Copies only when Target field is blank/null
Statistical Linkage Key (SLK-581)	No	N/A
Link	No	N/A
Formula	No	N/A
Duration	Yes	Copies only when Target field is blank/null
Live data types		
Contact	Yes	Copies only when Target field is blank/null
Organisation	Yes	Copies only when Target field is blank/null
Event	Yes	Copies only when Target field is blank/null
Event Session	Yes	Copies only when Target field is blank/null
Resource	Yes	Copies only when Target field is blank/null
Note	Yes	Copies only when Target field is blank/null
Asset	Yes	Copies only when Target field is blank/null
Quality Improvement	Yes	Copies only when Target field is blank/null
Document	Yes	Copies only when Target field is blank/null
Case	Yes	Copies only when Target field is blank/null
Generic module entities	Yes	Copies only when Target field is blank/null