## crimson

## FAQ – Can I Undo a Merge

Question: Can I undo a merge?

**Answer:** No. Merging is permanent and irreversible so do not merge records unless you are sure they are the same person.

If a merge was done by mistake, you need to create a new **People** record and use the adjustment type of **Transfer** to move gifts back to the correct record. Detailed steps below:

- 1. Create a New People Record for the merged record. See the <u>Crimson Add a People Record</u> guide for instructions on how to create a new **People** record.
- 2. After saving the new/re-created record, the Profile page will open. If you have exited that screen, run a **People Search** to find and open the new record.
- 3. In the profile, make sure you have selected the **Giving History** panel.
- 4. Click on "All" gifts to the right of the "Recent Gifts" area in the lower half of the screen.
- 5. Open the first gift to be transferred by clicking on the button to the left of the transaction.
- 6. Click the blue Adjust button and an Adjustment box and Adjustment Date field will appear.
- 7. Select **TR Transfer** from the **Adjustment** drop-down menu.

Adjust	
Adjustment	
TR - Transfer	~
Adjustment Date	
	▦
Donor id	
ID or First & Last Name	Q
Apply Cancel	

- 8. Enter an **Adjustment Date** to reflect the original contribution date by either manually entering the correct date or using the Calendar icon to select it. \**Please note: this is the date that will appear on your FEC report.*
- 9. Enter the new donor to transfer the contribution to by searching for the ID or First and Last

Name in the **Donor ID** search field and then press

- 10. Once you find the record, click **Select**.
- 11. Click **Apply** to finalize the transfer adjustment.
- 12. Repeat this process for each gift until all that were merged in error have been transferred to the correct record.