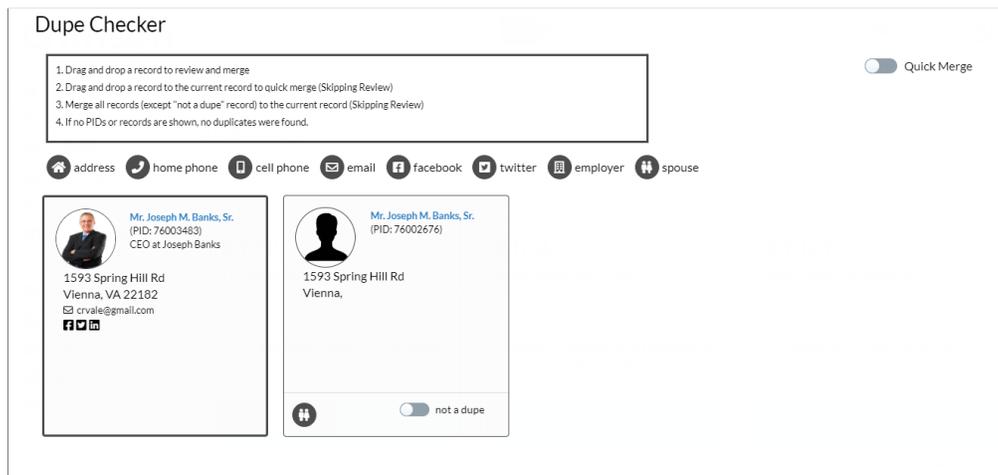


****Please note: Merging is irreversible, so do not merge unless you are certain the two records are the same person.**

Dupe Check in a People Record

1. After you have completed a **People** search and opened the record, click the **Dupe Checking & Merge** button  that is located at the bottom left section of the profile.
2. A **Dupe Checker** window will appear with **People** records that may be duplicates of that record.



3. Click and drag the record you want to review as a possible duplicate and drop it on original profile (it will be the first profile on the left). The **Merge** window will open, displaying the record to **Keep** on the left and the record to **Merge** on the right.

Merge

Record to keep

Mr. Joseph M. Banks, Sr. [PID: 74492693] 

Address 1593 Spring Hill Rd, Suite 401, Vienna, -

Home Phone

Work Phone

Email

Employer

OCCUPATION

ADDRESSID	TYPE	STREET
 350189	H	1593 Spring

Switch

- 1 Address 48
Carry if not 'Exists'
- 2 Phone, Fax, eMail and etc. 96
Carry if not 'Exists'
- 4 Contact 45
Copy
- 1 Activity 34
Copy
- 12 Task 106
Copy
- 1 Relationship 1 31
Copy
- 0 Relationship 2 11
Copy
- 3 Flag 9
Append if not 'Exists'
- 6 Keyword 20
Carry if not 'Exists'

Record to merge

Mr. Joseph M. Banks, Sr. [PID: 74178535] 

Address 1593 Spring Hill Rd, Suite 400, Vienna, VA-22182

Home Phone 123.456.7890

Work Phone 717.888.9172

Email crvale@gmail.com

Employer Joseph Banks

OCCUPATION CEO

ADDRESSID	TYPE	STREET
  276129	H	1593 Spr
  356346	H	211 E. Cs
  356347	H	2753 She
  356348	H	1451 S St
  356349	H	P.O. Box :
  356350	H	4506 Dal
  356351	H	4200 Ma

Merge 

4. The **Merge** window presents the two records side by side with a list of fields and types explaining which information will be saved to the single resulting **KEEP** record and which will not in the center column. Next to each field are the numbers of entries each record has. For example, in the screenshot above there are 282 to tasks for the left record and 146 for the right. Underneath each entry is the how the information will be saved. Refer to the options below to understand how each field may be transferred to the Keep record:

- **Carry over if not 'Exists'** – will carry over if it does not exist
- **Copy** – will copy over
- **Append if not 'Exists'** – will append/add if it does not exist
- **Not Applicable** – N/A

5. Organize data before merging:

- Click the  to make the **Merge** record the **Keep** record.
- To move specific information from the **Merge** record to the **Keep** record before merging, click the  button next to each entry.

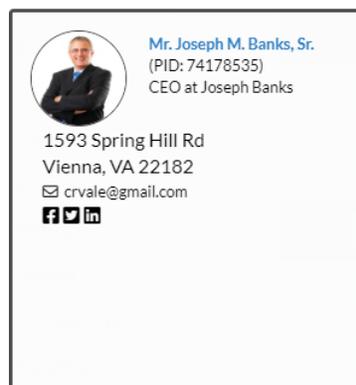
6. Click  to finalize the merge.

7. A confirmation message will appear asking: “Merge will make permanent changes. Are you sure to merge record _____ to _____?” Click **Yes** to merge the records or **No** to cancel the merge.

8. After the merge is complete, you will return to the **Dupe Checker** window. Repeat the process for all existing duplicate records. When you have finished merging, simply close out of the **Dupe Checker** window and you will return to the original profile.

Not a Dupe in a People Record

If a match is not a duplicate of the main record (for example one record is John Smith Sr. and the possible duplicate is actually John Smith Jr.), then use the **Not a Dupe** toggle button for the record. This will prevent the record from pulling in future Duplicate Reports and Dashboards available throughout Crimson.



Dupe Check Entire Database

Crimson also has several dashboards and detailed reports available for checking possible duplicate records.

- Visit the **Compliance Dashboard** to see the possible duplicate data counts and use the **Deduping Tool** by clicking the red **Possible Duplicates Card**.
- View the **Data Maintenance Reports** list to see a list of reports dedicated to duplicates. To see

all the reports, click the  button. For example, run the following report to see a list of possible duplicate individual type donor records:

1. Select the  **Data Maintenance Reports** list and find report # **104 – Dupe Checker (Individuals)**. This report uses keyline matches to find a list of all records that could be duplicates based on Address, Home Phone, Email and/or Employer.
2. Click the  button to run the report.
3. Click  to open or save an Excel file that contains the list of possible duplicates.
4. As you review the list for duplicates, use the **Merge** tool under the **People** menu to merge them together.
 1. Open the **People Dashboard** and click the **Merge** dashboard button to open a merge tool window.
 2. Within the merge window, search for the record you want to keep on the left side and press the **Select** button once you find it.
 3. Repeat this process for the record you wish to merge on the right side of the window (the search bar for the record to merge will appear after you have selected the record to keep).
 4. Continue with the merge steps listed above under "Dupe Check in People Record".
 5. Repeat this process until you have finished merging all the duplicates you find in the Dupe Check report file. You may want to run the Dupe Check report once more after finishing to confirm that no duplicates remain.