**Please note: Merging is irreversible, so do not merge unless you are certain the two records are the same person.
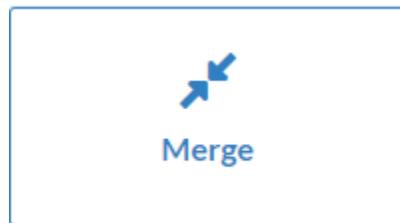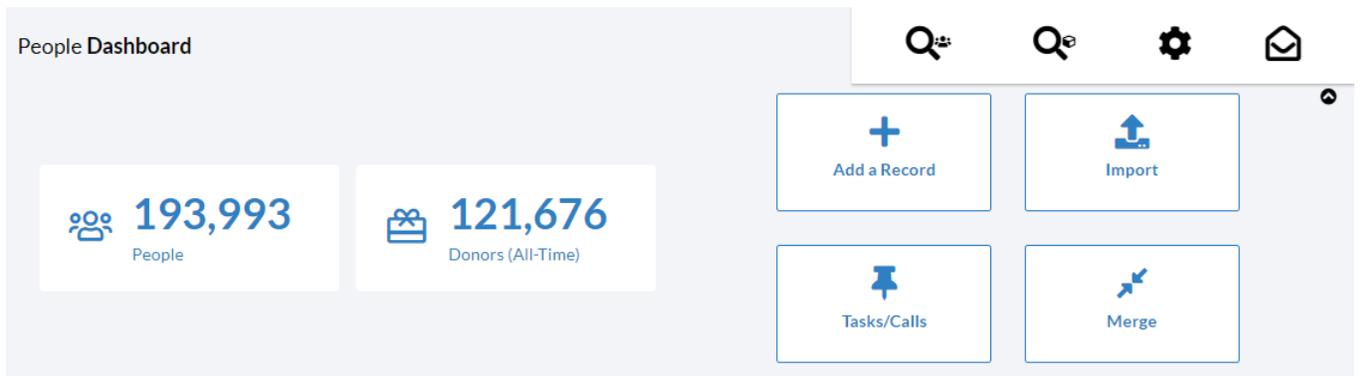
To access the **Merge** action button, navigate to the **People Dashboard** and click the **Merge** action button.

Once in the **Merge** feature, you can perform a merge of two People Records.

1. In the **Merge** feature window, use the search bar and the PID or Name to find the first record for the merge

2. At this point, there are two options:

   a. Click [Select] for the People Record you want to merge, and Crimson will automatically search for any possible duplicates. You can then select one of the possible duplicates to merge or click [No dupes, I want to search.] to manually search for the second record.

Merge ❓

Record to keep

[ID or Name] [🔍]

Possible Dupes

[No dupes, I want to search.]

⬜ Quick Merge

1. Drag and drop a record to review and merge
2. Drag and drop a record to the current record to quick merge (Skipping Review)
3. Merge all records (except "not a dupe" record) to the current record (Skipping Review)
4. If no PIDs or records are shown, no duplicates were found.

🏠 address   📞 home phone   📱 cell phone   ✉ email   fi facebook   🐦 twitter   🏢 employer   👥 spouse

Mr. Joseph Banks
(PID: 74157789)
Retired at Retired

2152 Evans Drive
Falls Church, VA 22202
✉ fia_05@hotmail.com
fi

Mr. Joseph Banks, Sr.
(PID: 74386244)
President at Abc Corporation

1234 Main Street
Fairfax, VA 22031
📞 703.123.4567
📱 703.790.8676
✉ jbae@cmdi.com

🏠   ⬜ not a dupe

   b. Check the box next to ⬜ Skip Auto Match and then click [Select] for the People Record you want. This option will pull upon a second search bar for you to find for the second People Record to merge.

Merge ❓   ✖

Record to keep

[ID or Name] [🔍]

Mr. Joseph Banks [PID: 74157789] ⊟

📍 Address   2152 Evans Drive, Falls Church, VA- 22202
📞 Home Phone 703.770.6032
📱 Work Phone 703.314.4666
✉ Email   fia_05@hotmail.com
Employer   Retired
OCCUPATION   Retired

Record to merge

[joseph banks] [🔍]

	PID	Name	ADDRE
Select	74157789	Mr. Joseph Banks	2152 Evans Falls Churc 22202
Select	74157837	Mr. Joseph Banks, Jr.	1010 New Y Brooklyn, N 11203
Select	74178535	Mr. Joseph M. Banks, Sr.	Suite 400 1 Spring Hill F Vienna, VA
Select	74386244	Mr. Joseph Banks, Sr.	Suite 100 1 Main Street VA 22031
Select	74490547	Joseph M. Banks	1202 Leesb Falls Churc 22043
Select	74492298	Mr. Joseph S. Banks, Jr.	167 Maple Vienna, VA
Select	74492693	Mr. Joseph M. Banks, Sr.	Suite 401 1 Spring Hill F Vienna,
Select	74493948	Joseph Banks	1593 Spring Road Vienn 22182
Select	74494482	Mr. Joseph Banks	1593 Spring Road Vienn 2218
Select	74496873	Joey Banks	1234 Moun

3. After you have selected your two records, the **Merge** window will update with an overview of the **Record to Keep** and the **Record to Merge**.

4. Use the middle list of fields in the center column to review which information will be saved to the single resulting **KEEP** record. Next to each field are the numbers of entries each record has. For example, in the screenshot above there are 293 to tasks for the left record and 62 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:
   a. **Carry over if not 'Exists'** – will carry over if it does not exist
   b. **Copy** – will copy over
   c. **Append if not 'Exists'** – will append/add if it does not exist
   d. **Not Applicable** – N/A

5. To organize the merge and data use the following icons:
   a. Click the **Switch** to make the **Merge** record the **Keep** record.
   b. To move specific information from the **Merge** record to the **Keep** record before merging, click the ← button next to each entry.

6. Click **Merge** 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.

For more ways to merge, please review the guide on **Merging Duplicate People Records** or on **Compliance's Deduping Tool**.