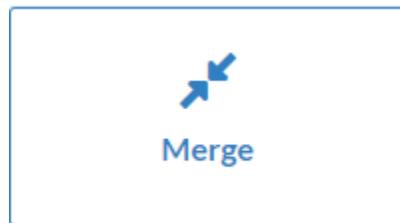
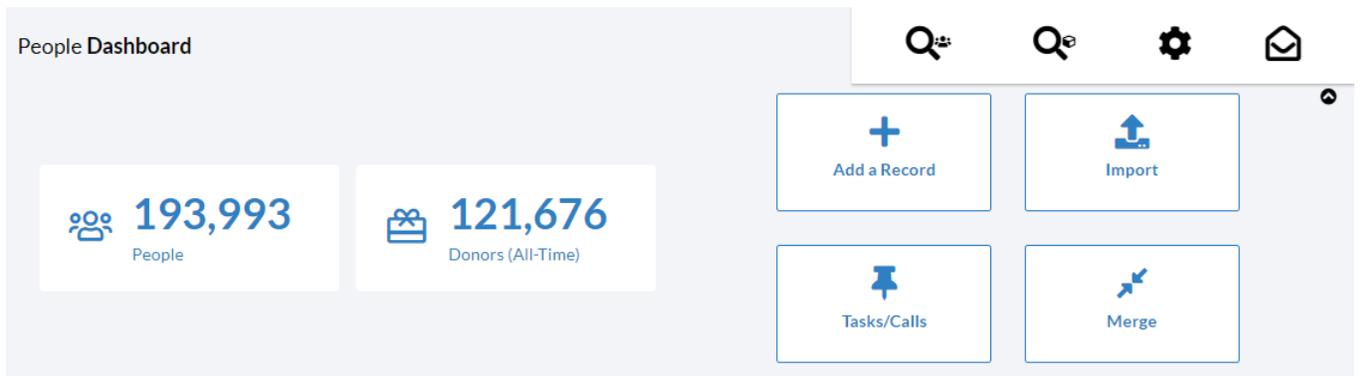


****Please note: Merging is irreversible, so do not merge unless you are certain the two records are the same person.**

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

Merge ?

Record to keep Skip Auto Match

joseph banks

	PID	Name	ADDR
Select	74157789	Mr. Joseph Banks	2152 Evans Falls Churc 22202
Select	74157837	Mr. Joseph Banks, Jr.	1010 New York 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

2. At this point, there are two options:

- 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

Possible Dupes

No dupes, I want to search.

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.

Quick Merge

- address
- home phone
- cell phone
- email
- facebook
- twitter
- employer
- spouse



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

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



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

- 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

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

	PID	Name	ADDRESS
<input type="button" value="Select"/>	74157789	Mr. Joseph Banks	2152 Evans Falls Churd 22202
<input type="button" value="Select"/>	74157837	Mr. Joseph Banks, Jr.	1010 New York Brooklyn, N 11203
<input type="button" value="Select"/>	74178505	Mr. Joseph M. Banks, Sr.	Suite 400 1 Spring Hill F Vienna, VA
<input type="button" value="Select"/>	74386244	Mr. Joseph Banks, Sr.	Suite 100 1 Main Street VA 22031
<input type="button" value="Select"/>	74490547	Joseph M. Banks	1202 Leesb Falls Churd 22043
<input type="button" value="Select"/>	74492298	Mr. Joseph S. Banks, Jr.	167 Maple, Vienna, VA
<input type="button" value="Select"/>	74492693	Mr. Joseph M. Banks, Sr.	Suite 401 1 Spring Hill F Vienna,
<input type="button" value="Select"/>	74493948	Joseph Banks	1593 Spring Road Vienn 22182
<input type="button" value="Select"/>	74494482	Mr. Joseph Banks	1593 Spring Road Vienn 2218
<input type="button" value="Select"/>	74496873	Joey Banks	1234 Moun

- 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**.

The screenshot shows a 'Merge' window with two records and a central field selection list. The 'Record to keep' is for Mr. Joseph Banks [PID: 74157789] and the 'Record to merge' is for Mr. Joseph Banks, Jr. [PID: 74157837]. The central list shows fields like Address, Phone, Contact, Activity, Task, Relationship, Flag, and Keyword, each with a count and a selection option.

Record to keep

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

ADDRESSID	TYPE	STREET
276947	H	1234 Main S
290792	H	2152 Evans
179474	B	1593 Spring

Record to merge

Mr. Joseph Banks, Jr. [PID: 74157837]

Address 1010 New York Ave, Brooklyn, NY- 11203

Home Phone 703.320.1234

Work Phone 567.234.1234 x1e011

Email yahoo@yahoo.com

Employer Abcd Corporation

OCCUPATION Business Executive

ADDRESSID	TYPE	STREET
179449	H	7842 Sne
179649	H	1010 Ne
350126	H	1010 Ne
360556	H	1233 Tes
370285	H	10107ne
370287	H	1593 Spr
350873	B	350 Nept

Field Selection List:

- Address (3) *Carry if not 'Exists'* (7)
- Phone, Fax, eMail and etc. (8) *Carry if not 'Exists'* (28)
- Contact (3) *Copy* (46)
- Activity (10) *Copy* (15)
- Task (18) *Copy* (19)
- Relationship 1 (2) *Copy* (4)
- Relationship 2 (2) *Copy* (11)
- Flag (4) *Append if not 'Exists'* (44)
- Keyword (6) *Carry if not 'Exists'* (31)

Merge

- 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:
 - 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

- To organize the merge and data use the following icons:

- Click the **Switch** icon 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.

- Click **Merge** to finalize the merge.

Merge will make permanent changes. Are you sure to merge record 74157837 to 74157789?

Yes

No

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](#).