

NOTE: Merging is irreversible. Do not merge unless you are certain two records are the same person.

As you load lists of contacts, prospects, and donors into the database overtime, you may notice the creation of duplicate records. Crimson provides helpful keylines to catch duplicate records at the point of data entry. However, some records need to be reviewed before they can be merged. If you have a one-off pair of duplicate records, you may want to use the [Merge Tool](#). If you instead have a higher volume of duplicate records to be reviewed and merged, then you may want to use the **Deduping Tool**.

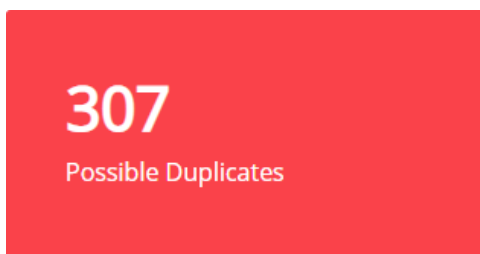
How Merges Work

When two records are merged in Crimson, all of the information in the “keep” record will remain. If there are blank fields in the keep record and information is available in the “merge” record, that information from the “merge” record will be kept. For example, if the keep record has a home phone number and the merge record has a business phone number, the merged record will have both. If the two records have different information for the same field, only the keep record information will be available after the merge. You may want to make changes to one of the records prior to a merge so that information from both are retained. At times you may also want to remove merge record information prior to the merge if you do not want it filled into a blank field.

Field Type For Merging	Merge Process
Address	Carry if it does not exist
Phonebook	Carry if it does not exist
Contact	Copy
Activity	Copy
Task	Copy
Relationship	Copy
Flag	Carry if it does not exist
Keyword	Carry if it does not exist
Club	Copy
Gift Transactions	Copy
Data Entry	Copy
Pledges	Copy
Event	Copy

Accessing the Deduping Tool

The Deduping tool can be found on the **Compliance Dashboard**. Click the **Possible Duplicates** card to open the deduping tool.



Possible Duplicate ✖

Showing 20 from Total 246

Match Type: Individual Donors Organization

PID	Match Type	Name ?	MRC Date	CTD	Email	FECMTEID	Spouse	Employer	Phone #	Address	Not a Dupe	Keep ?
74471161	EMAIL	Amy, Steele	7/30/16	\$25	Xdsreality@aol.com			CI Steele Realty Inc.		1591 Eastwind Kussimmee, FL 34946	<input type="checkbox"/>	<input type="checkbox"/>
74472816	EMAIL	Amy, Steeke	7/27/16	\$25	Xdsreality@aol.com			CI Steele Realty Inc.		1501 Eastwind Kissimmee, FL 34946	<input type="checkbox"/>	<input type="checkbox"/>
74483099	EMAIL	Andrew, Blake	7/30/16	\$50	Xamblake@aol.com			Self		P.O. Box 410191 East Cambridge, MA 02141	<input type="checkbox"/>	<input type="checkbox"/>
74483691	EMAIL	Andrew, Blake	7/23/16	\$50	Xamblake@aol.com			Self		P.O. Box 191 East Cambridge, MA 02141	<input type="checkbox"/>	<input type="checkbox"/>
74484676	EMAIL	Barbara, Matyi	7/30/16	\$51	Xwayb358@aol.com			Wdc Designs Inc - Self		12 Overlook Drive East Framingham, MA 01998	<input type="checkbox"/>	<input type="checkbox"/>
74485202	EMAIL	Barbara, Matyi	7/22/16	\$51	XWayb358@aol.com			Wdc Designs Inc (Self)		Po. Box 5462 Wayland, MA 01998	<input type="checkbox"/>	<input type="checkbox"/>
74455159	EMAIL	Blake, Andrew	7/30/16	\$100	amblake@aol.com			Self	H:6177144985	PO Box 410191 East Cambridge, MA 02141	<input type="checkbox"/>	<input type="checkbox"/>
74455750	EMAIL	Blake, Andrew	7/23/16	\$100	amblake@aol.com			Self	H:6177144985	PO Box 191 East Cambridge, MA 02141	<input type="checkbox"/>	<input type="checkbox"/>
74470686	EMAIL	Bud, Cardinal	7/30/16	\$25	Xbudc@theriver.com			C&C Construction Co		P.O. Box 91155 Tucson, AZ 83932	<input type="checkbox"/>	<input type="checkbox"/>
74480147	EMAIL	Bud, Cardinal	7/8/16	\$25	Xbudc@theriver.com			C&C Construction		7608. N. La Cholla Blvd Tucson, AZ 83932	<input type="checkbox"/>	<input type="checkbox"/>

Deduping Tool Page Features

PID – Unique Crimson People ID. Click the hyperlinked PID, to open the record’s full profile for review.

Match Type – Reason the records matched as possible duplicates.

Name – Full name of the record. If you hover over the name a blue question mark will appear. Click on the question mark to get additional details about the record without having to leave the screen.

PID	Match Type	Name ?	MRC Date	CTD	Email
74492062	ADDRESS	Lord (Mr.), Hugh D. ?	10/6/17	\$35	
74492531	ADDRESS	# 74492062			
74490573	ADDRESS	Mr. Hugh D. Lord			
74492024	ADDRESS	11 Charles Circle Warner, GA 31093		\$10	lsiu3@cmdi.net
74492051	ADDRESS				
74492052	ADDRESS				
74492246	ADDRESS	Donation History:			
74492249	ADDRESS	FundCode	Amount		
74492251	ADDRESS	P2018	\$35.00		
74492252	ADDRESS	P2016	\$17.50		
74492253	ADDRESS	Siu, Lydia			

MRC Date – Donor’s most recent contribution date.

CTD – Donor’s cycle to date total amount.

Email, Home #, Cell #, Business #, Street, City, State, Zip – Donor’s primary contact information.

Spouse – Donor’s spouse’s name.

FECMTEID – The FEC Committee ID if the Donor has one.

Filters – The default results view is set to show possible Individual duplicate records. However, the Possible Duplicates tool includes an option to filter and view possible Organization dupes as well. You can also choose to filter dupes by **Match Type** or display only records that are **Donors** to help prioritize which dupes are reviewed and processed first. Select the filters you are looking to use and the results will automatically update.

Possible Duplicate

Showing 20 from Total 291

Match Type

All

Individual
 Organization
 Donors


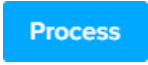
PID	Match Type	Name	MRC Date	CTD	Email	FECCTEID	Spouse	Employer	Phone #	Address	Not a Dupe	Keep
74492062	ADDRESS	Lord (Mr.), Hugh D.	10/6/17	\$35						11 Charles Circle Warner, GA 31093	<input type="checkbox"/>	<input type="checkbox"/>
74492531	ADDRESS	Lord, Hugh, Jr.	8/1/17							11 Charles Circle Warner, GA 31093	<input type="checkbox"/>	<input type="checkbox"/>
74490573	ADDRESS	Siu (Ms.), Lydia A.	5/16/18								<input type="checkbox"/>	<input type="checkbox"/>

Not a Dupe – Check this box if the matched pair are NOT duplicate records. Once processed, these records will no longer pull on any of the possible duplicate menus or reports going forward. Use, for example, when the matched pairs are a father and son who share similar contact information.

PID	Match Type	Name	MRC Date	CTD	Email	FECCTEID	Spouse	Employer	Phone #	Address	Not a Dupe	Keep
74492062	ADDRESS	Lord (Mr.), Hugh D.	10/6/17	\$35						11 Charles Circle Warner, GA 31093	<input type="checkbox"/>	<input type="checkbox"/>
74492531	ADDRESS	Lord, Hugh, Jr.	8/1/17							11 Charles Circle Warner, GA 31093	<input type="checkbox"/>	<input type="checkbox"/>

Keep – If the matched pair are duplicates, then you must check this box for the record you want to indicate as the “KEEP” record. Leave the box blank for the record you want to indicate is the “MERGE” record. Once processed, the “MERGE” (unchecked) records will merge into the “KEEP” record’s profile.

Using the Deduping Tool

- Go to the **Compliance Dashboard** and click the **Possible Duplicates** card. The first 20 pairs of duplicates will appear for review.
- If more details are required, hover over the name and click the  to view them without having to leave the screen. You may also click the hyperlinked PID to view a record’s full profile.
- Indicate if the records should be merged or not.
 - Not a Dupe** – Check this box if the matched pair are NOT duplicate records.
 - Keep** – Check this box if the matched pair are duplicates and you want to indicate the “KEEP” record. Leave this box empty for the record you want to indicate as the “MERGE” record. Once processed, the “MERGE” (unchecked) record will merge into the “KEEP” record’s profile.
- Repeat the above steps for each pair of matched duplicate records that follow until you have reached the end of the page or you are ready to stop your review.
- Click the  button at the bottom of the screen to process the pairs indicated as duplicates or not.
- The next 20 matched duplicate pairs will appear. Repeat the above steps until your review is complete.