Have duplicate records in your database? Not to worry! You can merge Contact Records as well as Group Records.

Notes: Before you get started, we recommend that you review all duplicate records to ensure that the data you need is preserved in the process. We recommend running a contact report that includes all duplicate contact/group data and exporting to .csv before merging to have a backup of your data.

Merging contacts or groups in the system involves selecting a "Winning" record. The winning contact or group record will remain in your database after the merge, and it should be the most up-to-date and complete record. You’ll also select a “Losing” record, which will be deleted from the system. These records are deleted permanently and the data cannot be retrieved.

Key activity and transaction data from the losing record will be transferred over to the winning record during the merge, and you can choose what data in the personal details section you would like transferred over from the losing record to the winning record. Some data will be permanently deleted and will need to be manually added to the winning record. Continue reading to see what data will be transferred and what will be deleted.

What happens to your data during a contact record merge?

The “Winning” record will be updated with the “Losing” record’s data (see the list below), and the “Losing” record will be deleted from the system. All duplicate data from the merged records will be removed, and all “Primary” designations for names, emails, employers, etc. will remain the same for the “Winning” record.

The following fields will automatically be updated from all “Losing” records into the “Winning” record for Contact Merge:

- All Engagements (Activity/Transaction Records)
- All Custom Fields
- All Notes
- All Relationships
- All Peer Pages, All Subscriptions
• All Soft Credits
• All Documents
• All Important Dates
• All Payment Sources
• All Communication Notes

The following data in the Personal Details section can be transferred over from the "Losing" record to the "Winning" record as secondary data:

• First Name
• Middle Name
• Last Name
• Email
• Address
• Phone Number
  ○ Home
  ○ Mobile
  ○ Business
• Employers
• Education

  Note: If any of the above fields are blank in the "Winning" record, the selected "Losing" record fields will transfer as Primary data in the "Winning" record

The following fields can only be transferred over if the fields in the "Winning" record is BLANK:

• Profile Image
• Social Media Profiles & Website
• Tags
• Title
• Suffix
• Nickname
• Business/Organization Name
• Pronoun
• Birthdate
• Deceased Date
• Marital Status

The following fields data will be **permanently deleted** from the “Losing” records during the merge:

• Contact ID (CID)
• Contact Type
• Groups

### Completing a Contact Merge

Once you've reviewed your duplicate records and are ready to complete a contact merge:

• Go to **Contacts > Merge Manager**.

• Select Record Type: **Contact Records**

Then, search for the two records you’d like to merge, and click “**Merge Selected Records**.”
An overlay will display that allows you to select the “Winning” record. From the dropdown list, select the record that you would like to keep in your database.

The overlay will then expand with all of the data fields you can transfer from the “Losing” record to the “Winning” Record. Select the fields you would like to transfer from the “Losing” record to the “Winning” record. Any fields you do not select will be permanently deleted from the database (see full list above of what data fields are transferrable and what will be permanently deleted). **NOTE: merging records is**
permanent and cannot be undone.

- Click Merge Records.
- You’ll receive a confirmation that the merge is complete:

![The Winning Record has been successfully updated.]

At this point, we recommend reviewing the updated record in your system to make sure it contains all the details you need. If anything is missing, you can manually add the data to the record using the backup you created at the beginning of the process.

What happens to your data during a group record merge?

During a group record merge, the “Winning” record will be updated with the “Losing” records data (see the list below), and the “Losing” records will be deleted from the system. All duplicate data from the merged records will be removed, and all “Primary” designations for names, emails, employers, etc. will remain the same for the “Winning” record.

When merging a Group record, you also have the opportunity to update or change the existing Group Name and Group Description for the “Winning” record.

The following fields from the “Losing” records will be added to the “Winning” Group record:

- All Associated Activity/Transaction Records
- All Custom Fields
- All Members
- All Peer Pages, All Subscriptions
- All Communication Records
- All Notes
- All Documents

The following field data from the "Losing" records will be deleted permanently:
Completing a Group Merge

Once you've reviewed your duplicate records and are ready to complete a merge:

- Go to **Contacts > Merge Manager**.
- First, select whether you want to merge Contact Records or Group Records.
- Then, search for the two records you'd like to merge, and click "Merge Selected Records."

![Merge Manager screenshot](image_url)
An overlay will display that allows you to select the "Winning" record. From the dropdown list, select the record that you would like to keep in your database.

You will then be able to select which data fields from the

**NOTE: After the merge is complete...**

- Whichever GPID is selected as the "Winning" Record will be updated with the Activity History, Campaign Messages, Documents, Custom Fields, Engagements, Notes, Payment Sources, and Soft Credit section data from the losing contact profile.
- The Group Details, and Tags section data from the losing contact profile **will get deleted permanently** and the "Losing" record will be deleted from the database.
- Please note that merging records is permanent and cannot be undone.

- Click **Merge Records**.

- You'll receive a confirmation that the merge is complete:

  The Winning Record has been successfully updated.

At this point, we recommend reviewing the updated record in your system to make sure it contains all the details you need. If anything is missing, you can manually add the data to
the record using the backup you created at the beginning of the process.