Merging Duplicate Contacts

Last Modified on 05/11/2023 2:28 pm EDT

Donor Management System

From time to time, you may notice that you may have accidentally entered duplicate Contacts in the Donor Management System; contacts that are supposed to be the same but are listed more than once.

Merging (or Deduping) your duplicate Contacts should be an important and regular part of your data hygiene best practices. This ensures that all of your data is easily searchable and ready to be analyzed.

Table of Contents:

- What is Merging?
- Why is Merging Important?
- Considerations for Merging
  - What information will be merged?
  - When to Single Merge
  - When to Mass Merge
  - Merging MailChimp Details & Summary Fields
- How to Merge Contacts
  - Single Merge
  - Single Merge Actions
  - Mass Merge
  - Mass Merge Actions

What is Merging?

Merging refers to combining Contacts that happen to be complete or partial duplicates of each other.

Merging can be done in two different ways:

- **Merging a single Contact (Single Merge):** on your Contacts Tab, you might come across duplicated Contacts that can be merged into one.
- **Merging multiple Contacts at once (Mass Merge):** an advanced action applied to all existing Contacts on the DMS aiming to find all possible duplicates based on set rules.

Why is Merging Important?

Charities that run successful campaigns often leverage patterns and trends based on demographics, behaviours and other insights about each contact.

Let's say you just finished up a four-month fundraising campaign starting in January and ending in April - and you notice you have a few repeat donors in your DMS Contacts list. One of these donors gifted equal amounts in

January, February and April. Recognizing this trend, you reach out and are able to convert this donor into a monthly donor.

However, what if you misspelled the donor's name and created a duplicate entry? One entry with the correct donor's name shows they gifted an amount in January and April. In the duplicate entry with the misspelled name, their profile only shows one donation in February. When viewing the data independently, it's unclear if there's a trend. As a result, you may miss the opportunity to convert this donor into a monthly donor.

In short, merging contacts helps ensure that you only need to pull these types of insights from a single contact rather than juggling and verifying the information from duplicate listings. And with a well-organized Contacts list, charities can focus their energy on what matters the most - engaging with their donors.

Considerations for Merging

What information will be merged?

- You will be able to select which specific Contact information to be updated, matched and added.
- **Relationships** will also be preserved.
- There may be cases where you wish to merge contacts of different Contact Types (i.e. Individual, Organization, Household)
  - In order to merge two Contacts, they must be the **same Contact Type**
  - **Learn more about changing a Contact's Contact Type to be able to merge with an existing Contact**
- **All Contributions details** (i.e. donation history, total contribution amounts) from both contacts **will be merged together,** resulting in no loss of Contribution data.

When to Single Merge

- We recommend that charities do a single merge whenever they notice an instance of a duplicate contact.
- Resolving duplicate contacts can be done quickly and effortlessly as it only requires a few clicks to merge two contacts.

Examples

- When you notice a misspelled or missing surname/given name in your Contacts list, it's a good idea to perform a quick check for duplicate entries to ensure the donor's data is centralized in a single Contact.
- If you come across a contact with a significant number of empty Contact Details fields, you should explore the possibility that a duplicate contact was created or if you need to collect more information about this contact.

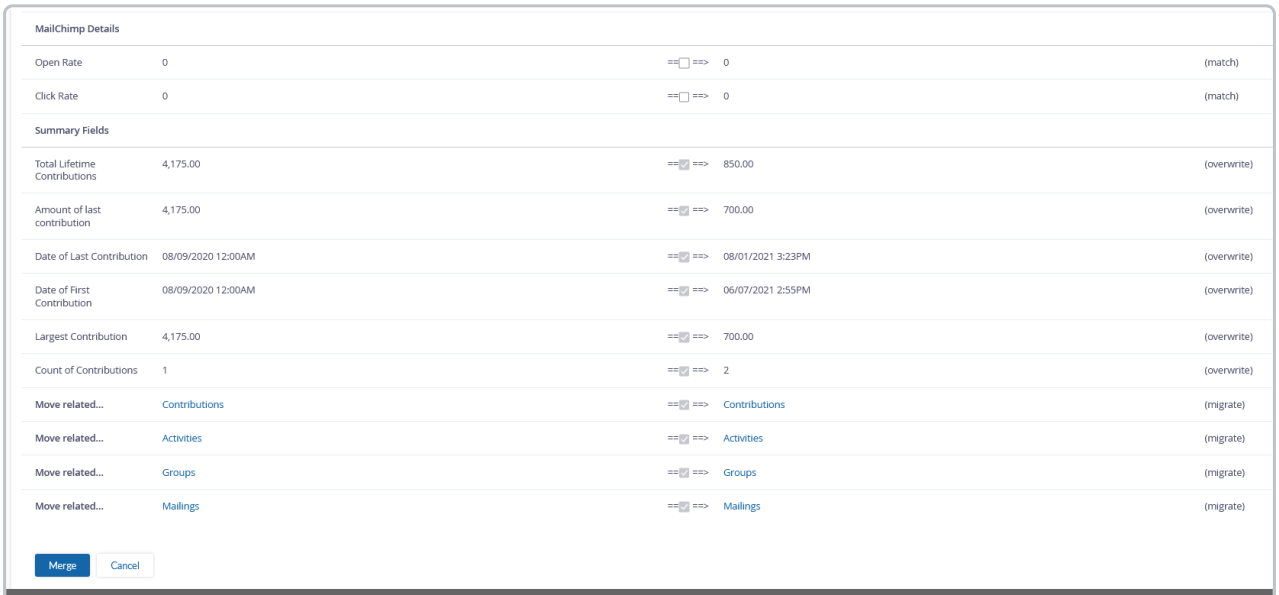
When to Mass Merge

- Finding duplicates should be done on a regular basis.
- The frequency is mostly dependent on how many Contacts are on your DMS at any time, but also how many Contacts are added on a daily basis.
- A bigger, more active donor base should be checked for duplicates more regularly.

Examples

- Outside of your set Mass Merging schedule, you should consider finding for duplicates when a large number of Contacts has been imported
- Examples of when to look for duplicates: Third-party event, new mailing list from external sources, etc.

Merging MailChimp Details & Summary Fields



MailChimp Details				
Open Rate	0	==☐ ==>	0	(match)
Click Rate	0	==☐ ==>	0	(match)
Summary Fields				
Total Lifetime Contributions	4,175.00	==☑ ==>	850.00	(overwrite)
Amount of last contribution	4,175.00	==☑ ==>	700.00	(overwrite)
Date of Last Contribution	08/09/2020 12:00AM	==☑ ==>	08/01/2021 3:23PM	(overwrite)
Date of First Contribution	08/09/2020 12:00AM	==☑ ==>	06/07/2021 2:55PM	(overwrite)
Largest Contribution	4,175.00	==☑ ==>	700.00	(overwrite)
Count of Contributions	1	==☑ ==>	2	(overwrite)
Move related...	Contributions	==☑ ==>	Contributions	(migrate)
Move related...	Activities	==☑ ==>	Activities	(migrate)
Move related...	Groups	==☑ ==>	Groups	(migrate)
Move related...	Mailings	==☑ ==>	Mailings	(migrate)

Merge Cancel

Merging MailChimp and Summary Fields

- When selecting which information to overwrite, match or add, you will see two sections: ***MailChimp Details*** and ***Summary Fields***.
- **The DMS will automatically identify the duplicated information** and will add (not overwrite) anything that is not a perfect match.
- **You won't be able to uncheck the boxes in these sections**, to ensure that all contact and contribution data will be preserved and merged.

How to Merge Contacts

Single Merge

When browsing or searching your Contacts Tab, you might encounter a duplicated Contact. Combining these two

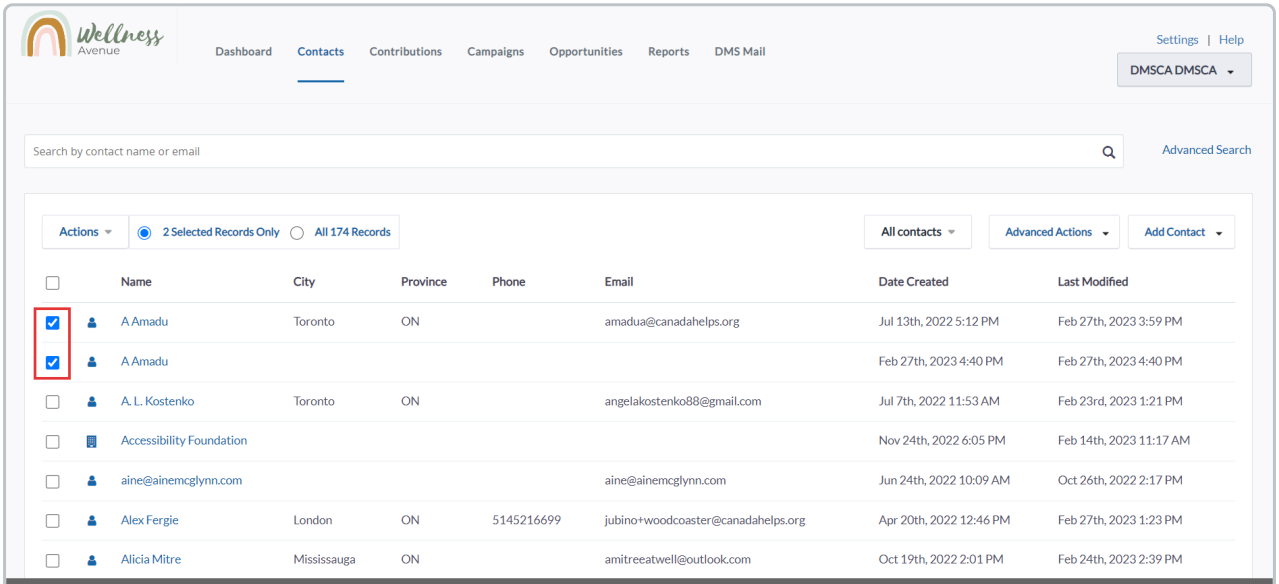
Contacts is known as a Merge Action.

> ***Check out this short video tutorial on the Single Merge process.***
>
> (Note: This video contains no audio).

Your browser does not support HTML5 video.

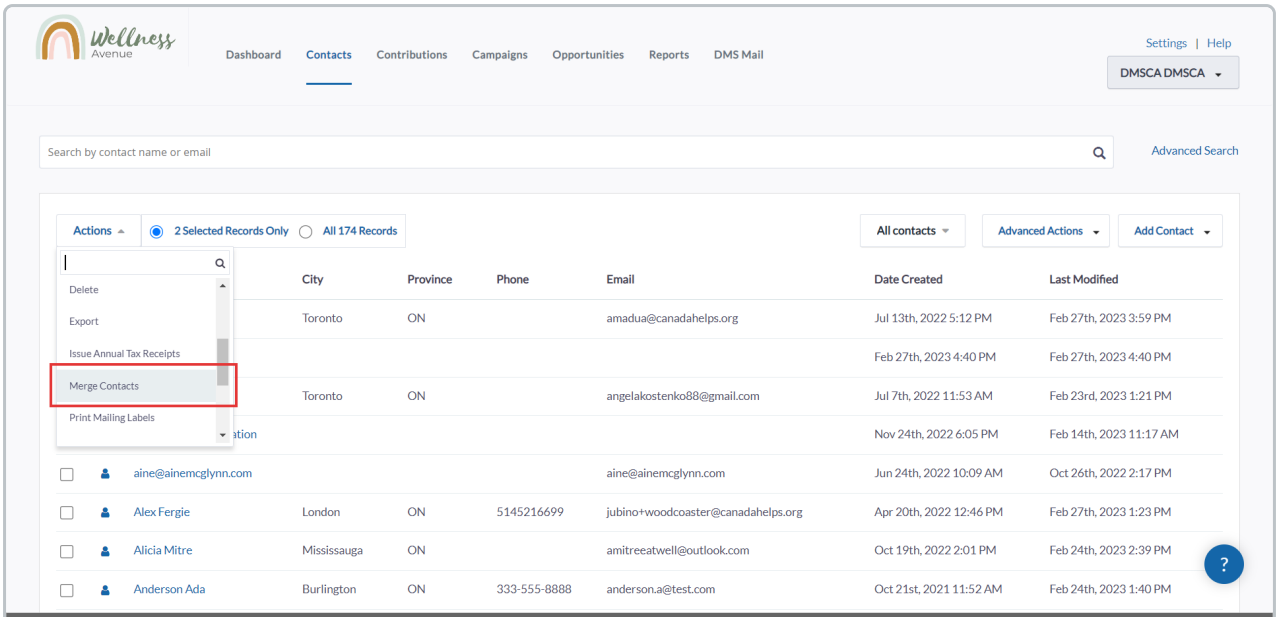
Or, follow the step-by-step instructions below on how to perform a single merge of two duplicate Contacts.

1. Visit your **Contacts tab** and select **two Contacts** to merge.



Select Contacts to merge

2. From the ***Actions*** *menu, select* ***Merge contacts.***

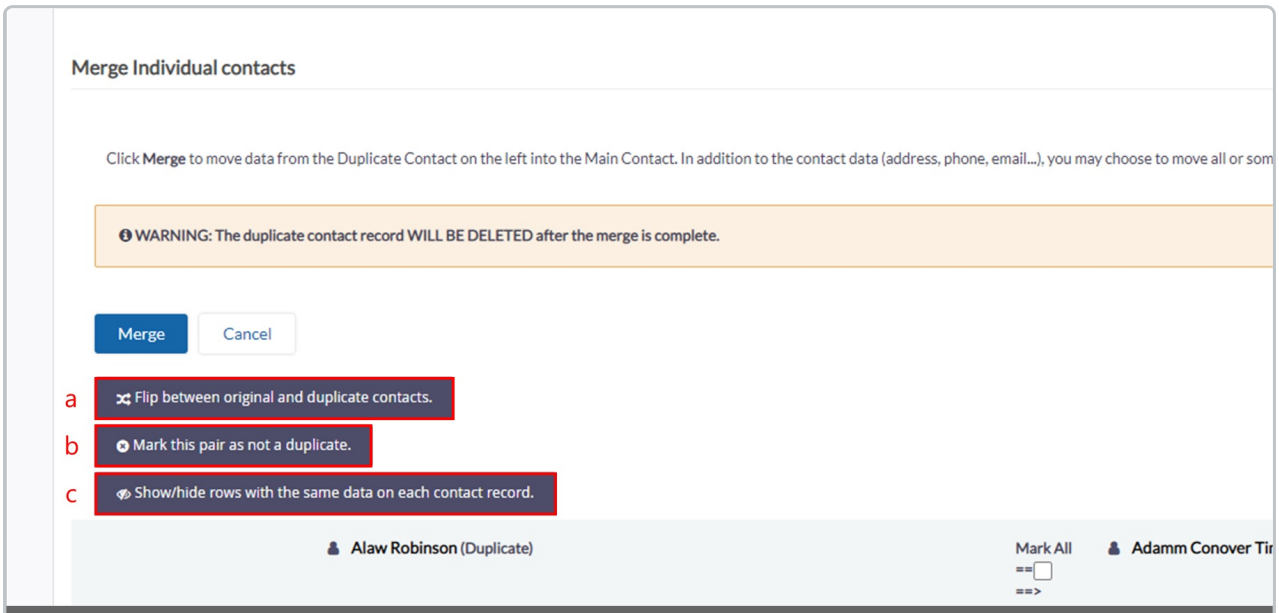


How to complete a Merge Action to merge two contacts.

3. You will be directed to the ***Merge Contacts*** page where you can select which details to Merge, add or ignore.

Single Merge Actions

4. On the **Merge Page**, you can find **several additional options** before finalizing the merge.

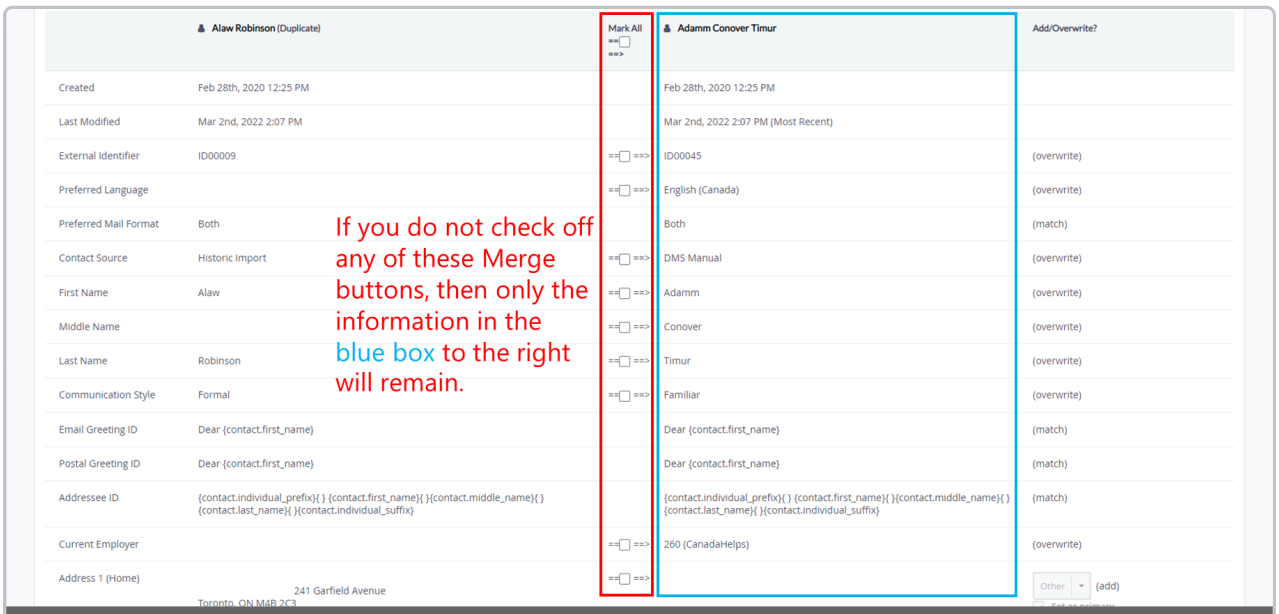


Options to help simplify a Single Merge.

- *a. If you click* ***Flip between original and duplicate contacts.****, this* lets you designate which of the two Contacts is the one to be kept and which one is a duplicate.
    - Generally, the duplicated Contact is the one which contains the most out-of-date information.
- *b. If you click* ***Mark this pair as not a duplicate.****, this* marks both Contacts as not duplicates of each other.
    - This, in turn, will leave them out of every subsequent Mass Merging process.
- *c. If you click* ***Show/hide rows with the same data on each contact record.****,* this hides identical fields so that you

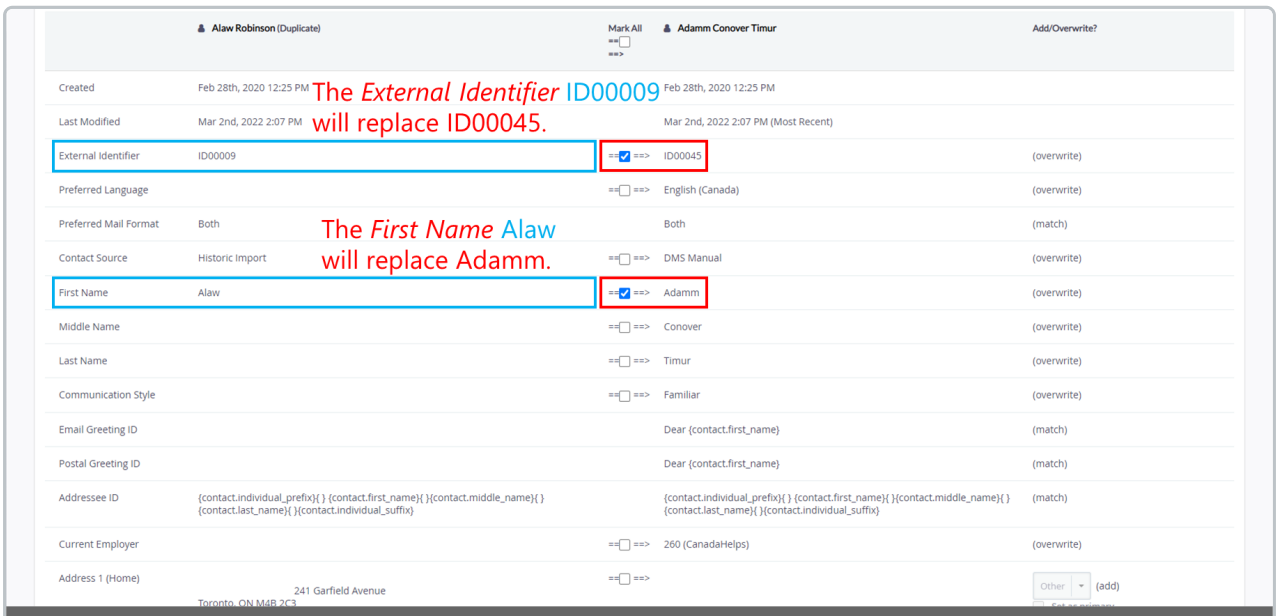
only need to review the differing information.

5. Before completing the Merge, it is advised to review all the fields and consider a few things below.



How to preserve the Contact details on the right.

6. **Contacts are Merged from left to right.** If you do not check off any of the Merge buttons, the contact on the **left** will be merged into the one on the **right**, resulting in only the **right** contact remaining.



The Contact detail on the left will replace the Contact detail on the right for any Merge box checked on

7. **If any of the fields on the left side is more accurate or preferable**, clicking the checkbox between the two Contact columns will preserve the left field over the right one.

8. Some fields will not be editable and will be greyed out on this page to preserve any necessary information. This includes information related to Contributions, Activities, Groups, and Mailings so it cannot be overwritten.

9. Select the ***Merge*** button at the bottom of the page to Merge the Contacts.

10. You will be forwarded to the remaining Contact's Profile Page.

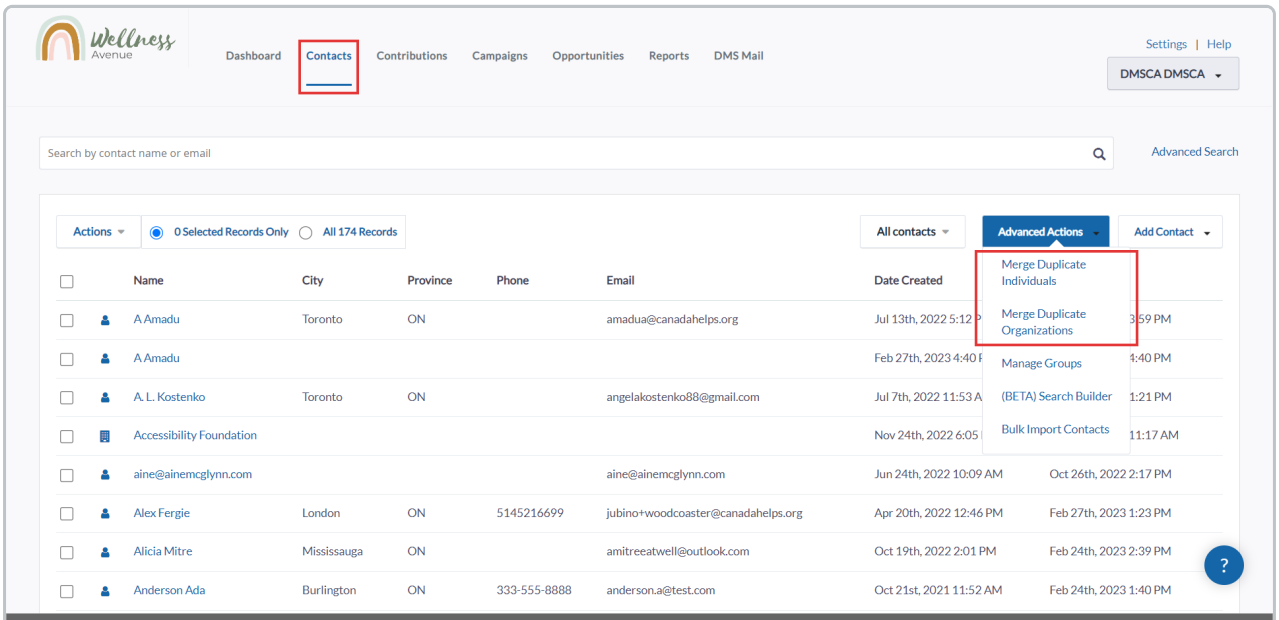
Mass Merge

The Mass Merge process is set to detect all possible duplicate Contacts within your DMS. It differs from a Single Merge since it does not require user input to identify the duplicates but rather follows a set of rules.

Mass Merging will need to be completed in two steps; first for Individual Contacts, then for Organizations. Households can only be Single Merged.

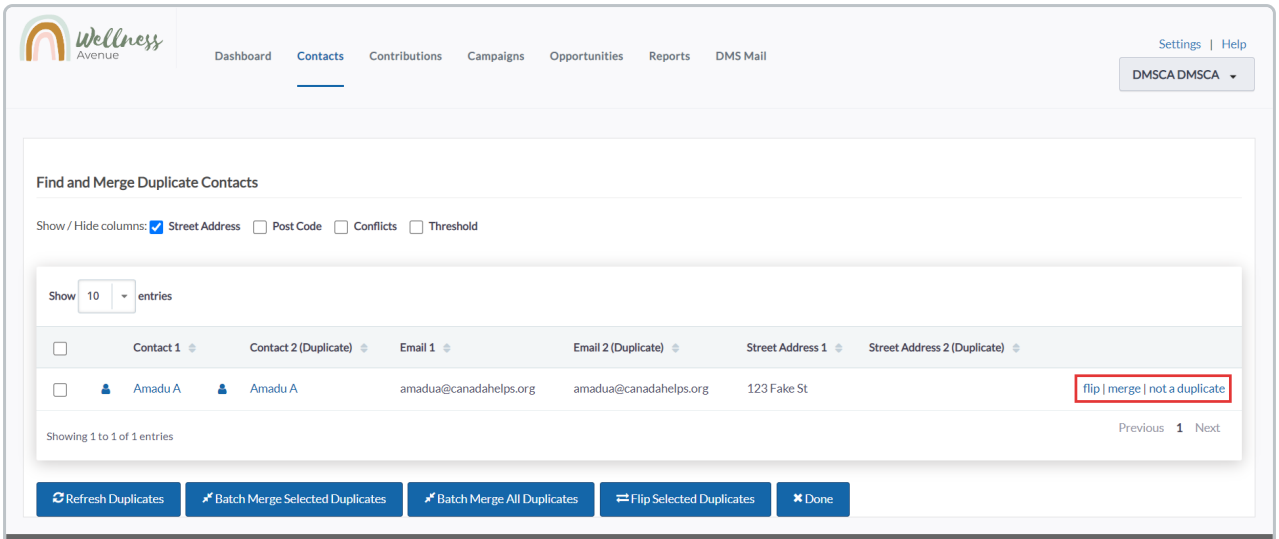
> **Important:** When Mass Merging, you will not be able to decide which details to retain or discard. It is strongly recommended to review each pair of potential duplicates ***individually***, by following the steps outlined above.

1. From your ***Contacts* tab**, under ***Advanced Actions,*** select ***Merge Duplicate Individuals*** or ***Merge Duplicate Organizations.***



Select Merge Duplicate Individuals

2. You will be taken to a landing page where you can mark potential duplicates as "Not a Duplicate" in necessary. Or select ***Merge*** to merge two duplicate Contacts.



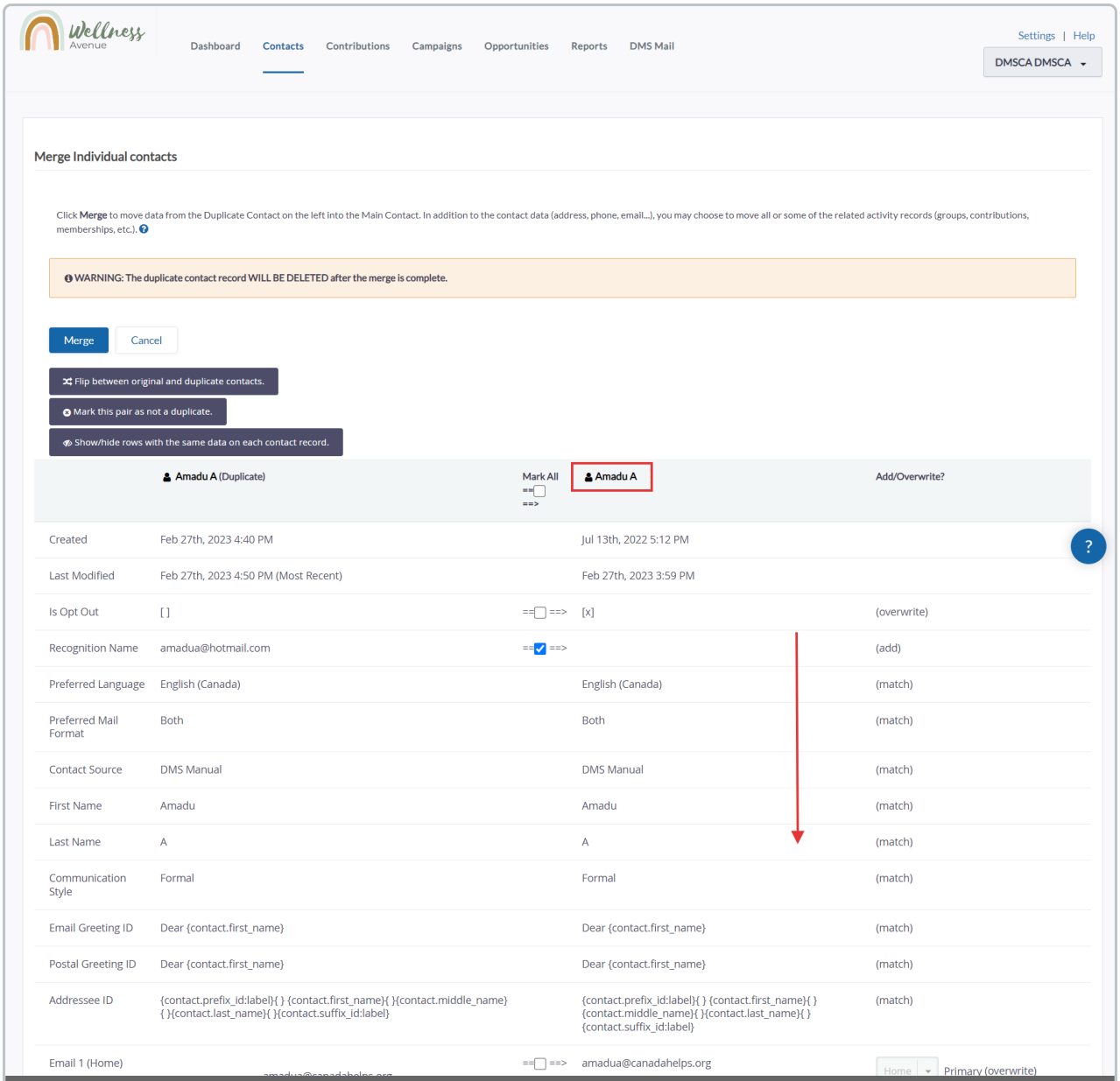
Select Merge to review the details before merging

Flip: Flips between original and duplicate Contact. Lets you designate which of the two Contacts is the one to be kept and which one is a duplicate.

Merge: Will take you to a landing page to review both profiles and select the information you wish to retain or discard

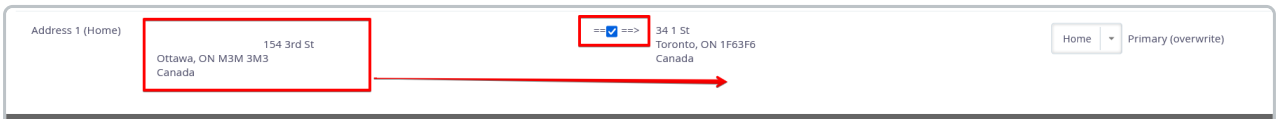
Not a Duplicate: Marks the selected pair of Contacts as not duplicates. This, in turn, will leave them out of every subsequent Mass Merge process.

3. After selecting ***Merge***, the profile on the **RIGHT** will be retained by default.



The Right profile will be retained

4. BUT if you select any of the available **merge boxes,** the details on the **LEFT will overwrite the details on the RIGHT.**



Merge box: the address on the Left will overwrite the address on the Right

Mass Merge Actions

Important: When Mass Merging, you will not be able to decide which details to retain or discard. It is advised to avoid using the buttons below.

- ***Refresh Duplicates*:** updates the list. Used when Contacts have been individually Merged.
- ***Batch Merge Selected Duplicates*:** merges only the selected (checkbox) Contacts and duplicates.
- ***Batch Merge All Duplicates*:** merges all duplicates listed, regardless of them being selected or not.
- ***Flip Selected Duplicates:*** flips between selected (checkbox) original and duplicate Contacts. Lets you designate which of the two Contacts is the one to be kept and which one is a duplicate.
- ***Done*:** exits the Merging process and no further action is applied.

5. Before completing the Mass Merge, it is advised to review all the fields and consider the below:

- **Contacts are Merged from left to right.** The contact on the **left** will be merged into the one on the **right**, resulting in only the **right** contact remaining. When Mass Merging, you will not be able to select the details you wish to retain, so please Mass Merge with **caution.**
- **If any errors or "conflicts" are detected,** the page will reload and the specific, individual conflicts will show for each line.

Note: After reviewing the conflicts, the Merge can be forced regardless if it's deemed acceptable by selecting "Force Merge Selected Duplicates". This action cannot be undone and will result in the duplicate Contact being deleted.

6. Select ***Batch Merge Selected Duplicates*** or ***Batch Merge All Duplicates*** to proceed with the Merge.

Note: This action cannot be undone and will result in the duplicate Contact being deleted.