

ClubRunner

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How do I merge contacts?

Michael C. - 2021-02-25 - Contacts

Club members and Officers may add the same person into ClubRunner in different areas.

For example: as an attendance meeting guest, and/or as a volunteer. These areas feed into the **Contacts Module**, so the Club can contact them at a later date. As a result, the same person may be located in the **Contacts Module** multiple times. To merge or combine these multiple contacts, use the **Merge Contacts** tool. To learn how to use this tool, please follow the steps below:

Note: You could use this tool to remove or delete contacts by creating a contact named "Deleted" and merging contacts you would like to remove into this contact. We do not recommend removing contacts, but if the contact was entered in error, this is the best way to remove it.

1. Please go to the website's homepage and login. Then click on the **Member Area** near the top right.
2. On the grey menu bar near the top, click the tab **Contacts**.
3. On the blue menu bar click the link **Merge Contacts**.
4. This takes you into the **Merge Contacts** page. As illustrated below, there are a few contacts which have duplicates. These are: Doug Adams, D Adams, Douglas Adams; and Margery Allingham and Marg Allingham.

Merge Contacts (Filtered) Merge Selected

Step 1. Select the records to merge

Please select up to three records that you wish to merge into one. Use the Search feature to search for specific contacts or members.

Filter records: Card List Display records

<input type="checkbox"/>	Last Name ▲	First Name ▼	Primary Email ▼	Primary Phone ▼	Groups ▼
<input type="checkbox"/>	Adams	Doug	da@example.com		Volunteers
<input type="checkbox"/>	Adams	D	da@example.com		Bulletin Subscribers
<input type="checkbox"/>	Adams	Douglas	da@example.com		Member Prospects
<input type="checkbox"/>	Allingham	Margery	ma@example.com		Bulletin Subscribers
<input type="checkbox"/>	Allingham	Marg	ma@example.com		Meeting Guests
<input type="checkbox"/>	Applegate	John	japplegate@example.com	Home: (202) 555-1234	Volunteers Members

5. Add a check mark beside the contacts you would like to merge together. Then click the **Merge Selected** button near the top right.

Note: You can only select a maximum of **three contacts** in total to merge at once.

Merge Contacts (Filtered)

Merge Selected

Step 1. Select the records to merge

Please select up to three records that you wish to merge into one. Use the Search feature to search for specific contacts or members.

Filter records:

Card

List

Display 25 records

	Last Name ▲	First Name ▼	Primary Email ▼	Primary Phone ▼	Groups ▼
<input checked="" type="checkbox"/>	Adams	Doug	da@example.com		Volunteers
<input checked="" type="checkbox"/>	Adams	D	da@example.com		Bulletin Subscribers
<input checked="" type="checkbox"/>	Adams	Douglas	da@example.com		Member Prospects
<input type="checkbox"/>	Allingham	Margery	ma@example.com		Bulletin Subscribers
<input type="checkbox"/>	Allingham	Marg	ma@example.com		Meeting Guests
<input type="checkbox"/>	Applegate	John	japplegate@example.com	Home: (202) 555-1234	Volunteers Members

- Using the drop down box called **Select Primary Contact**, select the contact you wish to be the 'master record'. In other words, the other contacts would merge into this one. Once finished our system deletes the 'secondary' contacts.

Merge Contacts

Step 2. Merge the contacts into the primary contact

The duplicate contact(s) information will be merged into the Primary Contacts record. Once the merge is complete the duplicate contact(s) will be deleted

Select Primary Contact Adams, D ▼

Contacts to be Merged

Name ▲	Primary Email ▼	Groups ▼
Adams, Doug	da@example.com	Volunteers
Adams, Douglas	da@example.com	Member Prospects

Showing all 2 records

Cancel

Merge Contacts

- Once done, click the **Merge Contacts** button near the bottom right.

Merge Contacts

Step 2. Merge the contacts into the primary contact

The duplicate contact(s) information will be merged into the Primary Contacts record. Once the merge is complete the duplicate contact(s) will be deleted

Select Primary Contact Adams, Douglas ▼

Contacts to be Merged

Name ▲	Primary Email ▼	Groups ▼
Adams, D	da@example.com	Bulletin Subscribers
Adams, Doug	da@example.com	Volunteers

Showing all 2 records

Cancel

Merge Contacts

- You should now see a **Success** message box saying the contacts were merged. As you can see below, Douglas Adams is no longer duplicated. All the other areas in ClubRunner where the contact was listed have now been updated to reflect this

merger.

Success Contacts were merged successfully

Merge Contacts (Filtered) Merge Selected

Step 1. Select the records to merge

Please select up to three records that you wish to merge into one. Use the Search feature to search for specific contacts or members.

Filter records: Card List Display records

	Last Name ▲	First Name ▼	Primary Email ▼	Primary Phone ▼	Groups ▼
<input type="checkbox"/>	Adams	Douglas	da@example.com		Volunteers Member Prospects Bulletin Subscribers
<input type="checkbox"/>	Allingham	Margery	ma@example.com		Bulletin Subscribers

Related Content

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