Automatically merge duplicate contacts %

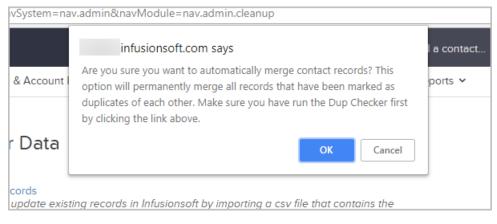
This article applies to: Max Classic

Pro-Tip! Max Classic can automatically merge (de-dupe) duplicate contacts once they've been identified. This is the most common option for a large database of contacts. When you automatically merge duplicates, you do not have a chance to review them prior to merging. The system automatically merges all identified duplicates at once. The auto-merge will take information from the newer contact record and use it to update the information in the older (original) contact record, based on the records' ID numbers. The merged record will contain all of the tags , history, notes, etc. from both records.

1. After running the duplicate check, go to Reporting > Data Cleanup.

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- 2. Choose an Auto Merge Option:
 - 1. Merge Duplicate Contact Records By Overwriting Old Data With New Data: Choose this option to replace old data with the newer data and add data that did not exist in the original contact record.
 - 2. Merge Duplicate Contact Records By Only Adding New Data, Not Overwriting Old Data : Choose this option to keep all of the existing data in the original record and only add missing information.
- 3. Click **OK** to acknowledge that this step is irreversible and continue with the merge. You can now view the new list of merged records or return to clean up more data.



Warning! You cannot un-merge data after the auto merge!