Manually merge duplicate contacts

This article applies to:

Max Classic

Pro-Tips!

Manually merge (de-dupe) duplicate contacts if you want to maintain control over the merge process. When you do a manual merge, you are able to review duplicates and decide to merge or not to merge each record on an individual basis. You might choose to manually merge duplicates if you are not completely confident in the accuracy of the criteria you set when you checked for duplicates, your database is not too large, or you run frequent duplicate checks.

Note that when you merge two contact records together, data like form submissions, notes, referral tracking, recent activity, etc... are also merged together.

1. After you run the duplicate checking process, go to **Reporting > Data Cleanup** in the main menu

2. Click on the **View Duplicate Contact Records** link

3. Click on **Manual Merge** beside one of the duplicates to view the match before merging. The older information for the person is on the left, and the newer information is on the far right. The center displays what the contact record will contain after the merge.

4. Click on the arrows to adjust the information in the center column to make sure the correct information is maintained.

5. Choose a merge option:
    - **Merge & View Contact**: Completes the merge and takes you to the new Person Record.
    - **Merge & Return to Search**: Completes the merge and takes you back to the list of duplicate records.
    - **Mark as Not Duplicates**: Removes the records from the duplicate list.

6. Repeat the process for each identified duplicate.