Merge Duplicate Records

Last Modified on 10/04/2024 11:30 am EDT

GiveSmart Donor CRM allows you to efficiently merge potential donor contacts in the module. Review potential duplicates at different risk levels and compare and select contact information to retain prior to merging, providing you the ability to ensure accurate and organized donor records.

To locate the Merging Center, click **Data Import & Review** from the left navigation and scroll to the **Check for Duplicates and Changes** section.

There are 4 options to choose from:

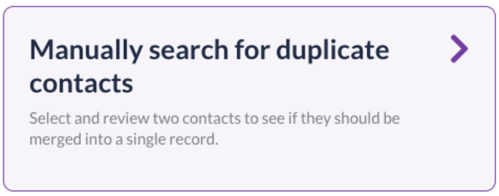
- Manually Search for Duplicate Contacts
  - Quickly locate known users
- Review Potential Duplicate Contacts
  - Allow Donor CRM to perform a scan of all contacts and identify potential duplicates
- Check Name Changes from Automated Imports
  - Review donor name changes that occurred through the automated data sync between GiveSmart Events and Fundraise
- Review Potential Duplicate Transactions
  - Allow Donor CRM to perform a scan of all transactions and identify potential duplicates based on transaction amount and date.

Video Timestamps:

- 0:14 Download Templates
- 0:37 Import Templates
- 1:31 Review Import
- 2:28 Review Potential Duplicate Contacts
- 3:50 Review Potential Duplicate Transactions
- 4:27 Check Name Changes from Automated Imports
- 5:09 Manually Search for Duplicate Contacts

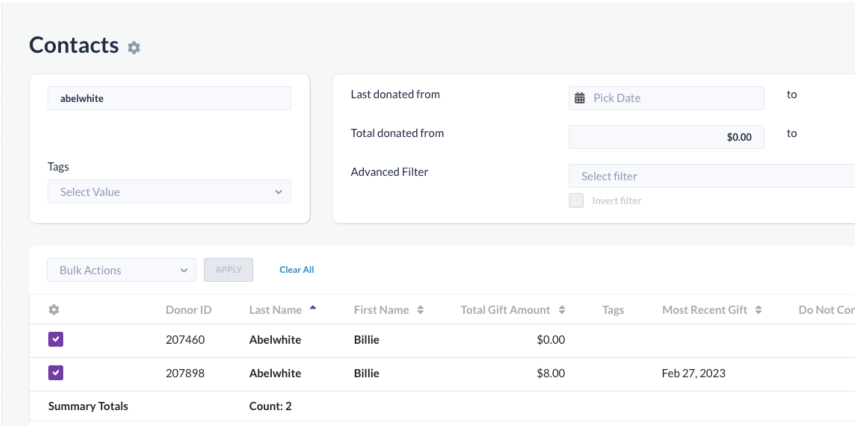
Search for Duplicates Manually

To manually search and review donors, select **Manually search for duplicate contacts** container. This option is typically used when there is a known duplicate that needs to be quickly located and merged.

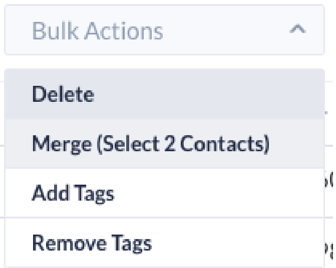


Search for the contacts via First/Last Name, Email or Phone.

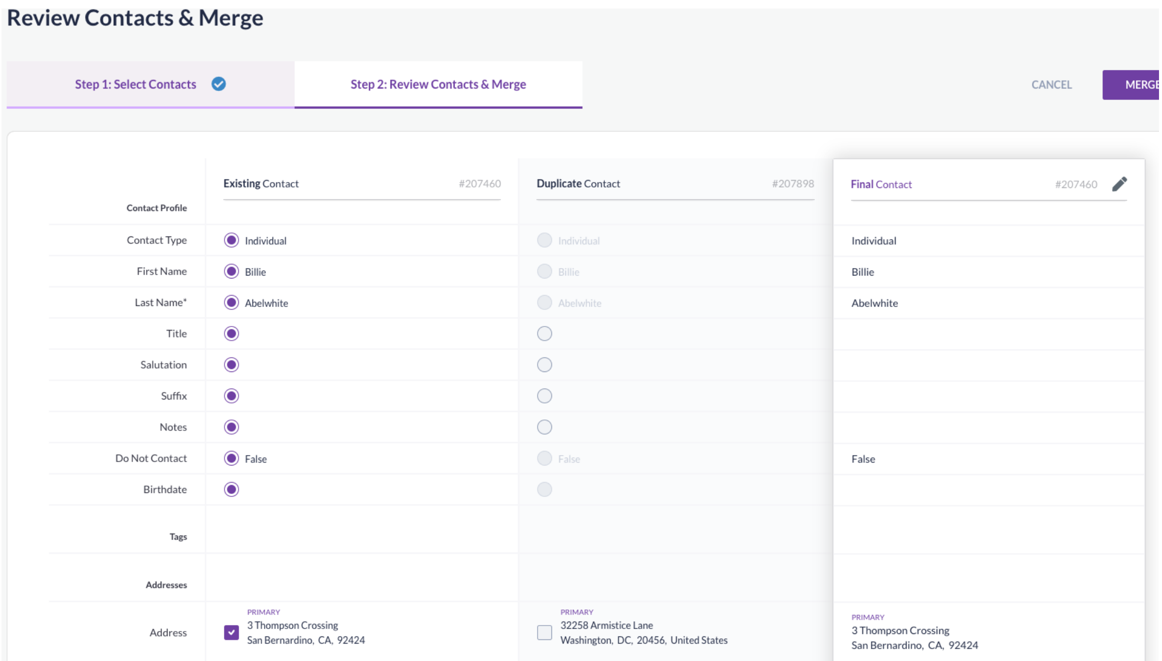
Once located, select the checkbox next to the contacts that need to be merged.



Click **Bulk Actions**, and select **Merge (Select 2 Contacts)** from the dropdown. Once selected, click the **Review for Merge** button.

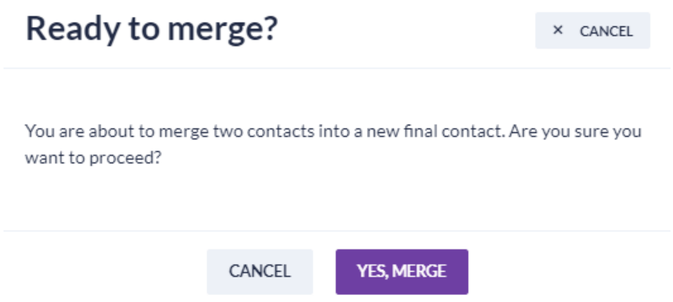


Review the contact information available on the 2 profiles, and select which information should become the primary contact information on the merged profile.



Once you've completed your review, click **Merge** in the upper right.

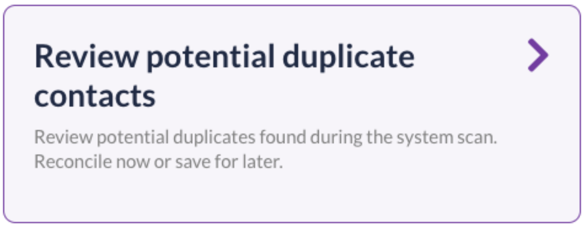
A dialogue window will pop up to confirm the merge. Select **Yes, Merge** to finalize the contact.



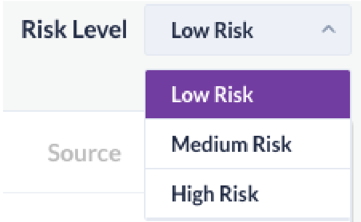
IMPORTANT NOTE: Once a contact has been merged, this action cannot be undone.

Review Potential Duplicate Contacts

Perform a scan of all contacts for review. Select the **Review potential duplicate contacts** container. This option is typically used after an event, after the 1st time a campaign is ran on a new GiveSmart module and is recommended to be periodically reviewed to ensure contact information remains accurate and organized.



Once selected, Donor CRM automatically scans all records to locate potential duplicates and places them into Risk Groups (Low, Medium, High). The landing page will default to the Low Risk group. To change risk groups, select the dropdown in the top right and select a risk group from the dropdown.

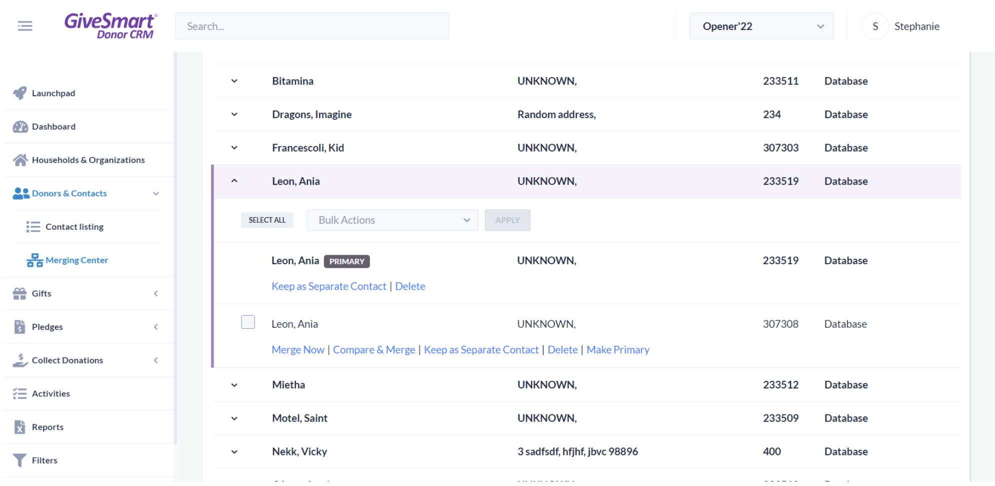


A potential duplicate is placed into the different risk groups based on the amount of information that matches between the profiles.

- Low Risk
  - Potential duplicates in the Low Risk group are your most likely candidates for being a true duplicate record as their contact information is most closely matched
  - To fall into this risk group, contacts must satisfy any of these criteria:
    - First Name + Last Name + Email
    - First Name + Last Name + Phone
    - First Name + Last Name + Address1 + Postal Code
- Medium Risk
  - Potential duplicates in the Medium Risk group have a slightly less chance of being a true duplicate record. Most commonly referenced here are familial relations.
  - To fall into this risk group, contacts must satisfy any of these criteria:
    - First Name + Last Name
    - First Name + Email
    - Last Name + Email
    - First Name + Phone
    - Last Name + Phone
- High Risk
  - Potential duplicates in the High Risk group have the least likely chance of being a true duplicate record, but have a small piece of shared contact information
  - To fall into this risk group, contacts must satisfy any of these criteria:
    - Email
    - Phone

Review a potential duplicate

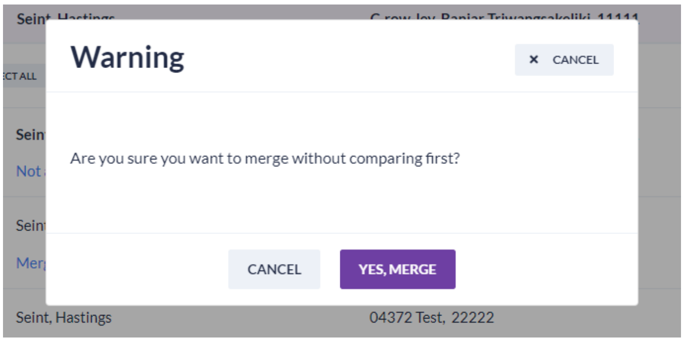
To review a potential duplicate, select a contact from the list.



There are multiple options for handling this potential duplicate: Merge Now, Compare & Merge, Keep as Separate Contact, Delete and Make Primary.

Merge Now

Merges the 2 contacts without comparing the data. The information listed on the Primary contact becomes the contact information for the merged profile, and differing information from the secondary profile is appended. Once this option is selected, a confirmation popup will appear, allowing you to confirm this merge. After the contact is merged, it will be removed from the potential duplicate list.

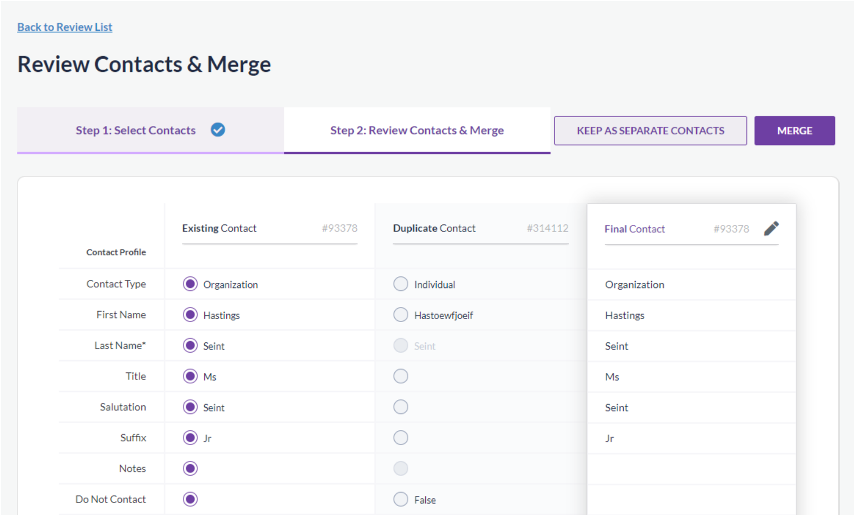


IMPORTANT NOTE: Once a contact has been merged, this action cannot be undone.

Compare & Merge

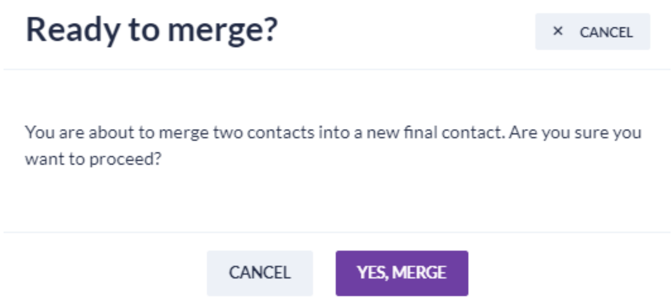
Allows you to compare the contact information between both profiles to select the primary contact information for the merged profile. If this option was selected incorrectly, you have the option to Keep as a Separate Contact.

Fields that have the same information or information listed only on 1 profile will not be able to be selected, as this information will pass directly to the merged profile. After the contact is merged, it will be removed from the potential duplicate list.



Once you've completed your review, click **Merge** in the upper right.

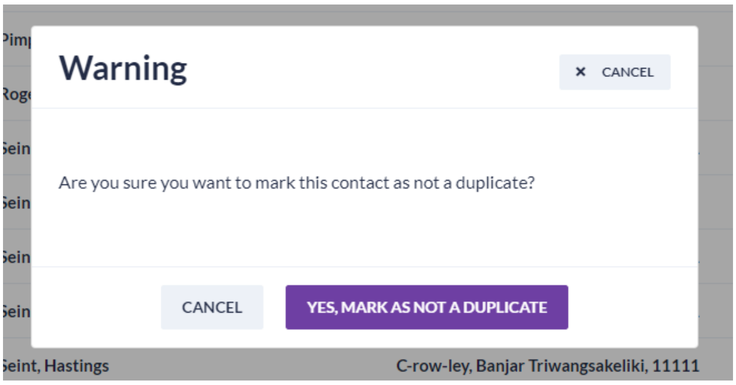
A dialogue window will pop up to confirm the merge. Select **Yes, Merge** to finalize the contact.



IMPORTANT NOTE: Once a contact has been merged, this action cannot be undone.

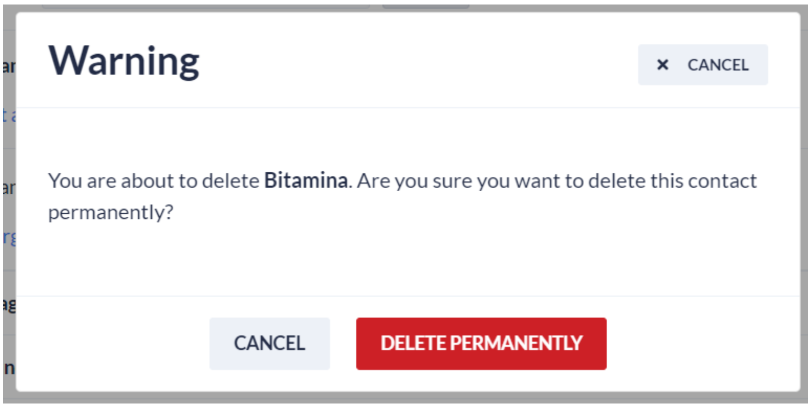
Keep as Separate Contact

If you've identified that 2 contacts are not a duplicate and should be kept as a separate contact, selecting this option will allow both records to be retained, and will remove them from the potential duplicates scan in the future. A popup will appear, allowing you to confirm this action.



Delete

By selecting Delete, this will **permanently delete BOTH records** from Donor CRM. This option should only be selected if you want to fully remove all record of this user from Donor CRM. A popup will appear allowing you to confirm this action.



Make Primary

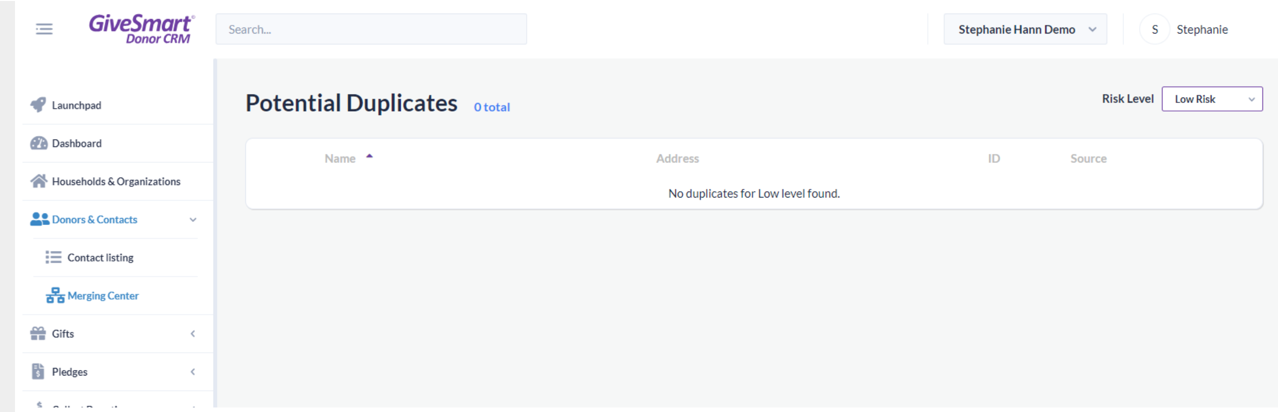
This will change the primary contact for that record. There is NO pop up warning confirmation, but if changed incorrectly the previously marked Primary Contact can be assigned as the Primary again. This option does not merge the profiles, allowing this profile to continue appearing in future scans.

Create Group

This allows you to create a new Household or Group for individuals who may share contact information or last name, but are not duplicate records.

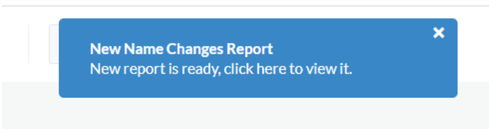
No duplicates to review

If there are no potential duplicates to review in a risk category, it will be indicated on that page.

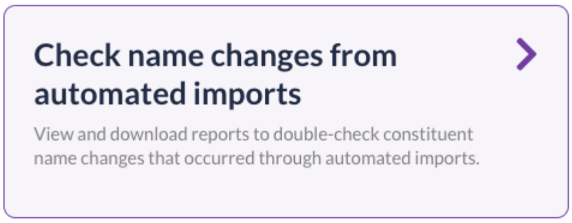


Check Name Changes from Automated Imports

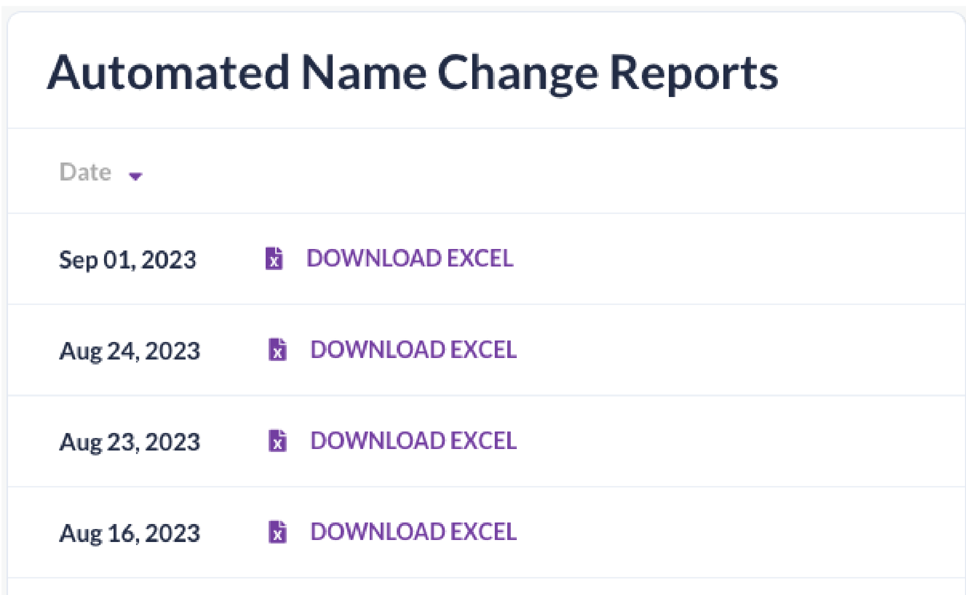
When a donor's name is changed in GiveSmart Events or Fundraise, this will automatically update the name on the associated donor profile in Donor CRM. When this occurs, all admin will receive an **email** and a popup will appear the next time you visit Donor CRM.



To review a list of name changes that occurred during an automated data sync, select the**Check Name Changes from Automated Imports** container.



Select Download Excel to view the details of the name change.



In the Excel file, Column B will indicate the name that was listed prior to the name change, and Column C indicates the new Name which has been applied.

Donor Id	Existing Contact Value	New Contact Value	Source
446221	ABhi Fasate	ABh F	FUNDRAISE

To change a name back to the original, or to make further modifications, locate the module source in Column D (in this case GiveSmart Fundraise), proceed to that GiveSmart module to make any name changes.

NOTE: Changing the name in Donor CRM will not prevent the name from being changed during the next automated data sync. The name will need to be changed in GiveSmart **Events** or **Fundraise** to ensure the name is reflected properly.

Review Potential Duplicate Transactions

Perform a scan of all suspected duplicate transactions for review. Select the **Review potential duplicate transactions** container. This option is typically used after a manual upload to ensure multiple instances of the same donation were not entered.

Once selected, Donor CRM automatically scans all transaction records to locate potential duplicates and applies the default filter of 'Same Last Name, Transactions within 2 days of each other'.   To modify this filter and expand the date range, select the dropdown and choose to review transactions within 2, 7 or 30 days of each other.

Review a potential duplicate

Potential duplicates are grouped together for review. To progress through the list, all displayed transactions must be reviewed and an option of: Review Later, Keep Separate or Delete must be selected before the Submit Selection And Move On button will become active.

Review Later	Keep Separate	Delete		External Transaction ID	Id	Date	Type	External System	First Name	Last Name
SELECT ALL	SELECT ALL	SELECT ALL								
					1059802	Apr 19, 2023	Cash/check		Jon	Biedermann
					1060493	Apr 21, 2023	Cash/check		Jon	Biedermann
					1081335	May 09, 2023	Cash/check		Jon	Biedermann
					1214896	May 10, 2023	Cash/check		Jon	Biedermann
					5373923	Jan 29, 2024	Cash/check		Jon	Biedermann
					5373984	Jan 29, 2024	Cash/check		Jon	Biedermann
					5533315	Jan 29, 2024	Cash/check		Jon	Biedermann
					29180	Apr 14, 2019	Cash/check		Sirius	Black

Showing 10 potential duplicate sets (of 113 sets total) SUBMIT SELECTION AND MOVE ON

Review Later

By selecting Review Later, the transactions will remain in their current state, and will continue to appear on the duplicate transaction report in the future.

Keep Separate

The Keep Separate option will retain the transaction and will remove it from appearing in the duplicate transaction report in the future. This option should be selected if the listed transaction is not a duplicate.

Delete

The Delete option should only be used when a listed transaction is identified as a duplicate. To retain 1 transaction and not the duplicate, select 1 record as Keep Separate and the other as Delete. These transactions will no longer appear in the duplicate transaction report.

NOTE: Once a transaction is deleted from Donor CRM, it cannot be restored.