



# Merging Duplicated Contact User guide

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# 1.1 MERGING DUPLICATED CONTACT

Use this function if you have duplicated Contact Card, to transfers all the related entries to one Contact Card and disable the other.

**NOTE**

If you are transferring a buyer related entries to a contact for which Buyer Card does not exist, it will relink existing Buyer Card to the new Contact.

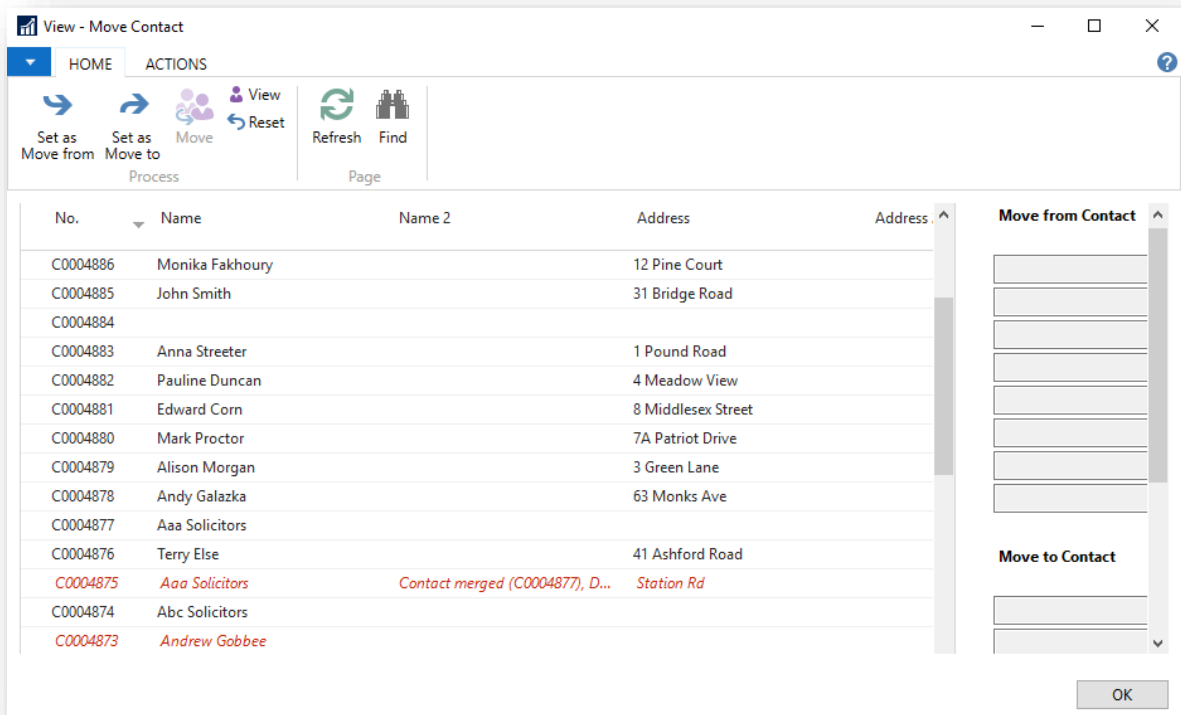
If you are transferring a buyer related entries to a contact for which Buyer Card does exist, it will relink all the buyer related entries to new Buyer Card associated with the Contact.

The same rule applies to all entries related to a Vendor Card.

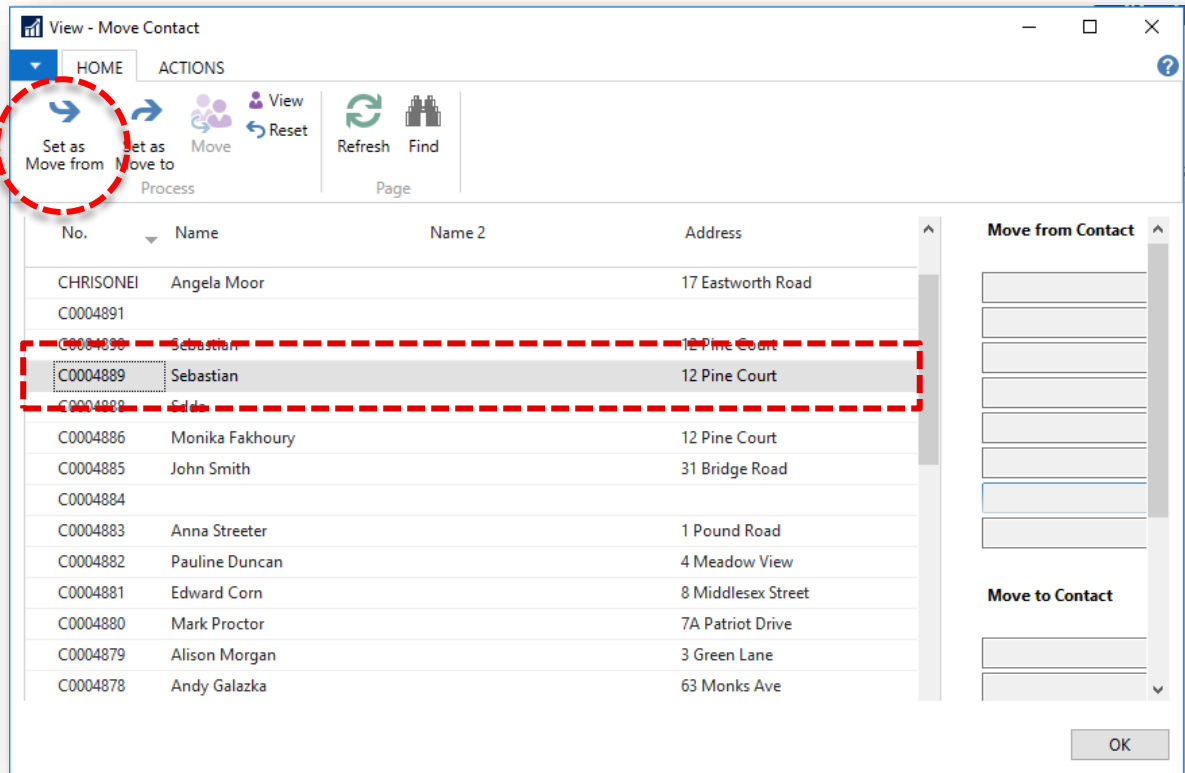
To merge a duplicated Contact:

1. In the Search box enter **Merge Contact** and then choose the related link.

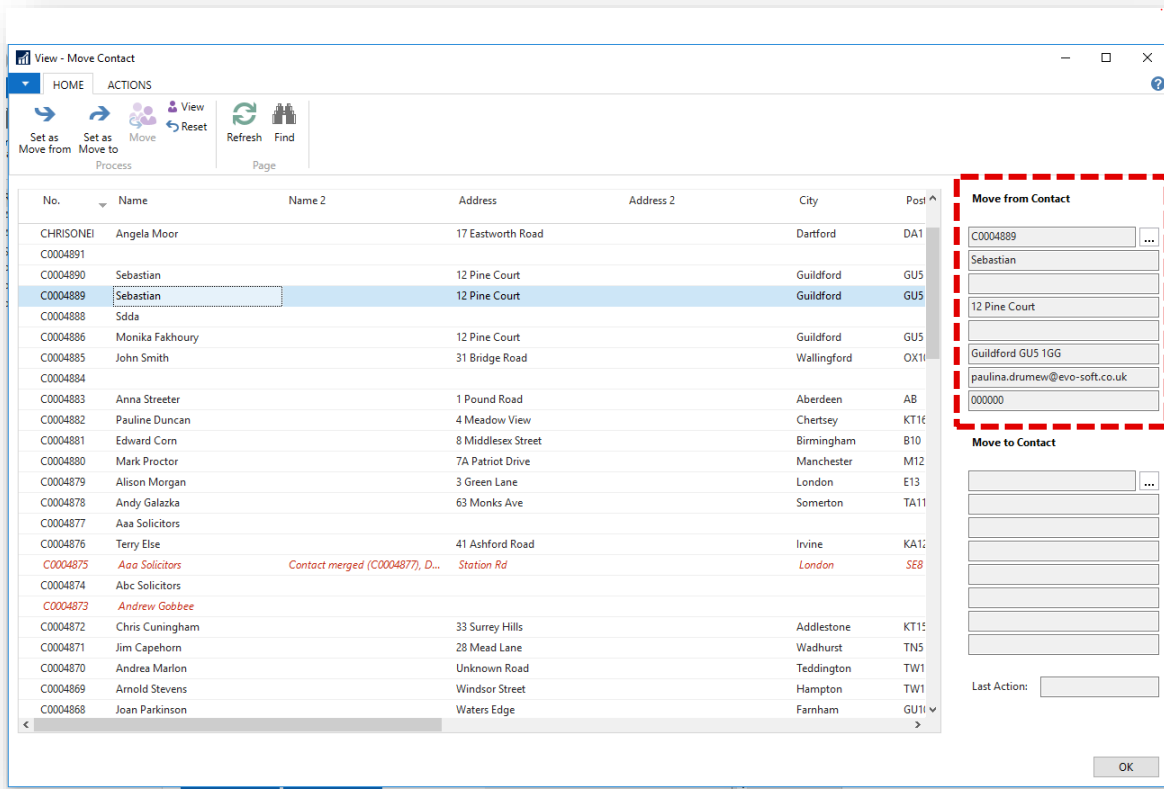
The **Move Contact** window opens.



- From the contact list, select a line with contact details you want to move all the related entries from, and then select **Set as Move from** located on the Ribbon.



Now, details of selected Contact are visible in **Move from Contact** window.



The screenshot shows a web application window titled "View - Move Contact". The main area contains a table of contacts. The contact with ID C0004889, named Sebastian, is selected. A "Move from Contact" dialog box is open on the right, showing the details of the selected contact.

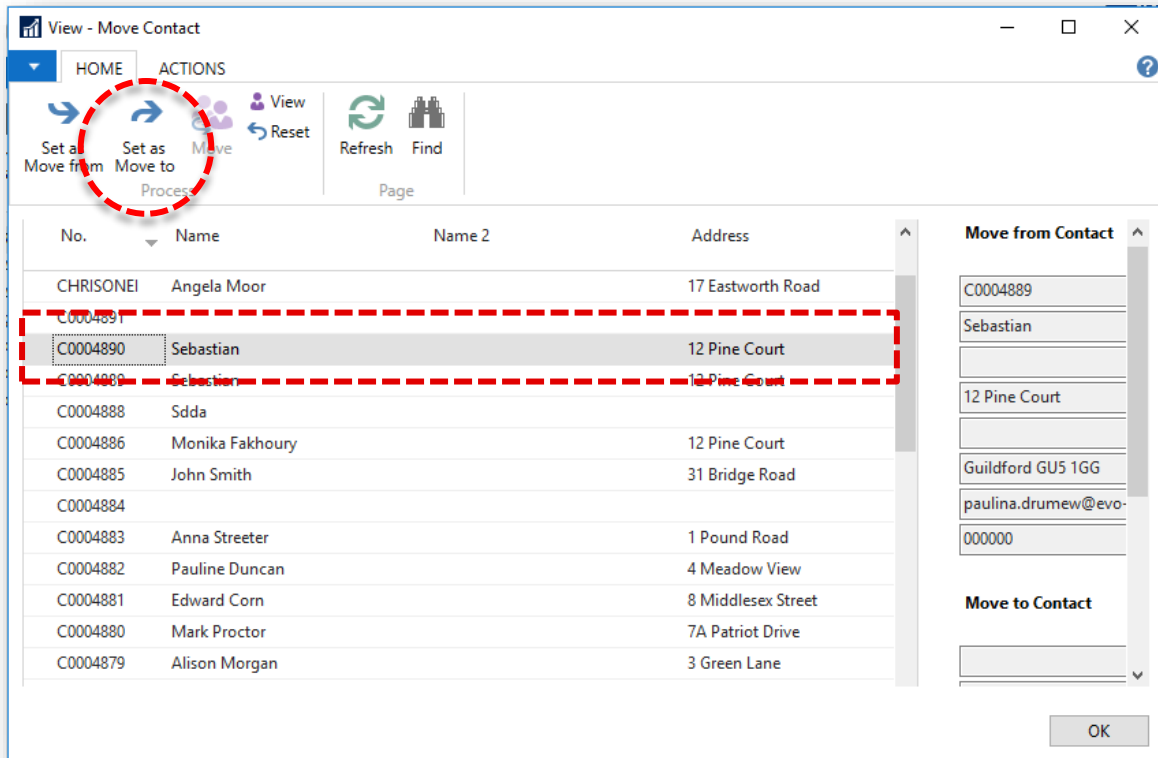
No.	Name	Name 2	Address	Address 2	City	Post
CHRISONEI	Angela Moor		17 Eastworth Road		Dartford	DA1
C0004891						
C0004890	Sebastian		12 Pine Court		Guildford	GU5
C0004889	Sebastian		12 Pine Court		Guildford	GU5
C0004888	Sdda					
C0004886	Monika Fakhoury		12 Pine Court		Guildford	GU5
C0004885	John Smith		31 Bridge Road		Wallingford	OX11
C0004884						
C0004883	Anna Streeter		1 Pound Road		Aberdeen	AB
C0004882	Pauline Duncan		4 Meadow View		Chertsey	KT16
C0004881	Edward Corn		8 Middlesex Street		Birmingham	B10
C0004880	Mark Proctor		7A Patriot Drive		Manchester	M12
C0004879	Alison Morgan		3 Green Lane		London	E13
C0004878	Andy Galazka		63 Monks Ave		Somerton	TA11
C0004877	Aaa Solicitors					
C0004876	Terry Else		41 Ashford Road		Irvine	KA11
C0004875	Aaa Solicitors	Contact merged (C0004877), D...	Station Rd		London	SE8
C0004874	Abc Solicitors					
C0004873	Andrew Gobbee					
C0004872	Chris Cuningham		33 Surrey Hills		Addlestone	KT15
C0004871	Jim Capehorn		28 Mead Lane		Wadhurst	TN5
C0004870	Andrea Marlon		Unknown Road		Teddington	TW1
C0004869	Arnold Stevens		Windsor Street		Hampton	TW1
C0004868	Joan Parkinson		Waters Edge		Farnham	GU11

The "Move from Contact" dialog box contains the following fields:

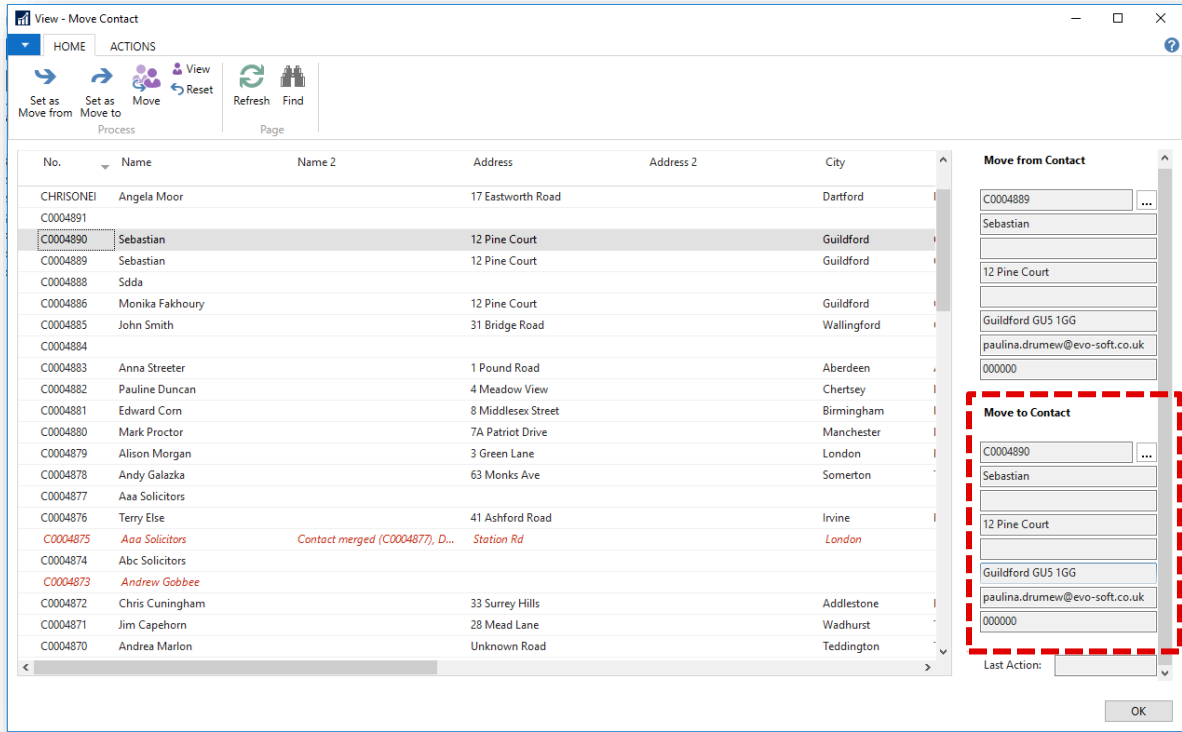
- Source Contact ID: C0004889
- Source Name: Sebastian
- Source Address: 12 Pine Court
- Source City: Guildford GU5 1GG
- Source Email: paulina.drumew@evo-soft.co.uk
- Source Postcode: 000000

The "Move to Contact" dialog box contains several empty input fields for the destination contact details.

- From the contact list, select a line with contact details you want to move previously selected contact's related entries to, and then select **Set as Move to** located on the Ribbon.



Now, details of selected Contact are visible in the **Move to Contact** window.



Before you process, make sure the **Move From** and the **Move To** contact details are correct.

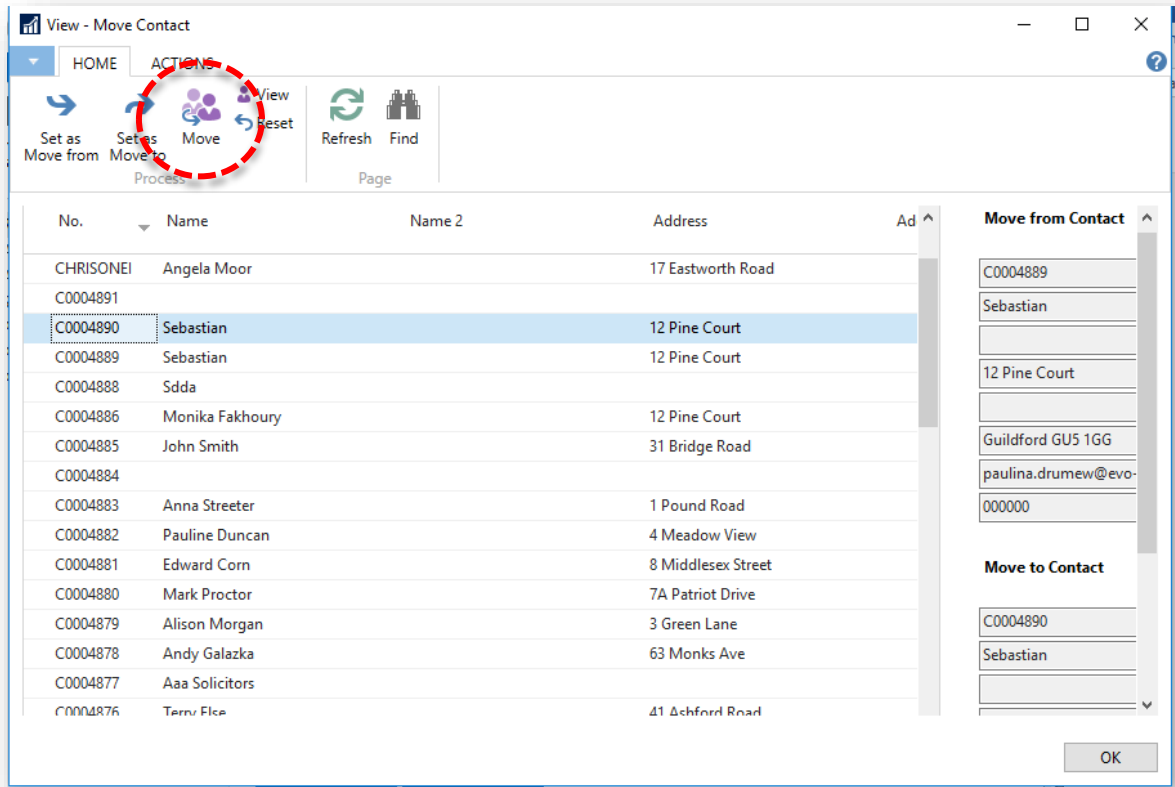
**IMPORTANT**

The process cannot be reverted!

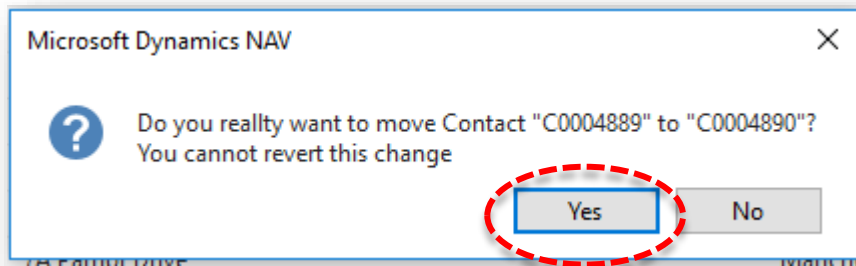
The Move contact process does not copy information from the General FastTab and does not copy settings from a vendor or a buyer card.

Before processing, make sure all the contact details from the CopyTo and all the settings on a buyer and a vendor card are correct.

4. To process the transfer, select **Move** from the Ribbon.



5. Select **Yes** to confirm on message: "Do you really want to move Contact ... to ...? You cannot revert this change".





Now, on the contact list, transferred contact is marked in red colour with information “Contact merged (Merged To contact number), DO NOT USE”, and all related entries are transferred to the new Contact.

After transfer is finished, the contact you are transferring from is disabled.

View - Move Contact

HOME ACTIONS

Process: Set as Move from, Set as Move to, Move, View, Reset

Page: Refresh, Find

No.	Name	Name 2	Address	Address 2
CHRISONEI C0004891	Angela Moor		17 Eastworth Road	
<del>C0004890</del>	<del>Sebastian</del>		<del>12 Pine Court</del>	
C0004889	Sebastian	Contact merged (C0004890), DO NOT USE	12 Pine Court	
<del>C0004888</del>	<del>Sebastian</del>		<del>12 Pine Court</del>	
C0004886	Monika Fakhoury		12 Pine Court	
C0004885	John Smith		31 Bridge Road	
C0004884				
C0004883	Anna Streeter		1 Pound Road	
C0004882	Pauline Duncan		4 Meadow View	
C0004881	Edward Corn		8 Middlesex Street	

