C-SMART HELP

MERGE DUPLICATE NAMES

If you have a duplicate name record for a person or entity, C-SMART will allow you to merge them while retaining all associated transactions. This helps you to maintain accurate records and ensure that C-SMART will alert you of any over-the-limit contributions.

HOW TO MERGE DUPLICATE NAMES

1. Go to **Merge Duplicate Names**.

    ➤ Hover your cursor over **Transactions** and click **Merge Duplicate Names.**

2. Filter the list of names.

    ➤ On **Duplicate Name Merge**, you can filter which lists of contributors appear. Individual will be the default. To change this, click **Filter By Name Code** and select a different option.

3. Identify the duplicate records.

> ➤ If you are using **Search by Name**, search for the name of the duplicate contact record.

OR

> ➤ If you are reviewing the names under **Duplicate Name Merge**, look for any duplicates.

4. After you have found the duplicate, select one record as the **Primary** and the other as a **Secondary**, then click **Continue.**

5. Click **Merge** on the window that opens.

Best Practices: You can have more than one name record designated as the secondary if there are three or more duplicate records.

Important: All transactions will be moved to the primary record and the secondary record will be deleted. Records deleted during a merge cannot be recovered.

6. Click **Continue** on the window that opens to complete the merge

7. The name merge has been completed

Best Practices: Download the PDF report confirming the name merge for your records.