

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**.

The screenshot shows the C-SMART New York City Campaign Finance Board interface. The user is logged in as 'Election Cycle 2021 - Sophia Rosario' with the user ID 'srosar1389'. The navigation menu includes 'Transactions', 'Documentation', 'Reports', and 'Submission'. Under the 'Transactions' menu, there are four categories: RECEIPTS, DISBURSEMENTS, OTHER, and TOOLS. The 'TOOLS' category contains three buttons: 'IMPORT CONTRIBUTIONS', 'FUNDRAISING EVENTS', and 'MERGE DUPLICATE NAMES'. A red arrow points to the 'MERGE DUPLICATE NAMES' button, which is also enclosed in a red rectangular box.

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.

The screenshot shows the 'Duplicate Name Merge' interface. The title is 'Duplicate Name Merge' with an information icon. Below the title, there is a step indicator: 'Step 1: Filter by Name Code then Search by Name'. There are two main input areas: 'Filter By Name Code:' and 'Search By Name:'. The 'Filter By Name Code:' dropdown menu is highlighted with a red box and has a red arrow pointing to it. The dropdown menu is currently set to 'Individual'. The 'Search By Name:' area has a text input field labeled 'Search Names'.

3. Identify the duplicate records.

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

Duplicate Name Merge ?

Step 1: Filter by Name Code then Search by Name

Filter By Name Code: Individual Search By Name: ←

Step 2: Select Names Show 10 entries

Primary	Secondary	Name	Address	Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	2
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	0
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	36-12 31st Avenue, 2C, New York, NY 10019	0

Showing 1 to 3 of 3 entries Previous 1 Next

OR

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

Step 2: Select Names Show 10 entries

Primary	Secondary	Name	Address	Transactions
<input type="checkbox"/>	<input type="checkbox"/>	hernandez, david		0
<input type="checkbox"/>	<input type="checkbox"/>	Alexander, John	7306 Woodside Avenue, Woodside, NY 11377	2
<input type="checkbox"/>	<input type="checkbox"/>	Blake, Laura	670 East 91st Street, New York, NY 10128	0
<input type="checkbox"/>	<input type="checkbox"/>	Cindy, Sherman	7306 Woodside Avenue, Woodside, NY 11377	0
<input type="checkbox"/>	<input type="checkbox"/>	Clark, Patty	36-12 31st Avenue, 2C, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Croutel, Caroline	36-12 31st Ave, #2C, Astoria, NY 11106	1
<input type="checkbox"/>	<input type="checkbox"/>	Danker, Thomas	36-12 31st Ave, 2c, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Davis, Alexis	24 Beach 102nd Street, Rockaway Park, NY 11694	0
<input type="checkbox"/>	<input type="checkbox"/>	Doe, Dana	123 Main, New York, NY 10027	0
<input type="checkbox"/>	<input type="checkbox"/>	Fitz, Joanna	66 Avenue A, 21C, New York, NY 10008	0

Showing 1 to 10 of 47 entries Previous 1 2 3 4 5 Next

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

Step 2: Select Names Show 10 entries

Primary	Secondary	Name	Address	Transactions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	2
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	0

Showing 1 to 2 of 2 entries Continue Cancel

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

i You have selected 2 name records to merge. The transactions associated with the secondary name(s) will be merged to the primary name. Click Merge to continue, or Cancel to cancel the process. ×

Primary	Secondary	Name	Address	Transactions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	2
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	0

Cancel Merge

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

⚠ Warning! --- Duplicate Name Merge Confirm

Merging names will move all transactions to the Primary Name, and the Secondary Name(s) will be deleted. Do you want to continue?

C-SMART will generate a PDF report of the duplicate name merge. Please save it for your records.

Cancel Continue

7. The name merge has been completed

i 2 name records have been successfully merged. x

Primary	Secondary	Name	Address	Transactions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	2
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	0

[Download PDF](#)

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Duplicate Name Merge Results

Save a copy for your records.

Primary Name

Name	Address	Name ID #	Trans ID #	Trans Type	Received Date	Amount
Morris, Louis	101-12 104th Street 2C Corona, NY 11368	8129				
			8460	In-kind Contribution	10/23/2018	\$500.00
			9991	MonCont	03/01/2018	\$100.00

Secondary Name(s)

Name	Address	Name ID #	Trans ID #	Trans Type	Received Date	Amount
Morris, Louis	101-12 104th Street 2C Corona, NY 11368	8483				

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