

**Author:** Kristenson, Joel  
**Last Updated:** 2016-10-04

## Overview

This article walks through the steps to perform a manual **drag-and-drop merge** of **duplicate contact (voter/donor) records**.

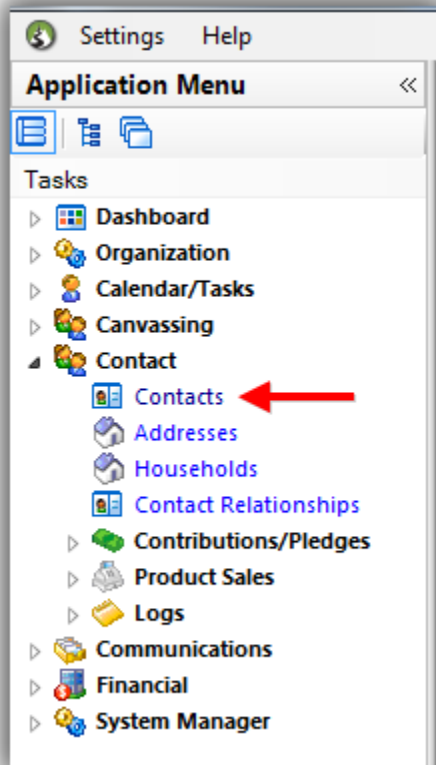
It also shows how to **view the log notes** in the contact's record card afterwards to see what happened during the merge. *When you run the merge the system will retain all relevant information from both records (without duplicating it), such as contributions, contact info, attributes, notes, etc.*

 **Tip:** It's good practice when **cleaning up your database** to:

- 1) [Conform All Address to Meet the Postal Code Standard](#)
- 2) [Find Possible Duplicates by Partial Name, Address, and/or Birthdate](#)
- 3) [Find Possible Duplicates by Primary Email Address](#)

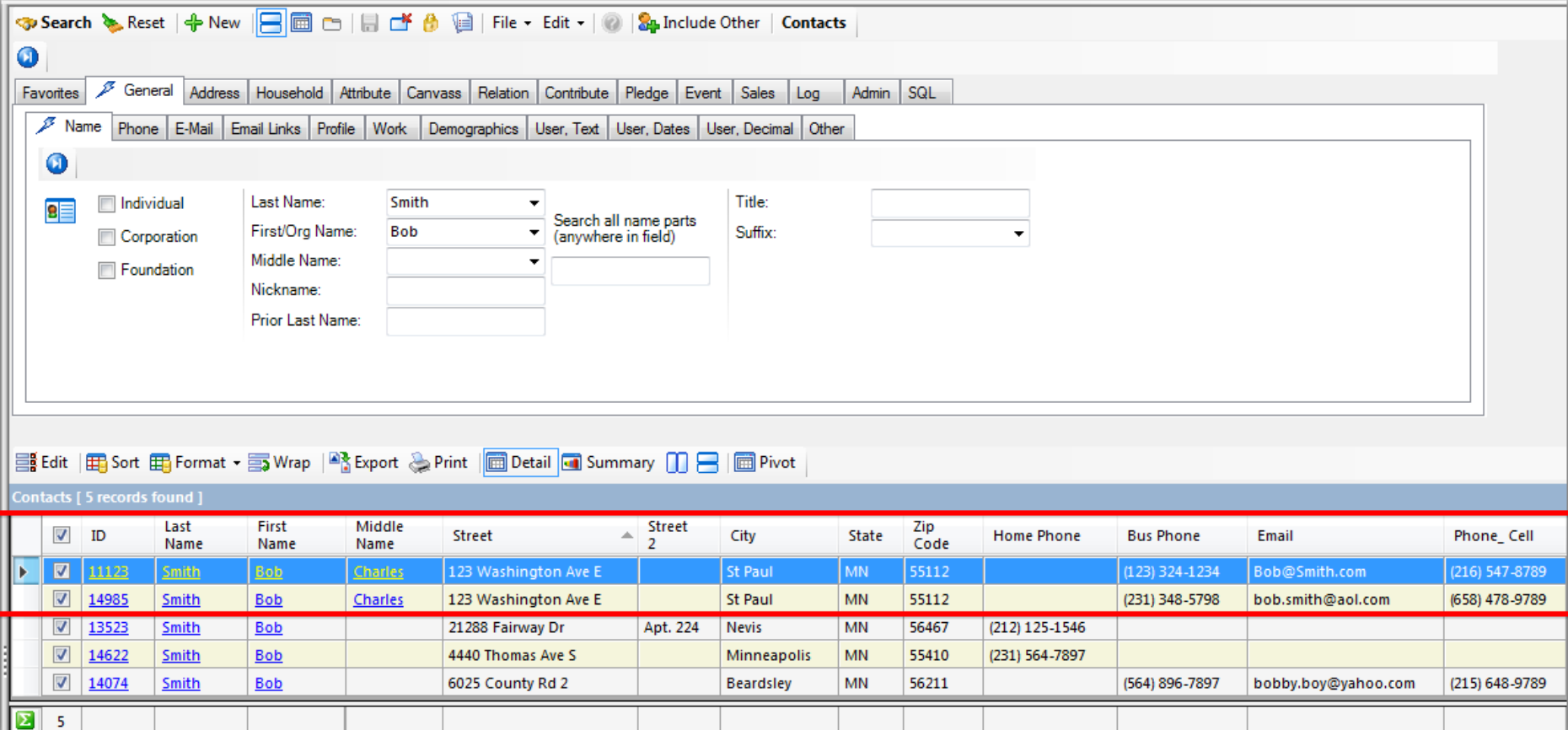
## Steps

Navigate to the **Contacts (Voters/Donors)** list.



Run your [search query](#) to **pull up the duplicates** so they are **both displaying** in the list. *In my example I pulled up duplicate 'Bob Smith' records with the same home address.*

**Run your search query to pull up the duplicate contact records in the list.**



The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with the text 'Search' and a 'Reset' button. Below the search bar, there are several tabs: 'General', 'Address', 'Household', 'Attribute', 'Cavass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'General' tab is selected. Below the tabs, there are several input fields for searching: 'Last Name: Smith', 'First/Org Name: Bob', 'Middle Name:', 'Nickname:', 'Prior Last Name:', 'Title:', and 'Suffix:'. There is also a checkbox for 'Search all name parts (anywhere in field)'. Below the search fields, there are several icons for 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. At the bottom, there is a table of contact records. The table has 14 columns: 'ID', 'Last Name', 'First Name', 'Middle Name', 'Street', 'Street 2', 'City', 'State', 'Zip Code', 'Home Phone', 'Bus Phone', 'Email', and 'Phone\_Cell'. The table contains 5 records. The record with ID 14985 is highlighted in blue, indicating it is the record to be merged into the record with ID 11123.

ID	Last Name	First Name	Middle Name	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Email	Phone_Cell
11123	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(123) 324-1234	Bob@Smith.com	(216) 547-8789
14985	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(231) 348-5798	bob.smith@aol.com	(658) 478-9789
13523	Smith	Bob		21288 Fairway Dr	Apt. 224	Nevis	MN	56467	(212) 125-1546			
14622	Smith	Bob		4440 Thomas Ave S		Minneapolis	MN	55410	(231) 564-7897			
14074	Smith	Bob		6025 County Rd 2		Beardsley	MN	56211		(564) 896-7897	bobby.boy@yahoo.com	(215) 648-9789

Click on the row for the record that you **\*don't\*** want as the primary record so that the row turns **blue**. In my example I highlighted the record with the higher 'ID', which means it's a newer record, which I'll merge into the record with a lower 'id'.

Contacts [ 5 records found ]													
	ID	Last Name	First Name	Middle Name	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Email	Phone_Cell
<input checked="" type="checkbox"/>	11123	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(123) 324-1234	Bob@Smith.com	(216) 547-8789
<input checked="" type="checkbox"/>	14985	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(231) 348-5798	bob.smith@aol.com	(658) 478-9789
<input checked="" type="checkbox"/>	13523	Smith	Bob		21288 Fairway Dr	Apt. 224	Nevis	MN	56467	(212) 125-1546			
<input checked="" type="checkbox"/>	14622	Smith	Bob		4440 Thomas Ave S		Minneapolis	MN	55410	(231) 564-7897			
<input checked="" type="checkbox"/>	14074	Smith	Bob		6025 County Rd 2		Beardsley	MN	56211		(564) 896-7897	bobby.boy@yahoo.com	(215) 648-9789
5													

**Click on the row to highlight one of the duplicate records so the row turns blue.**

**(This will be the record that 'goes away' when you run the merge, so in this case it's the one with a higher TBZ ID).**

You can **click-and-hold** just about anywhere on the row to begin the process—I prefer to click the **small black triangle** icon on the far-left of the highlighted row. Click and hold for about **3-4 seconds**.

The screenshot shows the TrailBlazer software interface. At the top, there is a search bar and navigation tabs including 'Search', 'Reset', 'New', and 'Contacts'. Below this is a menu bar with options like 'General', 'Address', 'Household', etc. The main area contains a form for editing contact details, with fields for 'Last Name' (Smith), 'First/Org Name' (Bob), and 'Middle Name' (Charles). Below the form is a toolbar with icons for 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. At the bottom, a table displays 5 contact records. A red arrow points to the selection handle (a small blue triangle) of the second record, which is a duplicate of the first record.

ID	Last Name	First Name	Middle Name	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone
11123	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(123) 324-1234
14985	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(231) 348-5798
13523	Smith	Bob		21288 Fairway Dr	Apt. 224	Nevis	MN	56467	(212) 125-1546	
14622	Smith	Bob		4440 Thomas Ave S		Minneapolis	MN	55410	(231) 564-7897	
14074	Smith	Bob		6025 County Rd 2		Beardsley	MN	56211		(564) 896-7897

**Click-and-hold for 3-4 seconds.**

Slowly **drag-and-drop** the **source** contact record onto the **target** contact record. A **small rectangle icon** will appear under the mouse cursor if it's working correctly.

The screenshot shows the TrailBlazer software interface. At the top, there is a search bar and navigation tabs for 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. Below this is a form for entering contact details, including fields for 'Last Name', 'First/Org Name', 'Middle Name', 'Nickname', 'Prior Last Name', 'Title', and 'Suffix'. A search option 'Search all name parts (anywhere in field)' is also present. Below the form is a toolbar with options like 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. The main area displays a table of contacts with 5 records found. A red arrow points to a small rectangle icon next to the second record (ID 14985), which is a duplicate of the first record (ID 11123).

ID	Last Name	First Name	Middle Name	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Email
11123	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(123) 324-1234	Bob@Smith.com
14985	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(231) 348-5798	bob.smith@aol.com
13523	Smith	Bob		21288 Fairway Dr	Apt. 224	Nevis	MN	56467	(212) 125-1546		
14622	Smith	Bob		4440 Thomas Ave S		Minneapolis	MN	55410	(231) 564-7897		
14074	Smith	Bob		6025 County Rd 2		Beardsley	MN	56211		(564) 896-7897	bobby.boy@yahoo.com

**Drag-and-drop the source record onto the duplicate record.  
A small rectangle icon will appear under the mouse cursor if it's working properly.**

When you release the source record into the target record you'll get a pop-up screen with all the details about what's going to take place. After verifying the information, check the box in the lower-left, and click **[OK]**.





Merge Contacts: Bob Charles Smith [11123] <--Bob Charles Smith [14985]

Field	Target Contact	Source Contact
<b>Contact Fields</b>		
<b>Name</b>		
Title		
Last Name	Smith	Smith
First Name	Bob	Bob
Middle Name	Charles	Charles
Suffix	III	III
<b>Primary Home Address</b>		
Street	123 Washington Ave E	123 Washington Ave E
Street 2		
Street 3		
City	St Paul	St Paul
State	MN	MN
Zip Code	55112	55112
<b>E-mail Addresses</b>		
Primary E-mail	Bob@Smith.com	bob.smith@aol.com
Alternate E-mail		
<b>Phone Numbers</b>		
Home Phone		
Cell Phone	216-547-8789	658-478-9789
Work Phone	123-324-1234	231-348-5798
Work Phone Direct		
Alternate Phone	654-896-7897	
Alternate Phone 2		
<b>Fax Numbers</b>		
Fax		
Work Fax		
<b>Work</b>		
Employer		
Job Title		
Occupation		

**This data (in black) will 'not duplicate' since it's identical.**

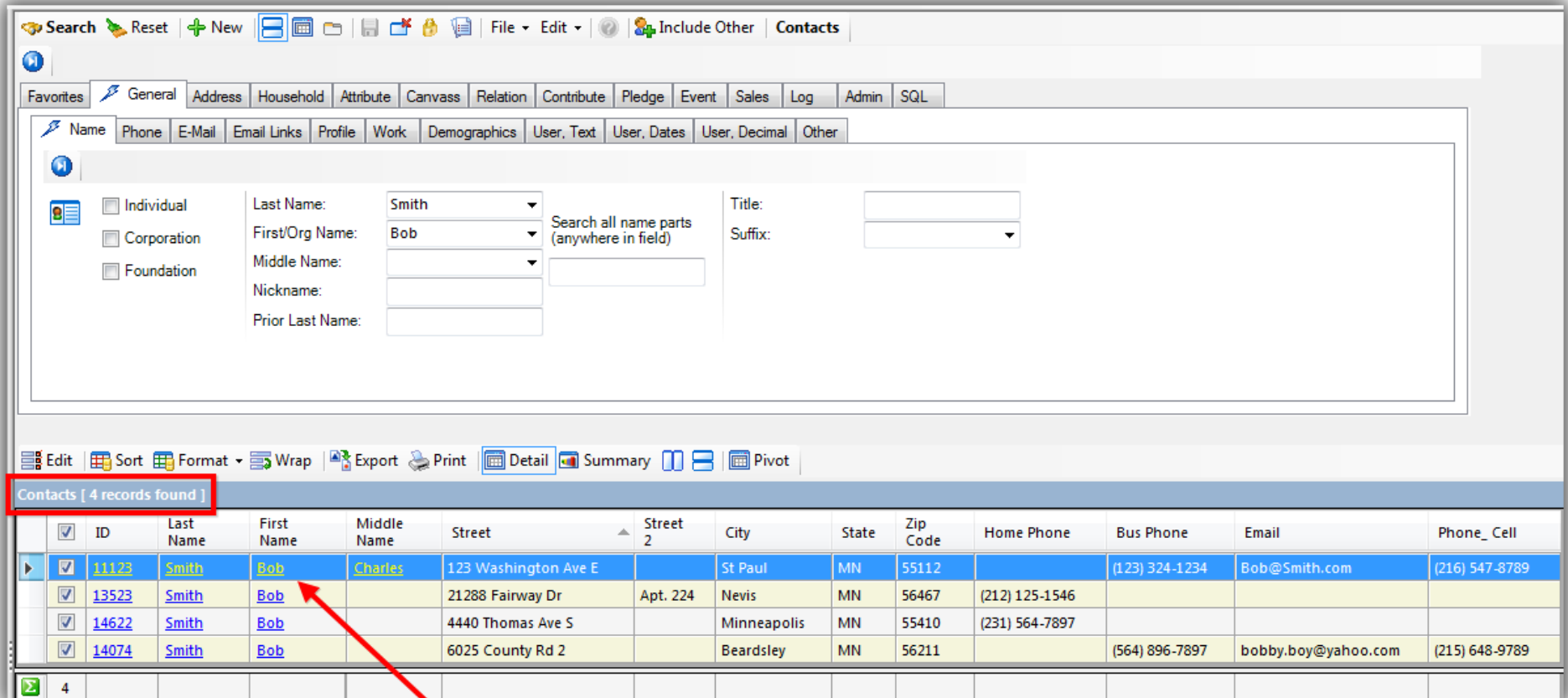
**Trail Blazer will retain all of this information (in red) since it's not identical. It will move the source email/phone numbers into alt email/phone number fields once the merge has completed.**

1

2

I understand that information from the source contact (on the right) will be merged into the target contact (on the left), and that subsequently the source contact will be deleted.

If the merge is successful the duplicate contact record will disappear. *\*If it fails you'll get an error message as to why. My example is below.*



Search Reset + New [Icons] File Edit Include Other Contacts

Favorites General Address Household Attribute Canvass Relation Contribute Pledge Event Sales Log Admin SQL

Name Phone E-Mail Email Links Profile Work Demographics User, Text User, Dates User, Decimal Other

Individual Corporation Foundation

Last Name: Smith  
First/Org Name: Bob  
Middle Name:  
Nickname:  
Prior Last Name:

Title:  
Suffix:

Search all name parts (anywhere in field)

Edit Sort Format Wrap Export Print Detail Summary Pivot

Contacts [ 4 records found ]

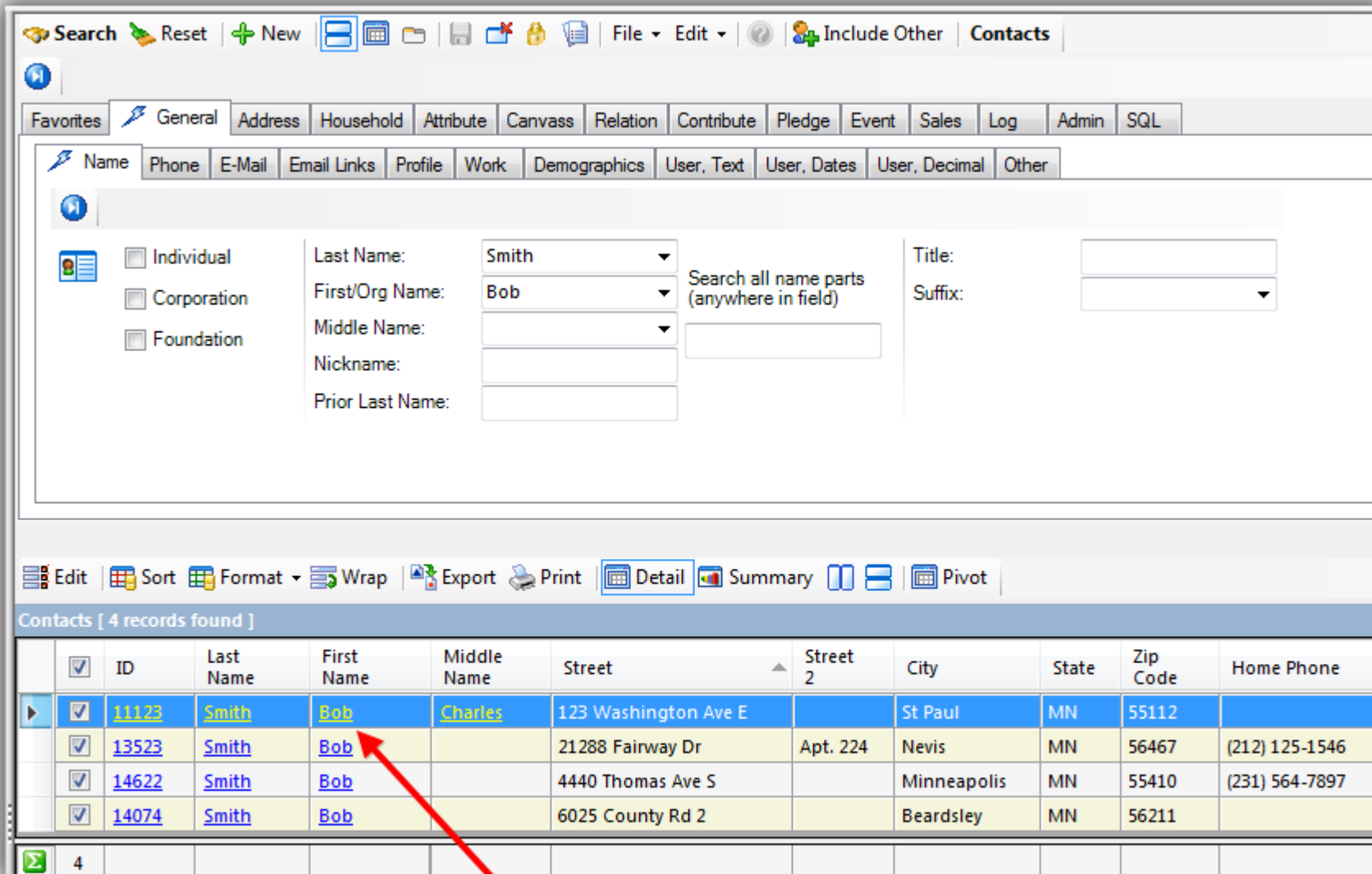
ID	Last Name	First Name	Middle Name	Street	Street 2	City	State	Zip Code	Home Phone	Bus Phone	Email	Phone_Cell
11123	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112		(123) 324-1234	Bob@Smith.com	(216) 547-8789
13523	Smith	Bob		21288 Fairway Dr	Apt. 224	Nevis	MN	56467	(212) 125-1546			
14622	Smith	Bob		4440 Thomas Ave S		Minneapolis	MN	55410	(231) 564-7897			
14074	Smith	Bob		6025 County Rd 2		Beardsley	MN	56211		(564) 896-7897	bobby.boy@yahoo.com	(215) 648-9789

**If the merge is successful the duplicate contact record will disappear.**

**(If it fails you'll get an error message as to why the merge couldn't take place).**

To view the details of the merge click on the contact's name to open their record card.





The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with options like Search, Reset, New, File, Edit, and Include Other. Below the menu bar, there are tabs for Favorites, General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, Log, Admin, and SQL. Under the General tab, there are sub-tabs for Name, Phone, E-Mail, Email Links, Profile, Work, Demographics, User, Text, User, Dates, User, Decimal, and Other. The main area contains a contact form with fields for Individual, Corporation, and Foundation checkboxes, and text boxes for Last Name (Smith), First/Org Name (Bob), Middle Name, Nickname, Prior Last Name, Title, and Suffix. Below the form is a toolbar with icons for Edit, Sort, Format, Wrap, Export, Print, Detail, Summary, and Pivot. At the bottom, there is a table titled 'Contacts [ 4 records found ]' with columns for ID, Last Name, First Name, Middle Name, Street, Street 2, City, State, Zip Code, and Home Phone. A red arrow points to the 'Bob' entry in the First Name column of the second row.

	ID	Last Name	First Name	Middle Name	Street	Street 2	City	State	Zip Code	Home Phone
<input checked="" type="checkbox"/>	11123	Smith	Bob	Charles	123 Washington Ave E		St Paul	MN	55112	
<input checked="" type="checkbox"/>	13523	Smith	Bob		21288 Fairway Dr	Apt. 224	Nevis	MN	56467	(212) 125-1546
<input checked="" type="checkbox"/>	14622	Smith	Bob		4440 Thomas Ave S		Minneapolis	MN	55410	(231) 564-7897
<input checked="" type="checkbox"/>	14074	Smith	Bob		6025 County Rd 2		Beardsley	MN	56211	

**Click on the contact's record card to open their record.**

Navigate to the **Logs** tab > **Log** sub-tab, click the **[Show Suppressed]** button, and you'll be able to **view the details of the merge** in the text box at the right. *My example is below where you can see the contact record has now been merged twice, the **Log Type** is recorded as **'Combine Comment'**.*

The screenshot shows the TrailBlazer interface for a contact record. The contact is **Bob Charles Smith [11123]**. The interface includes a top menu bar with 'Settings' and 'Help', a toolbar with standard file operations, and a main content area with tabs for 'General', 'Household', 'Gallery', 'Attribute', 'Poll', 'Relation', 'Contribute', 'Pledge', 'Event', 'Logs', 'Sales', and 'Admin'. The 'Logs' tab is selected and highlighted with a red box. Below the tabs, there are sub-tabs for 'Log', 'Notes', 'Email Log', and 'Clicked Links', with 'Log' also highlighted. A toolbar below the sub-tabs includes 'New', 'Delete', 'Export', 'Print', and 'Show Suppressed' (with a red '1' next to it). The main area displays a table of logs with 2 records found:

ID	Created	Text	By	Type	\$ or Hrs	Reminder Date	Reminder Subject
17361	10/4/2016 10:25 AM	Contact record [14...	Joel Kristenson	Combine Comment	.00		
14458	3/24/2011 3:25 PM	Donor record [111...	Mark Panger	Combine Comment	.00		

Below the table, a large grey box contains the text: **2. This log note will automatically get generated, and shows the details of the merge that took place.**

To the right of the table, there is a 'Log Type' dropdown set to 'Combine Comment', a 'Log Date' dropdown set to '10/ 4/2016', and a '\$ Amt or Hrs' input field set to '.00'. Below these fields is an 'Add/Open Reminder' button. A red box highlights the following text: 'Contact record [14985] merged with this contact record [11123] on 10/04/2016. Field Phone\_Bus data "231-348-5798" discarded. Field AltEmailAddress set to "bob.smith@aol.com". Field Phone\_BusExt set to "Ext. 113". Field Phone\_Cell data "658-478-9789" discarded.'

The bottom of the window shows a status bar with 'Logon = Joel Kristenson' and buttons for 'Email...', 'Save', 'Save and Close', and 'Cancel'.



If you make a mistake going through these steps, the [roll-back tool](#) will be your friend (*if you catch it soon enough*)—measure twice, cut once.

That concludes the steps, repeat until all duplicates are cleaned up.

The **related resources** below link to a variety of similar articles and videos on keeping your database tidy. *If you have any concerns going through these steps please call our live tech support.*



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

## **Related Resources**

**Article:** [Find Possible Duplicates](#)

**Article:** [Rollback – Undo Function](#)

**Article:** [How to Find Duplicate Contact Records by Identical \\*Primary\\* Email Address, and Automatically Merge them Together](#)

**Article:** [Auto-Merge Duplicate Contact Records](#)

**Article:** [Auto-Merging Duplicate Address Records](#)

**Article:** [How to Merge Attributes](#)

**Article:** [Automatically Conform Addresses](#)

**Article:** [Why won't some of my records merge?](#)

**Article:** [Managing Households – Creating, Deleting and Re-Creating](#)

**Article:** [Address Management](#)

**Article:** [Address Normalization \(unlimited addresses per person\)](#)

**Video:** [How to Manage Duplicates](#)

**Video:** [Households – What To Do B4 Householding!!](#)

**Video:** [Households – Delete and Recreate](#)

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **Twitter:** <https://twitter.com/trailblazersoft>

*\* As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

*[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.*

*\* After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

*\* This service is included in your contract.*