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### **Overview**

This article walks through the steps to mass merge duplicate contact records in your database. This requires that you have <u>appropriate security</u> clearance, and that the records are **identical** (*name/address*) in order to merge. There are some useful related resources at the bottom that cover the manual-merge process, and how to conform address records prior to running the mass merge utility for optimal success.

**Tip:** Open a *new* session of **Trail Blazer** before running these large procedures, if something goes awry you have a better chance of pinpointing, and rolling back the session.





Navigate to your contact (*donor/voter*) list, click [Search] in the upper-left, and select the load all radio button.

Trail Blazer Version 6.2.5547.12243 Der	no Nonprofit Joel - [Contacts]
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### From the File drop-down menu at the top follow File > Utilities > Merge

(Must have required <u>security clearance</u> to run this process).

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This will provide you a variety of options on how to run the merge. You *may* need to make a few passes on your list of contacts using each of these methods one-at-a-time.

#### This is the description on how Trail Blazer runs a merge:

In addition to the conditions employed by the merge method selected below, a merge will take place only if

- the state SOS registration number (if present in both records) matches.
- the birth date (if present in both records) matches.



Merge Contacts	8
Merge Options	
For each contact in the current list, search for and merge with duplicates in the database using the method specified below.	ne full
In addition to the conditions employed by the merge method selected below, will take place only if - the state SOS registration number (if present in both records) matches. - the birth date (if present in both records) matches.	a merge
<ul> <li>Merge contacts where name and home address match.</li> <li>Merge contacts where name and work address match.</li> <li>Merge contacts where email address and name match.</li> <li>Merge contacts where employee ID matches.</li> </ul>	
Progress Please press OK to proceed	
ОК	Cancel

You can also navigate to the **Options** tab and choose which contact record is considered the '**master**' record (*the one that remains*) by choosing to use either the **lowest** or **highest contact ID**. (*Image below*)



# Usually you'll leave the settings as default, but optionally you can change which contact record is considered the 'master' record either by highest or lowest record ID.

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with the highest cor	ntact ID		
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one with the highest i ie one with the lowes ith that record longer	d is the one that has t ID will be used as th In some cases, the	been added more ne master because more recent recor	e recently. By e you have rd may be
	d after transferring info cedence over the oth act with the lowest ID one with the highest i be one with the lowest ith that record longer.	d after transferring information to the master cedence over the other record when infor act with the lowest ID is the record that has one with the highest id is the one that has be one with the lowest ID will be used as the ith that record longer. In some cases, the	d after transferring information to the master. In general, the cedence over the other record when information in the two r act with the lowest ID is the record that has been in the data one with the highest id is the one that has been added more ie one with the lowest ID will be used as the master because ith that record longer. In some cases, the more recent record o-date in that case you would select the highest contact in

*This is the description on what these settings mean under the \*Options\* tab:* 



In a merge operation, the master record will be preserved, and the other record will be deleted after transferring information to the master. In general, the master record takes precedence over the other record when information in the two records is different.

The contact with the lowest ID is the record that has been in the database longer, while the one with the highest id is the one that has been added more recently. By **default**, the one with the lowest ID will be used as the master because you have worked with that record longer. In some cases, the more recent record may be more up-to-date -- in that case you would select the highest contact id option.

After selecting your preferences, click **[OK]**.

This starts the process, if you're working with a larger data set in the hundreds of thousands or millions, it may take a few hours to run.

Once complete it will provide you with the results.



Merge Contacts	8
Merge Options	
For each contact in the current list, search for and merge with duplicates in the full database using the method specified below.	r
In addition to the conditions employed by the merge method selected below, a merge will take place only if - the state SOS registration number (if present in both records) matches.	
- the birth date (if present in both records) matches.	
Result E 🕱	
Merge complete information merged for 2 contacts.	
ОК	
Merge by Email:Merging contact 10491 contact processed, 2 mergers occurred.	
OK OK	

Checkout the related resources below for how to **conform/merge** address records (*which is very beneficial prior to running a contact merge*) as well as other articles, and videos on the subject of managing your duplicate records in the database.





- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources

## **Related Resources**

Article: <u>Find Possible Duplicates</u> Article: <u>Manually Merge of Contact Records</u> Article: <u>Automatically Conform Addresses</u> Article: <u>Auto-merging Duplicate Address Records</u> Article: <u>Address Management</u> Article: <u>Rollback (Undo)</u> Video: <u>How to Manage Duplicates</u>



## Trail Blazer Live Support

- **O Phone:** 1-866-909-8700
- Benail: <a href="mailto:support@trailblz.com">support@trailblz.com</a>
- **Facebook:** <u>https://www.facebook.com/pages/Trail-Blazer-Software/64872951180</u>
- Twitter: <u>https://twitter.com/trailblazersoft</u>

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

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

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