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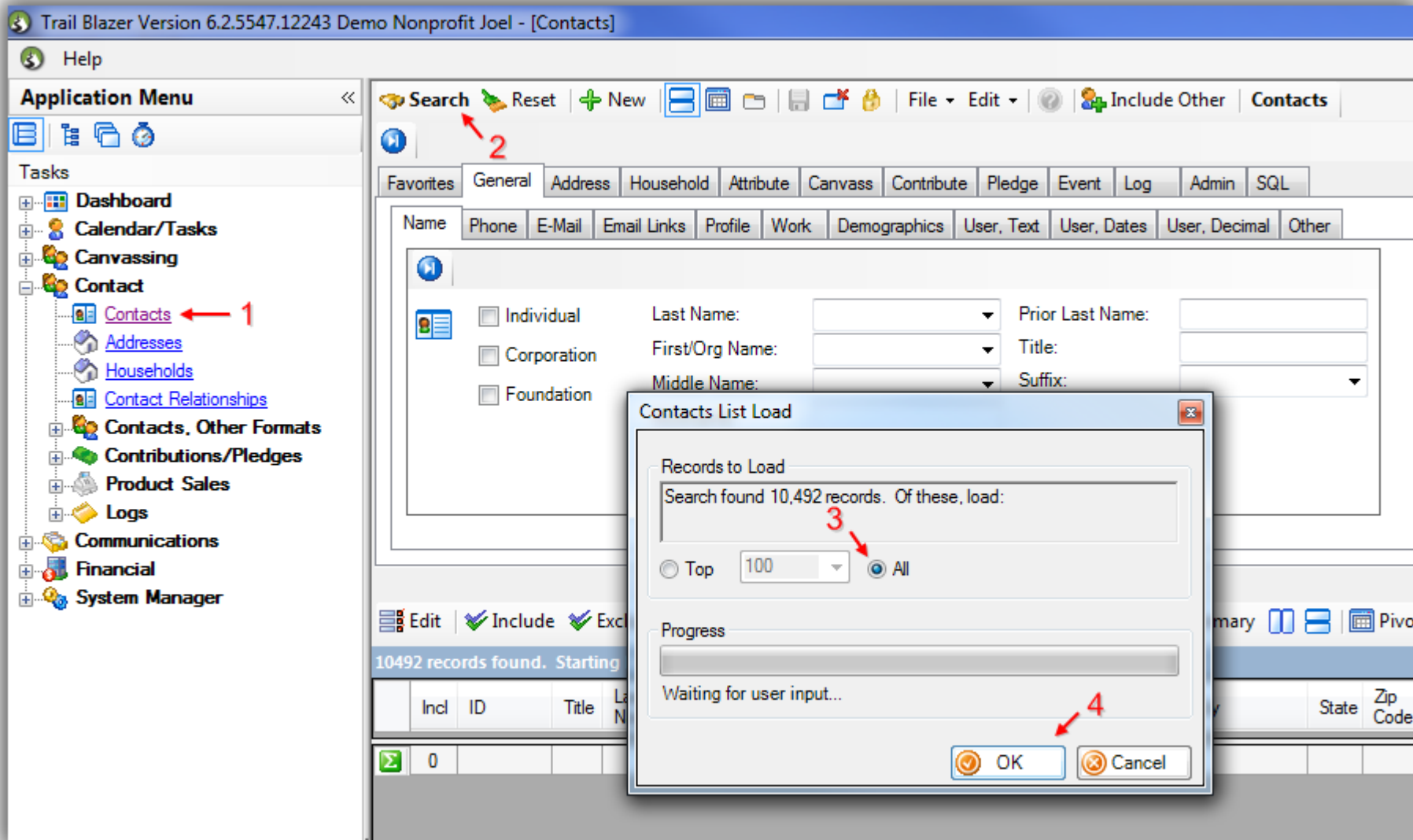
Overview

This article walks through the steps to mass merge duplicate contact records in your database. This requires that you have [appropriate security](#) 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.

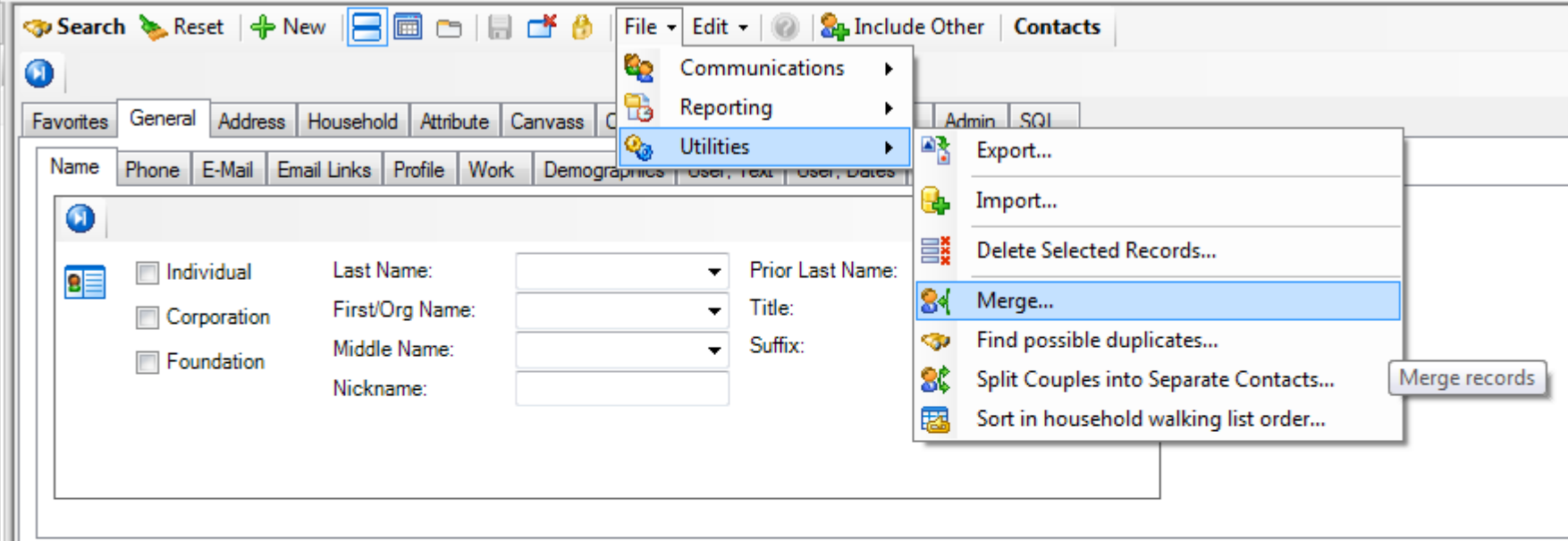
Steps

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



From the File drop-down menu at the top follow **File > Utilities > Merge**

(Must have required [security clearance](#) to run this process).



The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Utilities' option is selected, which has opened a sub-menu. In this sub-menu, the 'Merge...' option is highlighted. A tooltip labeled 'Merge records' is visible next to the 'Merge...' option. The background shows a contact record form with fields for Name, Phone, E-Mail, Email Links, Profile, Work, Demographics, User, Text, and User Dates. Below the form is a toolbar with options like Edit, Include, Exclude, Sort, Format, Export, Print, Detail, Summary, and Pivot. At the bottom, a table displays a list of contacts with columns for Incl, ID, Title, Last Name, First Name, MI, Address Type, Address, City, State, Zip Code, Home Phone, and Bus Phone.

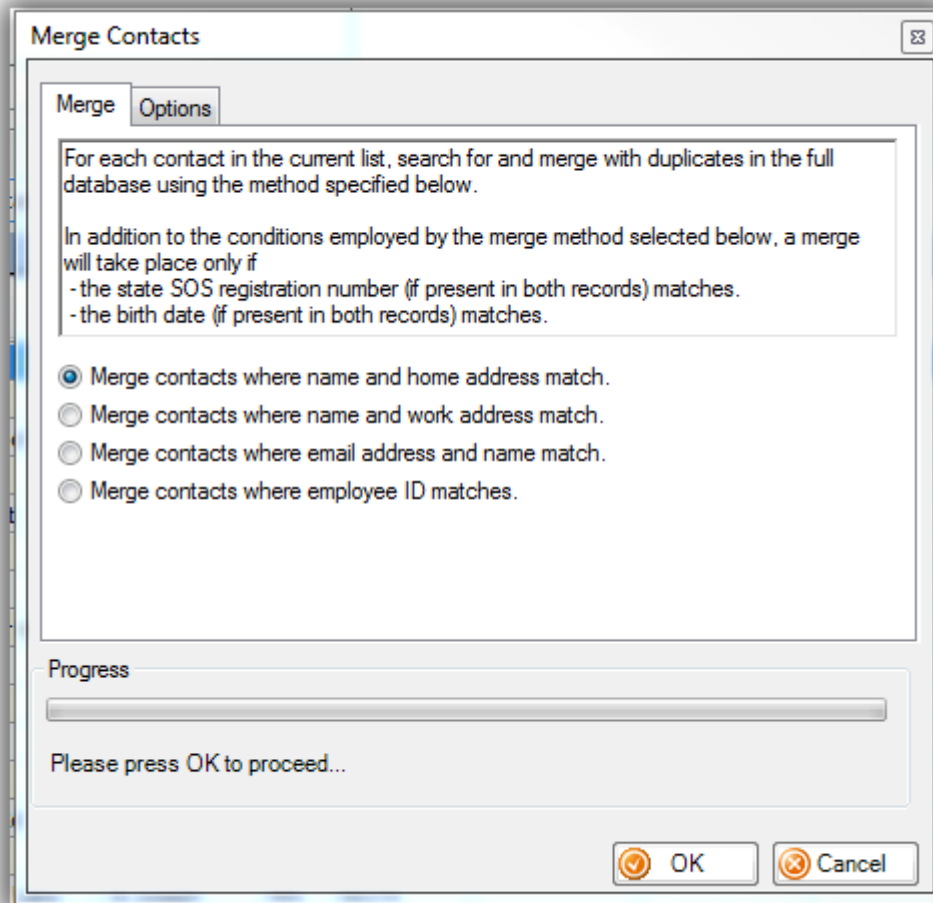
Incl	ID	Title	Last Name	First Name	MI	Address Type	Address	City	State	Zip Code	Home Phone	Bus Phone
<input checked="" type="checkbox"/>	10143			Agency for L...		Work	22898 Rachael Dr	Rogers	MN	55374		
<input checked="" type="checkbox"/>	10141			All Saints Pa...		Work	920 Rae Ct	Mendota Hei...	MN	55118		
<input checked="" type="checkbox"/>	10122			American C...		Work	10727 Braewood Cir	Bloomington	MN	55437		
<input checked="" type="checkbox"/>	9381			Ameriprise Fi...								

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:

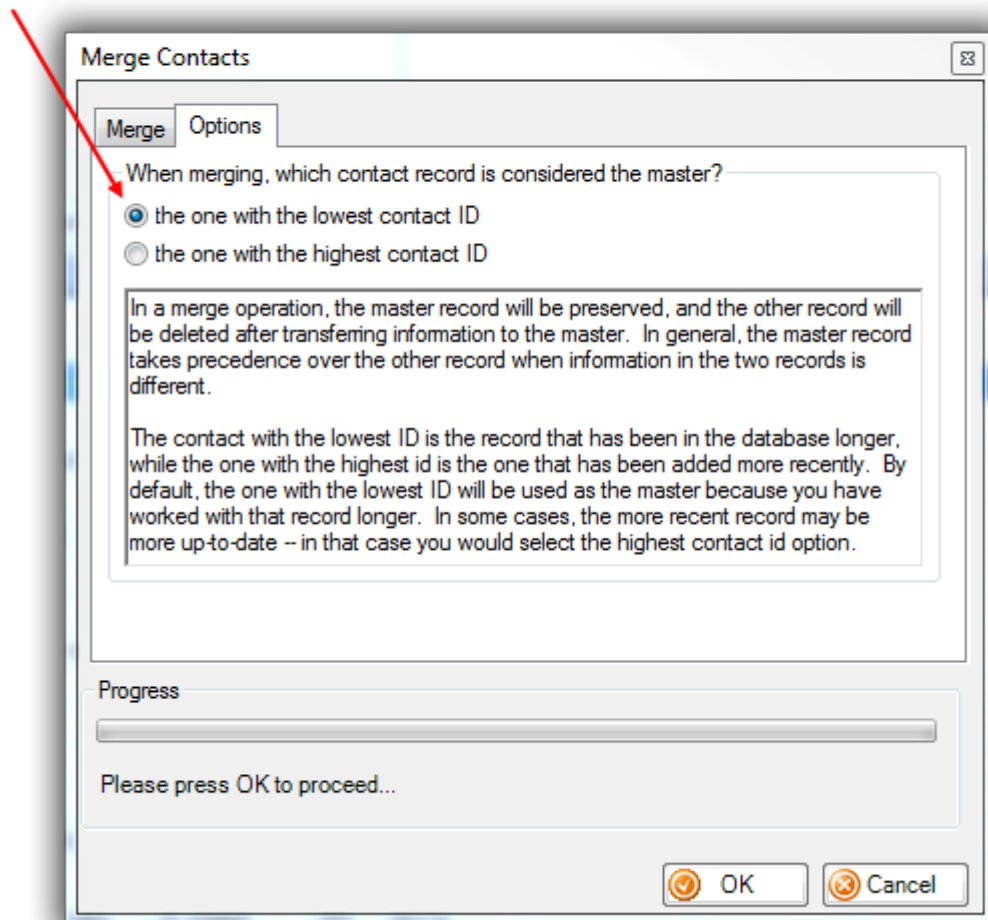
In addition to the conditions employed by the merge method selected below, a merge will take place only if

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



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.



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

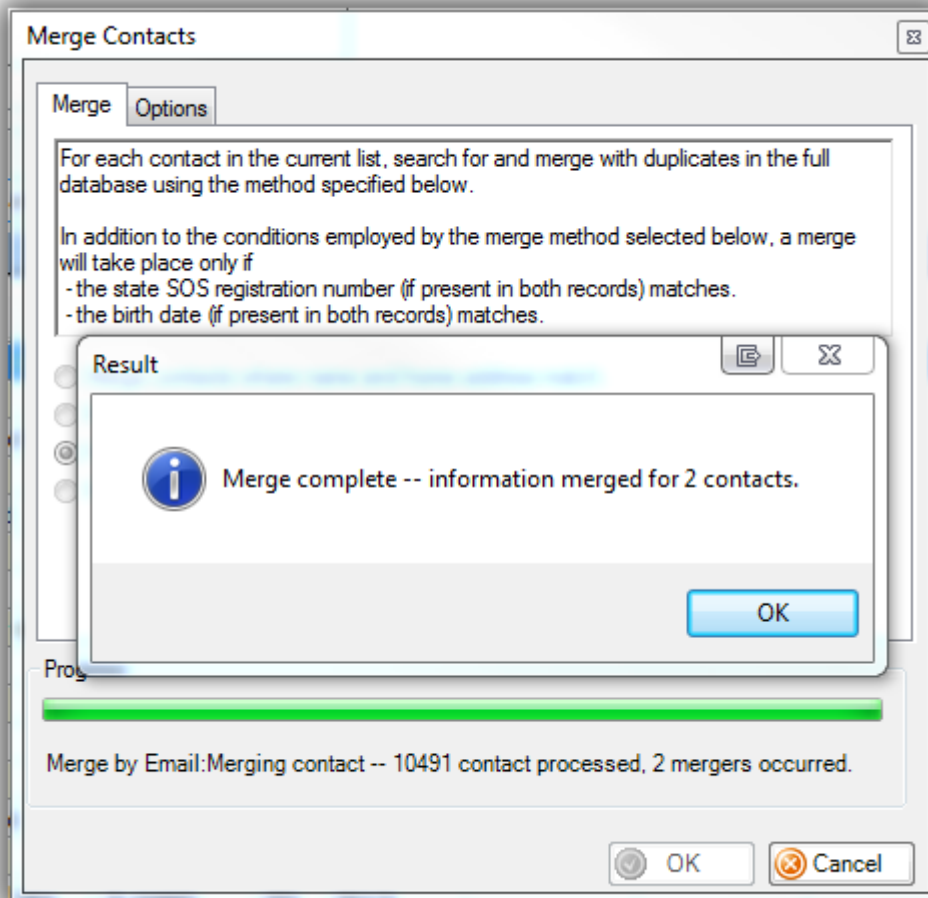
In a merge operation, the master record will be preserved, and the other record will be deleted after transferring information to the master. In general, the master record takes precedence over the other record when information in the two records is different.

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.



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.



Trail Blazer™

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

Related Resources

Article: [Find Possible Duplicates](#)

Article: [Manually Merge of Contact Records](#)

Article: [Automatically Conform Addresses](#)

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

Article: [Address Management](#)

Article: [Rollback \(Undo\)](#)

Video: [How to Manage Duplicates](#)

Trail Blazer Live Support

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** 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.*