

NPSP: Merge Contacts

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Overview

NPSP includes a tool that you can use to easily merge duplicate Contacts. With Contact Merge, you choose which Contact to keep and what data to use from each duplicate Contact. All related items, such as Opportunities and Payments, from each Contact are moved to the newly-merged Contact so that no data is lost. You can also merge Contacts using standard Salesforce functionality (https://help.salesforce.com/apex/HTViewHelpDoc?id=contacts_merge.htm), but with the NPSP merge, the Contacts do not need to be in the same Account.

NOTE: *This feature does not search for duplicates or merge in bulk.*

Important—Before You Merge

Before merging, consider the following:

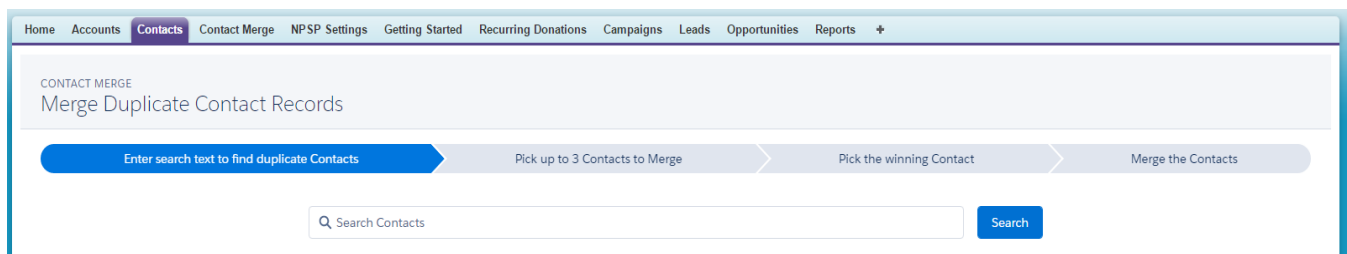
- Your best defense against duplicates is training users to search before entering new Contacts and Accounts. Consider customizing search layouts (https://help.salesforce.com/apex/HTViewHelpDoc?id=customize_searchlayout.htm) to give users more information about Contacts, so they can easily determine if the Contact already exists.
- We recommend that you formulate a plan for identifying duplicate Contacts and which fields can be used to determine if a Contact is a duplicate. Some keys to your duplicate defense may be:
 - Entering a middle initial for common names to differentiate between John S. Smith and John D. Smith

- Deciding if the appropriate secondary field for determining a duplicate is an address or email field or perhaps the Date of Birth field.
- Examine the Accounts associated with each of the Contacts to merge and determine which one should be the master Account after the merge.
- The user merging Contacts must have the ability to delete Contacts, access to every field on the Contact record, AND access to both Contacts through Salesforce security settings. All of this is required because merging Contacts is destructive and it's easy to make mistakes. Once you merge and delete records, there is no way to get them back. For these reasons, we recommend that only the System Administrator in an org merges Contacts.

Merge, Baby, Merge

To merge Contacts:

1. Click the **Contact Merge** tab. If you do not see the **Contact Merge** tab, click **+** at the end of the Tab Bar, then select **Contact Merge** from the list.



The screenshot shows the Salesforce 'CONTACT MERGE' interface. At the top is a navigation bar with tabs: Home, Accounts, **Contacts**, Contact Merge, NPSP Settings, Getting Started, Recurring Donations, Campaigns, Leads, Opportunities, Reports, and a plus sign. Below the navigation bar, the page title is 'CONTACT MERGE' and the subtitle is 'Merge Duplicate Contact Records'. A progress bar with four steps is displayed: 'Enter search text to find duplicate Contacts' (active, blue), 'Pick up to 3 Contacts to Merge', 'Pick the winning Contact', and 'Merge the Contacts'. Below the progress bar is a search bar with the placeholder text 'Search Contacts' and a blue 'Search' button.

2. Enter the name of the duplicate Contact in the Search bar, then click **Search**. You can use * as a wildcard. For example, if one Contact is Lawrence Jones and the other is Larry Jones, enter **L* Jones** to find both Contacts.
3. In the Found Contacts list, select the Contacts to merge. You can select up to three Contacts.
4. Click **Next**.

CONTACT MERGE

Merge Duplicate Contact Records

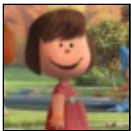


Selected Contacts

	John Smith <small>(select all)</small>	John Smith <small>(select all)</small>
Master Record	<input checked="" type="radio"/>	<input type="radio"/>
STANDARD FIELDS		
Account	Smith (John) Household	Smith (John) Household

5. Pay careful attention when selecting the Master Record. This determines which Account record the Contact will be associated with after the merge. The Contact(s) not selected as the Master Record will be deleted.
6. Choose fields from either record to include in the final merged record. Note that fields not chosen will be overwritten.
7. Click **Merge**, then click **OK** on the pop-up warning that merging is irreversible.

TIP: Since related items for all of the merged Contacts (such as opportunities and payments) are moved to the master Contact, be sure to check child records from custom objects for any duplicates.



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