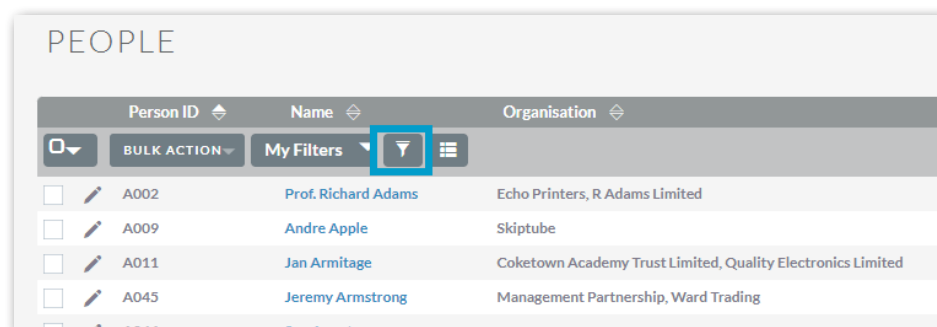


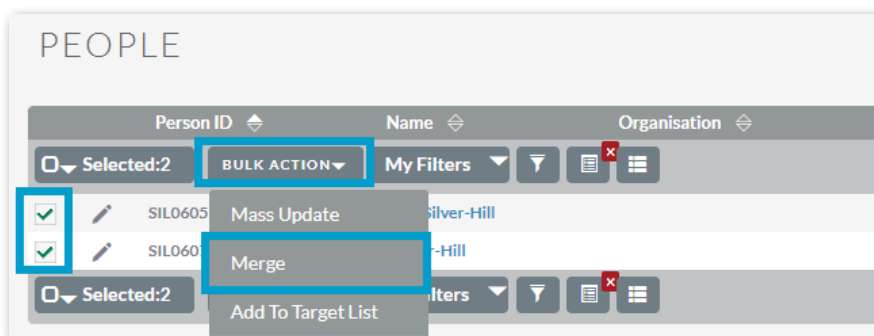
Visit support.fibrecrm.com for more info or contact your CRM Manager

Merging Records

1. If you have duplicate records in a module such as a duplicate person you have the option to merge the records together. To do this first navigate to the module where the duplicates are and then use the **Search Filter** to search for them.



2. In the **List View** use the tick boxes to select the duplicate records and then in the **Bulk Action** menu select **Merge**.



3. In the **Merge** screen, information from both records will be displayed in columns. The record that was 1st in the list will be shown as the Primary record, if you'd like to switch to the other record select the **Set as Primary** button.

ROSIE SILVER-HILL

SAVE MERGE CANCEL

Columns whose value in primary row differs from value in merging rows:

First Name: Rosie

Mobile: 07850137173

Office Phone:

Address: Example Way Cornwall

City: Helston

Country: --None--

Postcode: TR1 EXP

Country: UK

Lead Source: Direct Mail

Birthdate: 10-12-1992

HubSpot ID: 901

HubSpot Response: Date: 2023-06-22 11:43:55 - s837(A contact with the email 'rosie.hill@fibrecrm.com' already exists. Existing ID: 7011. Date: 2023-06-22 11:43:39 - Updated

Sensitive Data: Sensitive Data for Rosie Si SELECT

Engagement Letter Sent Date: 10-07-2023

Columns whose value is similar across all rows:

4. To copy over information from the duplicate record to the other click the **Left Arrows** buttons for each field. Once you're happy with all the information that will be combined into the one record click **Save Merge**.

ROSIE SILVER-HILL

SAVE MERGE CANCEL

Columns whose value in primary row differs from value in merging rows:

First Name: Rosie

Mobile: 07850137173

Office Phone:

Address: Example Way Cornwall

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Sensitive Data: Sensitive Data for Rosie Si SELECT

Engagement Letter Sent Date: 10-07-2023

Columns whose value is similar across all rows:

5. A pop up box will then appear asking if you'd like to delete the record that is no longer needed. Click **OK**. Once done you're records will be merged together and the duplicate removed.

demo.fibrecrm.cloud says

This action will delete following record(s): R Silver-Hill

Proceed ?

OK Cancel