

# Merging Duplicated Contact User guide

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## 1.1 MERGING DUPLICATED CONTACT

Use this function if you have duplicated Contact Card, to transfers all the related entries to one Contact Card and disable the other.

#### NOTE

If you are transferring a buyer related entries to a contact for which Buyer Card does not exist, it will relink existing Buyer Card to the new Contact.

If you are transferring a buyer related entries to a contact for which Buyer Card does exist, it will relink all the buyer related entries to new Buyer Card associated with the Contact.

The same rule applies to all entries related to a Vendor Card.

To merge a duplicated Contact:

1. In the Search box enter Merge Contact and then choose the related link.

The **Move Contact** window opens.

HOME	ACTIONS S Move Reset F	Refresh Find				
Pr	ocess	Page				
No.	, Name	Name 2	Address	Address 🗥	Move from Contact	^
C0004886	Monika Fakhoury		12 Pine Court			-
C0004885	John Smith		31 Bridge Road			=
C0004884						=
C0004883	Anna Streeter		1 Pound Road			=
C0004882	Pauline Duncan		4 Meadow View			=
C0004881	Edward Corn		8 Middlesex Street			=
C0004880	Mark Proctor		7A Patriot Drive			_
C0004879	Alison Morgan		3 Green Lane			_
C0004878	Andy Galazka		63 Monks Ave			
C0004877	Aaa Solicitors					
C0004876	Terry Else		41 Ashford Road		Move to Contact	
C0004875	Aaa Solicitors	Contact merged (C0004877), D	Station Rd			_
C0004874	Abc Solicitors					
C0004873	Andrew Gobbee					¥
					ОК	





2. From the contact list, select a line with contact details you want to move all the related entries from, and then select **Set as Move from** located on the Ribbon.

View - Move Co	ontact ACTIONS				- □ ×
Set as set as love from Nove	Nove s Move	Refresh Find Page			
No.	Name	Name 2	Address	^	Move from Contact
CHRISONEI	Angela Moor		17 Eastworth Road	- 11	
C0004891					
	Sebastian — — —				
C0004889	Sebastian		12 Pine Court	- i .	
£0004888					
C0004886	Monika Fakhoury		12 Pine Court		
C0004885	John Smith		31 Bridge Road		
C0004884					
C0004883	Anna Streeter		1 Pound Road		
C0004882	Pauline Duncan		4 Meadow View		
C0004881	Edward Corn		8 Middlesex Street		Move to Contact
C0004880	Mark Proctor		7A Patriot Drive		
C0004879	Alison Morgan		3 Green Lane		
C0004878	Andy Galazka		63 Monks Ave		~
					OK
					UK





#### Now, details of selected Contact are visible in Move from Contact window.

View - Move (	Contact						- 0	×
HOME	ACTIONS							
Set as Set ove from Mov	as Move Process	Refresh Find Page						_
No.	- Name	Name 2	Address	Address 2	City	Post ^	Move from Contact	
CHRISONEI	Angela Moor		17 Eastworth Road		Dartford	DA1	C0004889	
C0004891							Sehastian	
C0004890	Sebastian		12 Pine Court		Guildford	GU5	0000000	
C0004889	Sebastian		12 Pine Court		Guildford	GU5		
C0004888	Sdda						12 Pine Court	
C0004886	Monika Fakhoury		12 Pine Court		Guildford	GU5		
C0004885	John Smith		31 Bridge Road		Wallingford	OX1	Guildford GU5 1GG	
C0004884							paulina.drumew@evo-soft.co.uk	ĸ
C0004883	Anna Streeter		1 Pound Road		Aberdeen	AB	000000	
C0004882	Pauline Duncan		4 Meadow View		Chertsey	KT16		_
C0004881	Edward Corn		8 Middlesex Street		Birmingham	B10	Move to Contact	
C0004880	Mark Proctor		7A Patriot Drive		Manchester	M12		
C0004879	Alison Morgan		3 Green Lane		London	E13		
C0004878	Andy Galazka		63 Monks Ave		Somerton	TA11		
C0004877	Aaa Solicitors							
C0004876	Terry Else		41 Ashford Road		Irvine	KA12		
C0004875	Aaa Solicitors	Contact merged (C0004877), D	Station Rd		London	SE8		
C0004874	Abc Solicitors							
C0004873	Andrew Gobbee							
C0004872	Chris Cuningham		33 Surrey Hills		Addlestone	KT15		
C0004871	Jim Capehorn		28 Mead Lane		Wadhurst	TN5		
C0004870	Andrea Marlon		Unknown Road		Teddington	TW1		
C0004869	Arnold Stevens		Windsor Street		Hampton	TW1	Last Action:	
C0004868	Joan Parkinson		Waters Edge		Farnham	GU1( 🗸		
						>		
							C	JK



3. From the contact list, select a line with contact details you want to move previously selected contact's related entries to, and then select **Set as Move to** located on the Ribbon.

HOME	ACTIONS			
et a Set a ve from Move Pr	as Move Reset	Refresh Find Page		
No.	, Name	Name 2	Address	Move from Contact
CHRISONEI	Angela Moor		17 Eastworth Road	C0004889
C0004891				Sebastian
C0004890	Sebastian		12 Pine Court	
C0004889	Sebastion			12 Pine Court
C0004888	Sdda			
C0004886	Monika Fakhoury		12 Pine Court	
C0004885	John Smith		31 Bridge Road	Guildford GU5 1GG
C0004884				paulina.drumew@evo-
C0004883	Anna Streeter		1 Pound Road	000000
C0004882	Pauline Duncan		4 Meadow View	
C0004881	Edward Corn		8 Middlesex Street	Move to Contact
C0004000	Mark Proctor		7A Patriot Drive	
C0004880			2 Groop Lano	





Now, details of selected Contact are visible in the Move to Contact window.

HOME	ACTIONS					
et as Set a re from Move Pr	Nove Reset	Refresh Find Page				
No.	Name	Name 2	Address	Address 2	City	Move from Contact
CHRISONEI	Angela Moor		17 Eastworth Road		Dartford	C0004889
C0004891						Sebastian
C0004890	Sebastian		12 Pine Court		Guildford	
C0004889	Sebastian		12 Pine Court		Guildford	12 Pine Court
C0004888	Sdda					
C0004886	Monika Fakhoury		12 Pine Court		Guildford	
C0004885	John Smith		31 Bridge Road		Wallingford	Guildford GU5 1GG
C0004884						paulina.drumew@evo-soft.co.uk
C0004883	Anna Streeter		1 Pound Road		Aberdeen	000000
C0004882	Pauline Duncan		4 Meadow View		Chertsey	
C0004881	Edward Corn		8 Middlesex Street		Birmingham I	Move to Contact
C0004880	Mark Proctor		7A Patriot Drive		Manchester	
C0004879	Alison Morgan		3 Green Lane		London	C0004890
C0004878	Andy Galazka		63 Monks Ave		Somerton	Sebastian
C0004877	Aaa Solicitors					
C0004876	Terry Else		41 Ashford Road		Irvine	12 Pine Court
C0004875	Aaa Solicitors	Contact merged (C0004877), D	Station Rd		London	
C0004874	Abc Solicitors					Guildford GU5 1GG
C0004873	Andrew Gobbee					naulina drumew@evo-soft.co.uk
C0004872	Chris Cuningham		33 Surrey Hills		Addlestone	
C0004871	Jim Capehorn		28 Mead Lane		Wadhurst	00000
C0004870	Andrea Marlon		Unknown Road		leddington	V Inst Action
					>	Last Action:

Before you process, make sure the **Move From** and the **Move To** contact details are correct.

#### IMPORTANT

The process cannot be reverted!

The Move contact process does not copy information from the General FastTab and does not copy settings from a vendor or a buyer card.

Before processing, make sure all the contact details from the CopyTo and all the settings on a buyer and a vendor card are correct.

as Sete from Move	s Move	Refresh Find Page			
No. 🚽	Name	Name 2	Address	Ad ^	Move from Contact
HRISONEI	Angela Moor		17 Eastworth Road		C0004889
0004891					Sebastian
0004890	Sebastian		12 Pine Court		
0004889	Sebastian		12 Pine Court		12 Dine Court
0004888	Sdda				12 Pine Court
0004886	Monika Fakhoury		12 Pine Court		
0004885	John Smith		31 Bridge Road		Guildford GU5 1GG
0004884					paulina.drumew@evo-
0004883	Anna Streeter		1 Pound Road		000000
0004882	Pauline Duncan		4 Meadow View		
0004881	Edward Corn		8 Middlesex Street		Move to Contact
0004880	Mark Proctor		7A Patriot Drive		
0004879	Alison Morgan		3 Green Lane		C0004890
0004878	Andy Galazka		63 Monks Ave		Sebastian
0004877	Aaa Solicitors				
0004876	Terry Fice		41 Ashford Road		
0004878 0004877	Andy Galazka Aaa Solicitors Terry Fice		63 Monks Ave		Sebastian

4. To process the transfer, select **Move** from the Ribbon.

5. Select **Yes** to confirm on message: "Do you really want to move Contact ... to ...? You cannot revert this change".





Now, on the contact list, transferred contact is marked in red colour with information "Contact merged (Merged To contact number), DO NOT USE", and all related entries are transferred to the new Contact.

After transfer is finished, the contact you are transferring from is disabled.

HOME	ACTIONS			
Set as Set as Set as Nove from Move	A View A View A Reset A View A Reset A View A View A Reset A View A Reset A View A Reset A	Refresh Find Page		
No.	Name	Name 2	Address	Address 2
CHRISONEI	Angela Moor		17 Eastworth Road	
C0004891				
-20004090-	Sebastian		12Pine Court	
C0004889	Sebastian	Contact merged (C0004890), DO NOT U	JSE 12 Pine Court	
00004080	<del>Sdda</del>			
C0004886	Monika Fakhoury		12 Pine Court	
C0004885	John Smith		31 Bridge Road	
C0004884				
C0004883	Anna Streeter		1 Pound Road	
C0004882	Pauline Duncan		4 Meadow View	
	51 10		0.147 1.11 01 1	



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