

People Merge

Using People Merge, you can combine information from two individual records into one record. This assists you with tracking accurate information for each individual in ACS.

Before Merging People Records

[Making a backup](#) is the first and most important step when merging records. After you merge records, a duplicate record is deleted from ACS, so having a recent backup is the only way to reverse any changes made when merging records.

Once you've backed up your data, choose your **Preferred** and **Duplicate** records in ACS.

Ideally, the preferred record contains more information and is more up-to-date than the duplicate record. The merge often uses information from the preferred record rather than the duplicate record, and for this reason, it's important to look at both records in View/Edit Individual and compare the data before performing a merge.

When you merge records, the duplicate record is merged into the preferred record. Single-value dates, fields, and lists in the duplicate record are overwritten unless the same field in the Preferred record is blank. To see which data changes during a merge, see [Merging Data in ACS People](#) and [Family and Contributions Data Changes when Merging Records](#). You could also print the duplicate record's People Profile report before you merge, so that you have a copy of the original information.

?▶ What if I need to merge more than two records?

You can only merge two records in ACS; however, if an individual has two duplicate records and one preferred record, you can perform two merges. First, carefully select your preferred record and your two duplicate records (the preferred record usually contains more information). Then, merge the duplicate record with the least information into the duplicate record with more information. Once you have one duplicate record, you can then merge the data into the preferred record.

In addition, you can edit your People Setup Settings to check for duplicates when entering new records. This can help you avoid merging duplicate records.

People Merge Records Security

Since merging people records changes data and deletes the duplicate record after the merge, you can restrict Merge Records to certain staff members in your organization. Any user who does not have security rights to Merge Records will not see that option on the Workbench or Classic menus.

The Merge Records security rights default to the value used for Change Family Unit. You can change these security rights in [Add/Edit Users](#).

To restrict or grant an ACS user's access to Merge Records

1. Under Advanced Tools, click the **Admin Utilities** tab.
2. In the drop-down list, select **Add/Edit Users**, then click **Go** .

3. In the Add/Edit Users window, select the user whose People Merge access you want to edit and click **Edit**.
4. On the **Security** tab, expand **People**.
5. Double-click on **Merge Records** to change the security value from **None** to **All** or **All** to **None**.
6. Click **OK**.

Merging Data in ACS People

When you merge people records, it's important to choose the preferred and duplicate records carefully.

When two records merge in ACS, the data rules vary according to the area of the individual's record. In some cases, information from the duplicate record merges to the preferred record, but in other areas of the program, information from the duplicate record does not transfer to the preferred record unless the field is blank.

If the [People Changes Log](#) is activated, the report lists the duplicate record as **Individual Merged**, and the preferred record lists the changes as **Individual Updated**.

Caution

Be sure to [make a backup](#) before merging people records.

Restoring a backup is the only way to "undo" changes if you need to.

Area of ACS	Merge Rule
Name fields, Label names, and Constituent IDs	The merge uses information from the preferred record. You do not have to recreate label names, but any retained label names on the duplicate record are deleted.
Profile, Additional Fields, Family Additional Fields, Departmental Fields, and Pictures tabs	The merge uses information from the preferred record, unless a field in the preferred record is blank. Then, information from the duplicate record merges to that field.
Addresses	<p>The Primary, Mailing, and Statement addresses from the preferred record are used, and addresses on the duplicate record merge to the preferred record if they do not conflict.</p> <p>If the preferred and duplicate record contain different addresses of the same level (For example, Home), you can select which address to keep for the Home address. You can also select a different address type for the other address.</p>
Contact Information	<p>After the merge, the preferred record's Preferred contact information displays. The merge also uses the Preferred Phone and Preferred E-mail from the preferred record, unless the fields are blank. If blank, information from the duplicate record is used.</p> <p>ACS merges additional phones, e-mails, and social media information. If phone, e-mail, or social media types conflict, you can select which data you want to keep.</p> <p>All Preferred Lists data is kept.</p>

Other Relationships	ACS merges both records to contain all Other Relationships; however, individuals cannot have an Other Relationship with someone in the same family.
Comments, Safeguard, and Document Library	ACS merges all individual and family Comments, Safeguard tasks, and Document Library data from both records.
Checkpoint Fields	The barcode from the record with the most recent Date Last Attended is kept. ACS merges notes from both records, and identical notes do not merge. Each note has a limit of 250 characters. The pager number from preferred record is used, unless blank.
Connections	If there are no date conflicts, ACS merges all family and individual connections. Unless blank, ACS uses Review Dates, Prospect Source, and Assigned Individuals from the preferred record. If the date, inward or outward classification, and type conflict, the connection is merged into the preferred record. All special instructions are merged into the preferred record. If the duplicate record is attached to other connections records, ACS updates those records to have the preferred record attached.
Reservations	If the preferred and duplicate records are not listed in the same activity, the reservation is merged to the Preferred record. If both records are listed in an activity, ACS uses the name field from the preferred record. ACS also uses the personal, contact, picture, and category information from the preferred record, unless these fields are blank. Notes from both records are combined, and any payments or costs listed on the duplicate record are added to the preferred record. After the merge, costs and payment totals recalculate and update with the new totals. If the duplicate record is listed as an emergency contact, team member, or event coordinator, ACS changes these fields to display the preferred record.
Contributions	If the duplicate's record is not combined, gifts and pledges are moved to the preferred record. If the duplicate's record is combined, you can move gifts and pledges to the preferred record or to the duplicate record's spouse. If the duplicate record's gifts and pledges are merged, gifts in Access ACS, mass added pledges, check images, envelope numbers, and bank accounts also merge to the preferred record.
Staff records	The preferred and duplicate records merge, unless the merge conflicts on organization or staff position. Then, ACS uses information from the preferred record.
Organization records with a primary contact attached	If the duplicate record is attached to an organization record, only the preferred record is attached after the merge.
Groups- Rosters	Roster information merges to the preferred record. However, if both the preferred and duplicate record have rosters in the same group, ACS keeps the preferred record in the group and deletes the

	duplicate.
Groups- Attendance markings	Attendance markings from both records move to the merged record unless both records are in the same master group. In that case, the individual markings merge to a single record. ACS recalculates the date last attended.
Checkpoint Rosters	ACS merges information on the preferred and duplicate records, unless a conflict exists. If any information conflicts, ACS keeps the preferred record and deletes the duplicate record.
DataShare	ACS merges comments from both the preferred and duplicate records, unless the comment is exactly the same.
Access ACS Gifts, Payment Methods, Groups, Attendance markings, and People data	<p>ACS merges information from the duplicate record into the preferred record. Single-value fields (such as member status) retain the value on the preferred record.</p> <p>If the primary and duplicate records have different saved payment methods, the merged record has access to all saved payment methods, including credit card and ACH accounts if you continue merging the records.</p> <p>We recommend that you take extra precautions, such as contacting the individual to verify payment information, before merging records that have different saved payment methods.</p>

Family and Contributions Data Changes when Merging Records

Depending on the records merged, family and contributions information may change.

If	Then
The duplicate (Merge From) record is the only person in the family.	All family data is removed from ACS.
The duplicate record is not the only person in the family.	All other family members' data remains in ACS.
The preferred record and duplicate record are in the same family.	The records are merged, and no family data changes in ACS.
The duplicate record has a combined envelope number.	The remaining record in the duplicate's family is updated to no longer have a combined envelope number.
The preferred record has a combined envelope number.	All gifts from the duplicate record are added to the Head's record for the merged individual.

Merging People Records

Merging people records helps you ensure that your data is accurate and up-to-date by merging duplicate records.

For example, suppose an individual's address changes. A volunteer in your organization updates the individual's address, but that individual has a duplicate record in ACS. If you use a search or filter to pull addresses before sending a mailing and the duplicate record is found, the mailing could be delivered to the incorrect address.

When you merge individual records, the merged record is a more accurate record of that individual's activity, and the duplicate record is deleted.

 **Note**

Before merging records, be sure you have a [current backup](#) in case a mistake occurs. That is the only way you can reverse the changes.

To merge people records

1. Carefully select the preferred and duplicate record. To learn more about this, see [Before Merging People Records](#).
2. Under **Manage Records**, click the **Tasks** tab.
3. In the drop-down list, select **People Merge Records**, then click **Go** .
4. In the Merge Records window, under **Select Preferred Record**, click **Find Person**.
5. When the Find Person window displays, select the **Preferred Record** and click **OK**. The preferred record's name, address, and member status now display in the Merge Records window.
6. Under **Select Duplicate Record to Merge**, click **Find Person**.
7. Select the **Duplicate Record** and click **OK**. The duplicate record's name, address, preferred e-mail, and member status display. To view additional information on the record, click **View/Edit**.
8. **OPTIONAL:** Click **Access ACS** to view and compare the selected individuals' data in Access ACS.
9. Click **Merge**.
10. When the confirmation message displays, click **Yes**.
11. For each field, select the fields to keep. For some information, such as home, mailing, or e-mail addresses, you can keep both addresses by selecting a new address type for the second address.
12. When the merge is complete, click **OK**.