

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>

<p>Contact Information</p>	<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>
<p>Other Relationships</p>	<p>ACS merges both records to contain all Other Relationships; however, individuals cannot have an Other Relationship with someone in the same family.</p>
<p>Comments, Safeguard, and Document Library</p>	<p>ACS merges all individual and family Comments, Safeguard tasks, and Document Library data from both records.</p>
<p>Checkpoint Fields</p>	<p>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.</p> <p>The pager number from preferred record is used, unless blank.</p>
<p>Connections</p>	<p>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.</p> <p>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.</p> <p>If the duplicate record is attached to other connections records, ACS updates those records to have the preferred record attached.</p>

Reservations	<p>If the preferred and duplicate records are not listed in the same activity, the reservation is merged to the Preferred record.</p> <p>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.</p> <p>After the merge, costs and payment totals recalculate and update with the new totals.</p> <p>If the duplicate record is listed as an emergency contact, team member, or event coordinator, ACS changes these fields to display the preferred record.</p>
Contributions	<p>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.</p> <p>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.</p>
Staff records	<p>The preferred and duplicate records merge, unless the merge conflicts on organization or staff position. Then, ACS uses information from the preferred record.</p>
Organization records with a primary contact attached	<p>If the duplicate record is attached to an organization record, only the preferred record is attached after the merge.</p>
Groups- Rosters	<p>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.</p>
Groups- Attendance markings	<p>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.</p>
Checkpoint Rosters	<p>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.</p>

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>