

Merging People Records

Merging people records helps to 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 their address, but that individual has a duplicate record in ACS. If you 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 the more accurate record, and the duplicate record is deleted.

We recommend that you [back up](#) your ACS data before merging records.

If you know the names of duplicate records, perform the following procedure:

1. Carefully determine the preferred and duplicate record. To learn more about this, see [Before Merging People Records](#).
2. Under **Manage Records**, click the **Tasks** tab. (*If you don't see the Manage Records section, you're ACS program is probably running the Classic menu instead of the Workbench menu. [Turn on the Workbench menu](#).*)
3. In the drop-down list, select **People Merge Records**, and click **Go**. The People-Merge Individual window displays.
4. On the Merge Individual tab, click **Find Person**. The Find Person window displays.
5. Select the name with duplicate entries, and click **OK**. The People-Merge Individual window displays with The name, contact information, and member status of both duplicate entries displays.



Useful Information

If more than one duplicate entry exists, the People-Merge Individual window displays the amount of duplicate information in the form of a percentage that you can select.

OPTIONAL: To view additional information on the record, click **View Individual**.

OPTIONAL: To view and compare the selected individuals' data in Access ACS, click **Access ACS**.

6. Click **Merge**.
7. When the confirmation message displays, click **Yes**.
8. 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.
9. When the merge is complete, click **OK**.

If you don't know the names of any duplicate records and want ACS to locate them for you, perform the following procedure:

1. Under **Manage Records**, click the **Tasks** tab. (*If you don't see the Manage Records section, you're ACS program is probably running the Classic menu instead of the Workbench menu. [Turn on the Workbench menu](#).*)
2. In the drop-down list, select **People Merge Records**, and click **Go**. The People-Merge Individual window displays.

3. On the Retrieve Suggested Duplicates tab, you have two options:
 - You can click **Use Last Search Results > Searches** first to retrieve your last selected duplicates. You can view more information about conducting [searches](#). After setting your search criteria, click **Load Possible Duplicates**.
 - You can click **Load Possible Duplicates** first, and the ACS program will perform the search with its own search criteria.
4. The Retrieve Suggested Duplicates grid displays with the search results.



Useful Information

The grid is sorted in order of percentage regarding what records are most likely to be duplicates that you can merge. Right-click anywhere in the grid to display print or export options for the contents of the grid.

5. Select a record, and click **Keep Selected**. The People-Merge Individual window displays with the duplicate record information.
 - OPTIONAL:** To view additional information on the record, click **View Individual**.
 - OPTIONAL:** To view and compare the selected individuals' data in Access ACS, click **Access ACS**.
6. Click **Merge**.
7. When the confirmation message displays, click **Yes**.
8. 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.
9. When the merge is complete, click **OK**.