



Merging Duplicate People or Companies

Duplicate records can be merged by dragging the record from the selector screen onto the 'main' open record.

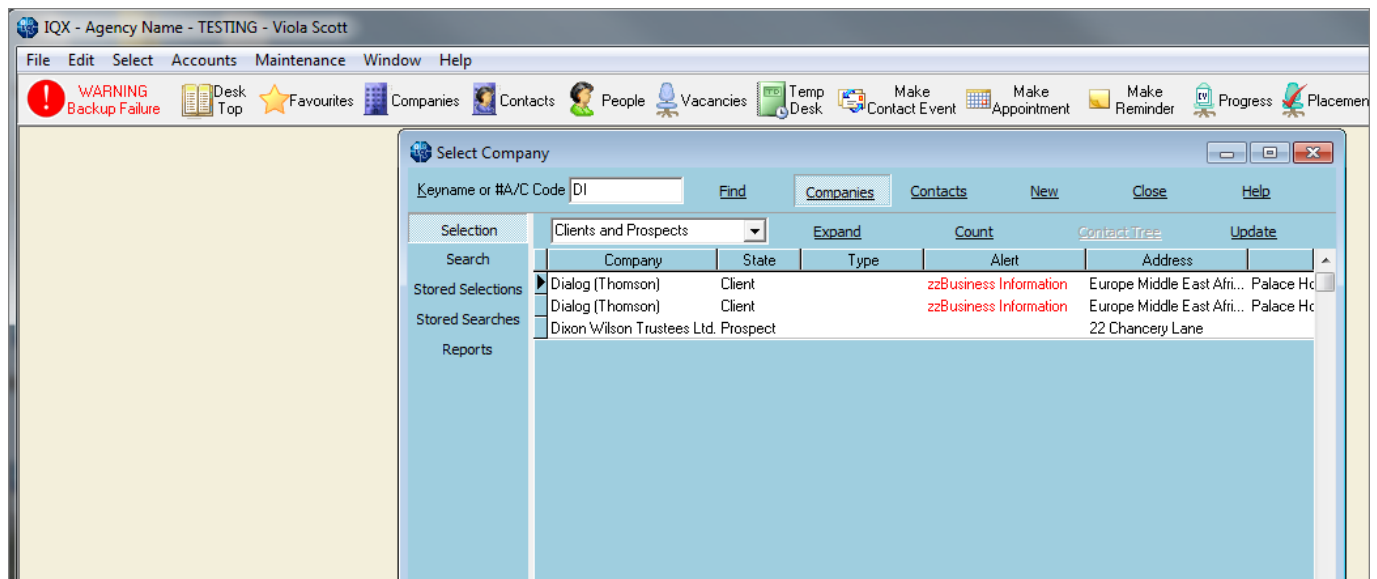
The main details - address, phone numbers, state, payroll number of the open record remain the same and all the links to skills, contact events, reminders, progress, placements, timesheets, etc. will be added to the open record.

This can only be done if the forms are NOT maximised as you drag from one form to another. It can only be done by users with drag merge rights set.

Companies

Open the Company Selector form and move it to the right of the screen.

Bring up the records to be merged on the selector.



Open the one you want to keep as the 'main' record and place it on the left of the screen.

Click only once back on the selector form on the line of the record you want to merge into the open 'main' record, the black arrow will show pointing to the selected line.

Then drag from the selector onto the open record until you see the cursor change. When you drop you will be asked to confirm that you want to merge.



The screenshot shows the iqx software interface. On the left, the 'Dialog (Thomson)' record is displayed with various fields like Name, Address, Phone, and Account Code. On the right, the 'Select Company' dialog box is open, showing a list of companies. A red arrow points from the 'Dialog (Thomson)' record to the 'Select Company' dialog box.

Company Contacts

All the contacts from the merged record will now be on the open record. If there are duplicate Contacts they can be merged within the company record.

Select the 'main' contact so the details appear top right, then click once on the other contact and drag from the line to the top right area. When you drop you will be asked to confirm that you want to merge.

The screenshot shows the iqx software interface. On the left, the 'Dialog (Thomson)' record is displayed. On the right, the 'Contact Tree' table is visible, showing a list of contacts. A red arrow points from the 'Contact Tree' table to the 'Dialog (Thomson)' record.

Select	Add	Contact Tree	Person	Leave	Include Former	Include Temps	Include Placed				
		Name	Status	Primary	Job Title	Note	Department	Start Date	Leave Date	Temp	Do not re emp
		Alison Fay	Client	☐	HR Officer					☐	☐
		Alison Fay	Client	☐	HR Officer					☐	☐

Person

Move the Selector to the right of the screen and bring up the records to be merged on the selector.

Open the record you want to remain as the 'main' record and place it on the left of the screen.



Click only once back on the Selector Form on the line you want to 'disappear' so the black arrow is seen.

Then drag from the selector onto the Open record until the cursor changes. When you drop you will be asked to confirm that you want to merge.

The screenshot shows the iqx software interface. On the left, the 'Bridget Jones' record is displayed with various fields like Name, State, and Contact Events. On the right, the 'Select Person' dialog is open, showing a list of search results for 'JONES'. A red arrow points from the 'Reports' button in the 'Select Person' dialog to the 'Bridget Jones' record in the main window.

Selection	Name	State	Address	Count
Search	Brian Jones	Current		
Stored Selections	Bridget Jones	Current		
Stored Searches	Bridget Jones	Current	8 Oxford Street	
Reports	Bridget Jones	Current		
Mail Merge	Jane Jones	Current		
Bulk CV Import	Janie Jones	Current		
Mailer Selections	Julia Jones	Current		
	Sally Jones	Current	House	
	Sally Jones	Current		
	Simon Jones	Current	3 Clifford Bridge Road	Binley

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