Merging Duplicate People or Companies

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

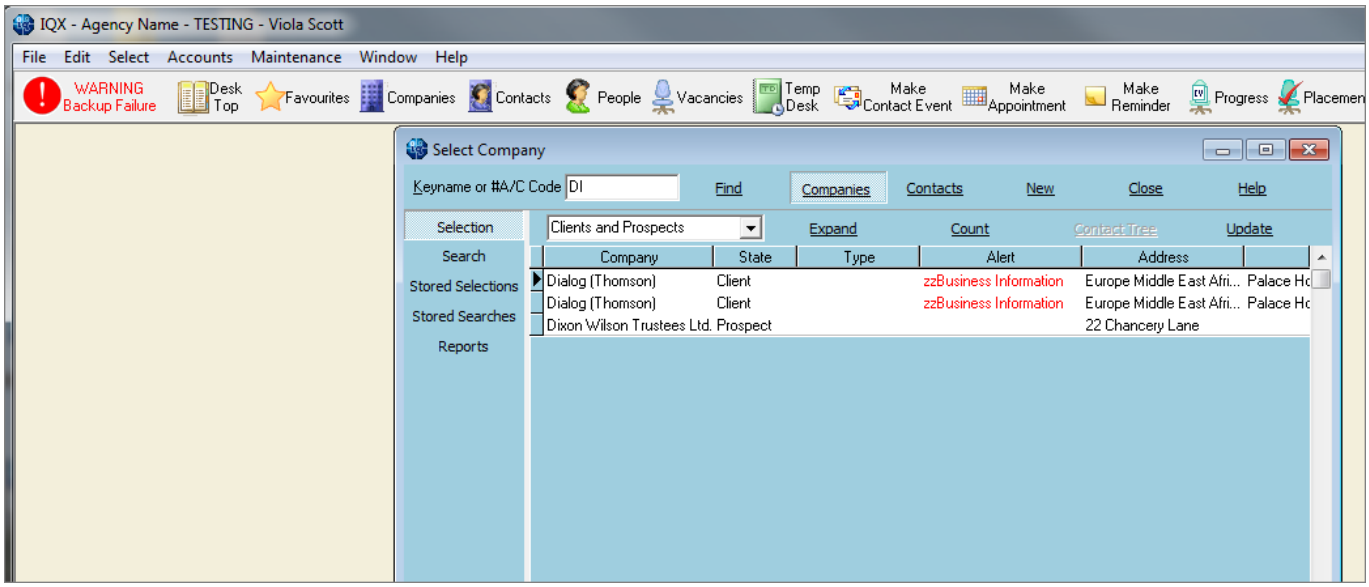
The main details - address, phone numbers, state, payroll number of the open record remain the same and all the links to skills, contact events, reminders, progress, placements, timesheets, etc. will be added to the open record.

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.

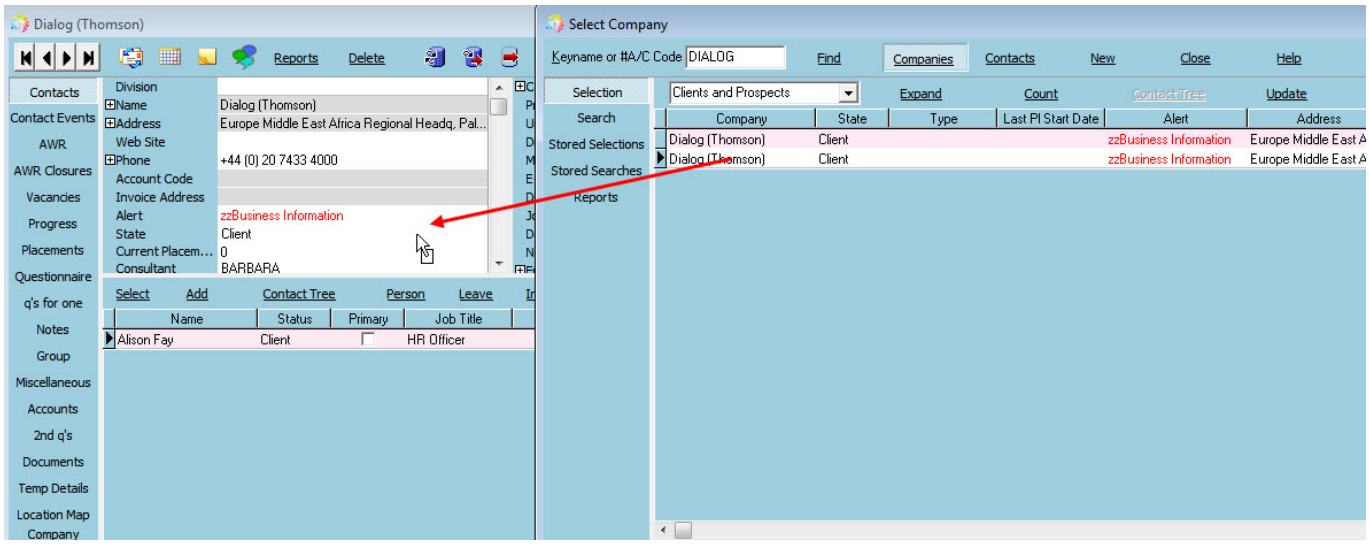
Bring up the records to be merged on the selector.



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.

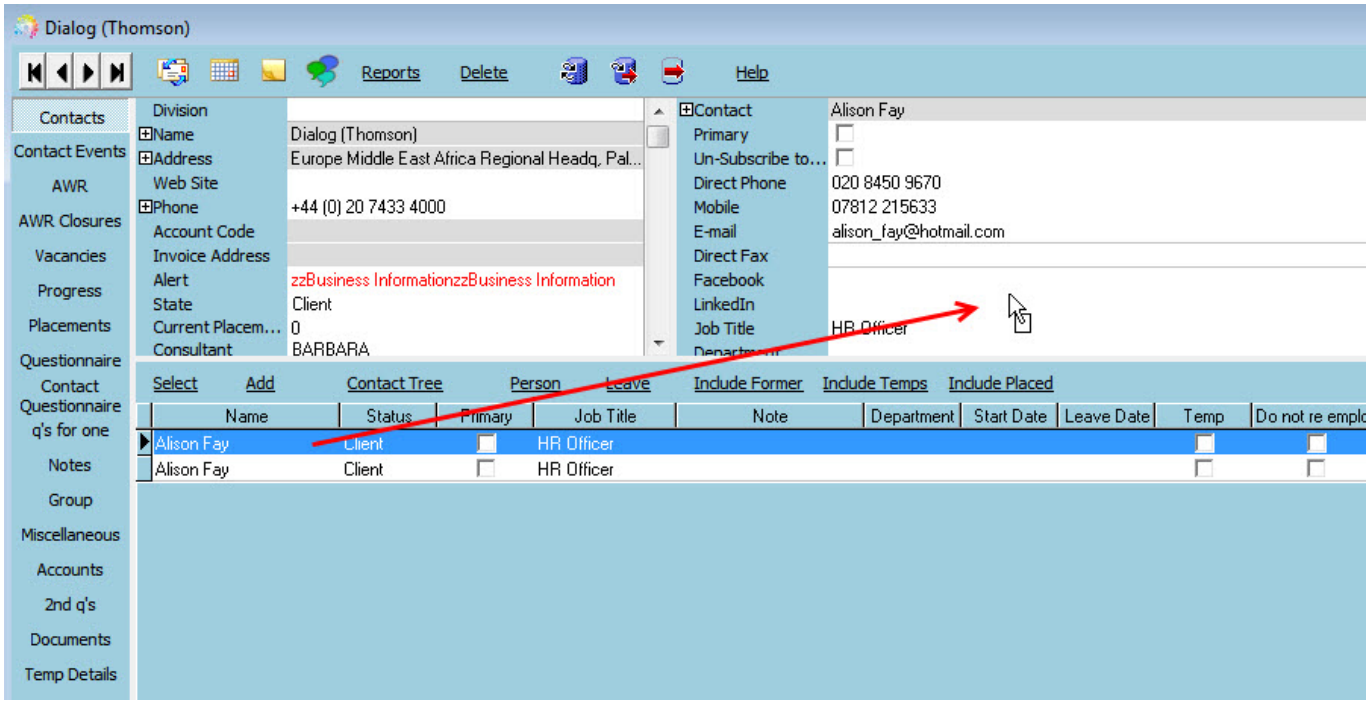
Then drag from the selector onto the open record until you see the cursor change. When you drop you will be asked to confirm that you want to merge.



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.



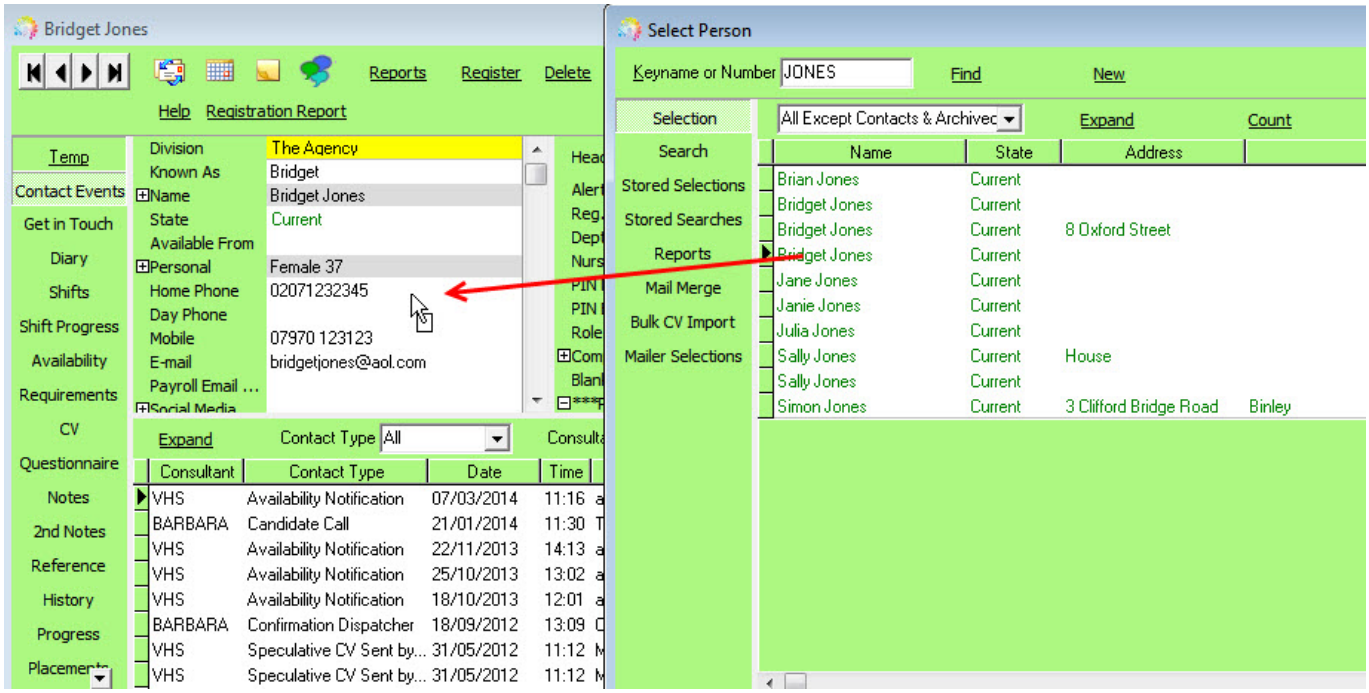
Person

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.



From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=hat_17&rev=1399292144

Last update: **2017/11/16 21:56**