



Merging Duplicate People or Companies

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

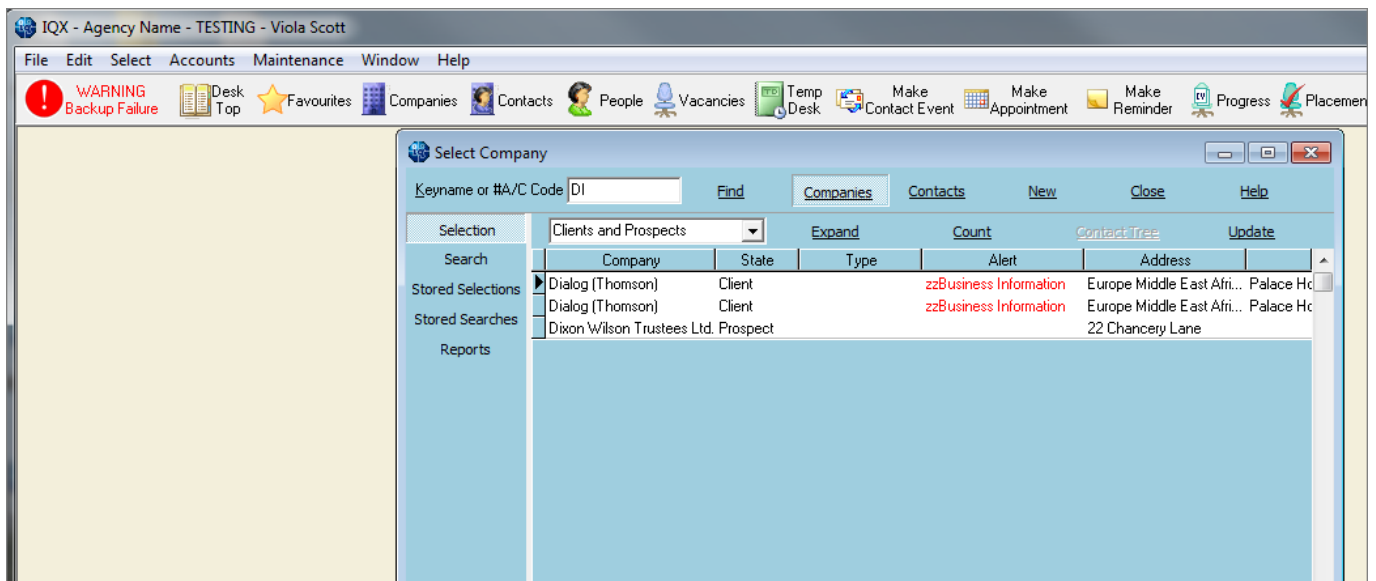
The main details - address, phone numbers, state, payroll number of the open record remain the same and all the links to skills, contact events, reminders, progress, placements, timesheets, etc. will be added to the open record.

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 fields for Name, Address, Phone, Account Code, Invoice Address, Alert, State, Current Placem..., and Consultant. A red arrow points from the 'Dialog (Thomson)' record to the 'Select Company' dialog box on the right. The 'Select Company' dialog box has a search bar with 'DIALOG' entered and a table of results. The table has columns for Selection, Company, State, Type, Last PI Start Date, Alert, and Address. The results show 'Dialog (Thomson)' as a Client with 'zzBusiness Information' as the Alert and 'Europe Middle East A' as the Address.

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 with fields for Name, Address, Phone, Account Code, Invoice Address, Alert, State, Current Placem..., and Consultant. A red arrow points from the 'Contact Tree' table to the 'Contact' details section on the right. The 'Contact Tree' table has columns for Name, Status, Primary, Job Title, Note, Department, Start Date, Leave Date, Temp, and Do not re empl. The results show 'Alison Fay' as a Client with 'HR Officer' as the Job Title. The 'Contact' details section shows fields for Primary, Un-Subscribe to..., Direct Phone, Mobile, E-mail, Direct Fax, Facebook, LinkedIn, Job Title, and Department.

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 is the 'Bridget Jones' record form, and on the right is the 'Select Person' dialog. A red arrow points from the 'Bridget Jones' record in the 'Select Person' dialog to the 'Bridget Jones' record in the main window.

Bridget Jones Record:

Temp	Division	The Agency
Contact Events	Known As	Bridget
Get in Touch	Name	Bridget Jones
Diary	State	Current
Shifts	Available From	
Shift Progress	Personal	Female 37
Availability	Home Phone	02071232345
Requirements	Day Phone	
CV	Mobile	07970 123123
Questionnaire	E-mail	bridgetjones@aol.com
Notes	Payroll Email ...	
2nd Notes	Social Media	
Reference		
History		
Progress		
Placement		

Select Person Dialog:

Keyname or Number: JONES Find New

Selection: All Except Contacts & Archived Expand Count

Search	Name	State	Address	Count
Stored Selections	Brian 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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