

This guide serves as an overview of how to merge projects/companies/contacts. Merging provides a way to allow an administrator to manage duplicate projects, companies or contacts in the system. It is important to use Merge instead of deleting to make sure that any inspection information that was collected is retained before a duplicate is removed.

Covered Topics:

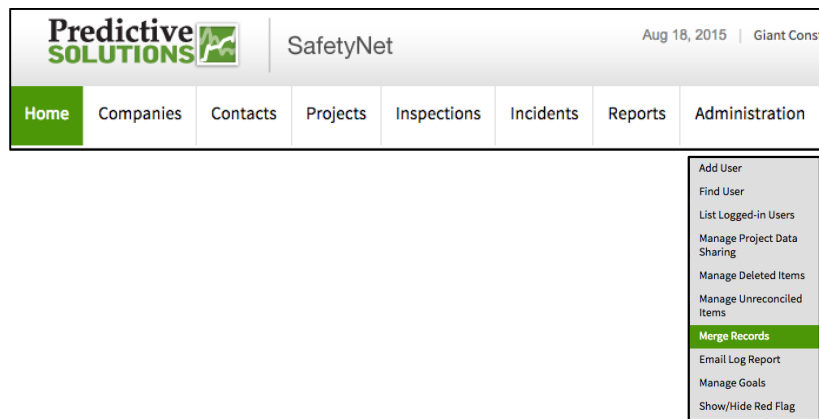
- Selecting Merge Type
- Searching For Items to Merge
- Final Merge

Selecting Merge Type

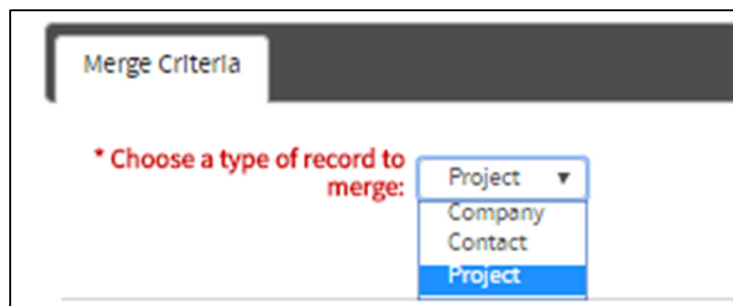
You have the ability to merge projects, companies or contacts. Keep in mind that some customers may have customized labels so different terms might be used instead of the standard project, company and/or contacts.

*** Note: Merging multiple records is an irreversible action. Please exercise caution in the selection of records to merge, and do not proceed without complete understanding of the consequence.**

1. Go to Administration menu and select "Merge Record".

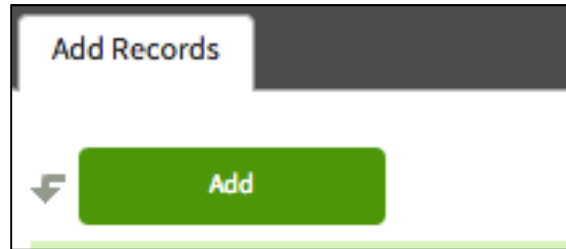


2. Under "Merge Criteria" tab select the type of record to merge. (Project, Company, Contact)

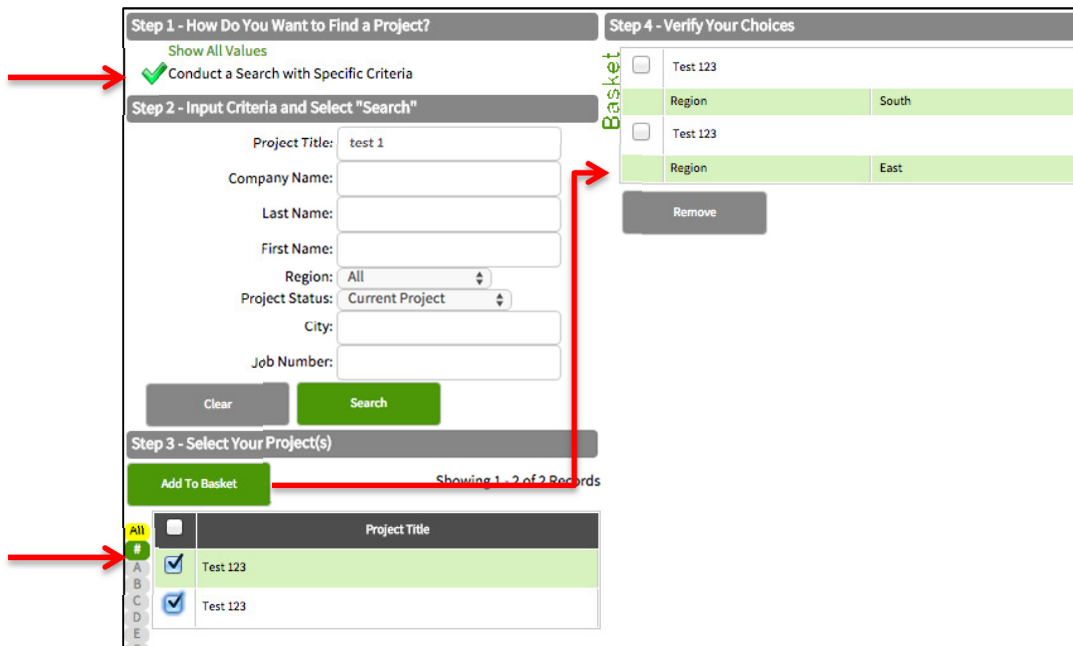


Searching For Items To Merge

- Under “Add Records” tab select “Add”, which will launch the picker in step 2.



- Find the specific records you want to merge either by searching, selecting on letter (A, B, etc.) or scrolling through the list. Check the box to select then click on “Add To Basket”.



- Then scroll down and select “Finish” and then the screen will refresh and the records to merge should be listed.

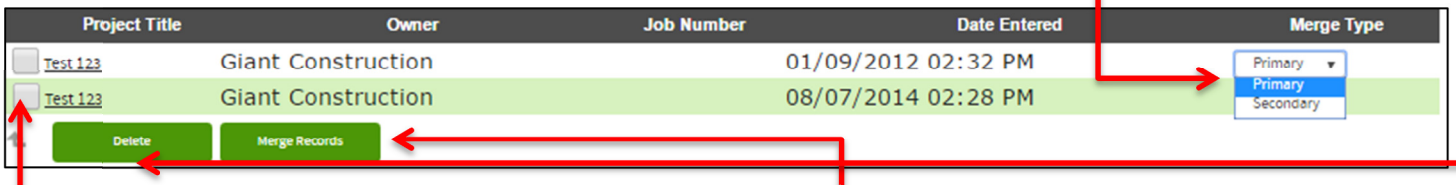
Project Title	Owner	Job Number	Date Entered	Merge Type
<input type="checkbox"/> Test 123	Giant Construction		01/09/2012 02:32 PM	Primary ▼
<input type="checkbox"/> Test 123	Giant Construction		08/07/2014 02:28 PM	Secondary ▼

Final Merge

Before you do the final merge you need to select your “Primary” record. By setting a record to primary this means that it will use all of the information from this record. Then any new information will be added from the “Secondary” record.

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1. Select a record as “Primary” by tapping on the drop-down:



2. Then select “Merge Records”
3. Records selected by mistake can be removed from the “Merge Records” selection screen by checking the checkbox for the one we added wrongly, and then clicking on the “Delete” button. Please note that the “Delete” button on this screen only removes the record from this screen (not from the database).
4. Once the records are merged you will get the following message indicating the merger is complete.

