

Resolve Duplicates

<i>Speech</i>	<i>Cursor Actions</i>
<p>In your contact list, you may notice that you have two contact records for the same person. This sometimes happens after importing a large number of contacts in your database.</p> <p>Duplicate contacts cause several problems:</p>	
<p>They take up extra space in your list windows and in the database itself.</p>	Show slide.
<p>The duplicates may get updated independently of one another, so one may have a recently changed phone number but the other still has the old phone number.</p> <p>If information is sometimes linked to one contact record and sometimes to another one, it is very difficult to track your interactions with that individual.</p>	Show slide.
<p>For example if a \$300 donation is recorded for one contact, and another \$300 donation for the other, you will not realize that this donor has actually given \$600.</p> <p>If you notice duplicate contacts in your database, do <i>not</i> delete one of them,</p>	<p>Expand contact record. Highlight donation. Expand another contact record. Highlight donation.</p>
<p>but instead use the Resolve Duplicates button to put the duplicate records together. That way, you create a single contact that has all the additional information that the two separate records had before. When you merge contacts in Sumac, any additional information, like communications and donations, is connected to the single resulting contact record.</p>	<p>Expand Special Editing. Point to Resolve Duplicates.</p>
<p>For example, there are two John Smith contacts. I can tell that they are duplicates because they have the same first and last name, as well as the same address and phone number.</p> <p>When I expand on either contact, notice that there is different information related to each of them.</p>	<p>Highlight two John Smith records. Point to First and Last name. Point to Address and Phone</p>
<p>This John Smith has a number of communications and donations associated with him.</p>	<p>Highlight records associated with the first John Smith.</p>
<p>The other John Smith also has some communication and donation records, as well as a few time docket.</p>	<p>Highlight records associated with the second John Smith.</p>
<p>To merge these two John Smiths together, select both of them.</p>	<p>Select the two John Smith records.</p>
<p>Click Resolve Duplicates.</p>	<p>Click Resolve Duplicates.</p>

The first window summarizes the additional information recorded for each contact. All these related pieces of information will be attached to the one resulting John Smith	Point to each Contact column.
Click OK.	Click OK.
The next window shows you all the fields in the contact record. It also has columns for three different contacts.	Point to list of fields in contact record.
The first column holds the information recorded in the first John Smith's contact record.	Point to first column.
The second column holds the information recorded in the second John Smith's contact record.	Point to second column.
Sumac highlights different fields in red. This helps you compare the fields in both John Smiths' contact records, and choose what information is correct and should be included	Point to fields in red.
in the final, merged John Smith record, which shows in the third column.	Point to third column.
To make things a bit easier, this radio button at the top of this window lets you show only the different fields.	Point to Show Only Different Fields. Click it.
To choose what information should be included in the resulting John Smith record, compare the different fields. For example, this John Smith has a Province listed as "Ontario." The other John Smith simply has "ON."	Point to red Ontario and ON.
In my database, I've been using the short forms for all states and provinces,	
so I want "ON" to appear in the resulting John Smith record. Click "ON" and Sumac enters "ON" into the resulting John Smith column.	Point to "ON" in resulting John Smith column.
Continue this process for all the different fields in these contacts' records to determine how the resulting John Smith will appear.	Click on more red text in different columns.
Click OK	Click OK.
and Sumac merges the two John Smiths into one single John Smith record.	Point to single John Smith in Contacts list.
If I expand the new John Smith record, you see that all related information – communications, donations <i>and</i> time docket – are now attached to the single John Smith record.	Expand John Smith. Point to related information.
<i>Check out more training videos to learn more about Sumac.</i>	