Merging Contacts

If you have 2 or more records in your contact list that represent the same actual person, you will most likely find it helpful to combine the details contained in those separate records into a single record.

When you merge duplicate records together, you must designate one of them as the "primary" record. The merged record uses any data in the primary record, even if one or more of the other original records has conflicting data. If a field in the primary record is blank, then the value is taken from the most recently updated of the other records.

Some aspects of a contact, such as groups, notes, and loans associated with the record, are additive; all these items included in any of the original records are combined and retained in the new record. In addition, a new general note is added to the merged contact with some details about the merge operation itself.

If more than 1 of the contacts being merged are on the same journey, the merged contact will be placed on that journey at the same point as the contact who had progressed furthest along that journey. If the contacts being merged are on different journeys, the merged contact will be placed on each of those journeys at the same points.

Tip
Depending on the intent of these journeys, you may want to consider manually stopping some of them.

The most restrictive marketing consent setting applied to any of the original records is kept in the merged record. For example, if *any* of the records indicates that the contact has opted out of email, the merged record will also be opted out.

In the following simple example, 2 similar contact records are being merged, with the first designated as the primary record. The resulting merged record is the same as the primary record, except that it brings in a phone number from the other record (because the primary record has none) and includes all the groups that both original contacts were assigned to.

Example Merge	Original Records		Merged Record
Primary Record	✓		
First Name	William	Bill	William
Last Name	Johnson	Johnson	Johnson
Nickname	Bill		Bill
Email Address	w.johnson@example.com	billjohnson@example.com	w.johnson@example.com
Cell Phone Number		(555) 555-5555	(555) 555-5555
Groups	buyers	veterans, prospects	buyers, veterans, prospects

Note
When you merge contacts, a new record is created. The original records are removed from your list in the platform, but they still exist in the database with a link to the new record. This means that if any external services are configured to push updates to one of the original records, those updates will be pushed through to the new record.

Manual Merge

To merge contact records:

1. Navigate to **Leads & Contacts → Contacts**.
2. Select the checkboxes for the contact records that you want to merge. You can only merge contacts records that you own in the platform.
3. Select **Actions → Merge Contacts**.
    a. This option is not available when only 1 contact is selected or when more than 5 contacts are selected. If you need to merge more than 5 contacts, you will need to perform multiple merge operations.
4. The Merge Contacts box opens. This box has 2 screens for you to step through.
    a. 1st screen:
        i. You are shown a list of all the contacts you selected to merge with the following identifying details:
            - full name (including title and suffix, if applicable)
            - full mailing address
            - email address
            - cell phone number
            - lead source
            - date and time the contact record was last updated

Note
You can click the **View Details** link for any contact here to open that contact's details page in a new tab.

        ii. On the left side, select the radio button for the record you want to be the primary record. The selected record is highlighted blue and has the label Current Contact below the name.
        iii. Click the **Next>** button.
    b. 2nd screen:
        i. You are shown a preview of the merged contact, including the same details listed above.
        ii. Review the description of some of the ways the data from the merged contacts is handled.
        iii. Check the box indicating that you acknowledge these effects.
        iv. Click the **Merge Contacts** button. (If the box above has not been checked, you are alerted to do so before you can proceed.)

Warning
Once a merge operation has been completed, it cannot be undone.
If you inadvertently merge any contacts in error, you will not be able to re-create those contacts with the same data using the Data Importer; these would be considered duplicate records and will not import successfully. You would have to re-create the contacts manually or contact Customer Support for assistance.

When the contacts have been merged, the box closes and the contact list updates. The original contact records are no longer available and are replaced by a single, new contact record with the merged information.

If any of the original contacts were shared with other users, the new record is shared with those users. If more than 1 of the original contacts were assigned, but not to the same user, the new record is assigned only to the user the primary contact had been assigned to.

API and Webhooks with Merging

Use the following examples to help set up how your system handles API responses.

Suppose you have created 2 contacts in the system, given ID numbers 9 and 10. Contact 9 was created through the UI, so there is no API response. Contact 10 was created using a POST command, so the following response is generated:

```
{
      "created": "external-api.totaldev.us/v1/contacts/10",
      "id": 10
}
```

If you then decide that contacts 9 and 10 are duplicates and use the merge feature outlined above, you will receive the following to notify you of the merge action:

```
{
      "item":"CONTACT",
      "id":11,"action":"CREATED",
      "hashValue":"7754099469a159fe64f84673c4a27670",
      "secret":"abcd1234"
}
```

Note that the above response indicates that a new contact, with ID 11, has been created. Contacts 9 and 10 are retained the database, but flagged as duplicates tied to the new contact. If you (or an external service) attempt to update record 10 with a new POST command, you will receive the following response:

```
{
      "duplicate": "external-api.totaldev.us/v1/contacts/11",
      "id": 11
}
```

This indicates that the record you have attempted to update is a duplicate and that your changes should be posted to record 11 instead. You can configure your system to automatically take a response of this type and generate a new POST command that targets record 11 instead.

