




# How to Merge Prospect Records

## Description

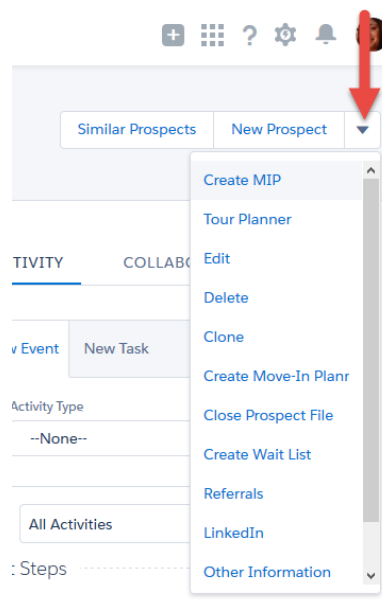
Use this function to combine duplicate prospect records into one

The system will automatically:

-  Move information from the duplicate prospect page to the file you would like to keep
-  Move activities from the duplicate prospect's file to the one being kept
-  Close the duplicate prospect file and flag it as a duplicate

## Step by Step

Note: The actions at the top of the prospect file may appear differently for different clients. The first two to four actions will appear at the top, and the remaining actions can be accessed by clicking on the drop-down arrow on the right





- 1 Navigate to one of the prospect files that you would like to merge
- 2 Click the **Similar Prospects** action


- 3 The system will search your database for inquirers, prospects, and spouses that have the same last name, phone number, or email address. Matches will be highlighted in red.
- 4 Review any matches to determine whether a match is a duplicate
- 5 If a duplicate is found, you can merge the two records by clicking on the **Merge** icon

Prospect

Prospect Name	Singer, Abraham (Lil Bassett)	ProspectFinder	Singer, Abraham (Lil Bassett) ( )
Inquirer Last Name	Singer	Inquirer's Email	
Prospect's Last Name	Bassett	Prospect's Email	
Spouse's Last Name		Spouse's Email	
Inquirer's Phone 1		Prospect's Phone 1	



Potential Duplicated Prospects (1)

Merge	Name	Inquirer Last Name	Prospect Last Name	Spouse Last Name	Inquirer Phone	Prospect Phone	Inquirer's Email	Prospect's Email	Community
	 Machin, Cathy (Lillian Bassett)	Machin	Bassett		(713) 638-2130	6132531437			RHS Sample Community




- 6 Decide which record you would like to keep and click **Keep**. NOTE: If one of the records has a move-in planner attached to it, you *must* keep the record with the move-in planner. If both records have move-in planners, you must keep both and will not be able to merge.

Select prospect you want to keep

 Machin, Cathy (Lillian Bassett) <b>Keep</b>	 Singer, Abraham (Lil Bassett) <b>Keep</b>
Task (9) Marketing Events Attended (18)	Traffic Source History (1)

Cancel



- 7 The screen will populate with fields that have data entered. Choose which data to keep in each field by clicking **Copy** by the data you would like to keep. The right-hand column displays data that you have chosen to keep.

Field	Machin, Cathy (Lillian Bassett)	Singer, Abraham (Lil Bassett)	Keep: Machin, Cathy (Lillian Bassett)
Inquirer First Name	Copy Cathy	Copy Abraham	Cathy
Inquirer Last Name	Copy Machin	Copy Singer	Machin
Initial Contact Date	Copy 1/1/2008	Copy 2/19/2016	1/1/2008
Mailing Label Instructions	Copy	Copy Inquirer	Inquirer
Amount	Copy \$500.00	Copy	500.00
Anticipated Move-in Date	Copy 8/20/2009	Copy	8/20/2009
As things change, do you have a plan?	Copy 2016-02-19 20:15 (nt) Planning to find a senior living community.	Copy	2016-02-19 20:15 (nt) Planning to find a senior living community.
Are you thinking about living w/children	Copy 2016-02-19 20:15 (nt) This is not an option as space is limited at daughter's house.	Copy	2016-02-19 20:15 (nt) This is not an option as space is limited at daughter's house.

8 Click **Merge Prospect** at the top of the screen

Select prospect you want to keep

Machin, Cathy (Lillian Bassett) Keep

Task (9)

Marketing Events Attended (18)

Singer, Abraham (Lil Bassett) Keep

Traffic Source History (1)

Cancel
➔
Merge Prospect

9 Click **OK**

10 Activities from the duplicate file will automatically move from the duplicate file to the file you have chosen to keep

11 The **Status** of the duplicate file will be set to *Duplicate*