

How to Merge Duplicate Entities



Merging Rules

1. A Primary entity is required to merge entities
2. There can only be one Primary
3. When two entities are merged, the Primary entity is the one that the others will be merged into.

1. Open an entity search screen then click the New button
2. Add values to fields with the duplicate values for the entities to be merged
3. Click the **Find Duplicates** toolbar button

Create New Entity

Find Duplicates Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name: irely

Contact:

Location:

Phone:

Email:

Search Address: Enter address to search...

Address: Fort Washington Avenue

City: New York State: NY

Zip/Postal: Country: United States

Time Zone: (UTC-04:00) Eastern Daylight Time

Organization: Company

Line of Business: BioFuel

? Ready

Duplicate Entities

Add Merge Close

Details

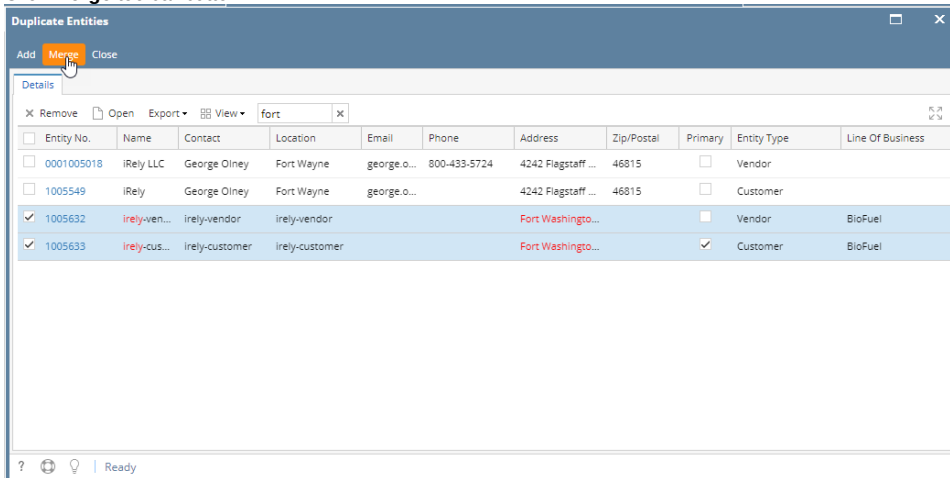
X Remove Open Export View fort

Entity No.	Name	Contact	Location	Email	Phone	Address	Zip/Postal	Primary	Entity Type	Line Of Business
0001005018	IReily LLC	George Olney	Fort Wayne	george.o...	800-433-5724	4242 Flagstaff ...	46815	☐	Vendor	
1005549	IReily	George Olney	Fort Wayne	george.o...		4242 Flagstaff ...	46815	☐	Customer	
1005632	Irely-ven...	Irely-vendor	Irely-vendor			Fort Washingto...		☐	Vendor	BioFuel
1005633	Irely-cus...	Irely-customer	Irely-customer			Fort Washingto...		☐	Customer	BioFuel

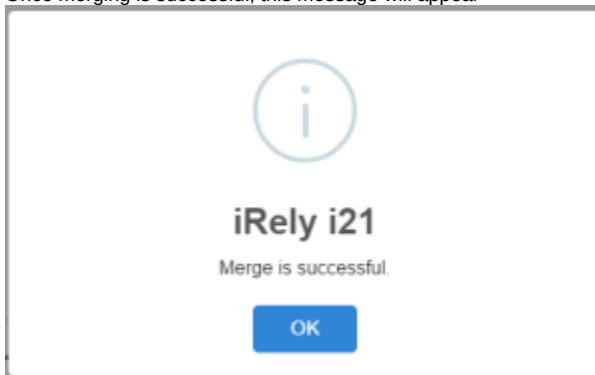
? Ready

4. On Duplicate Entities screen, select 1 Primary
5. Select the entities to be merged

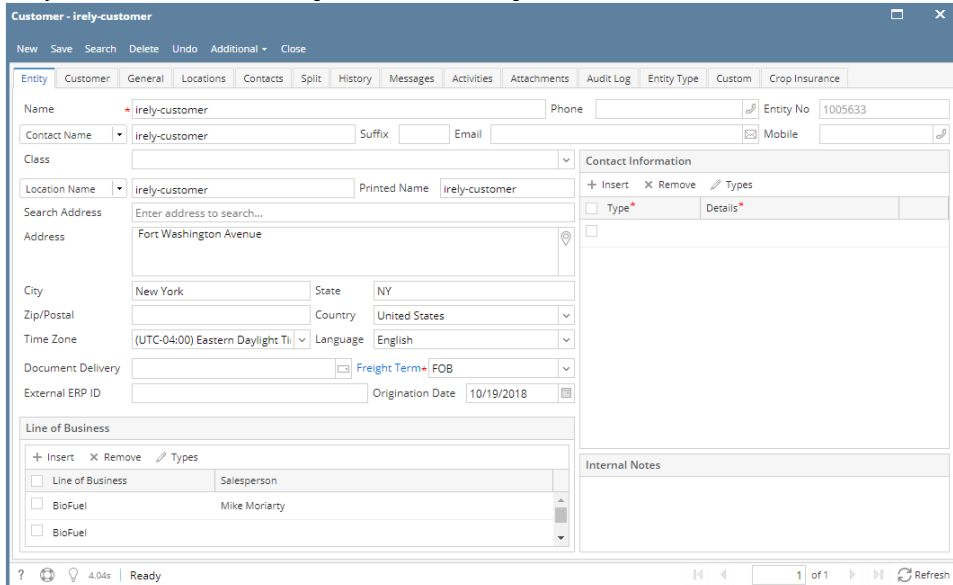
6. Click **Merge** toolbar button



a. Once merging is successful, this message will appear



b. Entity screen will show after clicking OK button on message box



1. On Duplicate Entities screen, select 1 Primary

Duplicate Entities

Add Merge Close

Details

X Remove Open Layout 101 X

Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
☒ 0001005148	101-cust	101-cust				2392	☒	Customer
☐ 0001005149	101-vend	101-vend				2392	☐	Vendor

2. Select the entities to be merged

Duplicate Entities

Add Merge Close

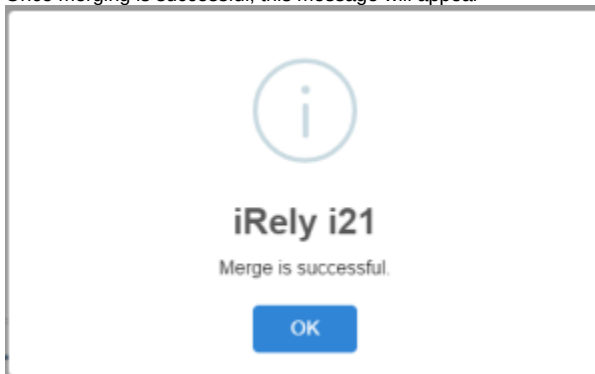
Details

X Remove Open Layout 101 X

Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
☒ 0001005148	101-cust	101-cust				2392	☒	Customer
☒ 0001005149	101-vend	101-vend				2392	☐	Vendor

3. Click Merge toolbar button

- a. Once merging is successful, this message will appear



- b. Entity screen will show after clicking OK button on message box

Entity - 101-cust

New Save Search Refresh Undo Additional Close

Entity General Customer Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (1)

Name: 101-cust Phone: Entity No: 0001005148

Contact Name: 101-cust Email: Mobile:

Location Name: 101-cust Origination Date: 7/21/2016

Address:

Zip/Postal: 2392 City: Tenterfield

State/Province: NSW Country: Australia

Timezone: (UTC-12:00) International Date Line West

Document Delivery:

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Internal Notes:

Contact Information

+ Insert X Remove Types

Type Details

Entity Type

+ Insert X Remove

Entity Type

☒ Customer

☐ Vendor



Merging Rules

1. A Primary entity is required to merge entities
2. There can only be one Primary
3. When two entities are merged, the Primary entity is the one that the others will be merged into.
4. Merging of 2 entities of the same type is not allowed

1. On Duplicate Entities screen, select 1 Primary

The screenshot shows the 'Duplicate Entities' window with a table of records. The first row is highlighted with a red border.

Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
0001005122	102-Ent	102-Ent	102-Ent@irely.com	123-456	102-Ent address	46772	☒	Vendor
0001005123	103-Ent	103-Ent	103-Ent@irely.com	123-456	103-Ent address	46772	☐	Customer

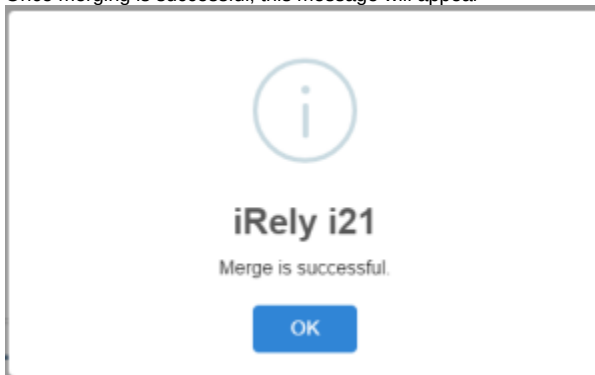
2. Select the entities to be merged

The screenshot shows the 'Duplicate Entities' window with the same table. Both rows now have their checkboxes selected.

Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
☒ 0001005122	102-Ent	102-Ent	102-Ent@irely.com	123-456	102-Ent address	46772	☒	Vendor
☒ 0001005123	103-Ent	103-Ent	103-Ent@irely.com	123-456	103-Ent address	46772	☐	Customer

3. Click **Merge** toolbar button

- a. Once merging is successful, this message will appear



- b. Entity screen will show after clicking OK button on message box

The screenshot shows the 'Entity - 102-Ent' screen with various fields and tabs. The 'Entity Type' section is highlighted with a red border.

Entity - 102-Ent

Entity Customer Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (1)

Name: 102-Ent Phone: 123-456 Entity No: 0001005122

Contact Name: 102-Ent Email: 102-Ent@irely.com Mobile:

Location Name: 102-Ent Location Origination Date: 03/28/2016

Address: 102-Ent address

Zip/Postal: 46772 City: MONROE

State/Province: IN Country: United States

Timezone: (UTC-11:00) Coordinated Universal Time-11

Print 1099: ☐ 1099 Name:

1099 Form:

1099 Type:

Federal Tax ID:

W9 Signed:

Internal Notes:

Contact Information

+ Insert X Remove Types

☐ Type Details

Entity Type

+ Insert X Remove

☐ Entity Type

☒ Vendor

☐ Customer

User Portal

Portal Access: ☐ Portal Admin: User Role