

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 [Close]

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: [Empty]

Location: [Empty]

Phone: [Empty]

Email: [Empty]

Search Address: Enter address to search...

Address: Fort Washington Avenue [Location Icon]

City: New York State: NY

Zip/Postal: [Empty] Country: United States

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

Organization: Company

Line of Business: BioFuel

? [Icons] Ready

Duplicate Entities [Add] [Merge] [Close]

Details

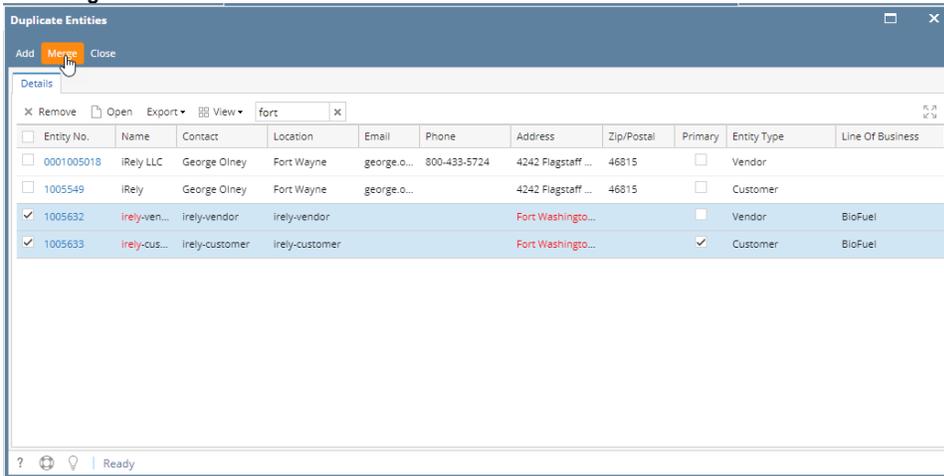
X Remove [Open] [Export] [View] [fort] [X]

Entity No.	Name	Contact	Location	Email	Phone	Address	Zip/Postal	Primary	Entity Type	Line Of Business
<input type="checkbox"/> 0001005018	iRely LLC	George Olney	Fort Wayne	george.o...	800-433-5724	4242 Flagstaff ...	46815	<input type="checkbox"/>	Vendor	
<input type="checkbox"/> 1005549	iRely	George Olney	Fort Wayne	george.o...		4242 Flagstaff ...	46815	<input type="checkbox"/>	Customer	
<input type="checkbox"/> 1005632	iRely-ven...	iRely-vendor	iRely-vendor			Fort Washingto...		<input type="checkbox"/>	Vendor	BioFuel
<input type="checkbox"/> 1005633	iRely-cus...	iRely-customer	iRely-customer			Fort Washingto...		<input type="checkbox"/>	Customer	BioFuel

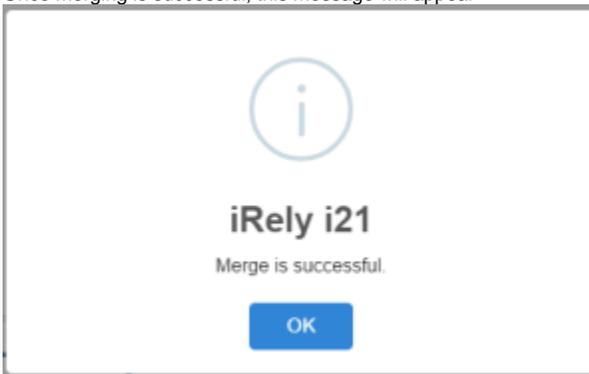
? [Icons] Ready

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

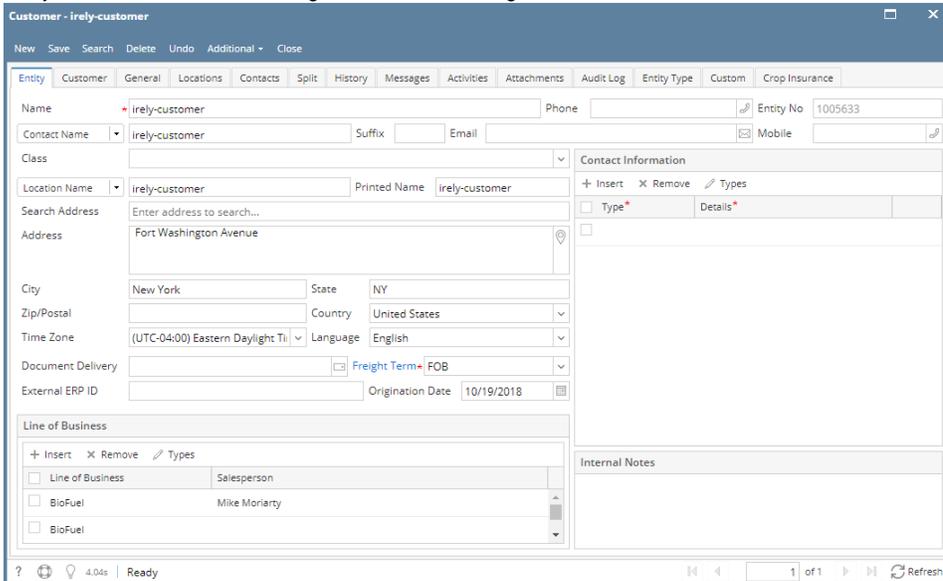
6. Click **Merge** toolbar button



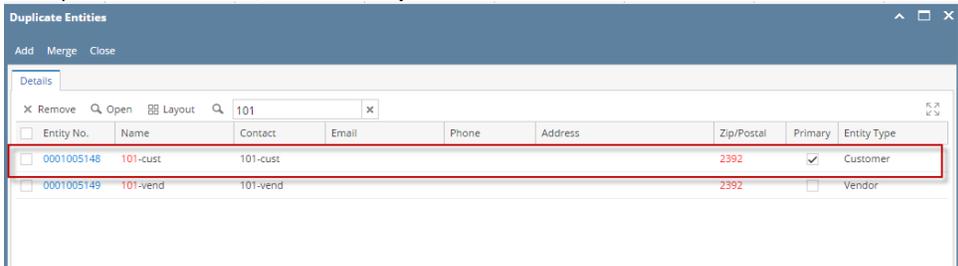
a. Once merging is successful, this message will appear



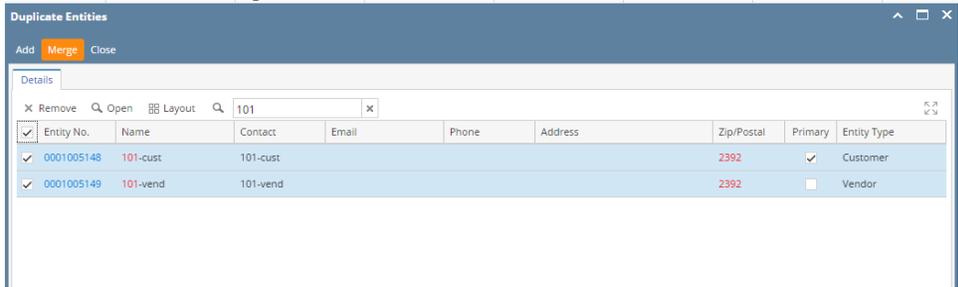
b. Entity screen will show after clicking OK button on message box



1. On Duplicate Entities screen, select 1 Primary

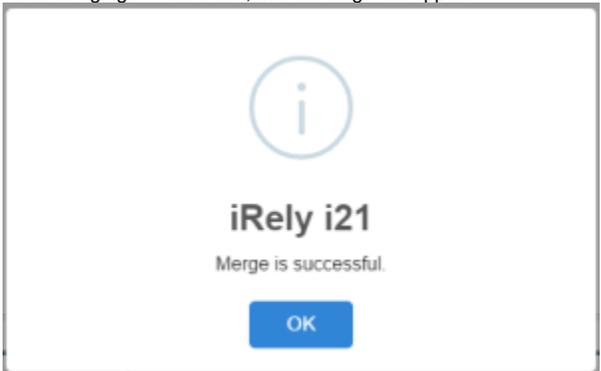


2. Select the entities to be merged

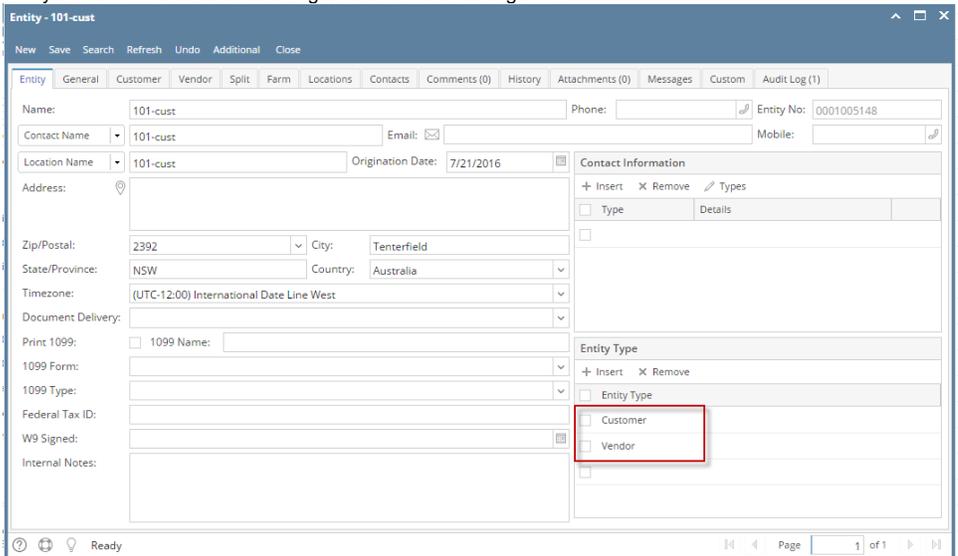


3. Click Merge toolbar button

a. Once merging is successful, this message will appear



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



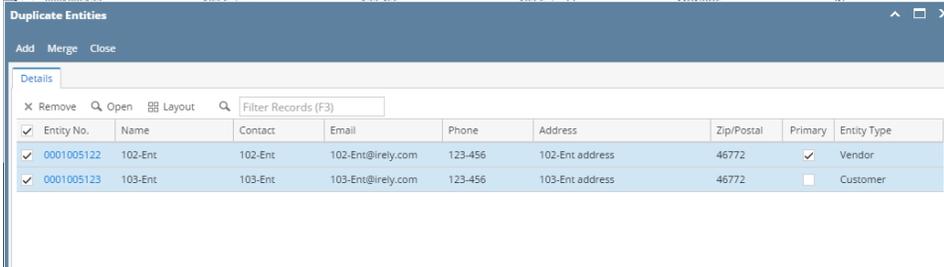
Merging Rules

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

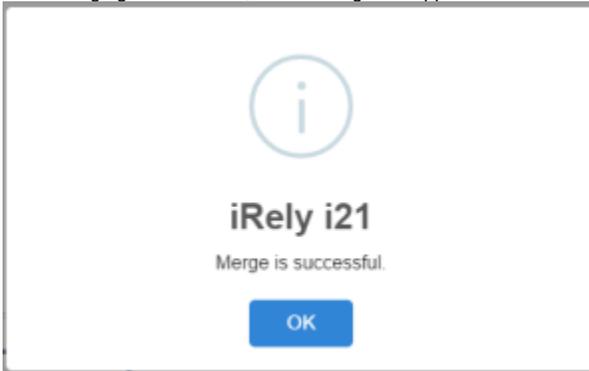


2. Select the entities to be merged



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

