# How to Merge Duplicate Entities

#### Merging Rules Δ

- 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
- Add values to fields with the duplicate values for the entities to be merged
   Click the Find Duplicates toolbar button

1	Create New Entity	/							×	
	Find Duplicates C	lose								
	Details									
		This screen ( it can be use	can be used t ed to check fo	to add a or Dupli	a new Entity cate Entities	if no duplic and merge	ate entity them.	exists	or	
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	Duplicate Entities									
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	I 0005540	L-AARTA ( )IAAV	Fort Wayne	george.o		4242 Flagstaff	46815		customer	
	1005549 iRely     1005632 irely-yeep	irely-yendor	irely-yendor			Fort Washingto			Vendor	BioFue

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

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#### 6. Click Merge toolbar button

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1005549 iRely Geo	rge Olney	Fort Wayne	george.o		4242 Flagstaff	46815		Customer			
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b. Entity screen Customer - irely-cust New Save Search	will shi omer Delete Ur	OW after clin	cking Ol	K button	on messag	e box					
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Search Address	Enter add	dress to search					Туре*	Details	·		
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#### 1. On Duplicate Entities screen, select 1 Primary

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Add Merge Close								
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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									×
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✓ 0001005149 101-vend	101-vend				2392		Vendor		

### 3. Click Merge toolbar button

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Merge is successful.	
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#### b. Entity screen will show after clicking OK button on message box

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ederal Tax ID:								_	Custom	er	1		
V9 Signed:									Vendor				
nternal Notes:													

## Merging Rules

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

### 1. On Duplicate Entities screen, select 1 Primary

	Duplicate Entities									⊐ ×
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I	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

Duplicate Entities								~ □ ×
Add Merge Close								
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<ul> <li>Entity No.</li> </ul>	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

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3.	Click Mei a.	r <b>ge</b> toolbar button Once merging is successful, this message will appear
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		iRely i21
		Merge is successful.
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b. Entity screen will show after clicking OK button on message box

ntity Customer	Vendor	Split	Farm	Locations	Contacts	Comments (0)	History	Attachments	(0) Me	ssages	Custom	Audit Log	(1)		
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Location Name 🛛 👻	102-Ent	Location	n		Or	igination Date:	03/28/20	16	Conta	ict Infoi	rmation				
ddress: 🔗	102-Ent	address							+ In:	ert X	Remove	🖉 Types			
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(ip/Postal:	46772			~	City:	MONROE									
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