Webinar: 31 Aug 2023



Cleaning up your contacts

Questions & Answers

Q: What if an organisation has had 2 name changes so is known under 3 different names and duplicates don't show? How do you merge them?

A: A user can manually filter their list of contacts to display the organisation(s) they wish to merge. From there, they can use the Bulk Action "Merge Contacts" which allows them to have more flexibility of the contacts they can merge and force the merging if the Duplicate Checker does not find it.

Q: Is there a way to archive contacts - when organisations close down, individuals pass away, etc.

A: It is currently not possible to archive contacts. The best option is to rename or append a contact name or add a flag/tag to denote them as no longer in use.

Q: Is there a way to include flags into reports?

A: Contact information is indeed reportable, however needs to be done via File Notes reporting. Flags are added as File Notes, of which the information in here is reportable.

Q: What if you need to unmerge a contact?

A: If you need to unmerge a contact we have a <u>Help Hub article</u> that outlines the process. It does involve a little manual work, so best to double-check before clicking the Merge button.

Q: Is it possible to add a title for individual contacts - we have church ministers who would like to use Rev but it is not available in the list of titles.

A: Default titles are hardcoded

Q: How does it work if a person is part of more than 1 Organisation?

A: Unfortunately this is currently not supported, individuals can only be associated with a single organisation.