Record Merge

In this Topic Hide

Overview

The Record Merge utility consolidates the contents of a "source" record into a "target" record to create a single, merged record. The user is then given the option of deleting the source record.

The utility is especially useful when duplicate records are discovered in SmartOffice, e.g., when the Duplicate Records feature is used. However, the utility can also be used to merge records that are not duplicates.

Watch the Fast Class: Mass Merging Duplicates

Record Merge uses a special record-matching algorithm (RMA) to analyze the source and target records. If the source record contains information that is not in the target record, that data is moved into the appropriate fields of the target record. If the source and the target contain different information in the same fields, the data in the target record remains unaltered.

Types of Records that Can Be Merged

The following types of records can be merged:

- Contacts
- Businesses
- Advisors
- Agencies
- Policies
- Carriers
- Products
- Riders

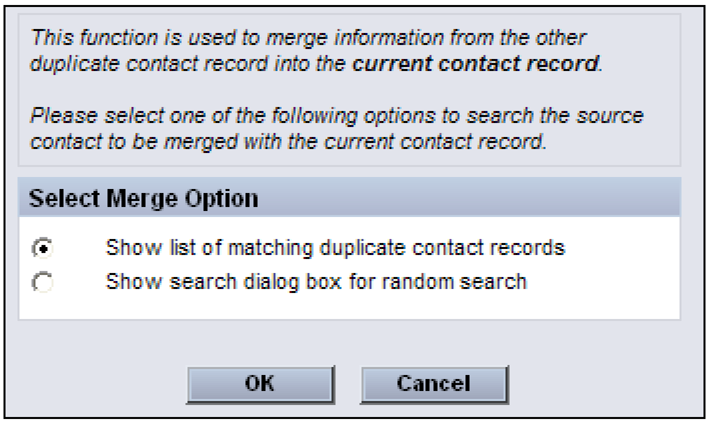
> **Note**: Investment securities, accounts and positions can also be merged, but the process for merging these records is somewhat different. See Investment Help Topics..

Merging Records

Records can be merged from a standard list of records as well as from the Duplicate Record List.

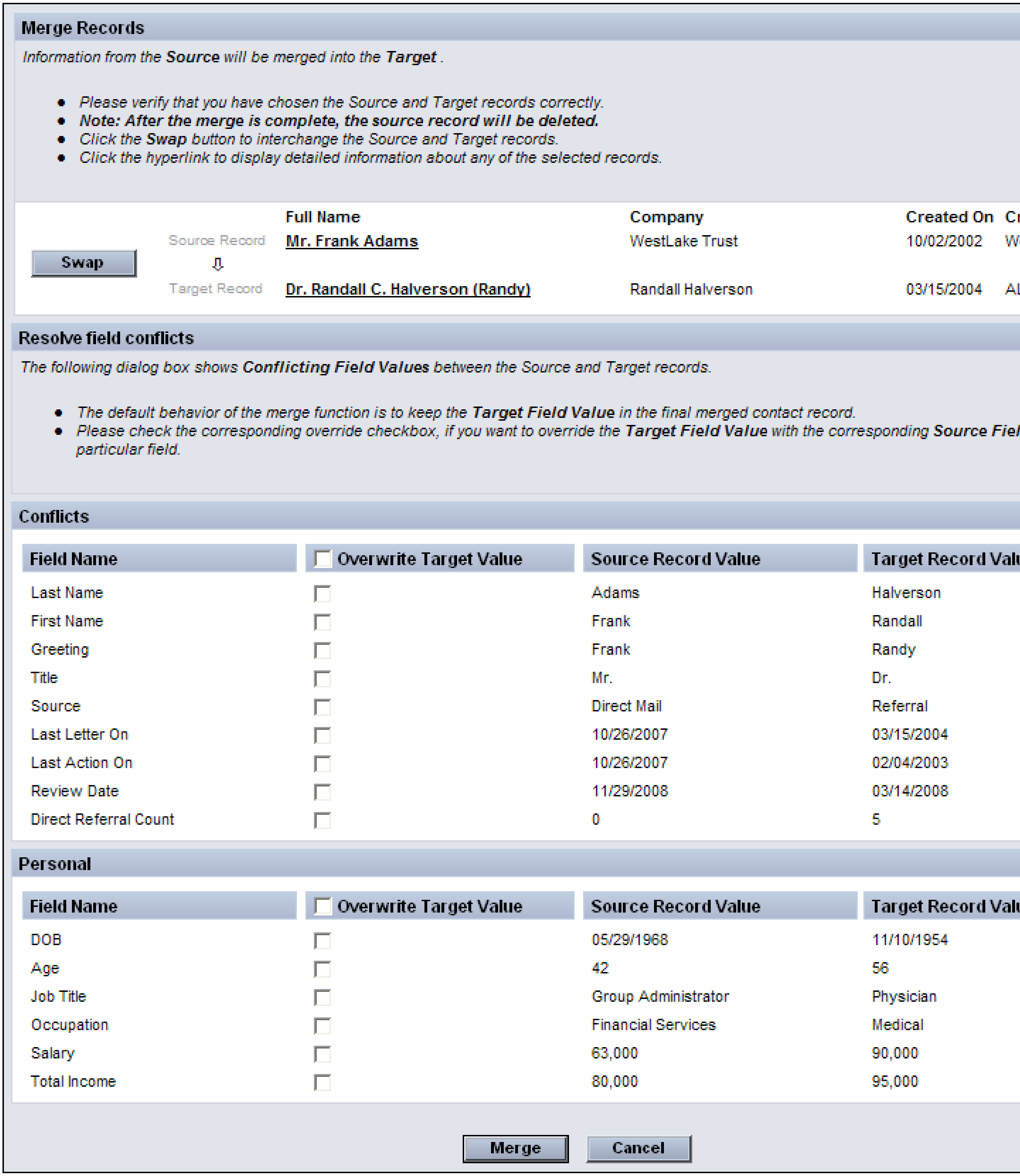
From a Standard List of Records

1. Search for the target record.
2. In the list of search results, tag the target record (or open it) and then click the **Menu** button.
3. From the expanded menu, select the appropriate option based on the type of record being merged:
   - **Advanced Options** > **Merge Records** (for contacts, businesses, advisors and agencies)
   - **Advanced Options** > **Policy Merge**
   - **Advanced Options** > **Carrier Merge**
   - **Product Merge**
   - **Rider Merge**
4. If the Select Merge Option dialog box opens, select one of the available source record options and click the **OK** button.



   - **Show list of matching duplicate contact records**: This option tells SmartOffice to use its record-matching algorithm to find and display source contacts that are duplicates of the selected target.
   - **Show search dialog box for random search**: Select this option to open a standard search dialog box and select the source record. Use this option of the source record is not a duplicate.
5. If a search dialog box opens, use it to search for the source record. Then, in the list of records displayed, select the source record.

6. When the Merge Records dialog box opens, carefully review the changes that will be made to the target record.



Merge Records

Information from the ***Source*** *will be merged into the* ***Target*** *.*

- *Please verify that you have chosen the Source and Target records correctly.*
- ***Note: After the merge is complete, the source record will be deleted.***
- *Click the* ***Swap*** *button to interchange the Source and Target records.*
- *Click the hyperlink to display detailed information about any of the selected records.*

		Full Name	Company	Created On	Cr
Swap	Source Record	Mr. Frank Adams	WestLake Trust	10/02/2002	W
	⇩				
	Target Record	Dr. Randall C. Halverson (Randy)	Randall Halverson	03/15/2004	Al

Resolve field conflicts

The following dialog box shows ***Conflicting Field Values*** *between the Source and Target records.*

- *The default behavior of the merge function is to keep the* ***Target Field Value*** *in the final merged contact record.*
- *Please check the corresponding override checkbox, if you want to override the* ***Target Field Value*** *with the corresponding* ***Source Fiel*** *particular field.*

Conflicts

Field Name	Overwrite Target Value	Source Record Value	Target Record Valu
Last Name		Adams	Halverson
First Name		Frank	Randall
Greeting		Frank	Randy
Title		Mr.	Dr.
Source		Direct Mail	Referral
Last Letter On		10/26/2007	03/15/2004
Last Action On		10/26/2007	02/04/2003
Review Date		11/29/2008	03/14/2008
Direct Referral Count		0	5

Personal

Field Name	Overwrite Target Value	Source Record Value	Target Record Valu
DOB		05/29/1968	11/10/1954
Age		42	56
Job Title		Group Administrator	Physician
Occupation		Financial Services	Medical
Salary		63,000	90,000
Total Income		80,000	95,000

Merge Cancel

7. Make any necessary changes:
   - If the source and target are reversed, click the **Swap** button to switch them.
   - In the Conflicts section, select the **Overwrite Target Value** option for any source record field that should overwrite the target record field. If this option is cleared, the target field's value is retained in the merged record.

8. Click the **Merge** button.
9. When the system asks whether the source contact record should be deleted, click the **Yes** button.

From the Duplicate Record List

1. Open the Duplicate Record List.
2. Tag two records to be merged.
3. Select **Menu** > **Merge Two Duplicates** to open the Merge Records dialog box.
4. Ensure that the source and target records are correctly identified and that any conflicts are resolved (refer to the previous section).
5. Click the **Merge** button.
6. When the system asks whether the source contact record should be deleted, click the **Yes** button.

Record-Matching Algorithm Used in Merges

Contacts

The table below provides details about the rules SmartOffice uses when merging contacts. The general rule that apples to all merges: If the specified fields in the source do not match data in the target, the source data is copied to the target.

Source Data	Fields Used to Determine Match	Notes
Household	Household Name	If household data is copied to the target, the target becomes a member of the household with a role of Other. For more information, see Households.
Key Relations	Related to, Relation	If the source has two key relations entries with the same name but different Relation or Related to field entries, these records are copied to the target.
Addresses	Address Block, City, Address Type	An address marked as Preferred in the source record retains that status after it is moved to the target. If the target already contains an address marked as Preferred, that status is removed.
Phone Numbers	Country Code, Area Code, Number, Phone Type	A phone number marked as Preferred in the source record retains that status after it is moved to the target. If the target already contains a phone number marked as Preferred, that status is removed.
E-mail/Web Addresses	E-mail Address, Web Address	An e-mail/Web address marked Preferred in the source record retains that status after it is moved to the target. If the target already contains an e-mail/Web address marked as Preferred, that status is removed.
Set Memberships	Set Name	

Policies	Policy #	The following policy data is moved to the target: riders, custom information, transactions, interested parties, subaccounts.
Investments	Account Number, Account Name, Security Name, Investment Name, and Investment Type	The following policy data is moved to the target: subaccounts, positions transactions, liabilities, interested parties. If the source record has investment account information that is not in the target, the investment account and its positions are copied to the target. If the source has a position that is not linked to an investment account, the position is copied to the target without an investment account linked to it.

Policies

Note the following rules that govern the copying of data during a policy merge:

- If the source and target policies have the same policy relationships, advisor or insured, the entry in the source policy is not copied to the target policy. For example, if Joseph Ackerman is the primary insured for both policies and has a risk class specified on the source side (but not on the target side), the target policy will end up with only one primary insured entry with no risk class specified.
- If the source policy contains policy relationships, advisors or insured contacts that the target policy does not have, those items are copied to the target policy. For example, if the target and source policies have different contacts for the primary insured, the primary insured entry from the source policy is copied to the target, resulting in two primary insured contacts existing in the target policy after the merge.

> **Note**: Any information in a policy relationship entry is also copied over. For example, if an advisor entry is copied to the target policy, the data in the Relation, Split Percent, As of Date, Expiration Date, Marketing Manager, Region Code, Office Code and Remarks fields for that advisor is moved over as well.

- For all other lists in a policy record (e.g., the Documents List), data that does not exist in the target policy is copied from the source policy. Existing entries in the target policy are not overwritten or deleted. For example, if the target policy has one entry in the Documents List and the source policy has one entry in the Documents List, the target policy will end up with two entries after the merge.
- For variable life and annuity life policies, the target policy can end up with duplicate entries for the same subaccount after the merge. Duplicate subaccounts can be deleted manually from the target policy's Subaccounts content link after the merge.
- If the user declines to delete the source policy after a merge, any items that were copied to the target policy during the merge operation (e.g., policy relationships, advisors, insured contacts, etc.) are deleted from the source policy. Any items that were not copied to the target remain in the source policy.