

# Merging And Deleting Accounts

Occasionally there will be a need to remove some accounts. In some cases you will want to merge together multiple records, in other cases you are interested in removing the record entirely.

*WARNING: Simply deleting a record when a duplicate is found could inadvertently cause the loss of important information and is not recommended.*

## Merging Duplicate Accounts

There are two best practice methods for identifying and merging duplicates in PlayMaker.

### **Method 1: Visualization**

PlayMaker's primary account view can be a powerful ally when looking to identify and correct data issues.

1. Click the Accounts tabs in the main PlayMaker menu bar for the appropriate data you would like to search on.
2. On the page displaying your list of accounts, change the sorting preference by clicking on the dropdown menu for Sort By, which is located under the Search Contacts bar on the left side of the page. Choose Name for accounts. Click Go.
3. Scroll through the list of names to look for entries that may be duplicates.
4. Click on the check boxes to the far left of the duplicate account names. Then scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select Merge Records.
5. In the Merge Tool display, the selected accounts will appear side by side. Choose which information to keep in each field by clicking on it and highlighting it green. Only information highlighted in green will appear in the final merged record.
6. Click on the Merge button, located at both the top and bottom of the Merge Tool display.
7. A notification stating Merge successfully completed will appear on your screen. You also have the option here to view the newly merged record or return to the main results display

by returning to the previous page.

### **Method 2: Using the Find Duplicate Accounts Tool**

1. Click on the Accounts tabs in the main PlayMaker menu bar for the appropriate data you would like to search on.
2. On the page displaying your list of accounts, scroll to the bottom of the display. In the area labeled Account Tools, click on the "Find Duplicate Accounts".
3. In the Duplicate Account Checker window that appears, select the fields you would like searched for matches. Click Run Duplicates Search, located at the bottom of the window.
  - Helpful fields for further refining your search include Name, Address 1, Phone 1, and ZIP code.
4. Click on the check boxes to the far left of the duplicate account names. Then either select "Merge Selected" at the top of the screen, or scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label select "Merge".
5. In the Merge Tool display, the selected accounts will appear side by side. Choose which information to keep in each field by clicking on it and highlighting it green.
  - Only information highlighted in green will appear in the final merged record.
6. Click on the Merge button, located at both the top and bottom of the Merge Tool display.
7. A notification stating Merge successfully completed will appear on your screen.
  - You also have the option here to view the newly merged record.
  - Any remaining duplicates that resulted from your previous search still will be displayed in this area.

**Note:** Always merge accounts (facilities) before you merge contacts (individuals).

### **Deleting Accounts**

1. Click the Accounts tabs in the main PlayMaker menu bar for the appropriate data you would like to search on.
2. Scroll through the list of names to look for entries that you would like to delete.
3. Click on the check boxes to the far left of the account name. Then scroll to the bottom of the display and from the dropdown menu beside the Bulk Actions label

select Delete Records.

**Note:** Accounts assigned to an event or referral cannot be deleted.