

Member Merge

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MERGE

Note: Merge is **final** and **cannot be undone**. Do not merge unless you are certain.

The merge process combines household units. This means that everyone in the “from” household is merged into the “to” household. Individuals cannot be extracted from a household unit and merged into another household unit.

If someone is no longer part of a household, they should be hidden and a new account created for them. This keeps the history intact from when they were part of the old household unit.

1. Click “Find Account” > Search for the “From” unit (the member(s) who will be merged into another unit)
 2. Click the Merge icon on the profile screen (permission based)
 3. Use the magnifying glass to search for the “To” unit and click Next
 4. For each person in the “From” household unit, select from the drop down to tell the system whether that person should be merged with an existing person in the “To” household (if they are the same person) or should be a new family member (if they are a separate person who doesn’t yet exist in the “to” household unit). Click Next.
 5. Select which demographic details and contact information to retain for each merged person.
 6. Click Finish to finalize. Remember, merging units is final and cannot be reversed. It will appear in the system as if the “from” unit never existed.
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