



Software

How to merge contacts

The application manager has the possibility to merge contacts when duplication occurs.

Merging contacts gathers the contacts information (email, phone, notes, files ...) into one contact with a single click.

To do so, take the following steps:

1. Click the **`Contacts**' tab and search for the contact name you want to merge, click on the contact name to access the contact form;

Demo EN (Interno)	Demo EN (Interno)
pportunities Properties Contacts Tasks 0 Leads 0 More	Manage Website
	Import contacts from Google
Find someone by typing their name	Add a new person
(Name, Email, Phone)	Add new company
or advanced search	Quick search
63 Contacts, recently updated contacts and companies.	► Teps ①
Show Recently updated contacts and companies	First page Next 😫 Help
Select Add a tan Send survey Send newsletter Pront Delete More	eGO Real Estate Academy
Cohn Smith Smith Sector Sector Sector Smith Sector Smith Sector Secto	
John Smith Created by Julien Norta, 08 Jan Sicho@hotmail.com add tass	

2. Select 'Edit this contact' (person or company);

Julya Facility		S Del	ete this contact
Down Shinds 100% ede	6	c this person O Ser	nd email
Phone: 914573993 Email: ambhliannaí com		O Ser	nd survey
amungginancom		O Ge	nerate copy key 🔘
Adding note about		O Ser	td newsletter
Contraction (Second Second		► Tasi	cs
		> Con	tact rating
		Visit	is to the property
Attach files	A 1 7 1	Popp	ortunities
		> Prog	perties associated
All Notes Users Notes System Notes Logs		Search Sun	veys
Wednesday, January 8, 15:14		New	vsletters
Note by Julien Horta	• Rela	ated contacts	
Agentin Centokr 22 Agenty		Prog	perties sent by email
add tags			
John Smith edit) voard	▼ Related files	edit	
Mail: smith@gmail.com	Other files (0)	Upload	
Telephone: 914573993			

3. On the right hand side of the application, click **'Merge this contact**';

Demo EN (Interno)	Contacts Tanks	Leads	More Mana;	e Website		Demo EN (Interno) 💌 🤤 Sign out
Change shoto	Edit person First name Last name Title Company	John Smith Add 18% Add compar		Update this person	Cercel	Is this a duplicate? If so, you can enjoy this contact whith the contact you want to keep.
· Details						
Gender Phone	Male Pemale 914573993]0				
Email	smith@gmail.com © Add another	0				
Marital Status	Choose one					
Date of Birth						
Nationality	Nationality					
Tax number						
Identification						
Identification issuing date						
Identification expiring date						
Role	(Choose a role)	(e) (c)				
Skype	Add skype account					
Google Talk	Add google talk arms	unt				
Websites	Add website address					

4. A new window will appear with the title '**Merge duplicate contacts**'. In step 2, enter the name of the contact you want to keep and then click on the correct name from the contact (s) displayed;

T. Seu	uted the "loser" of the merce
This " done notes preva be fille alread be co	John Smith" will be the "loser" of the merge. Merging contacts should be via the contact you want to delete. All details, as well as, contacts, , files and tasks associated will be moved to the original contact, ling only the data on this contact. Empty fields in the original contact wi ed in with data from the contact you want to delete. If the fields are y filled in the original contact, the data from the contact to delete will no pied.
2. Nex	t, choose the contact you want to keep (the "winner")
conta you 'r	tts together just go through the merge process again after the merge e performing now is done.
1	Click on the person or company you want:
	John Smith 📓 913567389 🖂 John@hotmail.com
3. Fina	ally, click "Merge these contacts"

5. Finally, click `Merge these contacts';

1. Selec	cted the "loser" of the merge.
This "J done v notes, prevail be filled already be cop	ohn Smith" will be the "loser" of the merge. Merging contacts should be ia the contact you want to delete. All details, as well as, contacts, files and tasks associated will be moved to the original contact, ing only the data on this contact. Empty fields in the original contact will d in with data from the contact you want to delete. If the fields are y filled in the original contact, the data from the contact to delete will not ied.
2. Next	, choose the contact you want to keep (the "winner")
You ca contac you 're	n only choose one contact. If you 'd like to merge more than two ts together just go through the merge process again after the merge e performing now is done.
1	John Smith Select someone else
3. Final	ly, click "Merge these contacts"
M	erge these contacts Cancel

6. The information of these two contacts, such as telephone, email, notes, etc. will appear as one contact and merged in the correspondent fields. No type of information is lost.

		😥 Delete this contact
John Smith 100% edit	edit this person	Send email
- Politer 913567389, 914573993		Send survey
John@hotmail.com, smith@gmail.com		Generate copy key ()
Arrison notes about		Send newsletter
Annual Look House		• Tasks
		Contact rating
		Visits to the property
Attach files	Add note	Opportunities
		Properties associated
Il Notes Users Notes System Notes Logs	Search	Surveys
Wednesday, January 8, 15:14		• Newsletters
Note by Julien Horta Agent in CENTURY 21 Agency		Related contacts
		Properties sent by email
Wednesday, January 8, 15:13		

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