

Help Content: Merge Duplicate Names

If you have more than one name record for the same person or entity, you can use this feature to merge their name records and bring all associated transactions under one name. This might be necessary for contributions raised through [NYC Votes Contribute](#), as data upload from NYC Votes to C-SMART will automatically create a new name record regardless of whether that individual is already in your database. Merging duplicate names helps to ensure that C-SMART will alert you of any over-the-limit contributions.

HOW TO MERGE DUPLICATE NAMES

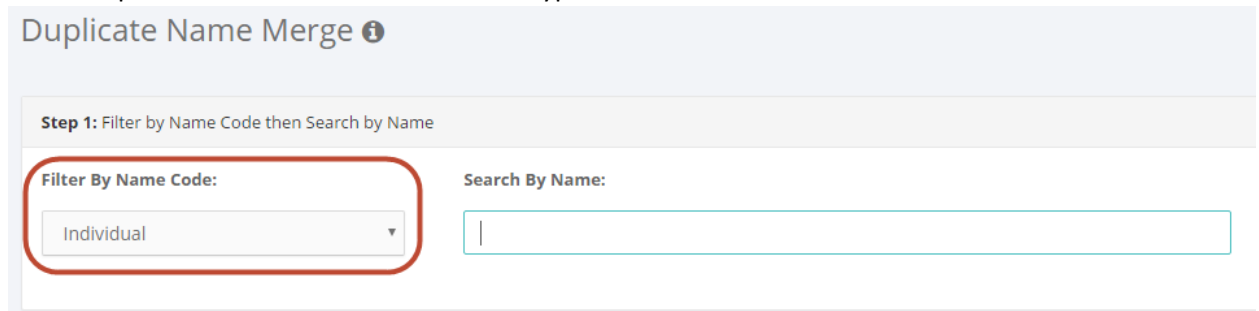
1. Go to Merge Duplicate Names.

Click **Transactions** and then **Merge Duplicate Names**.



2. Filter by name code.

You are now on the **Duplicate Name Merge** screen. C-SMART will default to the **Individual** name code. If you are trying to merge names under a different name code, use the **Filter By Name Code** drop-down menu to select a different type.



3. Search by name.

If you know the name of a particular individual or entity whose name records need to be merged, search for it in the **Search Names** bar, and then skip to **Step 5** below. If you do not know the name, review **Step 4** below.

Duplicate Name Merge ⓘ

Step 1: Filter by Name Code then Search by Name

Filter By Name Code: Individual Search By Name:

Step 2: Select Names Show 10 entries

Primary	Secondary	Name	Address	Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Phyllis	36-12 31st Ave, Astoria, NY 11106	0

Showing 1 to 3 of 3 entries Previous 1 Next

4. Find duplicate names.

If you do not know the name of a particular individual or entity whose name records need to be merged, search through the names displayed on the **Duplicate Name Merge** screen to find any duplicate names. Depending on the number of names in your database, you might need to go to other pages to see all of the entries.

Duplicate Name Merge ⓘ

Step 1: Filter by Name Code then Search by Name

Filter By Name Code: Individual Search By Name:

Step 2: Select Names Show 10 entries

Primary	Secondary	Name	Address	Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Blake, Laura	670 East 91st Street, New York, NY 10128	0
<input type="checkbox"/>	<input type="checkbox"/>	Clark, Patty	36-12 31st Ave, 2C, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Danker, Thomas	36-12 31st Ave, 2C, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Davis, Alexis	24 Beach 102nd Street, Rockaway Park, NY 11694	0
<input type="checkbox"/>	<input type="checkbox"/>	Doe, Jane	7306 Woodside Ave, Woodside, NY 11377	0
<input type="checkbox"/>	<input type="checkbox"/>	Fitz, Joanna	66 Avenue A, 21C, New York, NY 10008	0
<input type="checkbox"/>	<input type="checkbox"/>	Gregory, Joel	36-12 31st Avenue, 2C, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Hamilton, Veronica	36-12 31st Ave, 2C, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Healy, Andrea	172 E 7th St, 3B, New York, NY 10009	0
<input type="checkbox"/>	<input type="checkbox"/>	Johansen, David	36-12 31st Ave, 2C, Astoria, NY 11106	0

Showing 1 to 10 of 31 entries Previous 1 2 3 4 Next

5. Select the names.

Once you have found the duplicate names that need to be merged, you must select one to be the primary and the other(s) to be the secondary. All associated transactions will be merged and

recorded under the primary record. Once the duplicate names are selected, you can click **Continue**.

CANDIDATE SERVICES TIP(S):

✓ *If applicable, you can have more than one name record designated as the secondary.*

Step 2: Select Names Show 10 entries

Primary	Secondary	Name	Address	Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Jones, Phil	34 West 87th, New York, NY 10024	0
<input type="checkbox"/>	<input type="checkbox"/>	Leisler, Jessica	36-12 31st Avenue, 2C, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Matthews, Sarah	13314 Sanford Ave, East Elmhurst, NY 11369	0
<input type="checkbox"/>	<input type="checkbox"/>	McIntire, Joseph	36-12 31st Ave, #2C, Astoria, NY 11106	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1
<input type="checkbox"/>	<input type="checkbox"/>	Morris, Phyllis	36-12 31st Ave, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Palmer, Roy	75-12 Woodside Ave, 3R, Elmhurst, NY 11373	0
<input type="checkbox"/>	<input type="checkbox"/>	Rodriguez, Leni	36-12 31st Ave, 2c, Astoria, NY 11106	0
<input type="checkbox"/>	<input type="checkbox"/>	Rosario, Sophia		0

Showing 11 to 20 of 31 entries Previous 1 2 3 4 Next

Continue Cancel

6. Click Merge.

C-SMART will present you with a confirmation message. Click **Merge** if you are sure that you wish to merge the name records.

i You have selected 2 name records to merge. The transactions associated with the secondary name(s) will be merged to the primary name. Click **Merge** to continue, or **Cancel** to cancel the process. ✕

Primary	Secondary	Name	Address	Transactions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1

Cancel Merge

7. Click Continue.

C-SMART will present you with a final warning message, informing you that all transactions will be moved to the record designated as the primary name and that the secondary name record

will be deleted. Click **Continue** to proceed. You will be able to save or print a PDF record of the name merge.

Warning! --- Duplicate Name Merge Confirm

Merging names will move all transactions to the Primary Name, and the Secondary Name(s) will be deleted. Do you want to continue?

C-SMART will generate a PDF report of the duplicate name merge. Please save it for your records.

Cancel

Continue

8. Download PDF.

The name merge has now been completed, and you should download the available PDF for your records.

i 2 name records have been successfully merged.

Primary	Secondary	Name	Address	Transactions
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morris, Louis	101-12 104th Street, 2C, Corona, NY 11368	1

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