

How to Merge Contacts in Infusionsoft

1. Using the “Find a contact...” search field in the upper-right, conduct a search that will bring up both of the contact profiles you would like to merge. Press **Enter** to display the search results.
 - a. Depending on how much of the information is similar between the two profiles, you might need to try different search parameters to get both profiles to display in the search results. Some ideas:
 - i. Using their name
 - ii. Using part of their name
 - iii. Using their email address

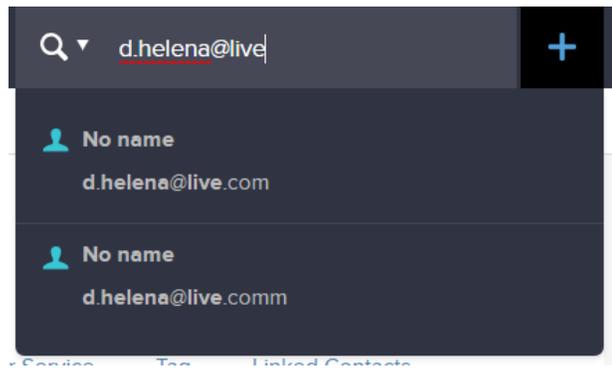


Figure 1. An example of the search field as you conduct the search, before the results page.

2. On the search results page, tick the boxes next to the contact profiles you wish to merge. Ticking the box at the top of the search results will select all of the results on the page.

Quick Search

Searched for *Contacts* using: "d.helena@live"

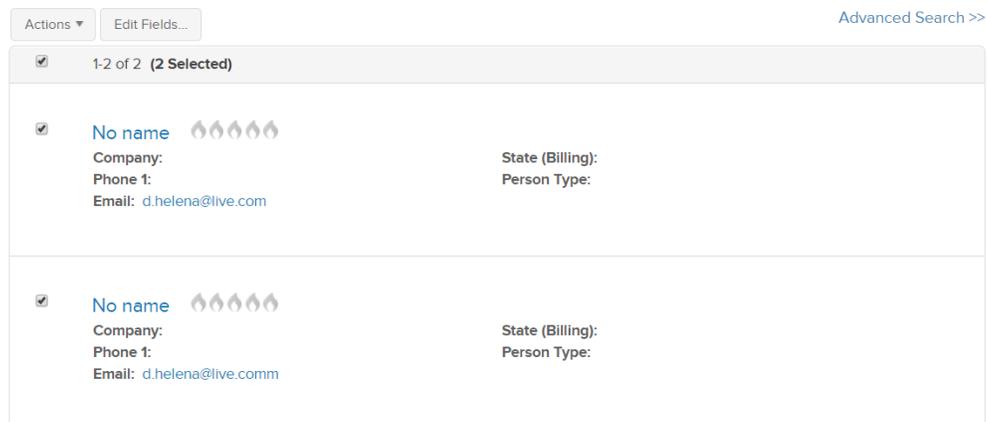
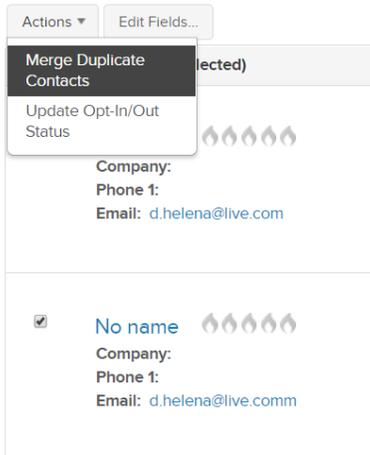


Figure 2. The search results with two customer profiles selected.

- Under the Actions drop down menu, select **Merge Duplicate Contacts**.



- Note:** If you do not see the “Merge Duplicate Contacts” option, you might not have the proper permissions. First try logging out of, then back into, Infusionsoft. If the option still does not appear, contact Mavi or Jon to apply the proper permissions to your account.
- You will now be able to edit the contact fields before the merge. Update the fields as required, and then select **Merge & View Contact** when everything is correct. You will get a pop-up notification asking if you want to continue, select **OK**.
 - Note:** By using the arrows to the left or right of a field, you will populate the field with the information on the left or the right. This is useful if one profile has correct information and the other does not.

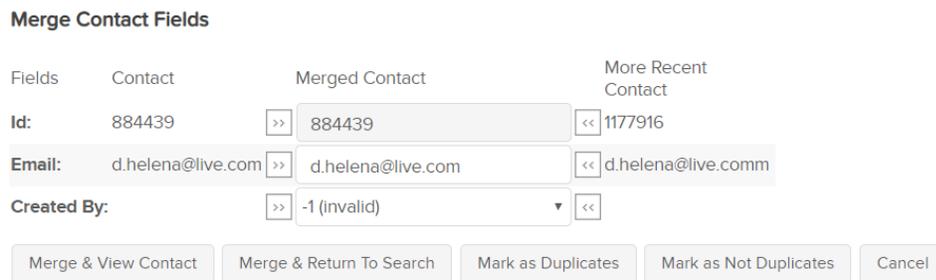


Figure 3. Here, you can edit the contact's information before the merge.

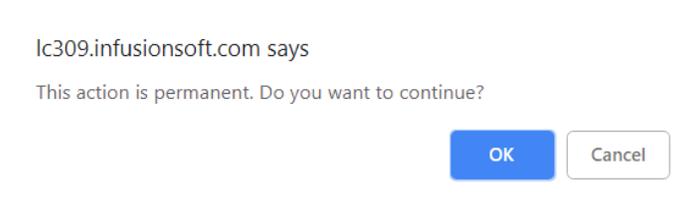


Figure 4. You will receive a pop-up similar to this to confirm the merge; select OK.

- The page will redirect to the merged contact profile. Ensure that everything appears correct before exiting the page.

Contact Information

General | Address | Additional Info | Person Notes | Custom Fields | Customer Service | Tag | Linked Contacts

General Information

First Name

Last Name

Company

Company

Go Search... Clear

Job Title

Person Type

Lead Source  

Account Summary

Amt Paid \$0.00
Bal Due \$0.00

Score

Lead Score  

Phone / Fax

Phone 1

Phone 2

Fax 1

Billing Address

Street Address 1

Street Address 2

Email / Social

Email 

Figure 5. The result of our merged contact.