Supporter Donation System Quick Tips
Merge Supporters

1. From the Main Menu, click on Procedures.
2. Click on Merge Supporters in the left column.
3. In the first dropdown (Choose a Supporter/Role to merge with another supporter/role), select the supporter that you wish to delete.
4. Select the supporter in the second dropdown (Choose the Supporter/Role it will be merged into) that you will be merging information into.
   NOTE: (You can review the supporters that you have just selected in steps 3 and 4 by clicking on Review Supporter Info buttons)
5. Click Continue at the bottom.
6. There are several tabs across the top that MUST be reviewed.
7. On the Supporter Info tab, select which data to keep when comparing the left side to the right side.
8. Click on the Partner Info tab on the top left of the screen and select which data to keep.
9. Click on the Custom Fields tab on the top left of the screen and select which data to keep.
10. When choosing your Addresses, E-Mail Addresses, Phones and Solicitors, please keep in mind that you can retain all fields, and make sure to select which one is the primary information for that tab.
11. After you have reviewed all of the information on all of the tabs across the top, click on the Merge Now button.

All classifications, Comments, Pledges, Payments, In-kind donations, Special Dates, Endowments, Solicitations, and Grants information from both supporters will merge into the new supporter record.