Merge Sites

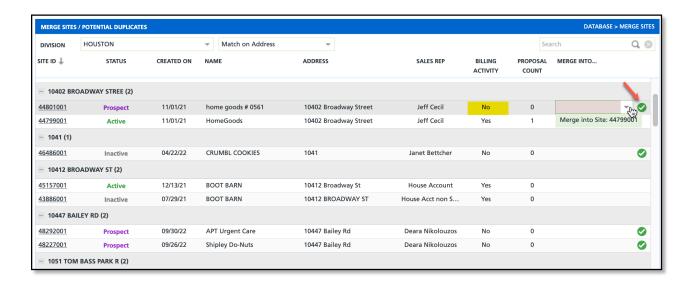
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Pathway: Database > Merge Sites

The Merge Sites /Potential Duplicates screen is used to merge duplicate sites into a single site record. Merge functionality is available to all sites that do not have any AR (Accounts Receivable) activity, **as indicated with a green check mark**.



The system will only process one site merge at a time.



Permissions

The following permissions are required to use the Merge Sites screen:

Permission ID	Permission Name
253	Merge Two Sites
395	Merge Sites

Field Descriptions

The following descriptions apply to the fields on the Merge Sites screen:

Field	Description
Division	Displays only the sites of the selected division.
Match on Name/Address	Match the sites based on either a duplicate name or address.
Search	Option to search for a specific site.
Field	Description
Site ID	The site identification number.

Status	Indicates the status of the site.
Created On	Displays the date the site was created.
Name	The name of the site.
Address	The physical address of the site location.
Sales Rep	Displays the name of the sales representative managing the account.
Billing Activity	Indicates if the site has any AR activity. If the site does not have any AR activity, as
	indicated with a "No," a green check mark is displayed.
Proposal Count	Displays the current amount of proposals for a site.
Merge Into	Drop down selection field listing sites for potential merging. Drop down is only available
	for sites that have a green check mark associated to them.

Merge Sites

- 1. Select the **Division** and 'Match' filters to load the screen.
- 2. To initiate the merge process, click within the 'Merge Into' column of the site marked with a green check mark. This will prompt a drop down menu to appear, showing the ID of the potential destination site(s). Choose the desired site from the list. If there are multiple options, they will all be displayed for selection.
- 3. Click the **green** √to process the change.