


Merge Sites

Last Modified on 04/16/2024 12:28 pm EDT

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.

MERGE SITES / POTENTIAL DUPLICATES										DATABASE > MERGE SITES			
DIVISION	HOUSTON		Match on Address							Search	<input type="text"/>	<input type="button" value="Q"/>	<input type="button" value="X"/>
SITE ID ↓	STATUS	CREATED ON	NAME	ADDRESS	SALES REP	BILLING ACTIVITY	PROPOSAL COUNT	MERGE INTO...					
- 10402 BROADWAY STREE (2)													
44801001	Prospect	11/01/21	home goods # 0561	10402 Broadway Street	Jeff Cecil	No	0		<input checked="" type="checkbox"/>				
44799001	Active	11/01/21	HomeGoods	10402 Broadway Street	Jeff Cecil	Yes	1	Merge into Site: 44799001	<input checked="" type="checkbox"/>				
- 1041 (1)													
46486001	Inactive	04/22/22	CRUMBL COOKIES	1041	Janet Bettcher	No	0		<input checked="" type="checkbox"/>				
- 10412 BROADWAY ST (2)													
45157001	Active	12/13/21	BOOT BARN	10412 Broadway St	House Account	Yes	0		<input checked="" type="checkbox"/>				
43886001	Inactive	07/29/21	BOOT BARN	10412 BROADWAY ST	House Acct non S...	Yes	0		<input checked="" type="checkbox"/>				
- 10447 BAILEY RD (2)													
48292001	Prospect	09/30/22	APT Urgent Care	10447 Bailey Rd	Deara Nikolouzos	No	0		<input checked="" type="checkbox"/>				
48227001	Prospect	09/26/22	ShipleY Do-Nuts	10447 Bailey Rd	Deara Nikolouzos	No	0		<input checked="" type="checkbox"/>				
- 1051 TOM BASS PARK R (2)													

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.
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