

Fluxx Merging Duplicate Records

- 1 [Merging Duplicate Contacts/Organizations](#)

Merging Duplicate Contacts/Organizations

In Fluxx, merging duplicate records is relatively straightforward. Follow the steps laid out below in order to merge several duplicative records into one consolidated record.

To begin, go to any Fluxx dashboard and navigate to and click on the icon found in the bottom left-hand corner of the screen (see also the screenshot, below). Clicking on the icon will bring up the "**Dashboard Themes**" menu; from the menu select the "**Table**" view.

FLUXX

REQUESTS AND GRA...

Search

ID: R-5033-2022

Status: LOI Draft

PERC

ID: R-5031-2022

Status: LOI Draft

PERC

ID: R-5017-2022

Status: LOI Draft

OAC

Dashboard Themes

Choose an item below to switch between Grantmaker views.

Please note that changes you make to dashboards in other views may persist even after you change views.

Default (Avant)
Standard card-based dashboards

Lite
Simplified one-card view

Table
Condensed view with datatables

Summary
High-level data at a glance

Legacy
Previous Default

First, select the icon in the bottom left-hand corner of the screen. From the menu that pops up, select the "Table" view

After clicking on the table view, the system will load and eventually pull up a screen that looks like the one found in the screenshot, below. From this screen, you can switch between looking at Organizations or People (you can also look at Jobs and Emails, but these tabs are not useful for merging duplicates), Search the table for a specific record or specific records, as well see more information and find linked records to the records displayed in the table by clicking on the record ID.

FLUXX Default Workspace

Organizations 1,580 **People 2,732** Jobs 284 | Emails 1,142 |

These tabs change which TYPE of record you are looking at (People or Organizations)

You can use the "Search" box to find specific users you know are duplicates

Search this table

0 Records Selected Actions

Each ID line here translates to 1 record; if you see two with the same name/email address, you should consider a merge

Click on the light blue ID in order to see more information about the record/linked records

ID	Prefix	Full Name	Middle Initial	Suffix	Email	Organization
463		Wendell Eugene Adkins				Wendell, Florida
514		Wendell				Wendell, Florida
1503		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1474		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1321		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1042		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
2586		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
2587		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
563		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
217	Dr.	Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1611		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
2124		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
923		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1099		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1109		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
3039		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1850		Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida
1827	Dr.	Wendell Eugene Adkins			wendell@wendell.com	Wendell, Florida

1 - 200 of 2,732 records

In order to merge duplicates from this screen, you'll want to select two records that look to be the same person. The best way to do this is usually to search the Person's (or Organization's) name in the search bar. When you pull up the two (or more) records that have the same name, check the other columns in the view to make sure that the user is really same. As we can see, not all the fields are the same across the two (or more) records (for example, the Organization name is different for these two User records, despite the fact that they represent the same person). In order to select these records for merging, you'll want to CTRL or Shift + Click on the Check Boxes next to the IDs of the records.

FLUXX Default Workspace

Organizations 1,580 **People 2** Jobs 284 | Emails 1,142 |

2 Records Selected Actions

CTRL+Click (or Shift+Click) in order to select both records

Name of User

ID	Prefix	Full Name	Middle Initial	Suffix	Email	Organization	Title	Main ph
2068		Reid Alish			reid@wendell.com	Wendell, Florida	Assistant Professor	
2294		Reid Alish			reid@wendell.com	Wendell, Florida	Assistant Professor	

1 - 2 of 2 records

Once you've selected the two (or more) records, click on the "Actions" button and then select "Merge Selected" from the dropdown menu that appears:

FLUXX Default Workspace

Organizations 1,580 **People 2** Jobs 284 | Emails 1,142 |

2 Records Selected Actions

Search Reid Alish

New Table

Dedupe

Merge Selected

ID	Prefix	Full Name	Middle Initial	Suffix	Email	Organization	Title	Main ph
2068		Reid Alish			reid@wendell.com	Wendell, Florida	Assistant Professor	
2294		Reid Alish			reid@wendell.com	Wendell, Florida	Assistant Professor	

1 - 2 of 2 records

One final screen will appear with all of the duplicate records you've selected. Now to finally consolidate the records. To do so, first click the check box next to the record that you want to be **primary** in the merge (i.e., the primary is by default the record that will carry all of its information over to the consolidated, merged record except for any fields you choose to overwrite from the other duplicative records), then you'll click on any records that should be **secondary** in the merge (i.e. their Linked records will flow to the consolidated record, but by default information on them will be overwritten by the data on the **primary** record). When you select the two (or more) records, **Bubbles** will appear next to each field. Any bubble that is **filled in** will pull **that bubble's information onto the consolidated record**.

For example, in the screenshot below all information will be coming from the record on the first line because all of the bubbles on line 1 are selected; if I wanted to pull over the Title from line two, however, I'd just need to select the Title bubble found on line two. When I've finished deciding what data should be on the consolidated, merged record, I just need to click the button **"Merge Selected."**

FLUXX Default Workspace

Organizations 1,580 | People 2 | Jobs 284 | Emails 1,142 | Dedupe People 2

2 Records Selected Merge Selected

After you've done selecting which fields to populate on the consolidated record, click "Merge Selected"

Fields that have the "Blue Bubble" filled in will populate onto the consolidated, merged record. Bubbles not selected will be lost

Set Prior ID	Primary	Prefix	Full Name	Middle Initial	Suffix	Email	Organization	Title	Main ph
2066	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
2294	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1 - 2 of 2 records

Clicking **"Merge Selected"** will give you one last chance to go back by giving you this confirmation screen, showing that you're merging the Secondary record (the first one in the list) into the Primary record (the second ID in the list). Click **"OK"** to proceed and merge the records.


wpp.fluxx.io says

The following People will be merged:

2294 -> 2068

OK Cancel

Now the contacts will be merged and all linked data to each of the two records will be re-linked to the one, consolidated record. You'll be brought back to the "Dedupe People (Or Organizations)" screen, but with no records appearing (this is normal). To return to the dashboard you began from, navigate your mouse back to the bottom left-hand corner of the screen, select the icon found there, and from the **"Dashboard Views"** menu click the **Default (Avant)** dashboard view.

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Default W

Organizations 1,580 | People 2 | Jobs 284 | Emails 1,142

Dedupe People 2


2 Records Selected Merge Selected ▾


Set Prim ID	Prefix	Full Name	Middle Initial	Suffix	Email


1 - 2 of 2 records


Dashboard Views ×


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 <https://wpp.fluxx.io/?db=avant>

From your main dashboard, you can pull up a "People" or "Organization" card and search to verify that your two duplicate contacts were successfully merged into one record.