

Merge Duplicate User Accounts

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Watch a Video

There are two methods to manage and merge user accounts duplicated on a campaign.

Tip: With GiveSmart ticketing, to merge a duplicate ticketed user, visit Ticket Orders and un-assign the duplicated attendee.

Merge Users

Review all user account details to located user accounts to merge.

Note: Confirm the two users being merged are the same user.

1. From the Users Container within the Dashboard, click the More button ("...").
2. Select Manage Users.
3. Locate a duplicated user account.
4. Select two user profiles.
5. Select Merge Users.
6. Select the information to keep.
7. Select Continue.
8. Confirm the information is correct.
9. Select Save Updated Account.

The screenshot shows the GiveSmart dashboard for 'GiveSmart Support Desk Inc'. The top right corner displays a total revenue of \$31,341.19. The main dashboard area is divided into several sections:

- SITE:** Website URL: vacation.givesmart.com, SMS: text vacation to 76278, Site Status: Live, Site ID: 26496.
- USERS:** 18 CHECKED IN, 142 TOTAL USERS. A table below shows user types: Campaign Assistant (0/2), Campaign Admin (0/7), GiveSmart (0/15), Volunteer (0/4), Donor (18/114).
- ITEMS:** 230 TOTAL ITEMS, 178 ITEMS - NO ACTIVITY. A table below shows item types: Auction Items (185), Instant Items (16), Live Items (5), Donation Items (8), Vote Items (10), Raffle Tickets (6).
- PAYMENTS:** \$15,330.86 and \$16,562.24.
- TICKETS:** 44 and 17.
- REVENUE:** (Empty section)

The left sidebar contains navigation options: SETUP (Settings, Design, Pages, Users), WAYS TO FUNDRAISE (Donation, Auction, Items for Purchase, Tickets), and EXECUTE & WRAP UP (Help).

Manage Duplicates

Review all user accounts and find two matches based on similar first and last names and non-conflicting account details.

Note: Only Org Admins have access to the Manage Duplicate feature.

1. From the Users Container within the Dashboard, click the More button ("...").
2. Select Manage Users.
3. Click the More button.
4. Select Manage Duplicate.
5. Select either Show me matches first or Merge Matches Now.

The screenshot shows the GiveSmart dashboard for a campaign named 'Vacation2'. The top navigation bar includes 'GiveSmart Support Desk Inc', a 'VIEW CAMPAIGN SITE' button, and a user profile icon 'KP'. The left sidebar contains navigation options: Dashboard, SETUP (Settings, Design, Pages, Users), WAYS TO FUNDRAISE (Donation, Auction, Items for Purchase, Tickets, P2P (Champions)), and Help.

The main dashboard area displays the following information:

- Dashboard:** Vacation2, 7/02/2021 4:00 pm - 7/02/2021 10:00 pm
- TOTAL REVENUE:** \$20,351.00
- Live Activity:** Button
- SITE:** Website URL: vacation2.givesmart.com, SMS: text vacation2 to 76278, Site Status: Live, Site ID: 81168.
- USERS:** 1 CHECKED IN, 51 TOTAL USERS. Breakdown by type: Campaign Assistant (0), Campaign Admin (0), GiveSmart (0), Volunteer (0), Donor (1).
- ITEMS:** 6 TOTAL ITEMS, 2 ITEMS - NO ACTIVITY. Breakdown by type: Auction Items (1), Instant Items (1), Donation Items (2), Vote Items (1), Raffle Tickets (1).
- PAYMENTS:** \$16,600.00, \$3,650.00
- TICKETS:** (Empty table)
- REVENUE:** (Empty table)

Tip: GiveSmart recommends choosing "Show me matches first" to review before merging.

Show me matches first

Review matches based on Low, Medium, or High-Risk.

1. Select Continue.
2. Review the possible matches and select the information to save.
3. Complete the Merge.

Note: Select the Skip for Now button to skip the merge process.

Merge Matches Now

All duplication identified, regardless of risk, are merged automatically.

