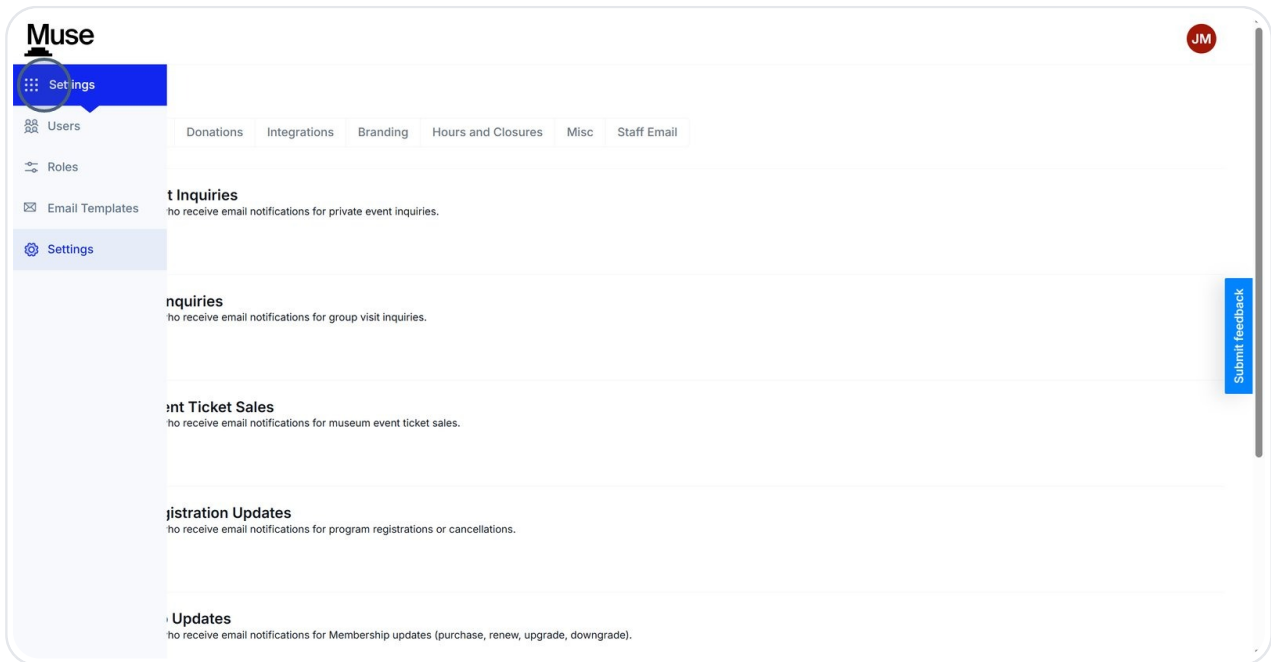


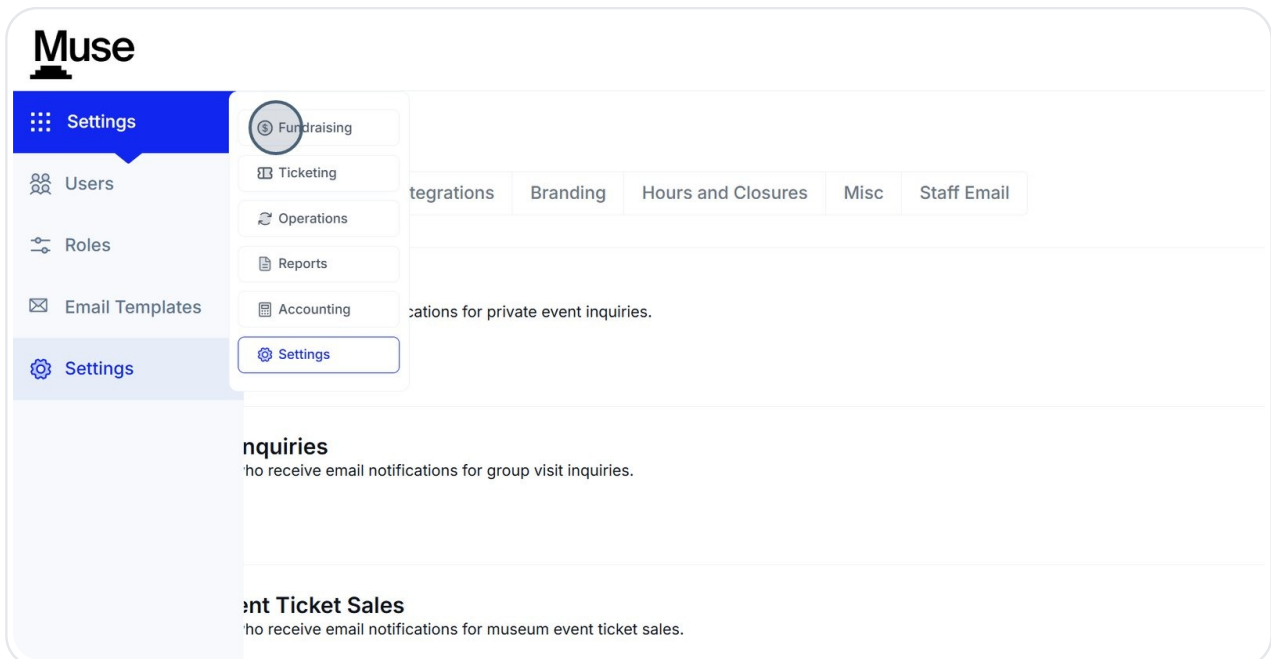


Merge Duplicate Constituent Records

1. Click the blue North Star icon.



2. Select "Fundraising."



3. Navigate to Constituents.

Muse

Q Search for an individual or organization

JM

Fundraising

Dashboard

Constituents

Campaigns

Donations

Events

Tasks

Reports

Settings

Organizations

All

View Lists

Add Individual

Name (A-Z)

Filter

	Last Name	Membership Status	Location	Last Activity	Fiscal Year Value	
	Cohen	Never Member	--	2/04/26	\$0.00	
	Mercado	Never Member	--	--	\$0.00	
	Fraser	Active	--	9/17/26	\$200.00	
	Fraser	Never Member	--	7/27/26	\$50.00	
	Fraser	Never Member	Jacksonville, FL	9/22/26	\$501.17	
	Fraser	Never Member	--	4/29/26	\$0.00	
	Fraser	Active	--	3/26/26	\$150.00	
	Fraser	Active	Jacksonville, FL	9/15/26	\$4,322.52	
	Jarvis	Active	Breckenridge, CO	6/17/26	\$1,915.90	
	Fraser	Active	Jacksonville, FL	5/18/26	\$220.70	
	Smith	Active	--	1/14/26	\$100.00	
	Vander Wert	Active	--	3/19/26	\$200.00	

Submit feedback

4. Use the search bar to quickly find individuals.

Muse

Q Search for an individual or organization

Individuals

Organizations

All

×

Amanda Fraser

☐ First Name	Last Name	Membership Sta
☐ Amanda	Fraser	Active

5. Click on the resultant constituent from the list to access their detailed profile.

Muse

Search for an individual or organization

Individuals

IndividualsOrganizationsAll

X

Amanda Fraser

First Name

Last Name

Membership Status

Amanda

Fraser

Active

6. Select the more options menu from the vertical ellipses to reveal advanced profile actions.

Muse

Search for an individual or organization

Return to All Constituents

AF

Amanda Fraser

Send Email

Record a Donation

Add to List

Add a Note

Record a Pledge

Membership

View

Plan

Individual + 1

Active

Renews on

8/18/27

Member since

2026

Contact Details

Edit all

Phone

--

Email

afraser157@gmail.com

Address

4514 Congressional Dr Jacksonville,
FL 32246, USA
P.O. Box 666 Jacksonville, FL 32246

Show more

Personal Details

Title

Suffix

--

--

Overview

Record a Gift

\$1,160.00

Total Giving

\$1,125.00

Total Recognition

24

All-time visits

24

Last 12 months visits

Pledges

Donations

Appeals

Add to Appeal

Committed

Gift Type

Designation

Amount

Type

Progress

Next

12/31/26

Money

Building Fund
2026 Capital...

\$79.50

Verbal

\$0 paid

6/11/26

>

Relationships

Add Relationship

There are no relationships

Tasks

Add Task

Submit feedback

View online

7. Choose "Merge into another Constituent" to start consolidating duplicate records.

The screenshot shows a constituent record page. At the top is a search bar with the placeholder text "Search for an individual or organization". In the top right corner is a red circular profile icon with the initials "JM". Below the search bar are two buttons: "Add a Note" and "Record a Pledge". A dropdown menu is open, showing the option "Merge into another Constituent" which is circled in red. Below the menu, the "Overview" section displays four statistics: Total Giving (\$1,160.00), Total Recognition (\$1,125.00), All-time visits (24), and Last 12 months visits (24). Below these are tabs for "Pledges", "Donations", and "Appeals", with "Add to Appeal" button to the right. A table of pledges is shown with columns: Committed, Gift Type, Designation, Amount, Type, Progress, and Next. The first row shows a pledge of \$79.50 for a "Building Fund" due 6/11/26. A blue "Submit feedback" button is on the right side of the page.

Committed	Gift Type	Designation	Amount	Type	Progress	Next
12/31/26	Money	Building Fund 2026 Capital...	\$79.50	Verbal	\$0 paid	6/11/26

8. Pick which record you want to merge.

The screenshot shows a merge selection dialog box. It contains a list of five records for "Amanda Fraser". Each record has a radio button, a name, an email address, and a total amount. The fourth record, with the email "No email, phone or address on file", is highlighted with a blue circle. At the bottom of the dialog are "Cancel" and "Continue to Preview" buttons. The background shows a blurred view of the constituent record page.

	Name	Email	Amount
☐	Amanda Fraser	amanda.fraser+1@musesoftware.ai	\$454,545
☐	Amanda Fraser	amanda.fraser@musesoftware.ai	\$0
☐	Amanda Fraser	amanda.fraser@musesoftware.ai · Jacksonville, FL	\$235
☒	Amanda Fraser	No email, phone or address on file	\$50
☐	Amanda Fraser	afraser157+2@gmail.com	\$0

9. Click Continue to Preview for a side-by-side comparison before committing to the merge.

Active

Edit all

ville,

2246

Tasks

☐ Amanda Fraser
amanda.fraser+1@musesoftware.ai

\$454,545

☐ Amanda Fraser
amanda.fraser@musesoftware.ai

\$0

☐ Amanda Fraser
amanda.fraser@musesoftware.ai · Jacksonville, FL

\$235

☒ Amanda Fraser
No email, phone or address on file

\$50

☐ Amanda Fraser
afraser157+2@gmail.com

\$0

Cancel

Continue to Preview

24
All-time visits

24
Last 12 months visits

Add

Type	Progress	Next
Verbal	\$0 paid	6/11/26
Add R		
onships		

10. Review and select the preferred value for each of the Personal details fields, like Title, Suffix, First Name, etc. to ensure accuracy.

AF Amanda Fraser

Send Email

Record a Donation

Membership

Plan Individual + 1

Renews on 8/18/27

Member since 2026

Contact Details

Phone --

Email afraser157@gmail.com

Address 4514 Congressional Dr Ja
FL 32246, USA
P.O. Box 666 Jacksonville

ARCHIVED (BEING ARCHIVED)

Amanda Fraser

KEPT (SURVIVES)

Amanda Fraser

Personal details

By default, the Kept record's value stays — unless it's blank and the Archived record has a value, in which c
value is selected. Click either side to override.

FIELD	ARCHIVED VALUE	KEPT VALUE
Title	☐ (blank)	☒ (blank)
Suffix	☐ (blank)	☒ (blank)
First name	☐ Amanda	☒ Amanda
Last name	☐ Fraser	☒ Fraser
Middle name	☐ (blank)	☒ (blank)
Preferred name	☐ (blank)	☒ (blank)
Gender	☐ (blank)	☒ (blank)

11. Confirm the correct email address so future messages reach the right contact.

Muse

Return to All Constituents

AF Amanda Fraser

Send Email

Record a Donation

Membership

Plan Individual + 1

Renews on 8/18/27

Member since 2026

Contact Details

Phone --

FIELD

ARCHIVED VALUE

KEPT VALUE

Salutation (informal)

☐ Amanda

☒ Amanda

Contact details

Every email, phone and address from both records is listed once. Ticked items are carried onto the Kept record. Ticked items fill its main email, cell phone and address, and the rest are saved as additional contact details. Up to 3 items can be kept.

Email addresses

☒ afraser157@gmail.com

from Amanda Fraser - Archived

Phone numbers

Neither record has any phone numbers.

Addresses

☒ 4514 Congressional Dr, Jacksonville, FL 32246, USA

from Amanda Fraser - Archived

12. Verify which phone number you wish to keep.

Return to All Constituents

AF Amanda Fraser

Send Email

Record a Donation

Membership

Plan Individual + 1

Renews on 8/18/27

Member since 2026

Contact Details

Phone --

Email afraser157@gmail.com

Address 4514 Congressional Dr Jacksonville, FL 32246, USA

Salutation (informal)

☐ Amanda

☒ Amanda

Contact details

Every email, phone and address from both records is listed once. Ticked items are carried onto the Kept record. Ticked items fill its main email, cell phone and address, and the rest are saved as additional contact details. Up to 3 items can be kept.

Email addresses

☒ afraser157@gmail.com

from Amanda Fraser - Archived

Phone numbers

Neither record has any phone numbers.

Addresses

☒ 4514 Congressional Dr, Jacksonville, FL 32246, USA

from Amanda Fraser - Archived

Communication preferences

Recommended: "Yes" is pre-selected whenever either record has the preference set, so a merge never re-enters someone opted out of. Click either side to override.

13. Review address details to choose the most accurate location for the merged record.



Membership

Plan	Individual + 1
Renews on	8/18/27
Member since	2026

Contact Details

Phone	--
Email	afraser157@gmail.com
Address	4514 Congressional Dr Jacksonville, FL 32246, USA P.O. Box 666 Jacksonville

[Show more](#)

kept.

Email addresses

☒

afraser157@gmail.com

from Amanda Fraser - Archived

Phone numbers

Neither record has any phone numbers.

Addresses

☒

4514 Congressional Dr, Jacksonville, FL 32246, USA

from Amanda Fraser - Archived

Communication preferences

Recommended: "Yes" is pre-selected whenever either record has the preference set, so a merge never re-emails someone opted out of. Click either side to override.

FIELD	ARCHIVED VALUE	KEPT VALUE
Do not email?	☐ No	☒ No

14. Set communication preferences to respect your constituents' wishes.

Return to All Constituents

AF

Amanda Fraser

Send Email

Record a Donation

Membership

Plan

Individual + 1

Renews on

8/18/27

Member since

2026

Contact Details

Phone

--

Email

afraser157@gmail.com

Addresses

☒

4514 Congressional Dr, Jacksonville, FL 32246, USA

from Amanda Fraser - Archived

Communication preferences

Recommended: "Yes" is pre-selected whenever either record has the preference set, so a merge never re-e someone opted out of. Click either side to override.

FIELD	ARCHIVED VALUE	KEPT VALUE
Do not email?	☐ No	☒ No
Do not mail?	☐ No	☒ No
Do not phone?	☐ No	☒ No
Prefers physical acknowledgement	☐ No	☒ No

Status & lifecycle

Recommended: Active is pre-selected if either record is Active, and Deceased if either record is marked de reason and notes only appear when a record is Inactive and are cleared if the merged record ends up Active rows only appear when a record is deceased.

15. Select the correct Status to accurately reflect the constituent's engagement.

Muse

Return to All Constituents

AF Amanda Fraser

Send Email

Record a Donation

Membership

Plan Individual + 1

Renews on 8/18/27

Member since 2026

Contact Details

Phone --

FIELD

ARCHIVED VALUE

KEPT VALUE

Status

Active

Active

Additional information

Each list below shows what will appear on the surviving record. Untick anything you don't want. Duplicates : automatically.

Everything else moves as well: 7 donation(s), 1 pledge(s), 2 task(s) and 1 membership(s) from Amanda Frase emails, events and other records.

Tags

Neither record has any tags.

16. Select which Tags to keep to enhance segmentation and targeted outreach.

Muse

Return to All Constituents

AF Amanda Fraser

Send Email

Record a Donation

Membership

Plan Individual + 1

Renews on 8/18/27

Member since 2026

Contact Details

Phone --

FIELD

ARCHIVED VALUE

KEPT VALUE

Additional information

Each list below shows what will appear on the surviving record. Untick anything you don't want. Duplicates : automatically.

Everything else moves as well: 7 donation(s), 1 pledge(s), 2 task(s) and 1 membership(s) from Amanda Frase emails, events and other records.

Tags

Neither record has any tags.

Households

Neither record belongs to a household.

Relationships

Neither record has any relationships.

17. Check Households to preserve family or shared connections during the merge.

Return to All Constituents

AF Amanda Fraser

Send Email

Record a Donation

Membership

PlanIndividual + 1

Renews on8/18/27

Member since2026

Contact Details

Phone--

Emailafraser157@gmail.com

Address4514 Congressional Dr Ja
FL 32246, USA

Additional information

Each list below shows what will appear on the surviving record. Untick anything you don't want. Duplicates i
automatically.

Everything else moves as well: 7 donation(s), 1 pledge(s), 2 task(s) and 1 membership(s) from Amanda Frase
emails, events and other records.

Tags

Neither record has any tags.

Households

Neither record belongs to a household.

Relationships

Neither record has any relationships.

Notes

All of the archived record's notes will be added to the surviving record.

18. Review Relationships to ensure valuable connections aren't lost.

Membership

PlanIndividual + 1

Renews on8/18/27

Member since2026

Contact Details

Phone--

Emailafraser157@gmail.com

Address4514 Congressional Dr Ja
FL 32246, USA
P.O. Box 666 Jacksonville

Show more

Tags

Neither record has any tags.

Households

Neither record belongs to a household.

Relationships

Neither record has any relationships.

Notes

All of the archived record's notes will be added to the surviving record.

1 note from Amanda Fraser → Amanda Fraser

Add a note about this merge (optional)

19. Look over Notes and add context so your team is always in the loop.

Send Email

Record a Donation

Membership

PlanIndividual + 1

Renews on8/18/27

Member since2026

Contact Details

Phone--

Emailafraser157@gmail.com

Address4514 Congressional Dr Ja
FL 32246, USA
P.O. Box 666 Jacksonville

Show more

Households

Neither record belongs to a household.

Relationships

Neither record has any relationships.

Notes

All of the archived record's notes will be added to the surviving record.

1 note from Amanda Fraser → Amanda Fraser

Add a note about this merge (optional)

Save a note about why you're merging these records. It will appear at the top of the archived record for future reference.

e.g. Duplicate from 2024 Mailchimp import - stray donation.

20. Hit Execute Merge to merge records.

gs to a nousemoid.

any relationships.

ord's notes will be added to the surviving record.

a Fraser → Amanda Fraser

this merge (optional)

y you're merging these records. It will appear at the top of the archived record for future reference.

2024 Mailchimp import - stray donation.

Cancel

Execute Merge

24

Last 12 months visits

Add to Appeal

Progress

Next

\$0 paid

6/11/26

>

Add Relationship

Add Task

Submit feedback