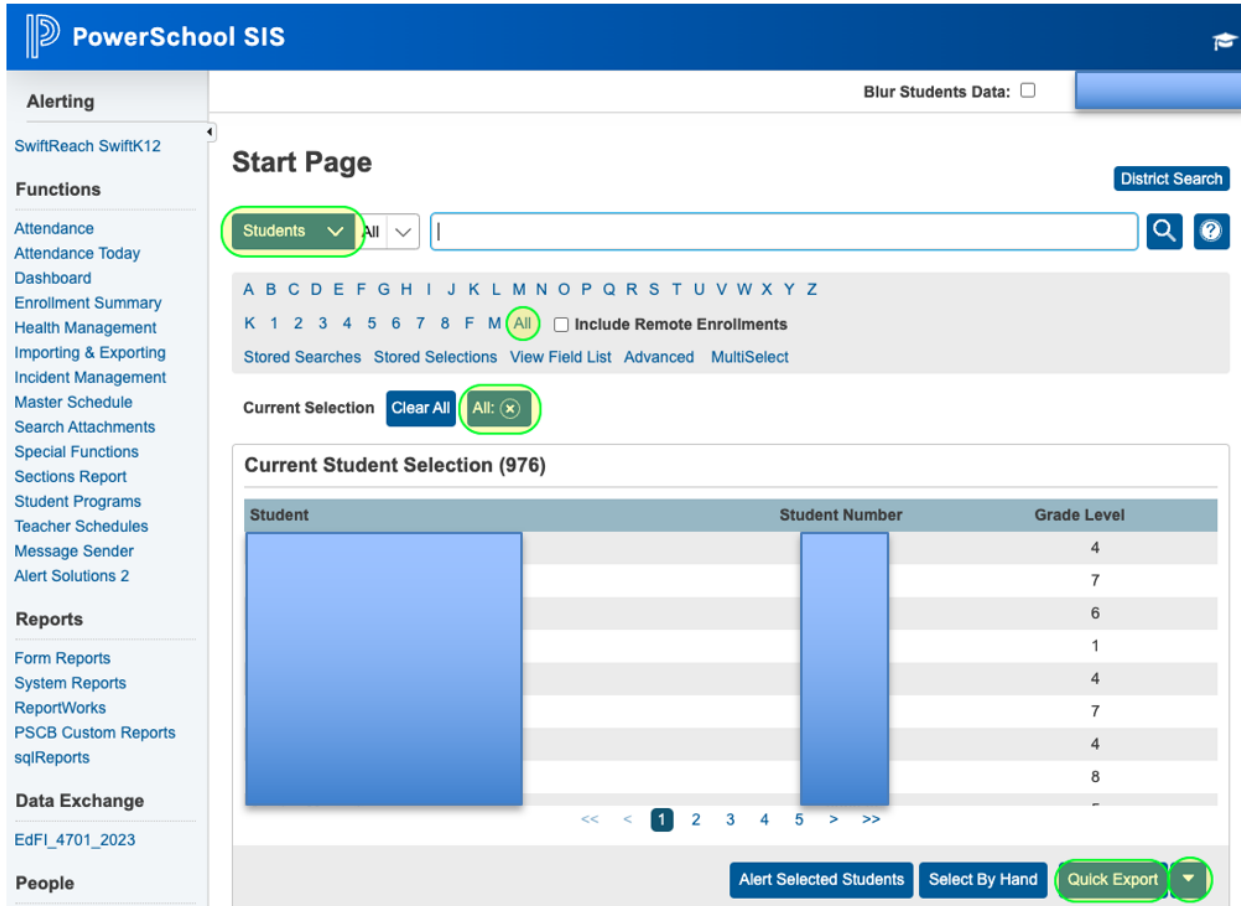# Consolidating Contacts

Step 1 – Run a '**Quick Export**' to create a copy of **all** your Students' Contacts.

-

Step 2 – Make sure that **all** of your Students have Contacts in their **Unlimited Contacts** (Core Contacts) page.

In the situation shown below, we see that the student does have Contacts. Some of these Contacts will be consolidated as discussed later beginning in step 6. It is important to note that your school utilizes Swift K-12 (Swift Reach), and it is possible that you may need to keep your 'Guardian' Contact, even though after renaming the 'No Name' to an actual Mother or Father's name, you will be left with a Duplicate Contact. Swift K-12, may very well be set up in your school to utilize this Guardian Contact as the primary contact.

Start Page > Student Selection > Contacts (Unlimited Contacts)

-

Step 3 – Make sure that the Guardian information on the **SC Student Contacts** page (**top portion**) has a First and Last Name along with an email address and phone numbers.

Note 1: Often the 'Guardian Contact' is created with **No Name** with only the email field populated. This is due to the 'Guardian Email' field being populated during enrollment and/or when filled out on the Student's Demographics page.

Note 2: If the Guardian email is the same as either the Mother's or Father's email this will create a Duplicate Contact, **but this can be resolved when the contacts are consolidated (Please read Important Message below).**

Important: Please check with your School's Swift K-12 administrator, and/or the District to determine how you should proceed with the 'Guardian' Contact prior to (Step 6) consolidating/merging that Contacts with one of the Parent Contacts.

Start Page > Student Selection > South Carolina State Information > Contacts (SC Top Portion)

-

Step 4 – Make sure that the Contacts list on the SC Student Contacts page (**bottom portion**) has **at least Contact 1 populated** with the correct information.

Start Page > Student Selection > South Carolina State Information > Contacts (SC Bottom Portion)

Step 5 – If additional information has been made available (**Contacts 2 - Contacts 10**) and is listed in the SC Students Contacts page (**bottom portion**), ensure that the information is also made available in the Student's **Unlimited Contacts page** as well. This may include manually adding that information into the 'Unlimited Contacts' page.

Note: It is also possible that the Contacts listed were merged into the 'Unlimited Contacts' (Core Contacts) via a previous Level Data operation.

Start Page > Student Selection > South Carolina State Information > Contacts (SC Bottom Portion)

Start Page > Student Selection > Contacts (Unlimited Contacts)

-

Step 6 – Run the **PSCB** Custom Report - Contacts - **Duplicate Contacts Report** to begin consolidating/merging Duplicate Contacts that are found in this report.

Note: Remember to **select all of your students** prior to running this report.

Start Page > PSCB Custom Reports > Contacts

Note: If the report finds Contacts of **students who are in another school's system**, you will want to **contact that school** to let them know if you consolidate the information. Remember that during the Consolidation process, the Web Access account (Parent Portal account) is merged, and this could potentially impact a parents ability to log in to their Parent Portal at another school.

Start Page > PSCB Custom Reports > Contacts > Contacts - Duplicate Contacts

-

Step 7 - Review and Consolidate your Contacts. Make sure that the Contacts on your 'Consolidated Contact' page are as you would like to be. Check your Web Access Account (Parent Portal account),

Students listed, Contact's Phone Numbers, Data Access and the Contact's Email. Once you are sure that the information on the page is correct, click 'Submit' and then 'OK' when the pop-up warning appears. You will now have just the one Contact.

Start Page > Edit Contact

Consolidate Contacts

Master	Exclude	Access Account	Contact Name	Phones	Email Addresses	Addresses	Students (Original Contact Type)
○	☐						
◉	☐						(Father)

◉ Consolidate All Data ○ Keep Master Only [Review]

Confirm Consolidation ✖

This action is irreversible. If present, only the web access account of the master contact will remain active. Be sure any additional or custom data tied to these contacts has been consolidated outside of these pages.

You are about to save the data on this page to a single consolidated contact:

• (ID 894065)

And delete the contact(s) named:

• (ID 966492)

[Cancel] [Ok]

-

Step 8 – After using the PSCB Duplicate Contacts report to consolidate as many Duplicate Contacts as you can, search your **Students' Contacts** individually to see the newly consolidated Contact list for each student. By using the Contacts listed there, search the District Unlimited Contacts' (Core Contacts) by Last Name and then First Name to see if additional Contacts are still left to be consolidated/merged.

Note: Emergency/Medical Contacts, Relatives (Aunts, Uncles etc.), and sometimes even different spelling of a person's name, **can be missed by the PSCB Duplicate Contact Report that was previously run**.

Start Page > Student Selection > Contacts

Step 9 – If additional work is needed, choose the listed Contacts by using the '**Select By Hand**' feature, **check mark the Contacts you would like to consolidate**, and then select the '**Consolidate Contact**' feature.

-

-

Start Page

Contacts ∨	First Name ∨	[ ]

Status	All ∨	Access Status	All ∨	☐ Filter By Current Student Selection (107)

Current Search Clear All Last Name: [ ]

Search results (20)

Start Page

Contacts ∨	Street Address ∨	[ ]	🔍

Status	All ∨	Access Status	All ∨	☐ Filter By Current Student Selection (107)

Current Search Clear All Last Name: [ ] ⓧ First Name: [ ] ⓧ

Search results (1)

Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
[ ]			[ ]		[ ]

Select By Hand

Search results (1)

☑	Contact	Access Account	Street Address	Phone Number	Email Address	Associated Student(s)
☑	[ ]			[ ]		[ ]

Cancel   Consolidate Contacts ▼

In the above example, there is only one Contact made for the above example, so there is no need to attempt to Consolidate. However, **if there had been a Contact created for "example" as an uncle and a Contact created for "example" as an Emergency Contact**, you would want to 'Select By Hand', check the two Contacts and 'Consolidate Contacts'.

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Important: Each school that I have worked with to consolidate Contacts has been unique. You may find that in addition to the above information, that you may add a step along the way.

I have additional information I can provide to you regarding the PSCB Duplicate Contact report, if you are running into issues with the report. Please let me know if I can help in any additional way as you go through the Contact consolidation process, and if you would like to schedule a meeting to review your unique situation. Level Data also has a workflow that can be followed (link below)

https://www.leveldata.com/blog/how-to-easily-manage-unlimited-contacts-in-powerschool