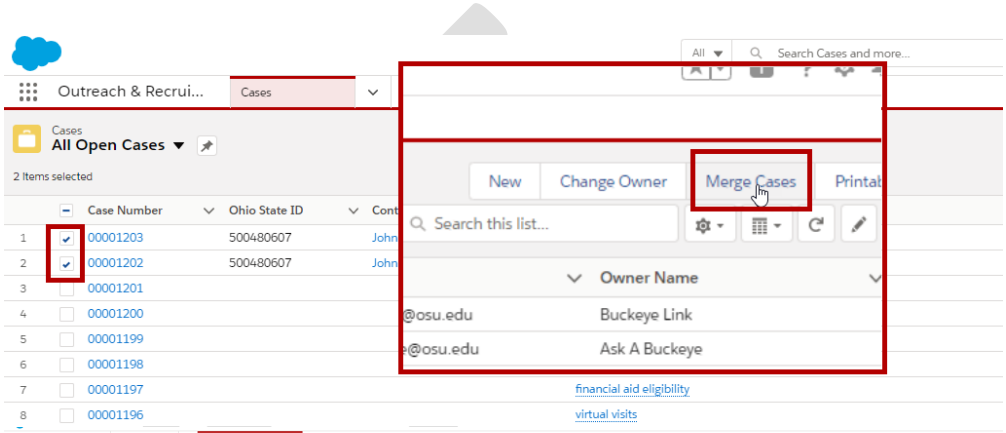
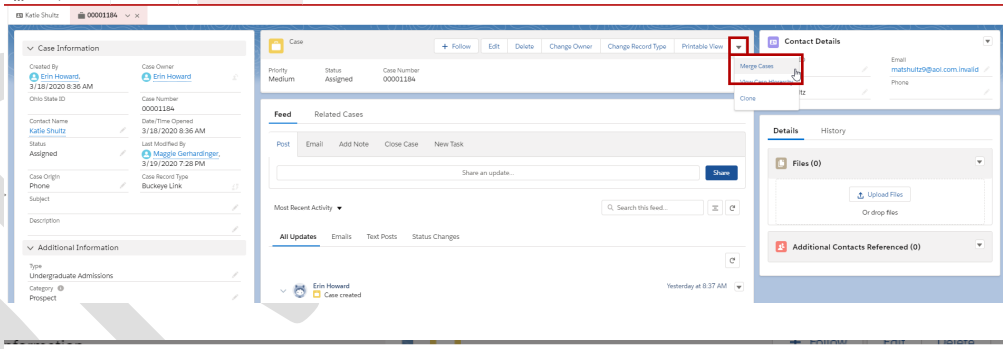
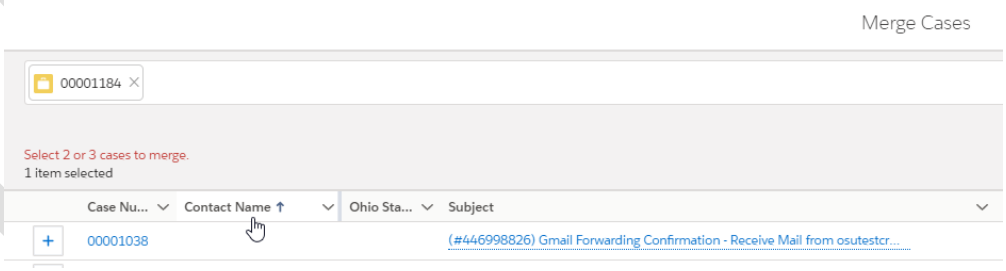
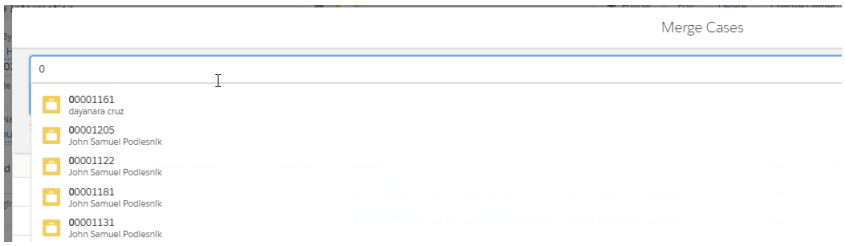
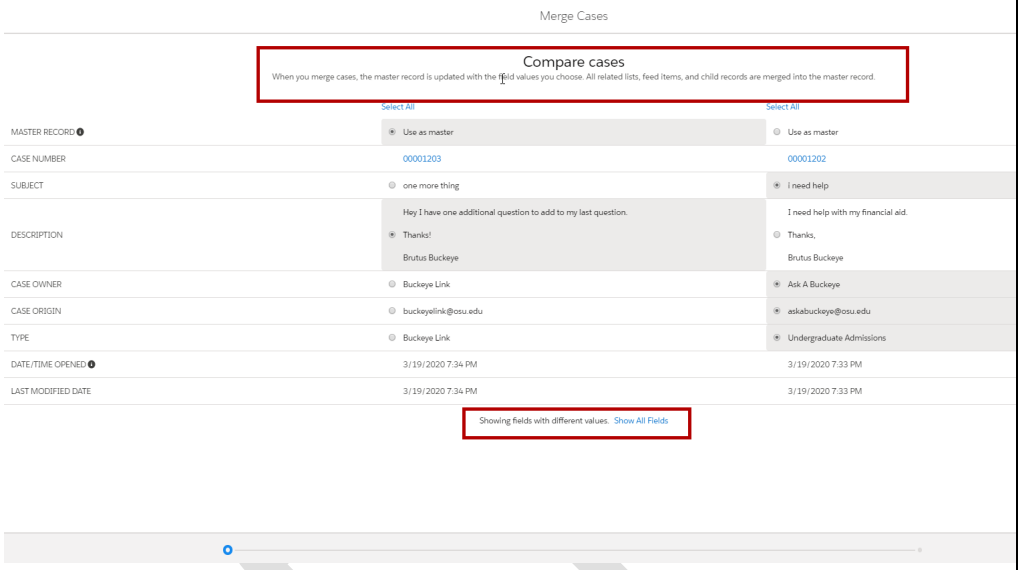
CASE MERGE

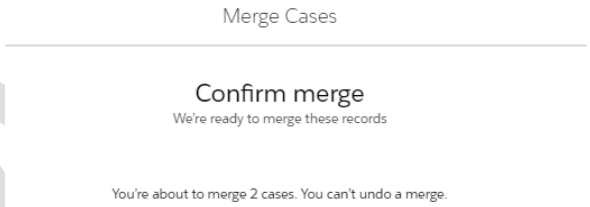
Step-by-Step	Screen
You have the ability to merge duplicate cases, and it can be accessed from multiple places on the platform. **From a case list view** Navigate to a case list view, and select up to 3 cases to merge. Click Merge Cases in the upper right corner.	
From an individual case record Click the dropdown arrow in the highlights panel, and select “Merge Cases.”	
The case record you are viewing will populate, and you will need to enter in the other case number to be merged with it.	
If you start to type in the search bar, your recently viewed cases will populate. Once you select the cases you want to merge, click “Merge Cases.”	

Compare Cases
In this section, the field values that differ between the cases will be presented, and you will need to select the value that should remain in the merged case.



Merge the case.

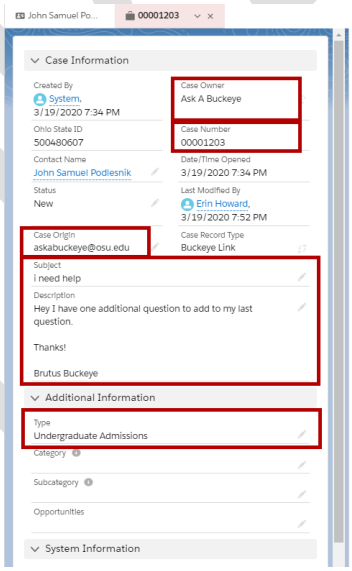
Note: Merging cases is irreversible.

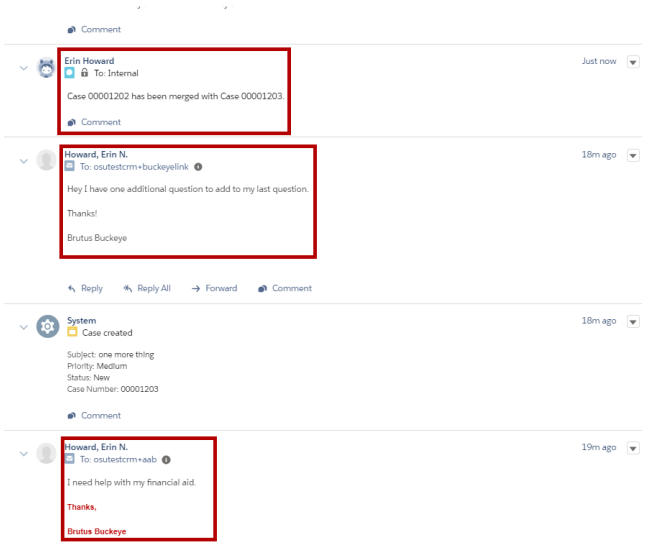


After the case is merged, open the master record to view the changes. In this example, Case 00001203 is the master record.

If you review the Compare Cases screen in the last step to the merged cases, you will see the updated fields.

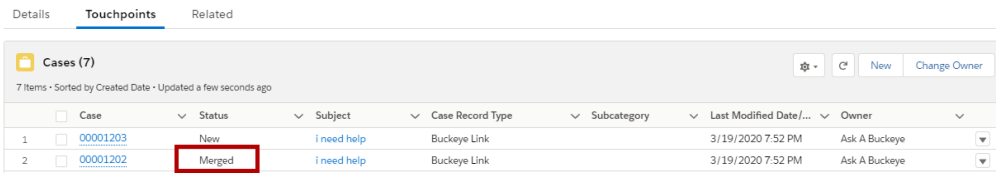
Note: When merging multiple records with emails, all emails from both cases are stored in the merged case.





The case that was not utilized as a master record is not deleted, but the status updates to “Merged.”

On this contact’s Case List, Case 00001202 is listed as “Merged.”



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