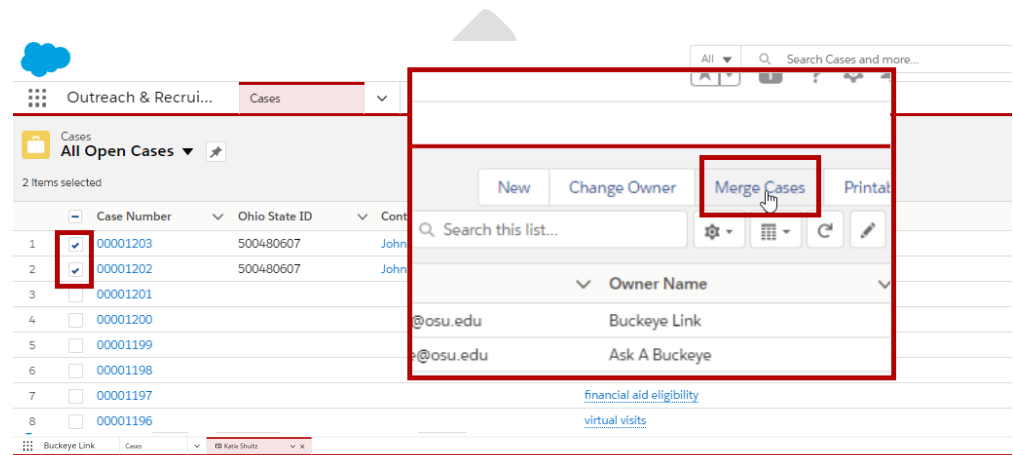
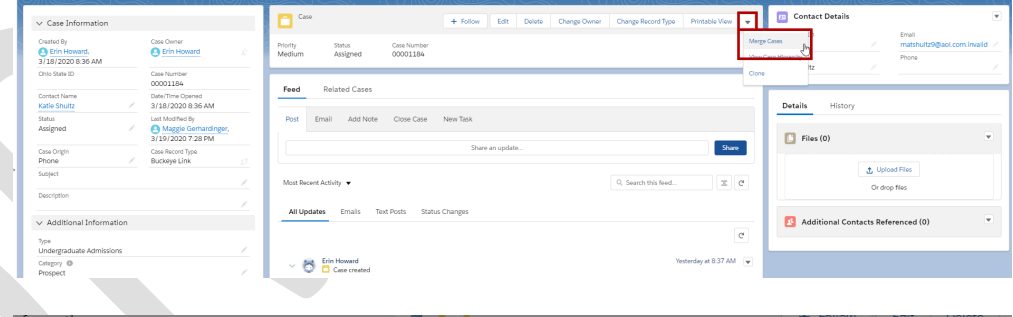
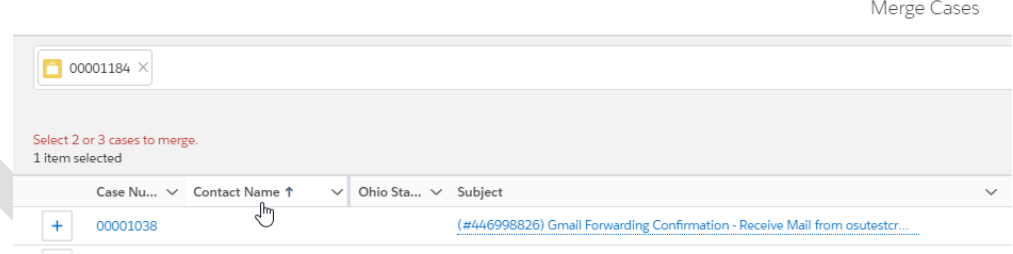
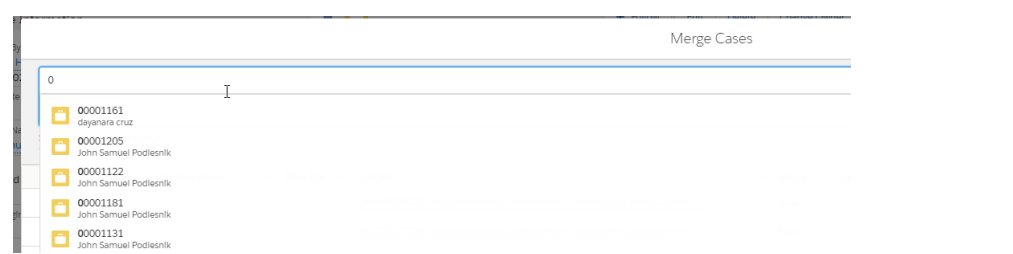


# CASE MERGE

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

## 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.

Merge Cases

Compare cases

When you merge cases, the master record is updated with the field values you choose. All related lists, feed items, and child records are merged into the master record.

	Select All	Select All
MASTER RECORD	<input checked="" type="radio"/> Use as master	<input type="radio"/> Use as master
CASE NUMBER	00001203	00001202
SUBJECT	<input type="radio"/> one more thing	<input checked="" type="radio"/> I need help
DESCRIPTION	Hey I have one additional question to add to my last question. <input checked="" type="radio"/> Thanks! Brutus Buckeye	I need help with my financial aid. <input type="radio"/> Thanks, Brutus Buckeye
CASE OWNER	<input type="radio"/> Buckeye Link	<input checked="" type="radio"/> Ask A Buckeye
CASE ORIGIN	<input type="radio"/> buckeyelink@osu.edu	<input checked="" type="radio"/> askabuckeye@osu.edu
TYPE	<input type="radio"/> Buckeye Link	<input checked="" type="radio"/> Undergraduate Admissions
DATE/TIME OPENED	3/19/2020 7:34 PM	3/19/2020 7:33 PM
LAST MODIFIED DATE	3/19/2020 7:34 PM	3/19/2020 7:33 PM

Showing fields with different values. [Show All Fields](#)

Merge Cases

Confirm merge

We're ready to merge these records

You're about to merge 2 cases. You can't undo a merge.

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.

John Samuel Po... 00001203

Case Information

Created By  
System  
3/19/2020 7:34 PM

Ohio State ID  
500480607

Contact Name  
John Samuel Podiesnik  
Status  
New

Case Origin  
askabuckeye@osu.edu

Subject  
I need help

Description  
Hey I have one additional question to add to my last question.

Thanks!  
Brutus Buckeye

Additional Information

Type  
Undergraduate Admissions

Category

Subcategory

Opportunities

System Information

Case Owner  
Ask A Buckeye

Case Number  
00001203

Date/Time Opened  
3/19/2020 7:34 PM

Last Modified By  
Erin Howard  
3/19/2020 7:52 PM

Case Record Type  
Buckeye Link

Comment

Erin Howard  
To: Internal  
Case 00001202 has been merged with Case 00001203.

Howard, Erin N.  
To: osutestcrm+buckeyelink  
Hey I have one additional question to add to my last question.  
Thanks!  
Brutus Buckeye

System  
Case created  
Subject: one more thing  
Priority: Medium  
Status: New  
Case Number: 00001203

Howard, Erin N.  
To: osutestcrm+aab  
I need help with my financial aid.  
Thanks,  
Brutus Buckeye

