

Merging Address Book Records

This guide covers the OPAS data function “**Change Links from Source to Target – Join Records**”. It is used to merge or join any two duplicate **Address Book** entries.

In this example, the OPAS **Address Book** contains two entries for the same person; one entry classifies the person as a soloist and the other as an orchestra member. Neither record can be deleted as both are linked to data elsewhere in OPAS – the ‘soloist’ entry is linked to concerts and contracts, and the ‘orchestra musician’ entry is linked to service assignments.

Co. / Last Name	First Name	Group	Instrument	Contact Number	Cell Phone
Torgul	Kim	Soloist	Violin		
Torgul	Kimberly	Orchestra Member	Violin 1	(703) 333-04491	(703) 999-0033

Prepare the record to be **deleted**

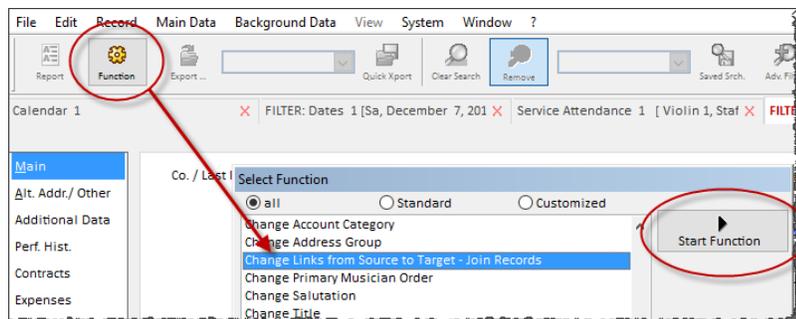
Clearly mark the entry to be removed from OPAS by adding the word “DELETE” to the person’s last name and clicking **Save** (the reason for this will become apparent in the next step)



Ensure any non-linked data such as phone numbers or notes that should be saved is either clearly marked or (better yet), manually moved to the **Address Book** entry that will be retained. Note that linked **Documents** will not be moved to the new record and must be manually re-linked.

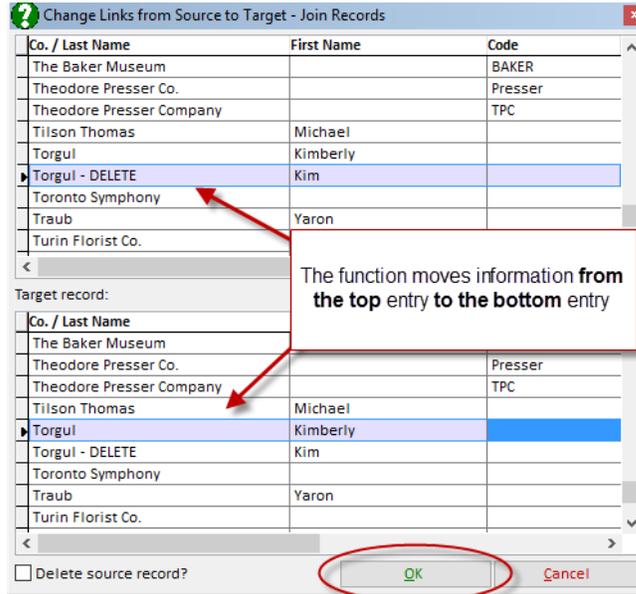
Click the Function icon and select the “Change Links...” function

Click the function button in the upper left-hand corner and select the “Change Links...” item from the list. Click Start Function



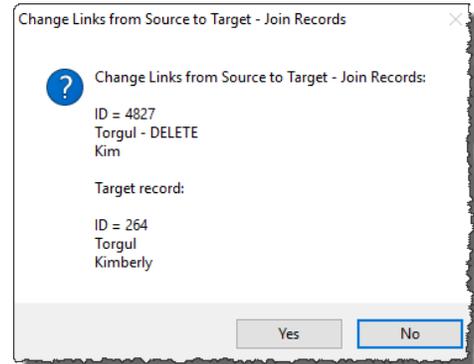
The function will display a two-pane window with all **Address Book** entities in both the top part and the bottom. In the **top** window, select the **Address Book** entity to be **deleted**. In this example, it is the soloist entry for the musician that is to be deleted, as that entry had much less information.

In the bottom window, select the Address Book **to be retained**. In our example, this is the orchestra member entry for the musician.



Note that in the lower left-hand corner, you can opt to automatically delete the top record after the links have been moved. Unless you are absolutely certain that you have moved all data, it is recommended that you leave this item un-checked.

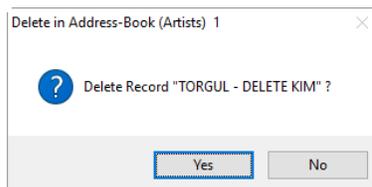
When you click the green **OK** button, OPAS will display a prompt to verify the move from one entry to the other. Click **Yes** and all restricting links (performance histories, contracts, services, etc.) from the top entry to the bottom entry.



Make any additional changes and delete the original record

After the function has run, the soloist version of the musician no longer has a performance history (the Perf. Hist. menu item is no longer red) and this **Address Book** entry can now be deleted.

The orchestra member version of the musician now has the soloist performance history (and any contracts) obtained from the other entry. However, Notes, Phone Numbers, Documents and other “flat” data has not been automatically brought over. The function will automatically move any **Address Groups** and/or **Instruments** required to keep the data links valid – in our example, the Soloist address group and instrument “violin” were both added to the orchestra member record.



After manually entering or moving other information, you can delete the original record as there are no data links in OPAS preventing its removal.

Notes Keep in mind that the “Change Links...” function can be taken quite literally; it *only* moves the data links that prevent a database record from being deleted. All other pieces of information are to be moved at your discretion.

The “Change Links...” **function does not move** any of the following:

- Linked Documents
- Phone Numbers
- Note fields
- Any information on the Additional Data screen
- Any information on the Personal Data screen
- Staff on the Contacts/Agents screen
- Alternate residences on the Contacts/Agents screen
- Agent links on the Contacts/Agents screen

If you wish this data to be preserved, you must manually recreate it on the new record