Managing and Merging Contacts

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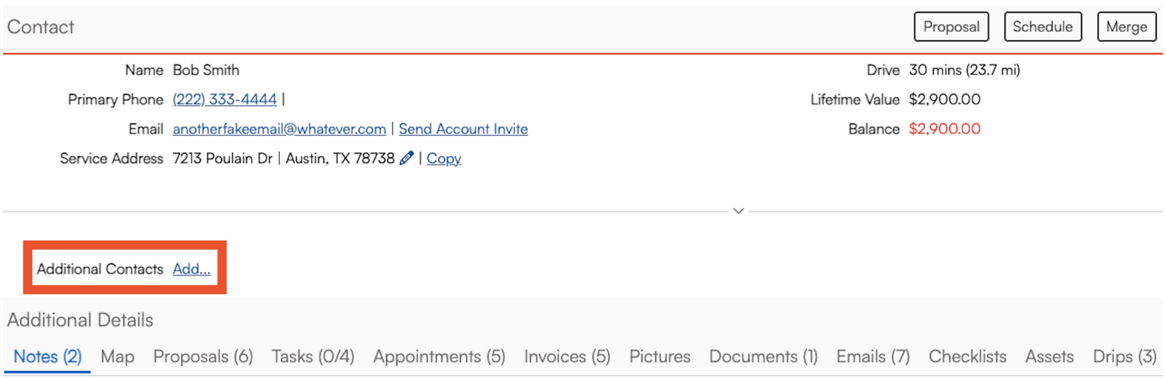
Overview

This page covers additional features around labeling multiple Contacts under a single "controlling" Contact to make it easier for billing and scheduling. Need some extra contact information on your customer? Does one property manager have several contacts in your location? You can add additional contacts as well as set up a "managed by" account.

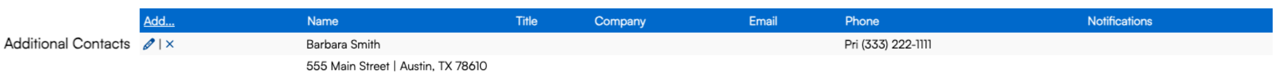
This article will review:

Additional Contacts

Have more than one person who wants to be emailed related to one contact record? No problem! Click **Add** next to the **Additional Contacts** line. This will open a new section at the top of the screen so you can add the contact, email, phone, address, notes, and so forth. You can also select which **email notifications** they should receive.



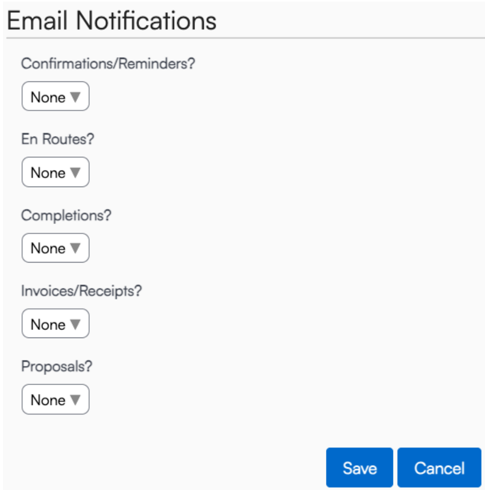
After adding, this is how the additional contact will appear. You can even add a note specific to the additional contact.



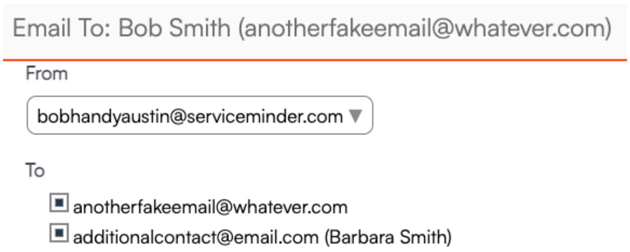
Permissions and Emailing

When adding an additional contact, the system will **not automatically enroll them in any marketing email campaign** that the main contact is subject to. The additional contact will not receive emails if you choose to launch an email campaign or a drip campaign for the main contact.

However, you **can choose which operational email notifications** the additional contact will receive — such as invoices, appointment confirmations, and completions.



If you use the **Direct Email** button in the **Actions** menu, you can also choose to include the additional contact on that message.



How Email Preferences for Additional Contacts Work

When an additional contact is configured to receive certain types of notifications (for example, “To:” for confirmations or “Cc:” for invoices), those recipients are **automatically included** when the system sends those communications.

- These additional contacts **may not appear as checked boxes** on the appointment, proposal, or invoice screen — this is expected.
- Even if those boxes appear unchecked, the emails will still be sent to the designated recipients according to their configured preferences.

This behavior helps ensure that all intended recipients consistently receive the correct communications, even if the selections aren’t visible during creation.

Verifying That Emails Were Sent

Automated reminders and notifications (appointments, proposals, and invoices) may not always appear in the individual contact’s **Email History**. To confirm delivery or review recipients, use the **Email Queue**:

1. Go to **Control Panel > Email Queue**.

2. Review outgoing emails, their **status** (sent, bounced, error, etc.), and the **recipient email addresses**.

3. Use this list as your audit trail to confirm that automated reminders and transactional emails were delivered correctly.

This is the most reliable way to verify that system-generated emails were sent to the proper recipients.

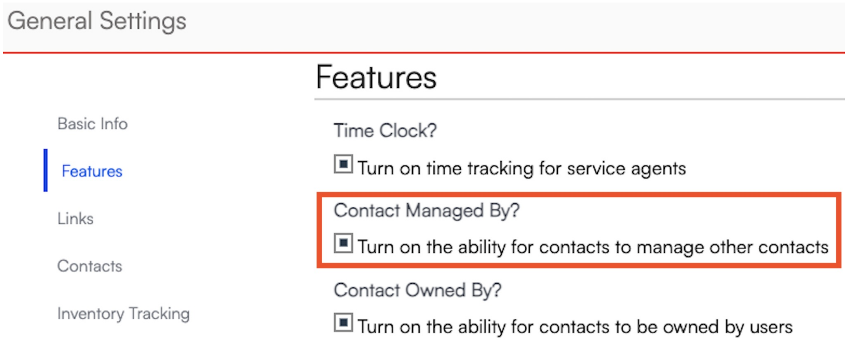
Managed By

If you have a contact that has multiple properties and you want to link them all together as a Parent/Child relationship you would use the Managed By tool.

> When there is a "Manager" for a contact, all invoices/receipts will go to that Managing Contact.

Here is how to get this set up for your organization.

1. Go to **Control Panel > General > Features**, check the box for **Contact Managed By?**



2. Create the **Managing Contact** (the contact that will be managing the others) before creating any "children" of that parent contact. You want to start at the highest level and work down.

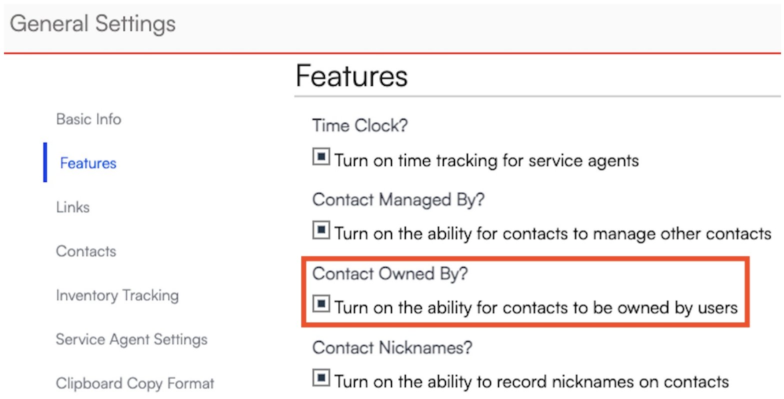
3. Add each location/property as a managed contact. When adding or editing each of the properties that you want linked use the **Managed By** box to search for the name or address of the “master” contact. That will link all the properties together.

> A few important tips:
> - Whichever contact you use as the managing contact (parent) will be the one that is listed on the invoices and be the billing account as well.
> - When it’s the same person who owns multiple properties you can make all the property contacts have the address as the “name” field to help you tell them apart.
> - If you use QuickBooks Online, the invoice will sync to the **Managed By** contact within QBO.

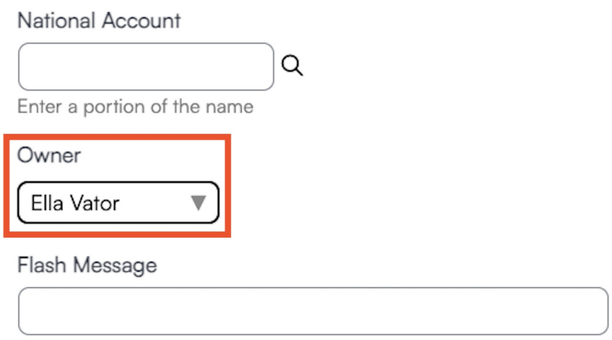
Contact Ownership

Contacts can have an **owner** - these are users in your service**minder** account that can own the contact. This is helpful for sales situations, notification options, and tracking.

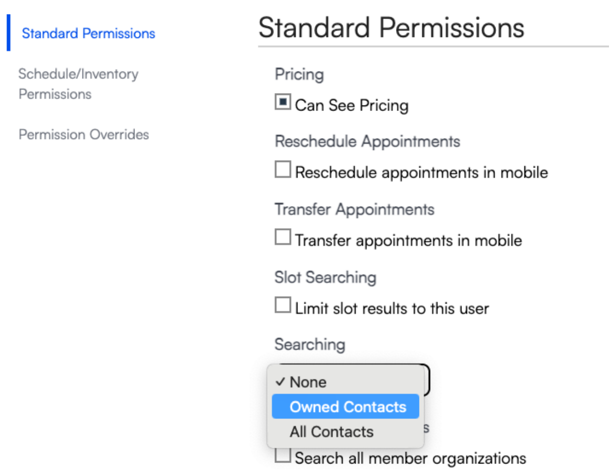
The setting must be enabled in **Control Panel > General > Features**:



Once that's turned on, when **editing/adding a contact** you'll have a dropdown selection of the usersto assign an owner of that account.



Additionally you have the ability to restrict users' searching abilities on each user's details page in **Control Panel > Users > Edit > Permissions**. Once it is set to **Owned Contacts**, that user will only be able to search for contacts they own and they will only get notifications for related to those owned contacts. Learn more about User Notifications **HERE**.

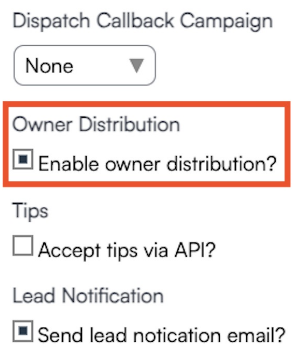


Owner Distribution

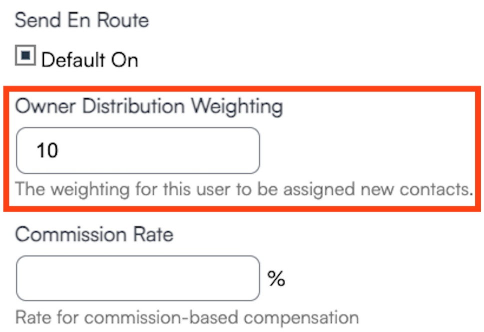
When leads come in via an API, you may want to have a system in place for assigning contact owners in a "round robin" fashion.

When a new contact is added, and owner distribution is enabled, the system will select an owner among all users based on the distribution weighting set. If you have 3 users and want equal weighting, you can give all 3 users the same weight, such as 10. If you have one user you want to give half the leads to, then divide the rest of the leads among two other users, then set one user at 10, and the other two at 5 (for example).

First, navigate to **Control Panel > API Keys** and edit the relevant API key. Check the box for **Owner Distribution**.



Next, go to **Control Panel > Users**. Edit the users whom you want to distribute leads to as Owners. Decide on the scale you want to use and assign values to the Users based on that.

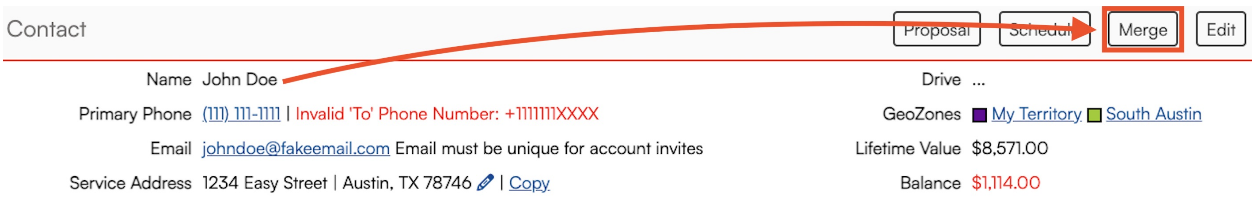


Merging Contacts

Find the contact you wish to merge the duplicate into. This is the contact you intend to keep during the merge process. You can find your contacts by clicking on the **Contacts** button on the top of every page, or search for them by name, email, or address in the search box located on the left side of every page.

Once you've found the contact, view their details by clicking on their name.

From there, a **Merge** button will be at the top of the contact's details box. Click this to be brought to a new page where the merge will take place.



On the left side of this page, you'll see your contact's details on a basic level. On the right, there will be a search box that you can use to find the duplicate contact that is to be merged with your currently selected contact on the left.

Your duplicate contact will then be merged with the contact whose page you are currently viewing. The contact you select here will be deleted after the merge is complete, so please exercise caution when merging contacts.

Once you've selected the duplicate, click **Merge** to confirm.

In the example above, John Doe will be the remaining Contact and John Doe 2 will disappear and be merged. Remember to be viewing the newest contact (the one you want to keep) when merging.

The system will take any empty fields in the primary contact and populate them with data from the duplicate contact. It will not attempt to overwrite any existing data. Keep in mind that any data on the duplicate contact will not be transferred over if the primary contact already has that information filled in.

If a duplicate contact is merged with a different lead source from the original contact record, this new lead source will be tracked in the system and tied to the invoice. Learn more about that **HERE**.

Merging Contacts with QuickBooks Online Connected

If your ServiceMinder account is integrated with QuickBooks Online (QBO), merging contacts can affect how invoices and payments sync between the systems. It's important to understand how merges work to avoid duplicate payments in QBO.

What Happens During a Merge

- When contacts are merged, invoices from the old contact are deleted and republished under the new contact.
- **Invoices** have a unique identifier (the invoice number), so they do not duplicate.
- **Payments** do not have a unique identifier, so during a merge, they can accidentally sync again and duplicate in

QBO.
- This issue is rare because merges are usually done on leads without invoices or payments.

How to Prevent Duplicate Payments

If you know you will be merging contacts that already have invoices or payments:
- **Option 1:** Temporarily **disconnect QuickBooks Online**, complete your merges, and then reconnect.
  - Payments won't sync again unless you later edit an invoice.
- **Option 2:Close your books** in QBO for the relevant periods.
  - If a payment tries to sync after merging, it will error out instead of duplicating.

Merging contacts with invoices or payments should be done with care when QBO is connected. To reduce the chance of duplicate payments appearing in QBO, unlink before merging, and always verify payment records afterward.

FAQs

If we have a Property Manager that runs several locations, how can we add each of those locations to their account? Or do we need to create separate accounts for each location?

You will need to add each location as a separate Contact but select the Property Manager in the **Managed By** field.

Ultimately what happens is the Property Manager becomes the parent contact, then each location/address would be it's own contact under the parent. So all billing would roll up to the parent/manager, but the appt/proposal/etc data would all be stored on that specific service address.

What is the difference between Contact Owner the same as Proposal Owner?

It can be or you can set them to be different Users within your organization.

Contact Owned By allows you to assign owners to specific contacts and change it by editing the contact. The owner will default to whoever created the contact. Enabling contact owner also has an effect on what contacts a user can see. There is a setting under standard permissions called "Searching" that is configurable per user -- it allows you to control whether a given user can only find "their owned contacts" or they can search the entire organization.

Most people who use "owned by" have multiple sales people so they only turn it on in that case. If there's a single contact owner, it's probably easier to just turn off Contact Owned By until there's a second person to participate.

There is also the ability to set the owner on a contact in a drip trigger. You could set up drip trigger for "contact added" and then have the action be to Set Owner to the desired user.

Proposal Owner is whoever created the proposal but can be changed before or after sending it by clicking on the pencil next to the proposal owners name and selecting the correct person. You proposal/invoice ownership setting are in Control Panel > Proposals.

We have a franchisee who created a bunch of proposals for a client on their main master page (we

are using the Managed By feature). But when they are going to schedule the jobs out they are doing it on the individual service address page. How can they attach those proposals to the appointments on the individual client pages?

The only way they'd be able to do it is if they move the proposals over to the contact with the individual service address. They can do this by clicking the pencil by the contact name on the proposal, selecting the contact the appointment is on, then they can attach the appointment.

I accidentally deleted or merged a contact that should not have been. What do I do now?

Accidents happen! Contact your Brand Administrator or submit a support ticket to our Client Success Team. We can either help you rebuild or restore the lost contact. A $250 data restoration fee may apply.