

When does the system automatically merge contacts 🔗

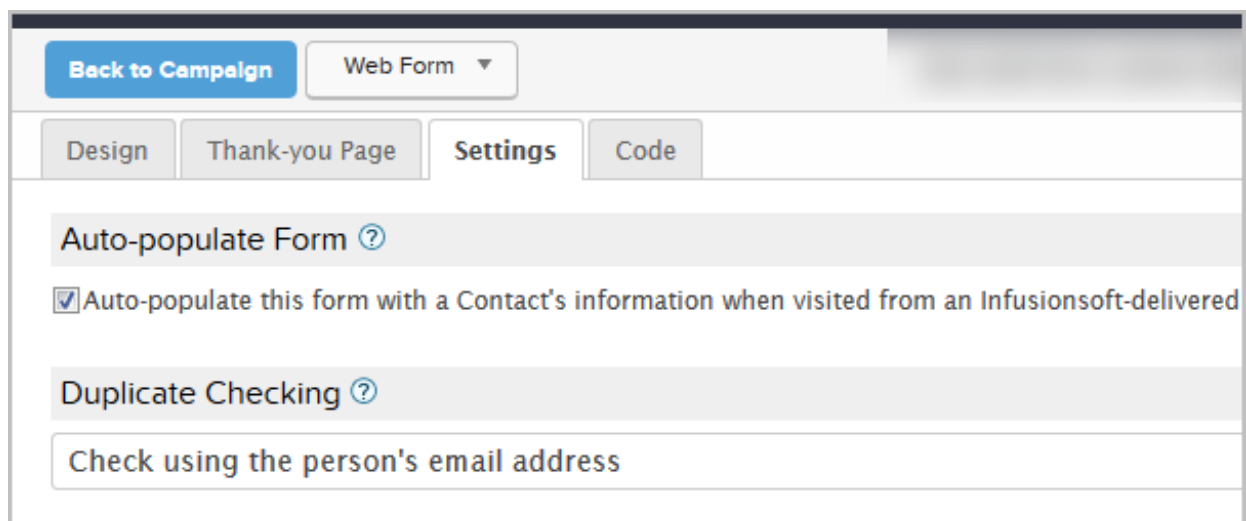
Pro-Tip! Infusionsoft does not automatically merge contact records together. Though listed here are times the system will auto update a contact record with newer information instead of creating a new contact record. All other methods of merging contacts have to be triggered or started by you.

Filling Out A Web Form, Landing Page, Or Internal Form

By default, Infusionsoft will check the email address entered into the form. If this is the same as what is on an existing contact, Infusionsoft will update the contact record with any new information that was entered in the form.

This setting can be edited for existing forms. Go to the form's Settings tab and adjust the "Duplicate Checking" Options. Don't forget to publish the campaign with these changes or they will not take effect.

The default setting for new forms can be edited in the Branding Center.



The screenshot shows the 'Settings' tab for a 'Web Form' in Infusionsoft. At the top, there is a 'Back to Campaign' button and a 'Web Form' dropdown menu. Below these are four tabs: 'Design', 'Thank-you Page', 'Settings' (which is active), and 'Code'. The 'Settings' tab contains two main sections. The first section is 'Auto-populate Form' with a help icon (?). It includes a checkbox labeled 'Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered' which is checked. The second section is 'Duplicate Checking' with a help icon (?). It includes a dropdown menu currently set to 'Check using the person's email address'.

Placing An Order On The Shopping Cart Or Order Forms

Unlike the other forms, an order's duplicate checker settings cannot be edited - they are preset to check by First Name, Last Name, and Email Address.

Performing A Mass Update From A Spread Sheet

This too is different from the Import Data tool in that it allows data to be updated from the .csv file to existing contacts. To use this tool, the contact's system ID numbers are required. For more details on this check out [this help article](#) .
