

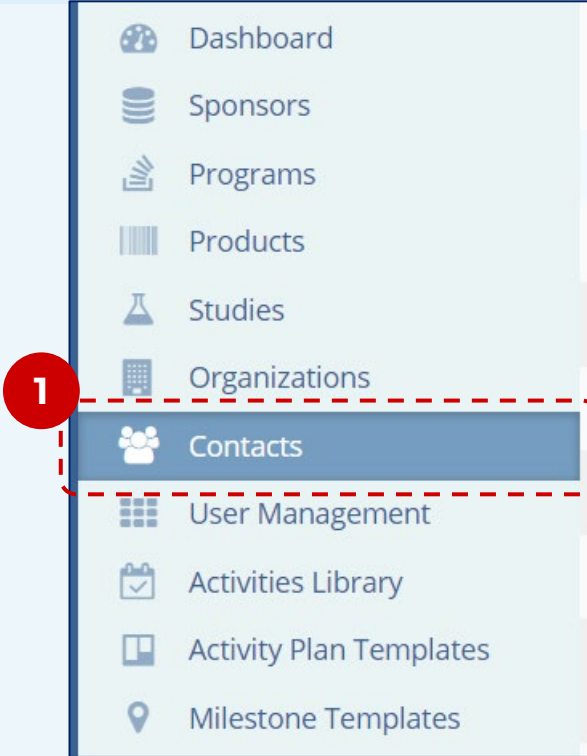
# How to Merge Global Contacts

CTMS version 3.1

## APPLICABLE TO:

- ☒ Company Admin
- ☐ Study Manager
- ☐ CRA

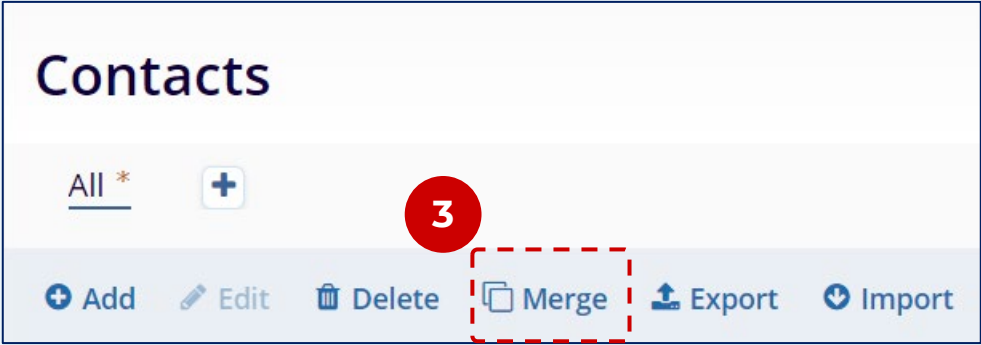
1 Log into the CTMS and select **Contacts** from the navigation links at the left side of the screen.



2 Select the contacts to be merged.

5 Records 2 Selected						
<input type="checkbox"/>	1 ↓	Full Name	Status	Job Title	Emails	Phone Numbers
<input type="checkbox"/>	☆	Jason Ogg	ACTIVE		Primary: jogg@ti.com	
<input type="checkbox"/>	☆	Michael Jordan	ACTIVE		Primary: MJ@ti.com	
<input type="checkbox"/>	☆	John Jamberry	NEW		Primary: jjam@ti.com	
<input checked="" type="checkbox"/>	☆	Jon Arbuckle	NEW	Head of Operations	Primary: jarbuckle@ti...	
<input checked="" type="checkbox"/>	☆	Jonathan Arbuckle	NEW			Mobile: +1 215 945 77...

3 Click on **Merge** in the menu bar above the grid.





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- Using the radio buttons provided, indicate whether the information from Contact 1' or 'Contact 2' should be used to create the 'Main Contact' during the merge.

Merge

Please note that contacts selected to be merged that are used within CTMS will be replaced with Main Contact

All contacts merged into the Main Contact will be deleted - this is a permanent action that cannot be undone. Please consult the [Online Help](#) for additional details

2 Contact

Main Contact Result of the Merge

Related Entities

Avatar

Full Name

Status

Preferred Languages

Preferred Communicati...

Time zone

Best Contact Time

JA

Jon Arbuckle

Jon Arbuckle

Jonathan Arbuckle

NEW

NEW

3 Entities

JA

JA

JA

Jon Arbuckle

Jonathan Arbuckle

NEW

Cancel

Merge

5

Press **Merge**.

**Note:** Duplicates such as these often result from users either failing to check for the contact prior to creating another entry or from the creation of the record in the system prior to a mass import of existing contact information. In order to minimize the number of duplicates, Company Administrators should prioritize the import of existing information and all users should be trained to check for existing records prior to creating a new entry.

Additionally, where possible, all contact entruess should be created with an email address in order to assist the system in detecting duplicates during the process of promoting them from the site level.

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