

Consolidating Contacts

Because the original system kept contacts directly on each student, one-to-one, multiple students would often have their own instance of the same contact. It is inevitable that all of these contacts will become visible after initial migration. These contacts were previously only seen on individual student pages, but the new system makes them more visible by bringing them to one location. By default, only contacts with Access Accounts are displayed in the new contact search results. This mimics the previous Parent search behavior so that impacts to staff workflows are minimized. When the search is performed without the Access Account filter you will see all of the contacts in your system. When duplicates are identified, they will either need to be deleted or consolidated into a single contact record.

Unfortunately, it is not possible for PowerSchool to automatically consolidate contacts. Every district uses PowerSchool in a unique way, with many of their own customizations. When there are data conflicts, someone must be there to decide which data should be kept and which should be discarded. **A consolidation tool is available on the Contacts Search screen** to make this process easier, however care must be taken when dealing with contacts that have custom data.

There are two methods for consolidation: Consolidate All Data and Keep Master Only. Both methods need the user to specify which will be the only remaining contact after consolidation, or the “Master” record.

Consolidate All Data

With the Consolidate All Data method, PowerSchool will analyze all contacts selected for consolidation and move all unique phone numbers, emails, addresses, and students to the Master record. Any single Relationship Type, Original Contact Type, or Access Account is automatically moved to the Master record. If there is more than one Relationship Type, Original Contact Type, or Access Account, PowerSchool cannot resolve which record should be kept, so it defaults to keeping the Master record. For all other fields the value on the master record is always kept, even if it is empty.

The Consolidation tool displays data to aid in determining which contact should be selected as the Master record, however it is imperative that each contact’s data is reviewed prior to final consolidation. PowerSchool cannot consolidate any custom data that may be associated to the contacts, and therefore users must enter any data from the other contacts that needs to be preserved on the Master. A preview screen is displayed in the final step of consolidation. Until the final **Submit Consolidation** button is clicked, users can add, edit, or delete any data to the Master record. After the final step of consolidation, the secondary contacts and their core data are permanently deleted from the system. Remember that PowerSchool cannot automatically delete custom data. Removing custom data that may have been tied to the secondary contacts should be considered as part of your consolidation workflow.

***Tip:** Consolidation can be split into multiple passes. If you are unsure a particular contact in the group should be consolidated, you can consolidate the ones you know about now, and consolidate any others at a later time.*

Keep Master Only

The Keep Master Only consolidation mode should be used only when it is known the secondary records can be discarded and permanently deleted from the system without any data being merged to the Master record. None of the phones, emails, addresses, students, or other data from the secondary contacts is kept in this mode. Only the Master record’s data is preserved.

Note: The Keep Master Only consolidation mode can delete a large number of contacts at one time, even if the contacts are not actually related. Mass delete is not the intended purpose of the consolidation tool and is **not supported**. It is not recommended to use the Consolidation tool to delete a large number of contacts as all contacts and their associated data (besides the Master record) will be permanently deleted and it can take a significant amount of time.