

3.5.5 Save Mapping

All users can perform a uniqueness check on each module by means of the "Find Duplicates" button when creating new records.

Define the set of fields to be matched and then click on Save Mapping.

LIST

Merging Criteria Selection
Select the match fields to find duplicate records

Available Fields

- Account Name
- Phone
- Website
- Fax
- Phone (other)
- Member Of
- Email
- Employees
- email (other)
- Ownership

Fields to be matched on

- Account Name

Jump empty fields ☒

Save Field Mapping Find Duplicates Cancel

At this point, whenever you attempt to edit an existing record or create a new one, the system will check for the existence of a record with the same combination of fields, alerting you to the presence of duplicates. For example, if the Email field is selected for matching, the warning shown in the following screenshot will be displayed.

Record già esistente nel sistema con dati:
Email: a@a.it
Vuoi salvare lo stesso?

OK Annulla

Revision #1

Created 25 May 2022 17:25:54 by Alberto

Updated 6 June 2022 12:30:15 by Alberto