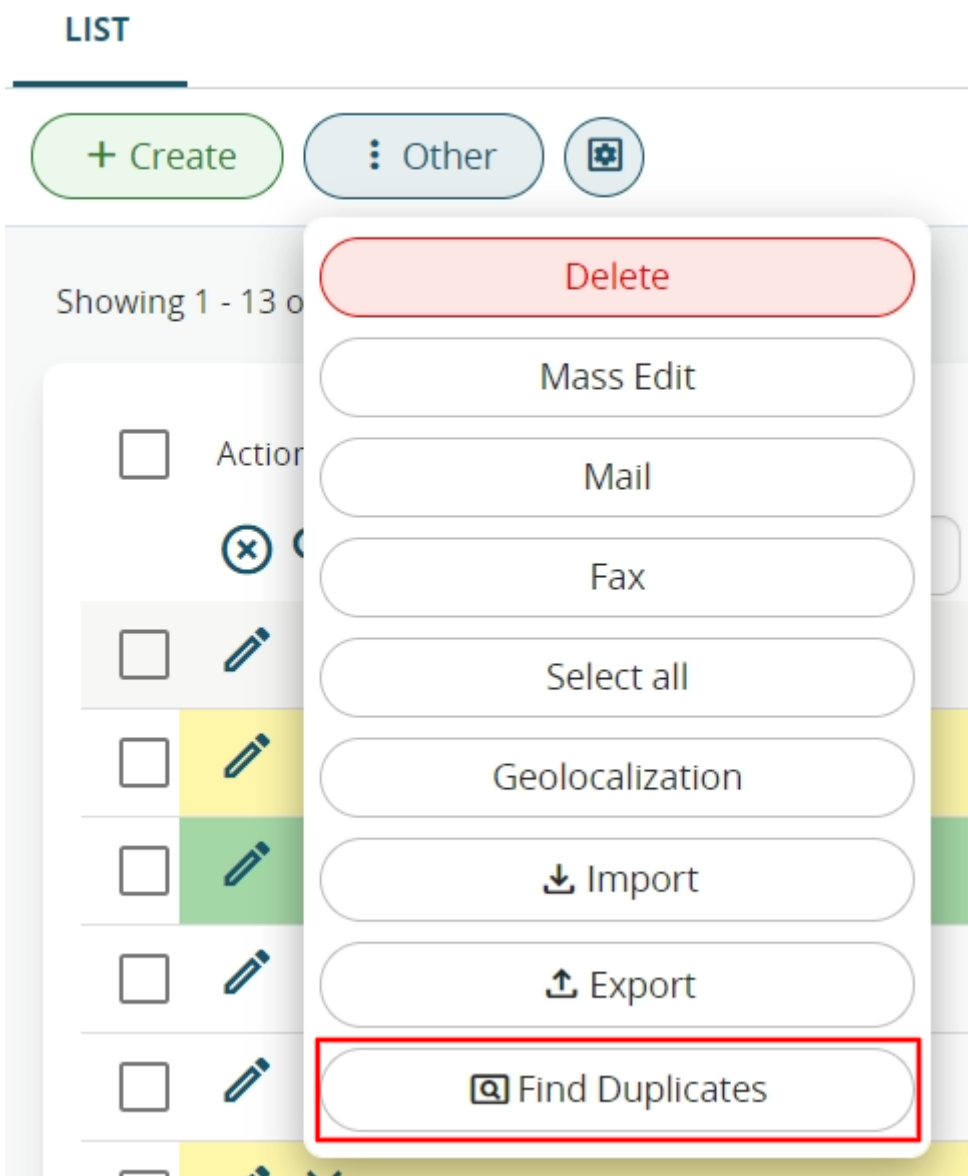


3.5.4 Checking duplicates in a module

You can check for the presence of duplicates in a module by means of a wizard.

To launch the duplicates check click on Other and Find duplicates in the module in question, then enter the key fields to find the duplicates (including customised fields).

Start the duplicates search procedure by clicking **OTHER > FIND DUPLICATES** button.



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

Duplicate Accounts

Total : 2 Duplicates:1

Delete

<input type="checkbox"/>	recordid	Account Name	Entity Type	Merge Select	Action
<input type="checkbox"/>	26	demovte	Existing	<input type="checkbox"/>	Merge
<input type="checkbox"/>	5387	demovte	Existing	<input type="checkbox"/>	

Duplicate records can be merged using the Merge button. You can merge up to three duplicate records at a time.

See the screenshot below for details on how to validate and merge duplicate records by selecting the required values field by field.

Merge Records In > Accounts

The primary record will be retained after the merge. You can select the column to retain the values. The other record will be deleted but the related information will be merged.

List Of Fields	Record #1 (select as primary record)	Record #2 (select as primary record)
Account Name	<input checked="" type="radio"/> demovte	<input type="radio"/> demovte
Phone	<input checked="" type="radio"/> (108) 792-9815	<input type="radio"/> --None--
Website	<input checked="" type="radio"/> www.demovte.com	<input type="radio"/> --None--
Fax	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Phone (other)	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Member Of	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Email	<input checked="" type="radio"/> test123@test123.com	<input type="radio"/> --None--
Employees	<input checked="" type="radio"/> 0	<input type="radio"/> 0
email (other)	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Ownership	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Rating	<input checked="" type="radio"/> Acquired	<input type="radio"/> --None--
Industry	<input checked="" type="radio"/> Chemicals	<input type="radio"/> --None--
Type	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Annual Revenue	<input checked="" type="radio"/> 0	<input type="radio"/> 0
Bank Details	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
VAT Registration Number	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Social Security number	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
External Code	<input checked="" type="radio"/> --None--	<input type="radio"/> --None--
Lock Automatic Emails	<input checked="" type="radio"/> no	<input type="radio"/> no

Note:

- the selected record will be the file that is saved following the merge;
- following the merge, the saved record will contain the merged relations;
- the records merge operation can be enabled or disabled in User profiles.

See the next paragraph, relating to the **SAVE FIELD MAPPING** button which allows you to check the data during insertion to avoid entering existing personal data.

Revision #1

Created 2026-01-28 14:56:10 UTC by Admin

Updated 2026-01-28 14:56:10 UTC by Admin