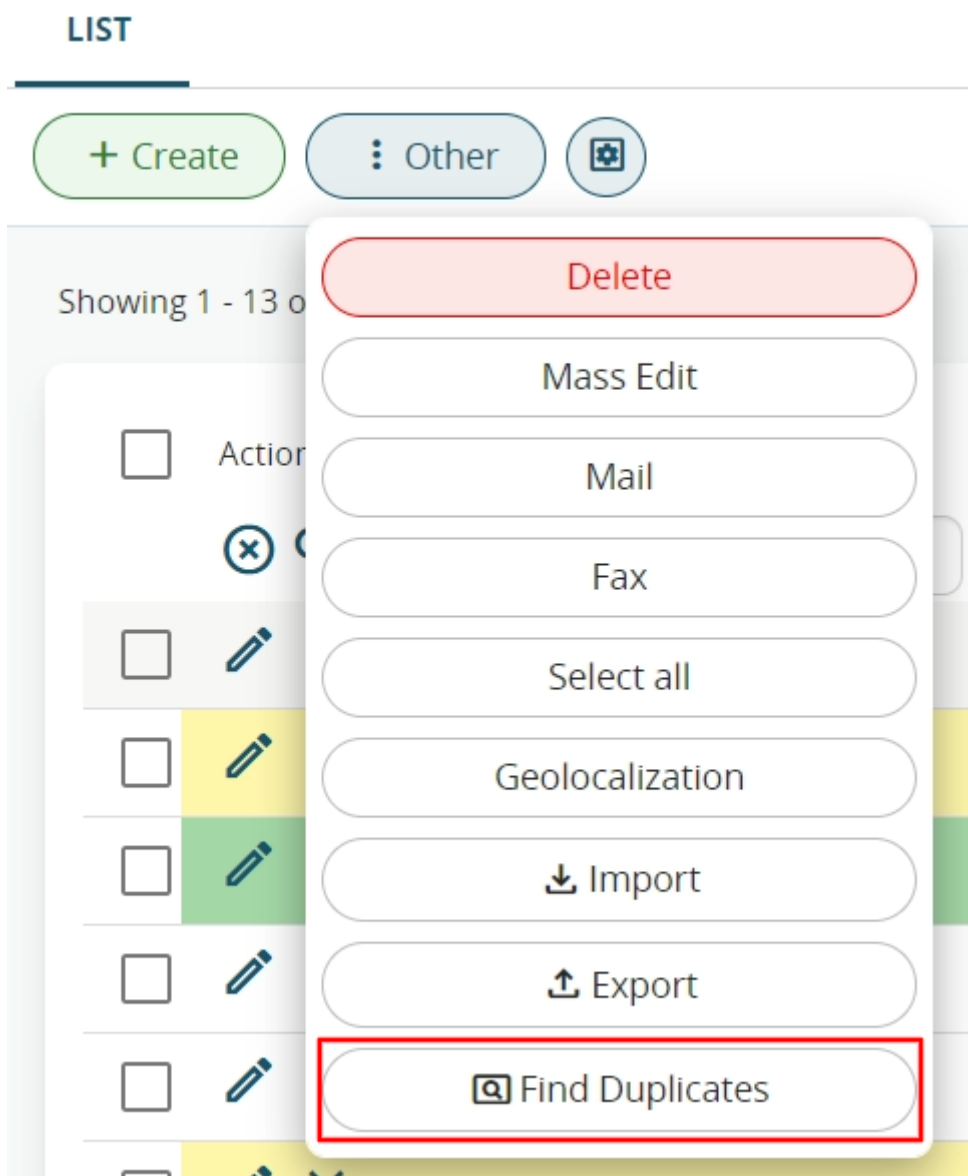


3.5.4 Checking duplicates in a module

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

Delete

Total : 2 Duplicates:1

☐	recordid	Account Name	Entity Type	Merge Select	Action
☐	26	demovte	Existing	☐	Merge
☐	5387	demovte	Existing	☐	

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	☒ demovte	☐ demovte
Phone	☒ (108) 792-9815	☐ --None--
Website	☒ www.demovte.com	☐ --None--
Fax	☒ --None--	☐ --None--
Phone (other)	☒ --None--	☐ --None--
Member Of	☒ --None--	☐ --None--
Email	☒ test123@test123.com	☐ --None--
Employees	☒ 0	☐ 0
email (other)	☒ --None--	☐ --None--
Ownership	☒ --None--	☐ --None--
Rating	☒ Acquired	☐ --None--
Industry	☒ Chemicals	☐ --None--
Type	☒ --None--	☐ --None--
Annual Revenue	☒ 0	☐ 0
Bank Details	☒ --None--	☐ --None--
VAT Registration Number	☒ --None--	☐ --None--
Social Security number	☒ --None--	☐ --None--
External Code	☒ --None--	☐ --None--
Lock Automatic Emails	☒ no	☐ 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 2026-07-06 15:07:40 UTC by Admin

Updated 2026-07-06 15:07:40 UTC by Admin