

# Duplicate Finder

Last Modified on 11/30/2022 12:52 am EST

Duplicate Finder searches for duplicate records based on different criteria, such as name, email address, phone or organization. To search for duplicates:

1. Select how you wish to select duplicate records. Note: Selecting more than one criteria will create a narrower filter and will display **ONLY** those records that match **ALL** selected criteria. If you are not sure, you may wish to try reviewing your results after selecting just one criteria:
  - Last Name
  - Organization
  - Primary Email
  - Work Phone
  - First Name
  - City, State, Zip/Post
2. Choose which records you wish to search. (If you wish to search across your entire database, simply apply a search without any criteria, and all records will be returned.)
3. Select **Apply**. All matching duplicate records will appear along with the number of records that match your criteria.
4. Select **Clean Up**.
5. You are able to perform these actions:
  - **Delete** one of the displayed records.
  - **View** one of the displayed records.
  - Choose one record to **Set as Main**. This makes the record the default location for any duplicate records to merge into.
  - **Merge to Main**. This lets you select a duplicate record to merge into your chosen Main record.

## Duplicate Finder

Details

Selected Records

Select Duplicates By

☒ Last Name

☐ Organization


☐ Primary Email

☐ Work Phone

☐ First Name

☐ City, State, Zip/Post

Target Group



76 Records Selected

Apply

LAST NAME	RECORDS	
ANDERSON	2	<div>Clean Up</div>
ATTENDEE	3	<div>Clean Up</div>
BROWN	3	<div>Clean Up</div>
EATEST	2	<div>Clean Up</div>

Clear

## Scrolling Through Duplicate Records

If you have more than one set of records to review for clean up, you are able to use the left/right scroll arrows to scroll through your selections.

Clean Up Duplicate

Match: Last Name  
ANDERSON

SET AS...	MERG...	ID	LAST NAME	FIRST NA...	ORGANIZ...	POSITION	PRIMARY ...	CITY	STATE	ZIP/POST	WORKPH...	
<input type="radio"/>	<input type="checkbox"/>	510	Anderson	Alexander			AlexanderA...	Queensland		3820		<div>Delete</div> <div>View</div>
<input type="radio"/>	<input type="checkbox"/>	505	Anderson	Katherine			KatherineA...	Queensland		5307		<div>Delete</div> <div>View</div>

Update

# Selected Records Tab

This tab displays all records that match your search criteria. Here, you can select the records that you want to work with.