Duplicate Finder

Last Modified on 06/03/2024 12:38 am EDT

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

First, define your duplicate search criteria from the below. Depending on the size and makeup of your attendee list, you may want to keep your search simple (search for duplicate email addresses only), or search by multiple criteria:

- Last Name
- Organization
- Primary Email
- Work Phone
- First Name
- City, State, Zip/Post

Selecting more than one criteria will create a narrower filter – **ONLY** those records that match **ALL** selected criteria will be displayed. This could create problems if (for example) somebody has left their work phone number field blank. If you're not sure, you may want to try reviewing your results after selecting just one of the above.

On the other hand, it may not be good idea to assume that two records with the same surname, or even the same surname AND first name, are definitely duplicate records – especially from a large data set.

Choose a target group to search and select **Apply.** (To search across your entire database, select **Apply** without any criteria, and all records will be returned.)

- Once you've chosen a target group, select Apply again within the Find Duplicates screen.
- All matching duplicate records will appear, and you'll also see how many records match on this criteria.
- For each duplicate record, you can select **Clean Up.**
- You can then choose to:
    - **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 means the selected duplicate record will be merged into your chosen Main record.

Scroll through Duplicate Records

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

Selected Records tab

After filtering, you can look under the Selected Records tab to see a complete list of the attendees this Express Action will be applied to.

	ID	NAME	ORGANIZATION
☑	1	Santos, Aditya	Aurora Foundation
☑	2	Lee, Aditya	Global Horizons Initiative
☑	3	Khan, Ahmed	Momentum Ventures
☑	5	Tanaka, Aaliyah	Pinnacle Ventures
☑	7	Ma, Aditya	Blossom Innovations
☑	9	Silva, Aditya	Rising Sun Technologies
☑	10	Takahashi, Aditya	Evergreen Alliance
☑	11	Gonzalez, Aaliyah	Spectrum Solutions
☑	12	Blanco, Aditya	Harmony Enterprises
☑	13	Ma, Aaliyah	Phoenix Foundation
☑	14	Costa, Ahmed	Phoenix Foundation
☑	16	Wu, Aditya	Bright Future Foundation
☑	18	Ma, Ahmed	Phoenix Foundation
☑	19	Yamada, Aaliyah	Evergreen Alliance

Total Records: 435

Save As Data Snapshot **Export To Excel** **Cancel** **Change**

You may see slightly different buttons underneath the list as those that appear in the image above, depending on the Express Action you're using.

- You can use all the Selected Records, or just pick out some from within that list.
- To exclude individual records, manually deselect them. You can select them again to include them if you change your mind.

When you're happy with the list, press the "Start" button to start the Express Action (you can also do this from the Details tab).

Save as Data Snapshot

You'll see this option under the Selected Records tab.

A Data Snapshot captures, or "remembers" the results of a search or report filter so you can re-use the data later. (If you want to save the filter itself, to search on it again later, use the save filter function.)

Read more about using Data Snapshots in this article.

Note: Save As Data Snapshot saves the results, not the selection criteria. Any Attendees added *after* you made this selection are NOT included, even if they match your original filter criteria. If you want to save the *Selection Criteria* (instead of the *results*), use the **Save** button inside the Filter screen.

Create Data Snapshot

- ⦿ Create New

Name   [   ]

Remove After   [3 DAYS   ⌄]

- ◯ Append to existing   [Please select...   ⌄]
- ◯ Replace existing   [Please select...   ⌄]

[Clear]   [Save]

Create Data Snapshot

- ⦿ Create New

Name

Remove After