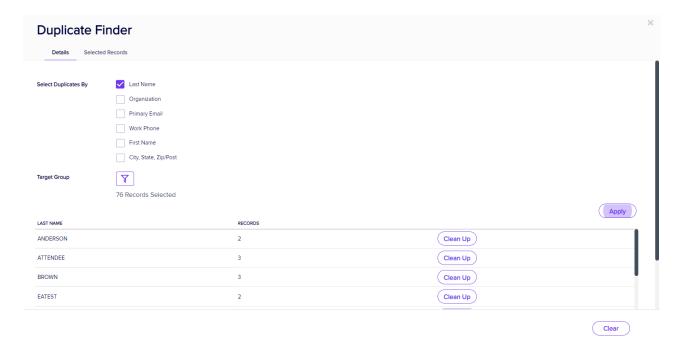
## **Duplicate Finder**

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

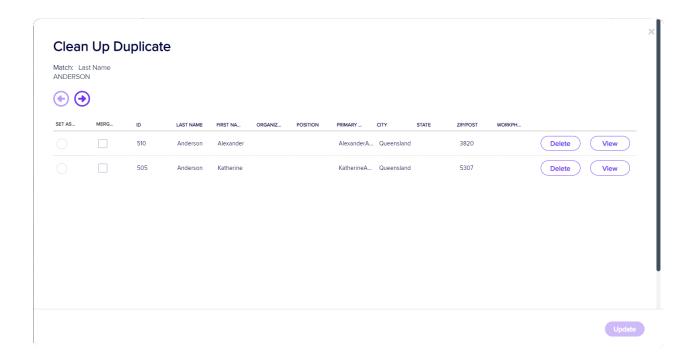
Duplicate Finder searches for duplicate records based on different criteria, such as name, email address, phone or organization. To search for duplicates:

- 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.



## 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.



## 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.