

Identify duplicate contact records

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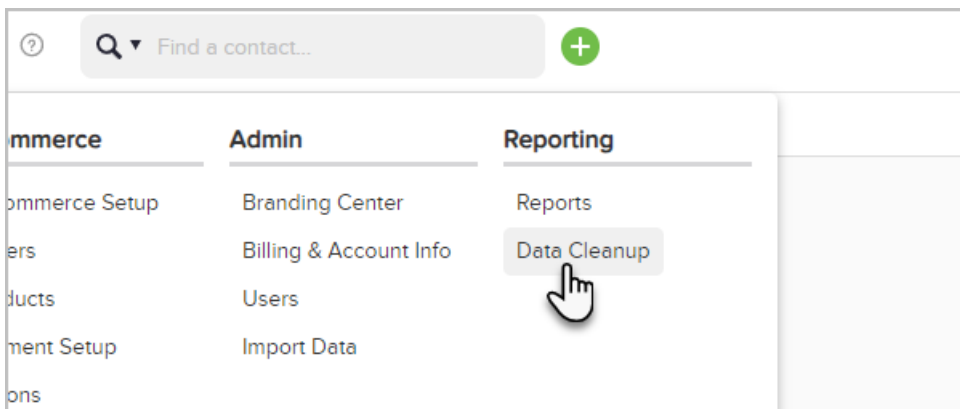
This article applies to:

[Max Classic](#)

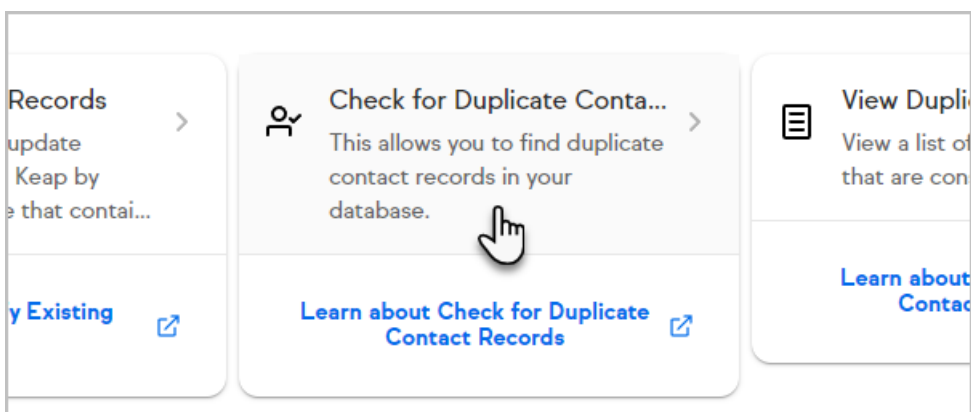
After your initial data import, you should run a duplicate check to consolidate data. The dup check tool identifies two matching records at a time based on the criteria you select. You may need to run the dup check and merge (dedupe) several times to identify all of the duplicate records in your system. After the initial data import, you should check for duplicates on a periodic basis. This will help keep your database from getting bloated and help ensure your lists and reports are accurate.

Pro-Tip! This process only identifies the duplicates. In the next user guide, you will learn how to actually merge duplicate records.

1. Go to **Reporting > Data Cleanup** in the main navigation menu



2. Click on **Check for Duplicate Contact Records**



3. Review the **Intro to Duplicate Checking** summary and click **Next**

GOOD FIELDS FOR DUP CHECKING

The best fields for dup checking are the ones that are the most unique. Email address is the best because most people have their own unique address. First + Last name is not the best because many people have the same name. (eg. John Smith). People's names in combination with address or phone number, will usually present a good result, since the likelihood of two people with the same name who have the same phone number is pretty low.

Next

4. Choose Who to Check:

Choose Who to Check

- Check all records. (May take a long time).
- Check all records that haven't been marked as a dup already.
- Check records that haven't been checked already.

1. **All records:** Checks all contacts, even if they've already been checked before.
2. **All records that haven't been marked as a dup already :** Checks only contacts that have not already been identified as a duplicate.
3. **Records that haven't been checked already:** Omits all of the contacts that have already been checked at some point in the past.

5. Choose the checking logic, and then click **Next**.

Review the logic summary to understand the logic behind stages and checks and the order in which the checks are run. Uncheck all of the boxes and select the criteria you want the system to use to identify duplicates. The best criteria is absolutely unique to an individual. In most cases, the email address is a good, unique identifier.

Stages

- STAGE 1: First Name + Last Name + One Other Field**
 - CHECK: FirstName + LastName + Email
 - CHECK: FirstName + LastName + Company
 - CHECK: FirstName + LastName + StreetAddress1
 - CHECK: FirstName + LastName + Fax1
 - CHECK: FirstName + LastName + Phone1
- STAGE 2: Email + One Other Field**
 - CHECK: Email + FirstName
 - CHECK: Email + LastName
 - CHECK: Email + Fax1
 - CHECK: Email + StreetAddress1
 - CHECK: Email + Phone1
- STAGE 3: One Field Check**
 - CHECK: Email

Next

6. Click on **OK** to confirm you're ready for the dup check to begin

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run at least
e to run any

martyc.infusionsoft.com says

This will automatically begin the deduping process. Are you sure you want to continue?

OK **Cancel**

First Name + One Other Field

7. The system will run the dup check and then give you 3 options:

1. View the list of contact records that are considered duplicates: Choose this to look at the list of duplicate contacts.
2. Go back to clean up more of your data: Choose this to view all data cleanup options, including auto-merge.
3. Click here to see all of your contacts: Choose this to see a list of all of your person records (not just

the duplicates.)
