

Finding and merging duplicates

Using the Healthwatch CiviCRM

About this resource

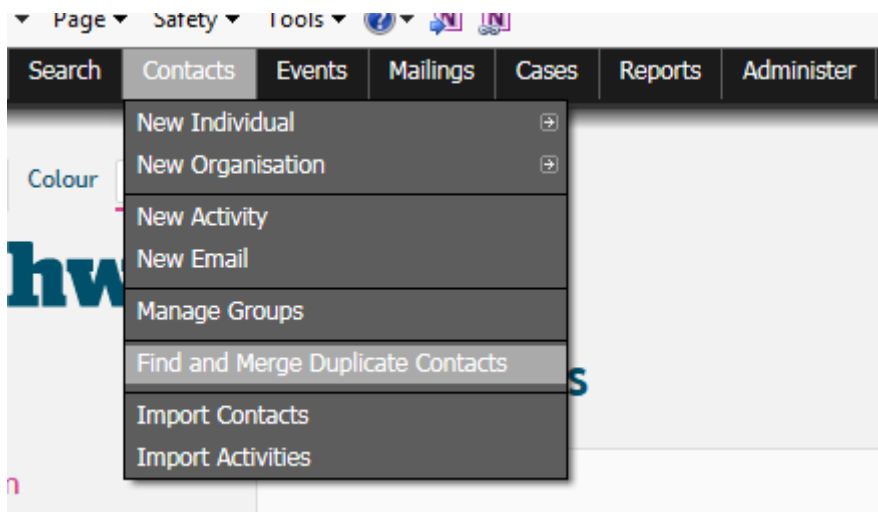
As with any CRM, it is important to prevent creating multiple records of the same contact. This resource tells you how to make sure you keep your data tidy by telling you how to find and merge duplicate records.

Finding duplicates

When manually creating a contact, a message box will appear in the top right-hand corner to let you know if similar contacts already exist.

However, if you have imported a number of contacts, you may wish to run the Find and Merge Duplicates program.

You will find it under the 'Contacts' section of the toolbar:



On clicking on 'Find and Merge', you will be taken to a new screen:

Find and Merge Duplicate Contacts

Manage the rules used to identify potentially duplicate contact records. Scan for duplicates using a selected rule and merge duplicate contact data as needed.

[View the Dedupe Exceptions](#)

| Household Rules | Usage | |
|--|--------------|---|
| Name and Email | Supervised | Use Rule Edit Rule Delete |
| Name and Email | Unsupervised | Use Rule Edit Rule Delete |
| + Add Rule for Households | | |
| Individual Rules | Usage | |
| Email (reserved) | General | Use Rule Edit Rule |
| Name and Address (reserved) | General | Use Rule Edit Rule |
| test | General | Use Rule Edit Rule Delete |
| People same name | General | Use Rule Edit Rule Delete |
| Name and Email (reserved) | Supervised | Use Rule Edit Rule |
| HW Wizard Rule v1 | Unsupervised | Use Rule Edit Rule |
| + Add Rule for Individuals | | |
| Organization Rules | Usage | |
| Name and Email | Supervised | Use Rule Edit Rule Delete |
| Name and Email | Unsupervised | Use Rule Edit Rule Delete |
| + Add Rule for Organizations | | |

Access Keys: ?

Here you have a range of the different dedupe rules you can run.

There are different ones for households, individuals and organisations. You can create new rules for each of those, relying on different fields, such as name and email, name and address, just email.

Some of the rules come with the CRM, and while you can edit them you cannot delete them, but any that you have created yourself can be deleted.

To use one of the deduping rules, simply choose your rule and click on ‘Use Rule’. You should then see the following screen:

If you just wish to dedupe a specific group you can do that, or you can dedupe all the contacts.

After clicking ‘Continue’, you will then see the list of possible duplicates:

Merging duplicates

| Contact 1 | Contact 2 (Duplicate) | Threshold | |
|-------------------|-----------------------|-----------|-----------------------|
| Joe Bloggs | Joe Bloggs | 2 | merge not a duplicate |
| Mr Willie Gibbons | Willie Gibbons | 2 | merge not a duplicate |
| jo bloggs | Jo Bloggs | 2 | merge not a duplicate |
| jo bloggs | Jo Bloggs | 2 | merge not a duplicate |
| test caller | test caller | 2 | merge not a duplicate |
| Sarah James | Sarah James | 2 | merge not a duplicate |
| Michelle Flores | Michelle Flores | 2 | merge not a duplicate |
| Jacqueline Woods | Jacqueline Woods | 2 | merge not a duplicate |
| Douglas Reynolds | Douglas Reynolds | 2 | merge not a duplicate |
| Ruby Richardson | Ruby Richardson | 2 | merge not a duplicate |
| Theresa Snyder | Theresa Snyder | 2 | merge not a duplicate |
| Jo Bloggs | Jo Bloggs | 2 | merge not a duplicate |

If you know that two contacts are not duplicates, then you can click on ‘not a duplicate’ and they will never be suggested as duplicates again.

If you click on merge, you will be taken to a screen showing all the information held on both contacts:

Merge Individual contacts

Click Merge to move data from the Duplicate Contact on the left into the Main Contact. In addition to the contact data (address, phone, email) choose to move all or some of the related activity records (groups, contributions, memberships, etc.).

Merge Cancel

Flip between original and duplicate contacts.

Mark this pair as not a duplicate.

| Joyce Adams (duplicate) | | Mark All | Joyce Adams |
|-------------------------|----------------------|-------------------------------------|---|
| External Identifier | | <input type="checkbox"/> | 4971 |
| Source of Contact Data | | <input type="checkbox"/> | Salesforce |
| Communication Style | Formal | <input checked="" type="checkbox"/> | |
| Job Title | | <input type="checkbox"/> | Actuary |
| Gender | | <input type="checkbox"/> | Female |
| Current Employer ID | | <input type="checkbox"/> | 2098 (Fadel, Fadel and Dooley) |
| Email:1:Work | jadamsqz@blogger.com | <input type="checkbox"/> | Home (overwrite) <input type="checkbox"/> add new jadamsqz@blogger.com |

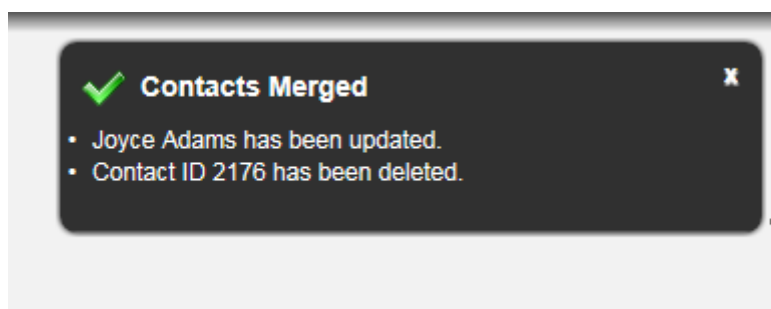
WARNING: The duplicate contact record WILL BE DELETED after the merge is complete.

Merge Cancel

In this example, Joyce Adams on the left has been marked as a duplicate and, if merged, will be deleted.

In this case, this is correct as the contact on the right has much more data. However, if you wish to keep any of the information of the duplicate and transfer it across, simply click on the tick box between them.

After clicking on 'Merge' you will be taken to the remaining contact's record, and shown the following message:



You should then check your merged contact to ensure that all required information has been transferred over.

Try it for yourself

- Run the find and merge duplicate contact program using the name and email rule for individuals. How many duplicates do you have?
- Merge a duplicate - is the result what you expected?

