

How to manage duplicate contacts

Maintaining a contact base of high quality requires time and being strategic with the information that we choose to collect. One of the most common issues is the unintentional creation of duplicates. Even if Secutix has some strategies in place to avoid this, such as forcing a [contact search](#) before enabling the creation of a new contact, sometimes it's not possible to avoid it from happening.

This is why our software has a **batch aimed to the identification of potential duplicates**: You will only have to check the list of potential duplicates and select the ones you want to merge in order to maintain a clean contact database. You can [check here how to set it up](#).

In the [Organization context](#), within the [Contact module](#), you can find the **Duplicates control menu**: Here you'll be able to search for potential duplicates identified by the system ([Duplicate state](#)* = Potential).

Contact

Clients

- ★ Individuals
- ★ Structures
 - Guides
 - Suppliers
 - Partners
 - Producers
 - Support
 - Artists
 - Exhibitors

Check for duplicates

B2B validation contacts

Initialisation

Venue

Catalogue

Operators

Goods

Tools

☆ Check for duplicates

LAST NAME First name

Contact number

Duplicate state *

Potential

Country

Phone

Town

Email

Postcode

Probability min. (%)

Probability max. (%)

Contact type

SEARCH

CLEAR

+NEW

-DELETE

▶MERGE

FALSE POSITIVE

PROBABILITY	PARENT INDIVIDUAL	PARENT STRUCTURE	UNACCOMPANIED CHILD	CHILD STRUCTURE
75	[62284]	CEPF BNP PARIBAS	[62811]	CEPF BNP PARIBAS
75	[62291]	CE INRS	[62846]	CE INRS
75	[62377]	CE NATIXIS	[62413]	CE NATIXIS
75	[62499]	CE PHILIPS FRANCE	[62845]	CE PHILIPS FRANCE

Among others, you can filter them by probability: **You can safely merge any duplicate with a probability of being a duplicate over 80%.**

If you click on *the number of a line of potential duplicates* (if you click elsewhere it's going to open their contact file), this screen will be displayed:

☆ **Duplicate > CEPF BNP PARIBAS**

Top of duplicate

LAST NAME First name CEPF BNP PARIBAS

✓ SAVE → MERGE

CONTACT NUMBER	ROLE	STRUCTURE	LAST ORDER
✓ 62284	Public	CEPF BNP PARIBAS	

Number of items: 1

Duplicate

LAST NAME First name CEPF BNP PARIBAS

✓ SAVE → MERGE

CONTACT NUMBER	ROLE	STRUCTURE	LAST ORDER
→ 62811	Public	CEPF BNP PARIBAS	

Number of items: 1

✓ SAVE → DELETE

STREET	POSTCODE	TOWN	PHONE	FAX	CONTACT NUMBER	LAST MODIFIED
→ 24 RUE DES JEUNEURS	75002	PARIS			62811	24/04/2022 04:22 am
✓ 24 RUE DES JEUNEURS	75002	PARIS			62284	24/04/2022 04:22 am

Here you can choose the information that you wish to keep after the merge or declare a "false positive" (aka. two contacts that are not real duplicates): **The buttons "Merge" and "Flag false duplicates" are on the top of the screen.**

After the merge, the contact selected as "Top of duplicate" is the one that will remain active. Every element linked to the contact that will be merged will then be attached to the "Top of duplicate": sales, cultural, shipment, financial histories; contact connections of all types (structures, individuals, relays...).

Note on the deduplication of structures and relays:

- If the [Duplicates detection batch](#) has been set up to detect structure contact files, the button "Including structure contact" will appear in the Check for duplicates menu.
- You can merge structure and relays according to the same principle as individuals. However, it is important to take into consideration that relay duplicates are only identified when they are attached to the same structure.
- When two structures are merged, you will have to wait for the batch to be run again to be able to see the potential relay duplicates resulting from the merger of those structures.

Finally, sometimes you might be able to identify a duplicate that hasn't been detected by the batch. Here's what you can do:

1. First, in the "Check for duplicates" menu, introduce any criteria to make a search: the button "New" will appear.
 - a. **Remark:** even though no results will come up, go ahead to click "New" to manually find your duplicate contacts.
2. Click on "New": A pop up screen will be displayed, and you'll be able to:
3. Search for the "Top of the duplicate" (the one you wish to keep) and
4. Search for the "Duplicate" (the one you want to merge).
5. Click on the "Merge" button at the top of the screen.

Check for duplicates

LAST NAME First name:

Contact number:

Duplicate state:

Country:

City:

Probability min. (%):

Probability max. (%):

Contact type:

Phone:

Email:

Zip Code:

SEARCH **CLEAR**

+NEW **DELETE** **MERGE** **FALSE POSITIVE**

PROBABILITY PARENT INDIVIDUAL PARENT STRUCTURE UNACCOMPANIED CHILD CHILD STRUCTURE EMAIL STREET ADDRESS PHONE

No item found.

If a contact has been previously marked as a **false positive**, you will not be able to find it while setting up a new duplicate since the contact is linked already to a previous contact:

1. Search either under "Potential" or "Incorrect Duplicate" duplicate state:

Check for duplicates

LAST NAME First name:

Contact number:

Duplicate state:

Country:

City:

Probability min. (%):

Probability max. (%):

Contact type:

Phone:

Email:

Zip Code:

SEARCH **CLEAR**

PROBABILITY PARENT INDIVIDUAL PARENT STRUCTURE UNACCOMPANIED CHILD CHILD STRUCTURE EMAIL STREET ADDRESS PHONE

No item found.

2. The previous link will show up as a result, click on "delete" to remove it:

Check for duplicates

LAST NAME First name: Contact number: 95270

Duplicate state: Incorrect duplicate Phone: All

Country: All Email:

City: Zip Code:

Probability min. (%): Probability max. (%):

Contact type: All

SEARCH CLEAR

PROBABILITY	PARENT INDIVIDUAL	PARENT STRUCTURE	UNACCOMPANIED CHILD	CHILD STRUCTURE	EMAIL	STREET ADDRESS	PHONE
80	[22617] Haron, Skye	[95270] Haron, Charlotte				57103 Sioux Falls 4001 East 28th St	6053711913

3. Once this process is completed, you will be able to setup your manual link as explained on the paragraph above from this article.

To continue with this training unit, [click here to learn about the contact file.](#)

[Old page - English](#)

[Old page - French](#)