

Fast•Class File

Client Data System

Volume 68: Managing Duplicate Contacts

The Potential Duplicate Contacts Report uses Record Matching Algorithms (RMAs) to identify potential duplicate contact records. Once potential duplicates are identified, you can easily merge duplicates into one contact record.

Additionally, the record merge feature will preserve SmartPad, Policy, and Investment information attached to each contact record included in a merge.

Using the Potential Duplicate Contact Report

- From the main screen in CDS, select **Reports** in the main menu.
- In the **Reports** menu, select **Potential Duplicate Contacts Reports**.

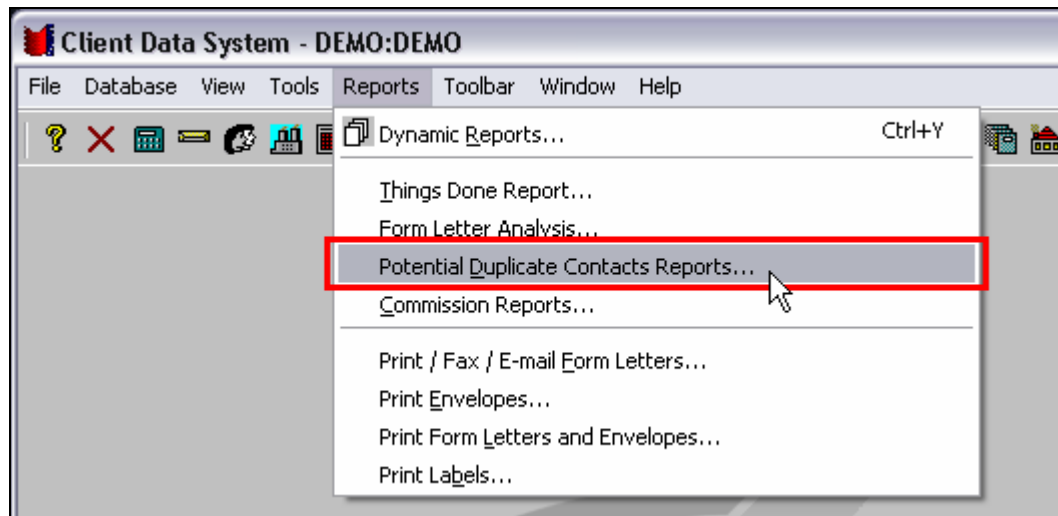


Figure 1: The Reports menu with Potential Duplicate Contacts Reports selected.

- CDS will open a **Filter Selection** window making it possible to search for duplicate contacts based on specific criteria. To search an entire database for potential duplicate contact records, leave all **Filter** fields and the **Set** field blank and click **OK**.
- Potential duplicate contacts will be displayed in the **Potential Duplicate Contacts** summary.

Last Name	First Name	Type	Birth Date	All Addresses	All Phones
Anthony	Brian	Prospect	09/16/1955		Residence (Pref) : (626)-792-2201 .
Anthony	Brian	Client	09/16/1955	Residence (Pref) : 3333 San Pasqual, Pasadena, CA, 91107 Business : 12 E. Colorado Blvd., Pasadena, CA, 91107	Business : (818)-388-7111. Residence (Pref) : (626)-792-2201 .
Chung	Harold	Client	02/07/1962	Residence (Pref) : 4131 Bernice Avenue, Los Angeles, CA, 90031 Business : 20225 S. Western Ave., Los Angeles, CA, 90053	Business : (213)-989-0433. Residence (Pref) : (323)-551-3232.
Chung	Harold	Client	02/07/1962	Residence (Pref) : 4131 Bernice Ave., Los Angeles, CA, 90032 Business : 20225 S. Western Ave., Los Angeles, CA, 90053	Mobile (Pref) : (626)-295-6598.
Loader	Ken	Client	10/01/1961	Business (Pref) : 8772 Colorado Ave., Glendale, CA, 91221	Business (Pref) : (818)-798-7288.
Loader	Ken	Prospect			
Loader	Ken	Client	01/10/1961	Business (Pref) : 8772 Colorado Ave.,	Business (Pref) : (818)-957-7288.

Figure 2: The Potential Duplicate Contacts summary.

The **Potential Duplicate Contacts** summary can be customized to include the **Birthdate**, **All Addresses**, and **All Phones** columns to make it easy to compare potential duplicates.

- Review the records in the **Potential Duplicate Contacts** summary to identify duplicate contacts. You may need to open contact records to verify that records identified as potential duplicates are, in fact, duplicate records.
- After identifying two (or more) duplicate records, tag all duplicate records.
- Identify the Target and Source record(s). The highlighted tagged record is the target record. Tagged records that are not highlighted become Source records.

Last Name	First	Type	Birth Date	All Addresses
Anthony	Brian	Prospect	09/16/1955	
Anthony	Brian	Client	09/16/1955	Residence (Pref) : 3333 San Pasqual, Pasadena, CA, 91107 Business : 12 E. Colorado Blvd., Pasadena, CA, 91107

Figure 3: Duplicate records tagged and Target record highlighted.

The Target record is the record that information will be added to and will also be the record that is preserved. Additionally, fields in the Target record that can have only one value, such as the **Type** field, will not be overwritten by data in the Source record. However, in cases where a record can hold multiple pieces of information – such as

addresses, emails, and phone numbers – all of the information from each selected (tagged) record will be preserved.

- After identifying Target and Source records, click the **Merge Duplicate Contacts** button in the **Potential Duplicate Contacts** summary toolbar.



Figure 4: The Merge Duplicate Contacts button.

- Before merging the contacts, CDS will display a reminder indicating that the Source record will be merged with the Target record. Click **Yes** to proceed.
- To delete the source record, click **Yes** in the deletion confirmation screen – or click **No** to review the source record again before deletion.
- CDS will confirm the contact merge.



Figure 5: Contact merge confirmation.

Merging Contacts in a Contact Summary Screen

If you identify duplicate contact records in the contact summary screen you can easily merge the contacts using the **Merge Contact** tool.

- After identifying duplicates, select the Target record and click **Record** in the toolbar.
- In the **Record** menu, select **Merge Contact**.

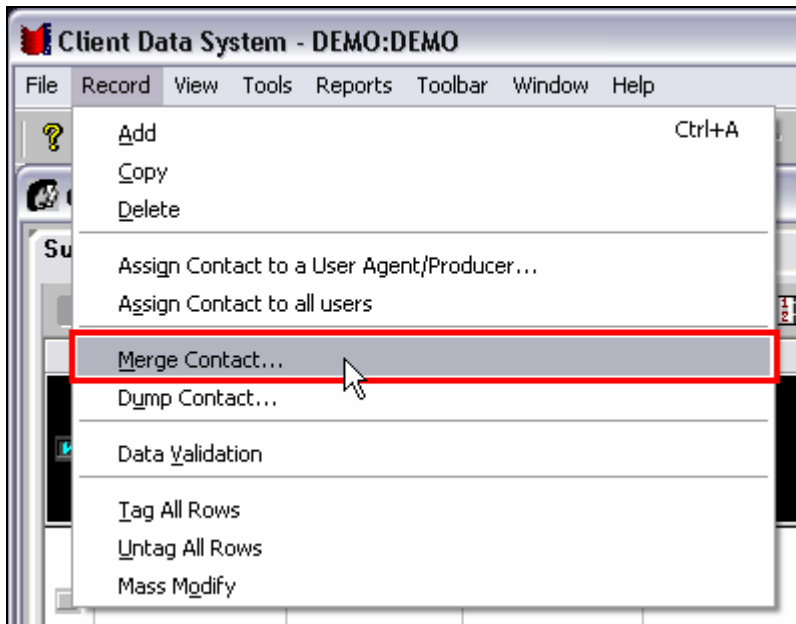


Figure 6: The Record menu with Merge Contact selected.

- CDS will confirm that you wish to merge data into the selected record. Click **Yes**.
- CDS will open the **Find Contact Information** window. Leaving the **Contact** option selected, perform a search for the source record – CDS will automatically add the last name from the target record to the **Search** field.
- In the **Select Source Contact to be Merged** window – select the Source record and click the **Ok, Select** (green checkmark) button.
- Confirm the Target and Source records using the **Target Record** and **Source Record** buttons in the **Merge Records** window.



Figure 7: The Merge Records window.

- After confirming Target and Source, Click **OK**.
- To delete the source record, click **Yes** in the deletion confirmation screen – or click **No** to review the source record again before deletion.
- CDS will confirm the merge.

About Record Matching Algorithms (RMAs)

When the program merges records, it uses a record-matching algorithm (RMA), which is a formula, or systematic plan, for preventing duplicates while still using new data. When two records match, it compares the data fields. If the incoming data contains information that is not in the original record, the utility moves that data into the appropriate fields. When the original record and the new one contain different data in the same fields, the data in the original record is not changed by the new data.

Below is a list of tables that are merged, and their RMA's. The RMA column lists the data columns that are used to compare the Target record with the Source record. Please notice that not all tables are merged.

Some tables are so tightly linked with other tables (such as Contact Extension with Contact and Activity History with Activity) that no RMA is required. They are included on this list because they are being merged. There is no RMA required for the contact record because the user is specifying which records are being combined.

Table Name	Record Matching Algorithm (RMA) (If required)
Client	
Clntextn	
Address	Type
Phone	Description
Activity	Date, Time, Type
Activity History	
Smartpad	Date, Time, User Number (User Name)
Letters	Date, Title, Keywords
Timelog	Date, Time From, Assigned To
Security	
Investment	Type, Symbol, Account Number
Transactions	Date, Type, Shares
SubAccount	SubPolicy Number, SubPortfolio Number
Liabilities	Secured By, Account Number, Lender, Date
Policies	Policy Type, Date, Policy Number
PolClnt	
Policy Transaction	Date, Type,
Riders	Rider Name, Description
OAnnuity	