Duplicate Contacts
User Guide

SmartOffice®

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Introduction

Duplicate Contacts is a tool that is used to check for duplicate records by using Record-Matching Algorithms (RMA). For information on the specific RMA used in each field of the contact record, view the RMA table in the *Appendix*. Duplicate Contacts can be cleaned up by both deletion and by using the Contact Merge tool. Contact Merge only applies to Individual Duplicate Contacts.

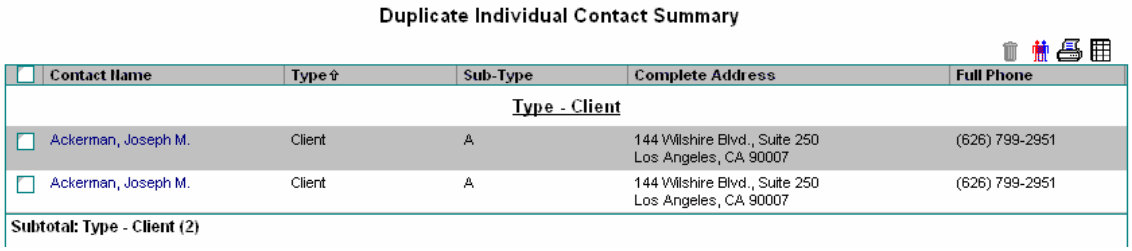
Navigation

To access the Duplicate Contacts feature, select the **Contact** menu item and then select **Duplicate Contacts** from the expanded menu to open the Select the Contact Type dialog box.

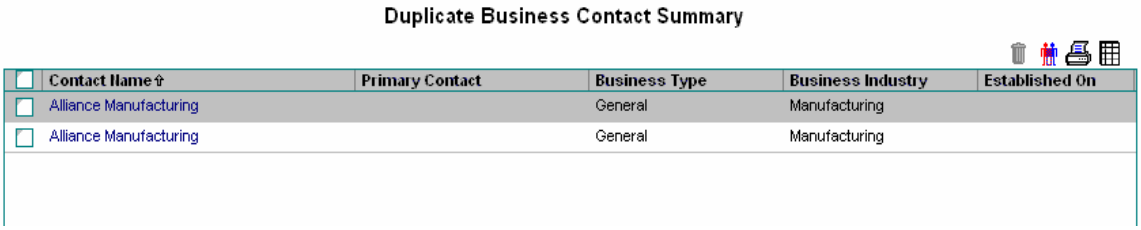
- **Duplicate Individual Contacts:** Searches for potential duplicate individual contacts only.
- **Duplicate Business Contacts:** Searches for potential duplicate business contacts only.

Select the appropriate Contact Type option to display the Duplicate Contact Summary list. This list can be used to either delete duplicate records or run the Contact Merge tool (for individual contacts only).

Duplicate Individual Contacts Summary List



Duplicate Business Contacts Summary List



Appendix

Record Matching Algorithms (RMA)

The following is the logic used to determine if there are any duplicate records in the Office.

Individual Contacts

Primary Match – Step 1

- If the Last Name, First Name and Record Type are an exact match, go to Step 2.
- If not an exact match, go to the next record.
- Important Note: None of these fields can be blank. If any field is blank, go to the next record.

Step 2 - DOB

- If an exact match (no fields are blank), it is a possible duplicate record. Go to Step 3.
- If any one or both fields are blank, it remains a possible duplicate record. Go to Step 3.
- If the values are different, it is not a duplicate. Go to the next record.

Step 3 – SS#

- If an exact match, it is a possible duplicate record. Go to Step 4.
- If any one or both are blank, it remains a possible duplicate record. Go to Step 4.
- If the values are different, it is not a duplicate. Go to the next record.

Business Contacts

Primary Match

- If the Business Name and Record Type is an exact match, a duplicate record was found.
- If not an exact match, go to the next record.
- Important Note: None of these fields can be blank. If any field is blank, go to the next record.