

Fast-Class File

Client Data System

Volume 102: Managing Duplicate Contacts

Once potential duplicate records are identified, you can easily merge duplicates into one record. There are two ways to merge contact records in CDS. The first involves using the **Potential Duplicate Reports** option. The second involves using the **Merge Contact** tool from a contact summary screen.

The record merge features will preserve SmartPad, Policy, and Investment information attached to each contact record included in a merge.

Before merging or deleting contacts, we recommend that you have a recent and secure backup of your CDS data. For more information on creating a backup, view the **Database Backup Fast Class**.

To merge duplicate contacts in CDS:

- Select **Reports** in the main menu.
- From the Reports menu, select **Potential Duplicate Reports**.
- From the Duplicate Report options window, select the type of record you'll be checking for duplicates. Click **OK**.
- From the Filter selection window, you're given the option to search for duplicates through a filter or a set. Choose a filter or set or leave these fields blank. Click **OK**.

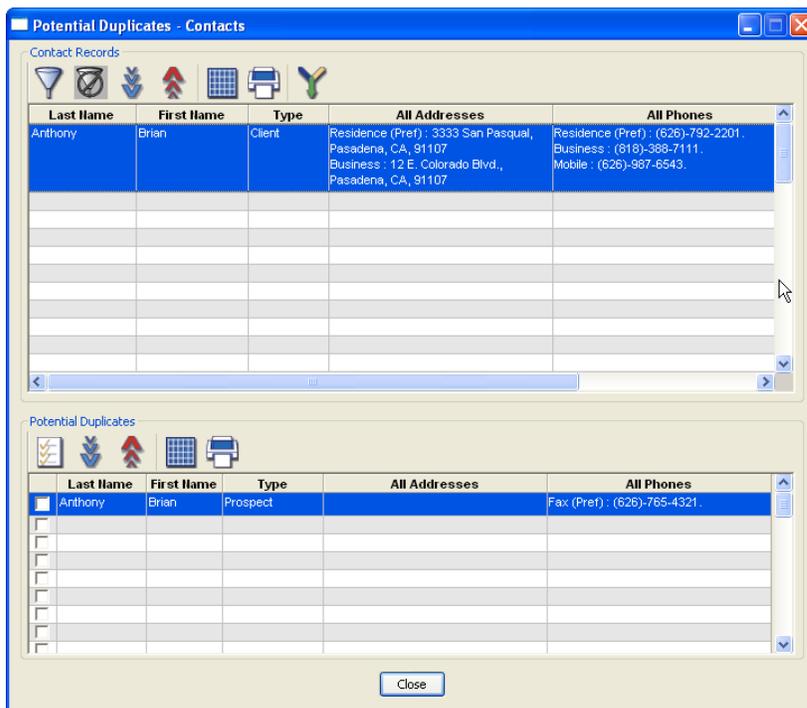


Figure 1: The Potential Duplicates screen

- CDS loads the Potential Duplicates screen, which displays potential duplicates to be merged.

Note: To verify if these records are actual duplicates, compare record fields such as name, address, telephone number, and social security number. Double-click on a record to view more detailed information.

- The record(s) in the Contact Records section is called the **Target** record. The Target record is where information will be added to and will also be the record that is preserved during the merge.
- The record(s) in the Potential Duplicates section is called the **Source** record. All the information from the Source record will be absorbed by the Target record.

For example: If the Target record has the Type listed as Client, and the Source record has the Type listed as Prospect, the Client Type will overwrite the Prospect Type in the records that are being merged.

- After identifying that your records are duplicates, click the **Merge Duplicate Contacts** button.
- Click **Yes** to confirm the merge.
- In the Remove Duplicate Record Options window, check the first option to save the Source record in the database but categorize it as a duplicate. Check the second option to delete the Source record. Click **OK**.

To merge duplicate contacts from a Contact Summary screen:

Merging duplicate contacts from a Contact Summary screen allows you to choose which duplicate contact should be identified as the Target and which contact should be identified as the Source.

- From a Contact Summary screen with contact records identified as duplicates, highlight the record you wish to be identified as your Target record. The duplicate record that is not highlighted will be identified as the Source record.

Note: Before identifying Target and Source records, you may wish to review each record to verify which record has the most up-to-date information.

- With the Target record highlighted, select **Record** in the main menu.
- From the Record menu, select **Merge Contact**.
- Click **Yes** to confirm the merge.
- Make sure Contact is selected in the Find Contact Information window and click **OK**.
- In the 'Select the Source Contact to be merged' window, select the Source record and click the OK button (the green check mark).
- Confirm the Target and Source records in the Merge Records window. Click **OK**.
- If you'd like to delete the Source record, click **Yes**.
- CDS will then confirm the merge.