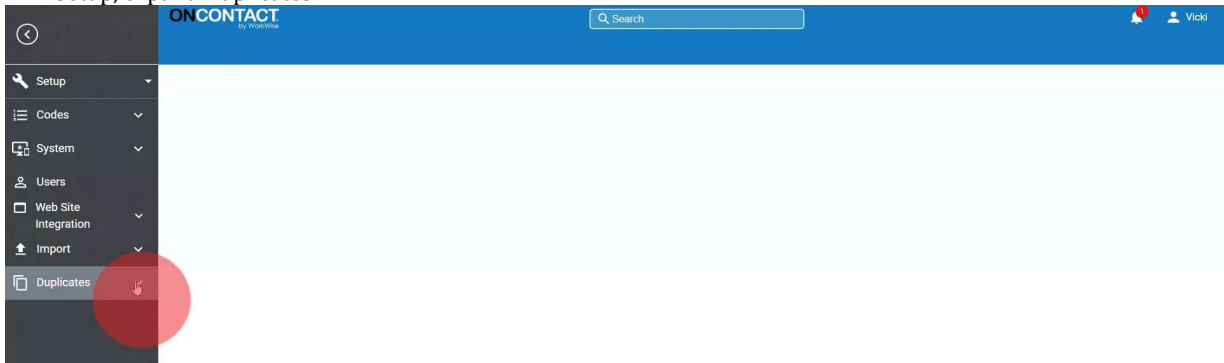
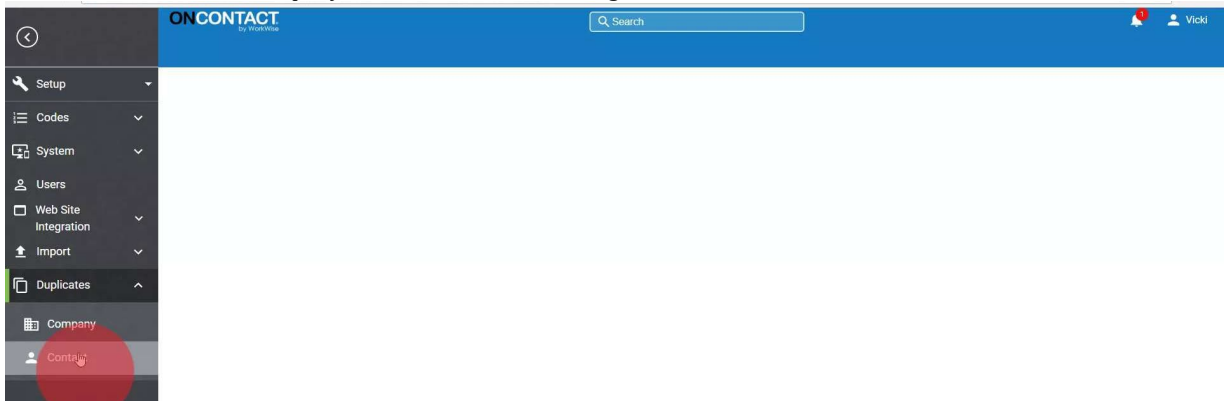


# DEDUPLICATING DATA

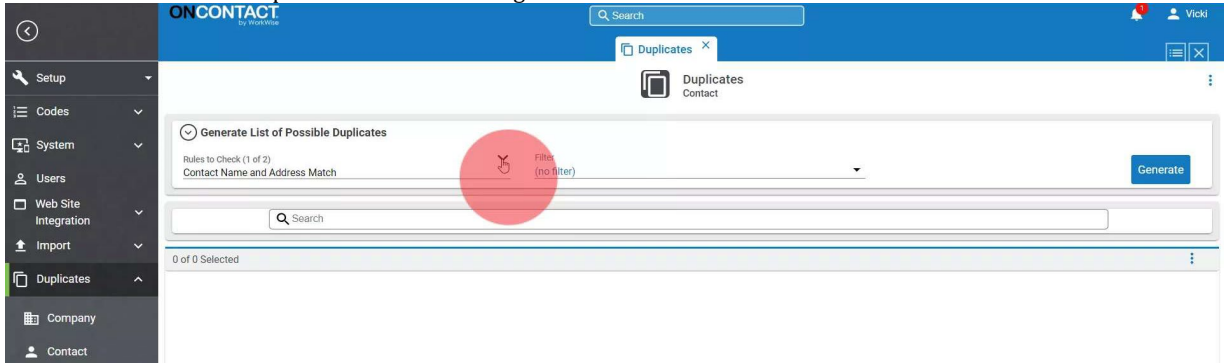
1. In Setup, expand Duplicates



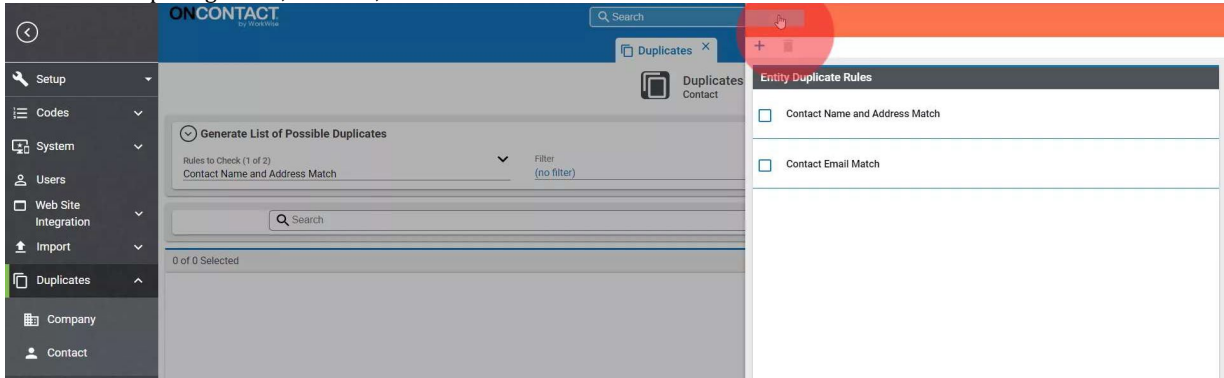
2. You can select either Company or Contact- we are selecting Contact



3. You can review the comparison criteria or change it

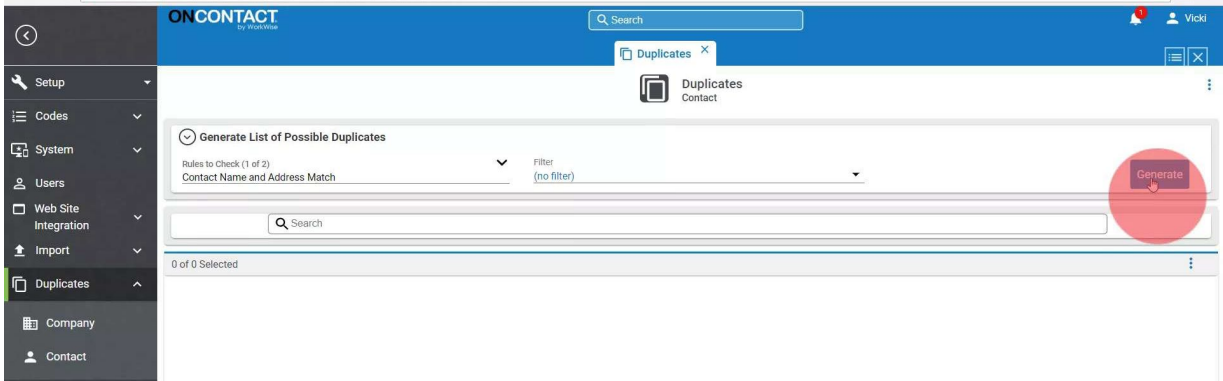


4. We are comparing Name, Address, and Email data

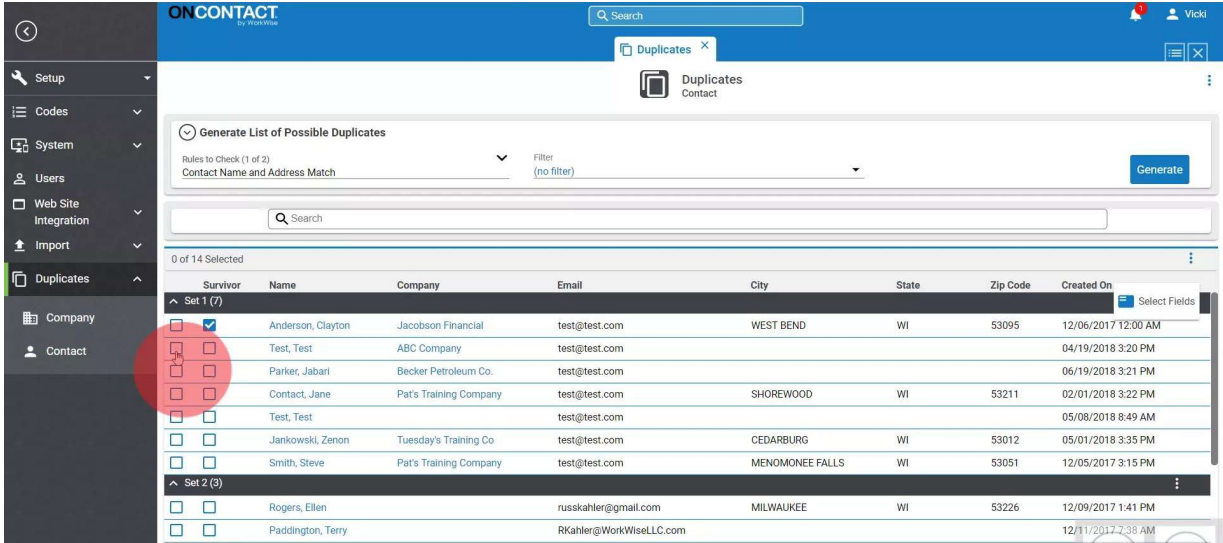


# DEDUPLICATING DATA

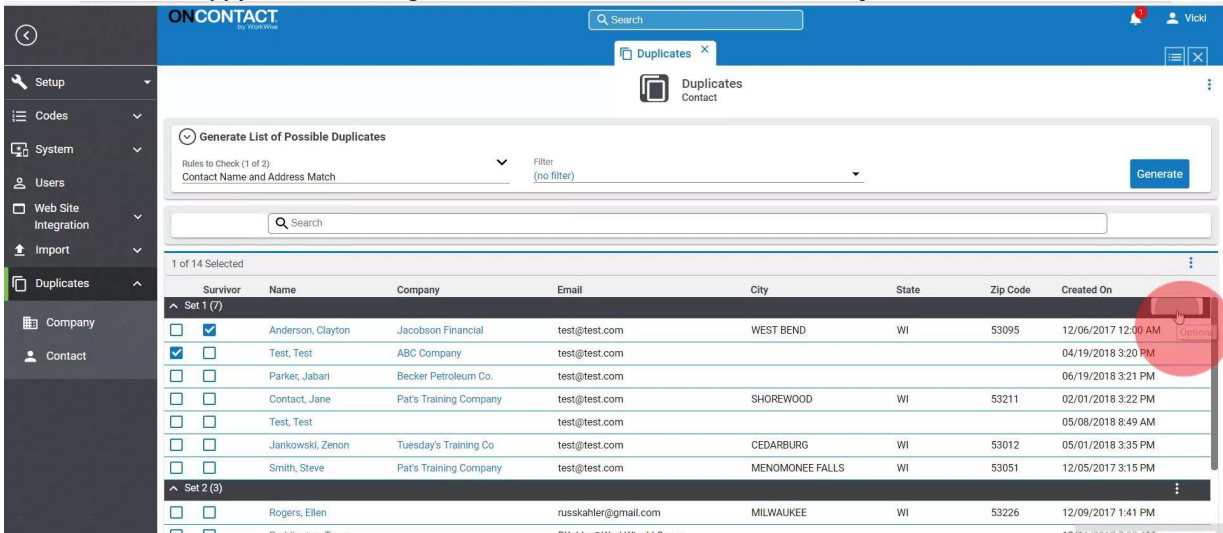
## 5. Click Generate



## 6. Click to select a Survivor Record.



## 7. Select the Record(s) you want to merge with the selected Survivor record. Click Options



# DEDUPLICATING DATA

## 8. Click Merge data

The screenshot shows the 'ONCONTACT' interface for managing duplicates. The 'Generate List of Possible Duplicates' section is active, with rules set to 'Contact Name and Address Match'. A table below shows 14 selected records. A red circle highlights the 'Merge Set' button in the 'Options' panel on the right.

Survivor	Name	Company	Email
<input checked="" type="checkbox"/>	Anderson, Clayton	Jacobson Financial	test@test.com
<input checked="" type="checkbox"/>	Test, Test	ABC Company	test@test.com
<input type="checkbox"/>	Parker, Jabari	Becker Petroleum Co.	test@test.com
<input type="checkbox"/>	Contact, Jane	Pat's Training Company	test@test.com
<input type="checkbox"/>	Test, Test		test@test.com
<input type="checkbox"/>	Jankowski, Zenon	Tuesday's Training Co	test@test.com
<input type="checkbox"/>	Smith, Steve	Pat's Training Company	test@test.com

## 9. Click Yes

The screenshot shows the same interface as step 8, but with a confirmation dialog box overlaid. The dialog asks 'This set will be merged. Are you sure?' and has 'NO' and 'YES' buttons. A red circle highlights the 'YES' button.

## 10. The selected records are now merged.

The screenshot shows the 'ONCONTACT' interface after the merge. The 'Generate' button is highlighted with a red circle. The table below shows 8 selected records, indicating that the duplicates have been merged.

Survivor	Name	Company	Email	City	State	Zip Code	Created On
<input type="checkbox"/>	Rogers, Ellen		russkahler@gmail.com	MILWAUKEE	WI	53226	12/09/2017 1:41 PM
<input type="checkbox"/>	Paddington, Terry		RKahler@WorkWiseLLC.com				12/11/2017 7:38 AM
<input type="checkbox"/>	kahler, russ		russkahler@gmail.com				12/17/2017 8:48 AM
<input type="checkbox"/>	Flintson, Fred	Becker Petroleum Co.	test@test.com				02/15/2018 3:19 PM
<input type="checkbox"/>	Anderson, Clayton	Jacobson Financial	test@test.com	WEST BEND	WI	53095	12/06/2017 12:00 AM
<input type="checkbox"/>	Harding, Jackson		khessner@workwiseilc.com	MILWAUKEE	WI	53202	01/02/2018 2:14 PM