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MAKING CRM MAKE SENSE

SalesLogix Enhancements **Check for Duplicates**

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1.0 OVERVIEW

Provision

- Provide ability to scan SalesLogix database for duplicates based on user defined search criteria
- Provide ability to create a group based on results
- From an external tool – create a group based on Contact/Account ID's

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	Item
Forms System:	EMAF_LocateDuplicates
Menus System:	EMMS_LocateDuplicates

Updated:
(None)

Impact Analysis

None of the additions will alter the system in any way and can be easily removed without issue.

Installation

Simply install the bundle as normal – all plugins are unique and the bundle will update the scripts as necessary.

Post Bundle Install

Installing the bundle completes the installation.



2.0 LOCATE DUPLICATES

Login as Admin and go to Tools | Options | Locate Duplicates and the following is displayed:

Locate Duplicate Records

Use this form to create a contact/account group based on a pasted set of ID's. You can then use the merge facilities to merge the records together. Alternatively, choose fields to search by and select Run Find to compare the database via those fields.

Type
 Contact Account

- ACCOUNT
- ACCOUNTMANAGERID
- ADDRESS.ADDRESS1
- ADDRESS.ADDRESS2
- ADDRESS.ADDRESS3
- ADDRESS.CITY
- ADDRESS.POSTALCODE
- ADDRESS.STATE
- CONTACT.TYPE
- DEPARTMENT
- EMAIL
- FAX
- FIRSTNAME
- LASTNAME
- MOBILE
- PREFIX
- STATUS
- SUFFIX
- TITLE
- WORKPHONE

Run Find Count Create Group Close on completion

NB: You can choose to run the search based on either the Account or Contact.

Using the field selections, you can decide what to use in order to find duplicates within the system, simply click an item on or off. The search is based upon a concatenation of all chosen fields. The fields can be added to and customised to your requirements.

Press **Run Find** to begin the search. When duplicates are found – the ID's are shown in the right hand panel. You can then press **Create Group** to create a SalesLogix group.

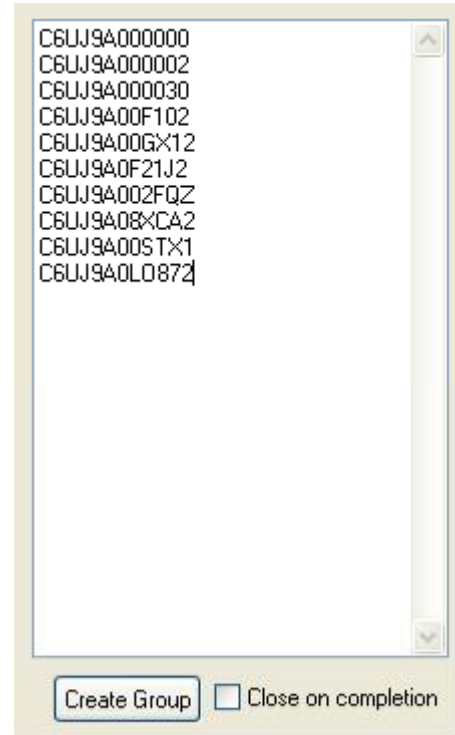


3.0 ALTERNATIVE OPERATION

You can also use this utility to create a group based on "pasted ID's" – for example, if you have examined the data externally and simply wish to create a group from those IDs.

For example, assume the following is your list of IDs:

```
C6UJ9A000000  
C6UJ9A000002  
C6UJ9A000030  
C6UJ9A00F102  
C6UJ9A00GX12  
C6UJ9A0F21J2  
C6UJ9A002FQZ  
C6UJ9A08XCA2  
C6UJ9A00STX1  
C6UJ9A0LO872
```



You can paste those into the right hand pane:

Pressing **Create Group** – will then create a group within SalesLogix – which you can then use to run the Merge process on.

