

# PlanPlus™ Online

## Merge and Purge duplicate Contacts in PlanPlus™ Online

Search for offending contacts in the database e.g. if you know when the duplicates were introduced you can search by create date. Click Advanced Search

# PlanPlus™ Online

The screenshot shows the PlanPlus Online interface. The 'Advanced Search' menu item is highlighted in yellow, with a red arrow pointing to it and the text 'Click to Search'. Below the navigation bar, there is a search bar with 'search contacts' and 'search all' buttons. A notification for a 12-day recurring appointment reminder is visible. On the left, there is an 'Add New Contact' form. On the right, a table of contacts is displayed with columns for Contact Name, Source, First Name, Last Name, and Main Phone. The table lists several contacts, including Adam Adamson, Dave Baldwin, Ward Cleaver, George Cloony, John Davidson, Vin Diesel, Roger Federer, Harrison Ford, Zack Johnson, Tom Lehman, Andrew McLaine, and Maria Sharapova.

Pick your search criteria e.g. search by create date. To select all: (Contact Number > 1).

# PlanPlus™ Online

The screenshot shows the PlanPlus Online interface with the 'Advanced Search' criteria form. The 'Contact Number' dropdown is highlighted in yellow, with the text 'To select all Contacts' next to it. The form includes various search criteria fields such as Display Name, First Name, Phone, Address Line 1, City, Postal Code, Classification, URL, Department, Job Title, Last Name, Email, Address Line 2, State, Country, Title, Net Worth, Sex, and Responsibility. There are also 'Search' buttons for Classification and Title. The interface includes a navigation bar, a search bar, and a notification for a 12-day recurring appointment reminder.

Click Search on the bottom of the page.

A search form with the following fields: String, Sold Opplys, OrgRel, Position, zillow, Address, city, Blogfeed, and Groups. Each field has a dropdown arrow and an adjacent input box. At the bottom left is a yellow 'Search' button. At the bottom center is a 'Save As' field containing the text 'New Search 03/18/2008'.

See the results and Right Click the top most square to select all.

## PlanPlus™ Online

The screenshot shows the PlanPlus Online interface. At the top, there are navigation tabs: Home, Organization, Contact (highlighted), Opportunity, Calendar, and My Account. Below the tabs is a navigation bar with links for Summary, New, Manage Views, Reports, Lists, By Product, and Advanced Search. A 'Welcome Phil Baldwin' message is on the right. A search bar contains 'search contacts' and 'search all'. Below the search bar is a notification for a 'Reminder & Alert: Appointment Reminder: Webinar'. The 'Advanced Search' section includes a 'Turn On/Off Explanations' link and tabs for 'Special Searches', 'Saved Searches', and 'Recent Searches'. The 'Special Searches' list includes: Sync List, Search Contact by Note, Search Contact by Organization, Search Contact by Opportunity, Search Contact by Product, Search Contact by Assets, and Custom Field Value / Period. The 'Search Criteria' section shows a dropdown menu with '1' selected. The 'Search Result' section displays a table with columns: #, Contact Name, Address, Main Phone, and Email. The table contains 10 rows of contact information, including names like Adam Adamson, Harrison Ford, and Tiger Woods.

Go to the bottom of the results and click Update Value

This screenshot shows the bottom portion of the search results table. The table has columns for #, Contact Name, Address, Main Phone, and Email. The last row is highlighted. Below the table, there is a row of action buttons: 'Add / Remove Team Member', 'Batch Assign', 'Update Value' (highlighted in yellow), 'Mark For Sync', 'Add To List', 'Mail & Print', and 'Delete'. At the very bottom, there are three buttons: 'Print Report', 'Create New', and 'Back To Summary'.

Find the Merge Duplicate Records (select the box) and Submit

Add Note  
Subject:   
Content:

Batch Create Opportunity

Batch Create Task

Merge Duplicate Records

Send Request to update Contact Information

Attach Email Campaign Process

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Home | Organization | **Contact** | Opportunity | Calendar | My Account |   
March, 2011  
7:01 Day (2:00 Left) | Week 1  
[Settings & Profile](#)  
Summary | New | Manage Views | Reports | Lists | By Product | Advanced Search  
Welcome Phil Baldwin | Preferences | Email Center | Help | Login

|

12 Reminders & Alerts: Appointment Reminder, three day recurring

100 %

A Merge action consists of one Master record, and one or more Duplicate record(s). The Duplicate records are merged into the Master record. After the merge, the Duplicate records will be marked as Deleted.

Select	Contact ( Master Record )	Duplicate Records
<input checked="" type="checkbox"/>	Aden Adams ( 7461 )	aden.adams@ ( 7460 )

Multiple duplicates will be found. The Master record is usually the newest record, but the older information will be merged into the newer record.