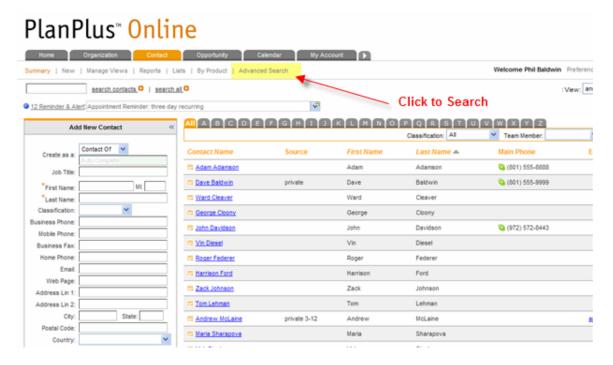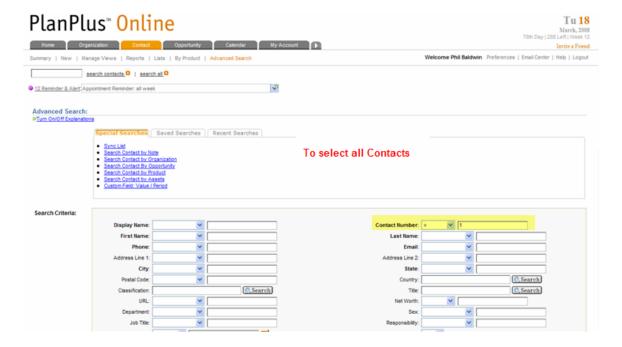Merge and Purge duplicate Contacts in PlanPlus™ Online

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
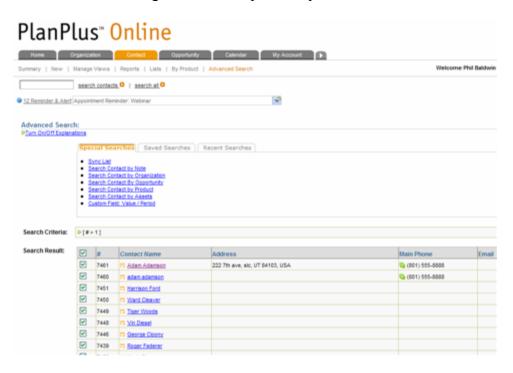

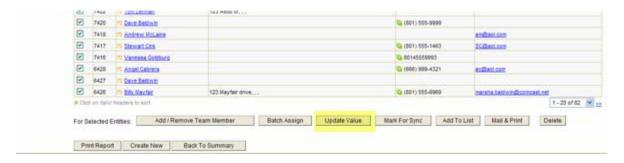Pick your search criteria e.g. search by create date. To select all: (Contact Number > 1).

Click Search on the bottom of the page.

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

Go to the bottom of the results and click Update Value

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

Submit   Cancel

PlanPlus Online

| Home | Organization | Contact | Opportunity | Calendar | My Account | ▶ |

Summary | New | Manage Views | Reports | Lists | By Product | Advanced Search   Welcome Phil Baldwin Preferences | Email Center | Help | Logou

search contacts ✪ | search all ✪

● 12 Reminder & Alert 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
☑	⬜ Adam Adamson (7461)	⬜ adam adamson (7460)

Submit

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