

How to Find Duplicate Entities

The Duplicate Entities screen shows the existing entities that has matching setup with the new record the user is trying to add. This is to avoid adding the same entity to a different entity type.

- 1. On the user's menu panel, open an Entity menu (i.e Users, Vendors, Customers, etc)
- 2. On Entity search screen, click **New** button
- 3. Enter details on **Name, Contact, Email, Phone, Address,**
- 4. Click **Find Duplicates** toolbar button
- 5. Duplicate Entities will be displayed containing the matching existing records that has the same data with new record

Note: Results are not Location and Zip Code specific

Note: If Address and Zip/Postal fields has values + each of the field

Fields			Duplicate Result
Name	Address	Zip/Postal	Entity that matched strictly with the name, address and zip will display
Contact	Address	Zip/Postal	Entity that matched strictly with the contact, address and zip will display
Email	Address	Zip/Postal	Entity that matched strictly with the email, address and zip will display
Phone	Address	Zip/Postal	Entity that matched strictly with the phone, address and zip will display

- 1. On the user's menu panel, open an Entity menu (i.e Users, Vendors, Customers, etc)
- 2. On Entity search screen, click **New** button

Create New Entity

AddFind DuplicatesClose

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name:

Contact:

Email:

Zip/Postal:

Country: Philippines

Phone:

Address:

?

Ready

3. Enter details on **Name, Contact, Email, Phone, Address, Zip/Postal**

Create New Entity

Add Find Duplicates Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name: Ent

Contact:

Email:

Zip/Postal: 46772

Country: United States

Phone:

Address:

Ready

4. Click **Find Duplicates** toolbar button

5. Duplicate Entities will be displayed containing the matching existing records that has the same data with new record

Duplicate Entities

Add Merge Close

Details

X Remove Open Layout Filter Records (F3)

Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
<input type="checkbox"/> 0001005122	102-Ent	102-Ent	102-Ent@irely.com	123-456	102-Ent address	46772	<input type="checkbox"/>	Customer
<input type="checkbox"/> 0001005122	102-Ent	102-Ent	102-Ent@irely.com	123-456	102-Ent address	46772	<input type="checkbox"/>	User
<input type="checkbox"/> 0001005124	104-Ent	104-Ent	104-Ent@irely.com	123-456	104-Ent address	46772	<input type="checkbox"/>	Customer
<input type="checkbox"/> 0001005128	105-Ent	105-Ent	105-Ent@irely.com	123-456	105-Ent address	46772	<input type="checkbox"/>	Vendor
<input type="checkbox"/> 0001005128	105-Ent	105-Ent	105-Ent@irely.com	123-456	105-Ent address	46772	<input type="checkbox"/>	User
<input type="checkbox"/> 0001005129	105-Ent	105-Ent	105-Ent@irely.com	123-456	105-Ent address	46772	<input type="checkbox"/>	Vendor
<input type="checkbox"/> 0001005130	106-Ent	107-Ent	107-Ent@irely.com	123-456	106-Ent address	46772	<input type="checkbox"/>	Customer
<input type="checkbox"/> 0001005130	106-Ent	107-Ent	107-Ent@irely.com	123-456	106-Ent address	46772	<input type="checkbox"/>	Ship Via
<input type="checkbox"/> 0001005130	106-Ent	107-Ent	107-Ent@irely.com	123-456	106-Ent address	46772	<input type="checkbox"/>	User
<input type="checkbox"/> 0001005130	106-Ent	107-Ent	107-Ent@irely.com	123-456	106-Ent address	46772	<input type="checkbox"/>	Vendor
<input type="checkbox"/> 0001005133	113-Ent	113-Ent	beth.delapaz@irely.c...	123-456	113-Ent address	46772	<input type="checkbox"/>	Ship Via

Ready

1. On the user's menu panel, open an Entity menu (i.e Users, Vendors, Customers, etc)

2. On Entity search screen, click **New** button

Create New Entity

Add Find Duplicates Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name:

Contact:

Email:

Phone:

Address:

Zip/Postal:

Ready

3. Enter details on **Name, Contact, Email, Phone, Address, Zip/Postal**

Name:	Ent-001
Contact:	Ent-001
Email:	ent001@test.com
Phone:	89-989-989
Address:	Ayala
Zip/Postal:	1227

4. Click **Find Duplicates** toolbar button

5. Duplicate Entities will be displayed containing the matching existing records that has the same data with new record

Duplicate Entities									
Add Merge Close									
Details									
X Remove Open Layout Filter Records (F3)									
<input type="checkbox"/>	Entity No.	Name	Contact	Email	Phone	Address	Zip/Postal	Primary	Entity Type
<input type="checkbox"/>	0001005025	Mercury Payment Sy...	Administrator		866-813-7336	150 Mercury Village Dr.	81301	<input type="checkbox"/>	Vendor
<input type="checkbox"/>	0001005028	John Hancock Retire...	John Hancock Jr.		1-800-395-1113	123 Illinois Stree	56029	<input type="checkbox"/>	Vendor
<input type="checkbox"/>		Doug at North Centr...	Doug at North ...					<input type="checkbox"/>	User
<input type="checkbox"/>		Harriett at Central C...	Harriett at Cent...					<input type="checkbox"/>	User
<input type="checkbox"/>		Kent Kercheval	Kent Kercheval					<input type="checkbox"/>	User
<input type="checkbox"/>		Morgan at Central C...	Morgan at Cent...					<input type="checkbox"/>	User
<input type="checkbox"/>		Yan Weichenthal	Yan Weichenthal					<input type="checkbox"/>	User
<input type="checkbox"/>	0001005069	Ent-111	Ent-111	Ent-1@irely.com	(323) 881-1282 ...	4000 Union Pacific	90023	<input type="checkbox"/>	Customer
<input type="checkbox"/>	0001005070	Ent-222	Ent-222	Ent-1@irely.com	(323) 881-1283	4001 Union Pacific	90023	<input type="checkbox"/>	Customer
<input type="checkbox"/>	0001005071	Software DEMO Entity	Owen Owner	owen@software.com	555-555-0001	4242 Flagstaff Cv	46815	<input type="checkbox"/>	Customer
<input type="checkbox"/>	2262016A	SSS New Entity	sssentity	zzz@zzz.com	123456	Ayala Ave	1227	<input type="checkbox"/>	Vendor
<input type="checkbox"/>	2262016A	SSS New Entity	sssentity	zzz@zzz.com	123456	Ayala Ave	1227	<input type="checkbox"/>	Customer