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Overview

This article will show you the different ways you can find possible duplicate records (*Voters/Donors/Contacts*) in your database. Even the most conscientious organizations will get duplicate records from time to time due to uncontrollable factors.

<u>Outline</u>

#1 Find Possible Duplicates#2 Assign Possible Duplicates to an Attribute En Masse#3 Related Resources

#1 Find Possible Duplicates



Navigate to your contact list (Voters/Donors/Contacts). In this example I used a nonprofit database where we renamed **Donors** to **People and Orgs**. <u>Click here</u> to learn how to customize labels in your database.



Load up a list of records you want to search through for duplicates. *If your database has a large amount of records i.e.* 100k – 1Milliion+ you may want to run this process in different chunks. In my example I loaded all 10,496 records.



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Click [File] > Utilities > Find Possible Duplicates



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8	Corporation	First/Org Name:		-	Title:	84	Merge
		Middle Name:		•	Suffix:	%	Find possible duplicates 3
	Foundation	Nickname:				8¢	Split Couples into Separate Donors
						8	Sort in hous Find possible duplicates
						_	

The ="tie breaker" columns include:

- Middle Name
- Birthdates
- SOS (Secretary of State Number)
- Address
- Last Name
- First Name

Example: If you select only name and address, people with different middle names will be listed as a possible duplicates.



Set Column to Search For Possible Duplicates	ß
Tie Breaker Options	
Trail Blazer's merge tools are based on exact matches of name and address and birthday etc. However, sometimes the addresses are not exactly the same.	
Comparing the addresses below you can see that they are the same, but our normal merging process would not see them as indentical.	
123 Main Street, Apt 101 123 Main St Apt 101	
The default tie breaker process includes last name, first name, and the first 8 characters of the address. You may optionally include middle name, birthday and voter election board Voter Number to your tie breaker criteria.	
When evaluating for duplicates	
…include middle name.	
include birthdays.	
…include election board voter number (SOS #).	
8 Number of characters of the address to include (default=8).	
255 🌧 Number of characters of the last name to include (default=255).	
255 Number of characters of the first name to include (default=255).	
OK OK]

You can change around the options to fit your needs – every time you run the process you will need to start with a new contact list.

If you lower the numbers for characters to include in the address and name you will likely find more duplicates but they could be false positives. For instance it could be a Sr. and Jr. living at the same address with similar names.



In my example I lowered the 3 thresholds to 8, click **[OK]** when you're ready to run the process.

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8 🚔 Number of characters of the first name to include (default=255).					
OK OK					

Trail Blazer will display a progress bar, if you're working with millions of records it will of course take some time and you may want to launch a separate session of TBZ.



Progress	8
Progress	
Additional data columns for 500 of 10496 records received.	
Cancel	

Once complete it will prompt you with the results and a recommendation to assign this list an attribute of "Possible Duplicates". <u>Click here</u> to learn how to set attributes en masse.

In my example I had 36 possible duplicates from my entire list of about 10,000 records.



ADDITIONAL INFORMATION	C X
36 possible duplicates have been found and are now displayed. It is HI recommended that you assign these to an attribute of your choosing return to this list periodically as needed. If you close this list, you will n re-run this analysis again to regenerate the list.	so you may
For more information about Group Management see the Group Mana instructional videos at http://trailblz.com/Support/Learning/VideosTra	
You can copy the contents of this message by pressing Ctrl+C on you	r keyboard.
	ОК

Click [OK] to finish.

Here's a sample snapshot of my duplicates:



Possible Duplicates

	📑 Edit 🎸 Include 🛭 🗲 Exclude 🌐 Sort 🖽 Format 🏝 Export ò Print 🛅 Detail 🗔 Summary 🕕 🚍 🕅 Pi								
Don)onors [36 records found]								
	Incl	ID	Last Name	First Name	Address 💌	City	State	Zip Code	
		<u>12366</u>	<u>Clark</u>	<u>Patti</u>	9903 Tree Farm Rd	Eden Prairie	MN	55347	
	V	<u>9423</u>	<u>Clark</u>	Patti	9903 Tree Farm Rd	Eden Prairie	MN	55347	
	V	<u>8143</u>	Swanberg	John	7969 Island Rd	Eden Prairie	MN	55347	
	V	<u>8144</u>	Swanberg	John	7969 Island Rd	Eden Prairie	MN	55347	
	V	<u>1051</u>	Burton	Michael	706 Bellows St	Saint Paul	MN	55107	
	V	<u>1052</u>	Burton	Michael	706 Bellows St	Saint Paul	MN	55107	
	V	<u>9650</u>	<u>Markovic</u>	<u>David</u>	697 George Kennedy	Belle River	ONT	N0R1A0	
	V	<u>10334</u>	Markovic	David	697 George Kennedy	Belle River	ONT	N0R1A0	
	V	<u>5280</u>	McDerm	Patrick	6470 129th St W	Apple Valley	MN	55124	
	V	<u>5281</u>	McDerm	Patrick	6470 129th St W	Apple Valley	MN	55124	
	V	<u>73</u>	<u>Alden</u>	<u>John</u>	6217 France Ave S	Edina	MN	55410	
	V	<u>74</u>	<u>Alden</u>	<u>John</u>	6217 France Ave S	Edina	MN	55410	
	V	<u>10947</u>	Mortola	Cosimo	555 z st	Mobile	AL	36604	
	V	<u>11510</u>	<u>Mortola</u>	Cosimo	555 z st	Mobile	AL	36604	
	V	<u>2314</u>	Foster	<u>Michael</u>	5061 Golden Valley Rd	Golden Valley	СТ	06500	
		<u>9447</u>	Foster	<u>Michael</u>	5061 Golden Valley Rd	Golden Valley	MN	55422	
	V	<u>4218</u>	<u>Klamm</u>	<u>Daniel</u>	4130 140th St NE	Prior Lake	MN	55372	
	V	<u>4219</u>	<u>Klamm</u>	<u>Daniel</u>	4130 140th St NE	Prior Lake	MN	55372	

From here it's at your discretion how to proceed. Some options would include:

- Delete out the duplicate records
- Merge contact records
- Perform drag-and-drop merges to combine information into a single record
- Run automatic merging (requires records match exactly for merge to work)
- Assign the list to an attribute such as "Possible Duplicates"



In my example I chose to assign these records to an attribute called "Possible Dupes" en masse – the next section walks through that process.

#2 Assign Possible Duplicates to an Attribute En Masse

After you've got the list of possible duplicates on your screen click [Edit] > Set > Set Attributes



1		
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Image: Set 2 → Image: Set Attributes		
Favorites General Address Household Attribute Canvass Contribute		
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☑ Infer/Set Gender		
📑 Make Donor Type Ind if not set		AL .
Attribute In at least Organizational Duties Set Donor Type Set Donor Type	Date To	Note
○ In range ○ In all Create Lawn Sign Records		
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0 🔄 to 0 🐳 🧰 Social Networking		
of 0 selected		
E Social Networking 2		
📑 Edit 🐦 Include 😻 Exclude 🌐 Sort 🌐 Format 🐴 Export 🖕 Print 🧰 Detail 🖪 Summary 🕕 😑 🧰 Pivot		
36 Possible Donor Duplicates Found		
So rossible Donor Duplicates round		

Click the **Assign selected attributes to donors** radio button and check the box of the attribute you want to set. **Attribute would have needed to be created previously*, <u>click here</u> to learn how.



Set Attributes	
 Assign selected attributes to donors Remove selected attribute assignments from donors 	Attributes Contact Method DB Cleanup Possible Dupes donors social net pref Group Membership Not (items in this folder are hidden from normal vorganization Organization Organizers Social Network Pref Social Networking Social Networking 2 Social Networking 2 Source Volunteer
	<

Click **[OK]** to proceed. Click **[OK]** again after prompted with the security warning.



Set Attributes	
 Assign selected attributes to donors Remove selected attribute assignments from donors 	Attributes Contact Method DB Cleanup Orossible Dupes donors social net pref Group Membership Not (items in this folder are hidden from normal) Ornanization
Warning	
🔔 36 D	onors may be updated. Do you wish to proceed?
	OK Cancel
	4
	OK OK Cancel

You'll be notified when the process is complete. You can now search by that attribute in the future.



Set Attributes	
 Assign selected attributes to donors Remove selected attribute assignments from donors 	Attributes Contact Method DB Cleanup Possible Dupes donors social net pref Group Membership Not (items in this folder are hidden from normal to Oroanization Result 0 donors processed. 0 K
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- Knowledge Base Articles

- 3rd Party Resources

#3 Related Resources

Article: <u>Regular Maintenance – Best Practices</u> Article: <u>Merge Contact Records</u> Video: <u>How to Manage Duplicates</u> Video: <u>Attributes – Assign en masse</u> 3rd Party Learning Resource: How to Find Duplicates in Excel

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