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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.

Outline

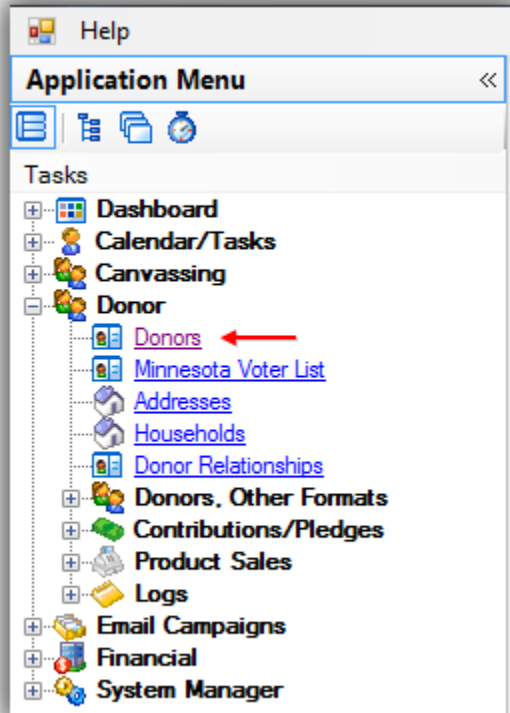
#1 Find Possible Duplicates

#2 Assign Possible Duplicates to an Attribute En Masse

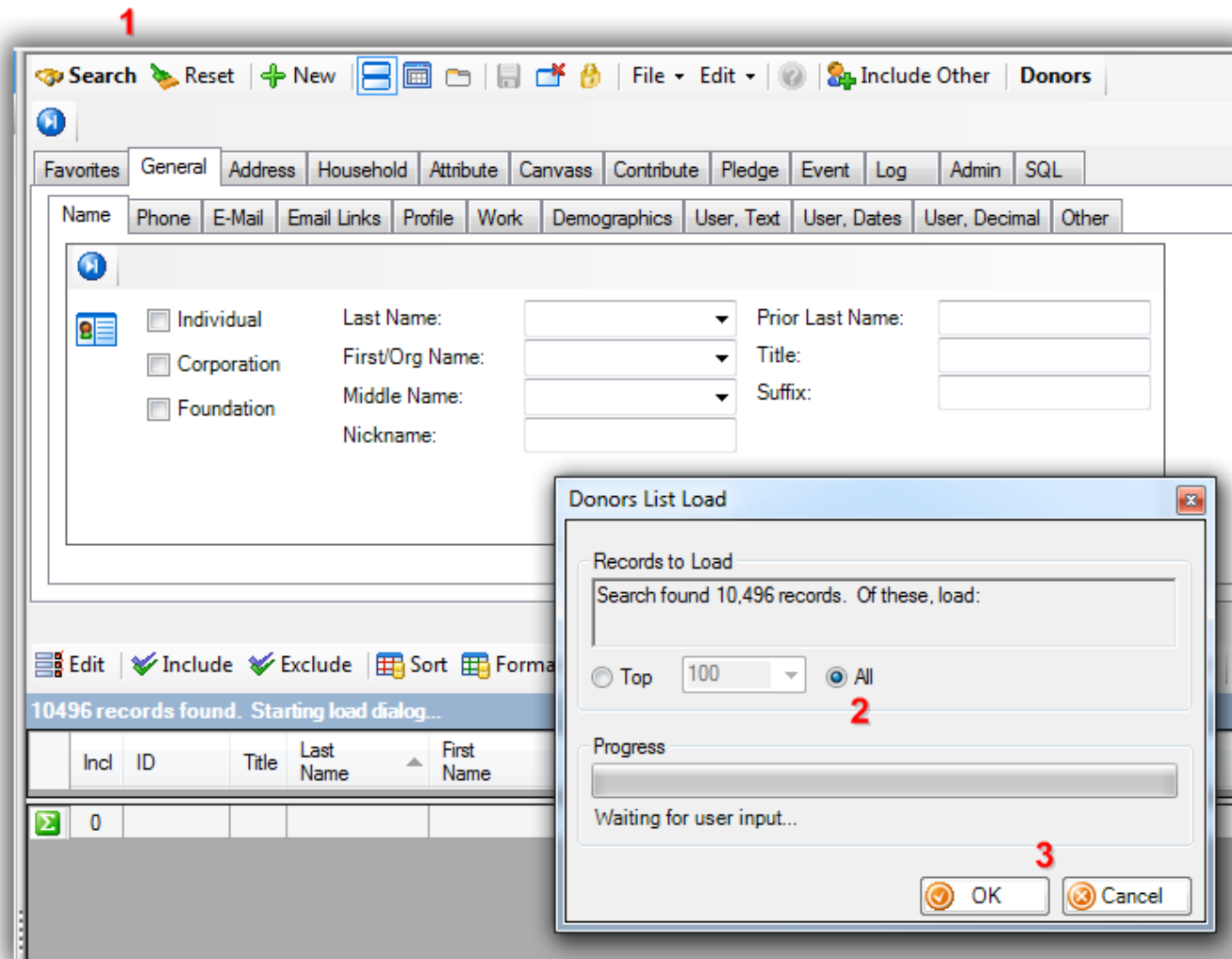
#3 Related Resources

#1 Find Possible Duplicates

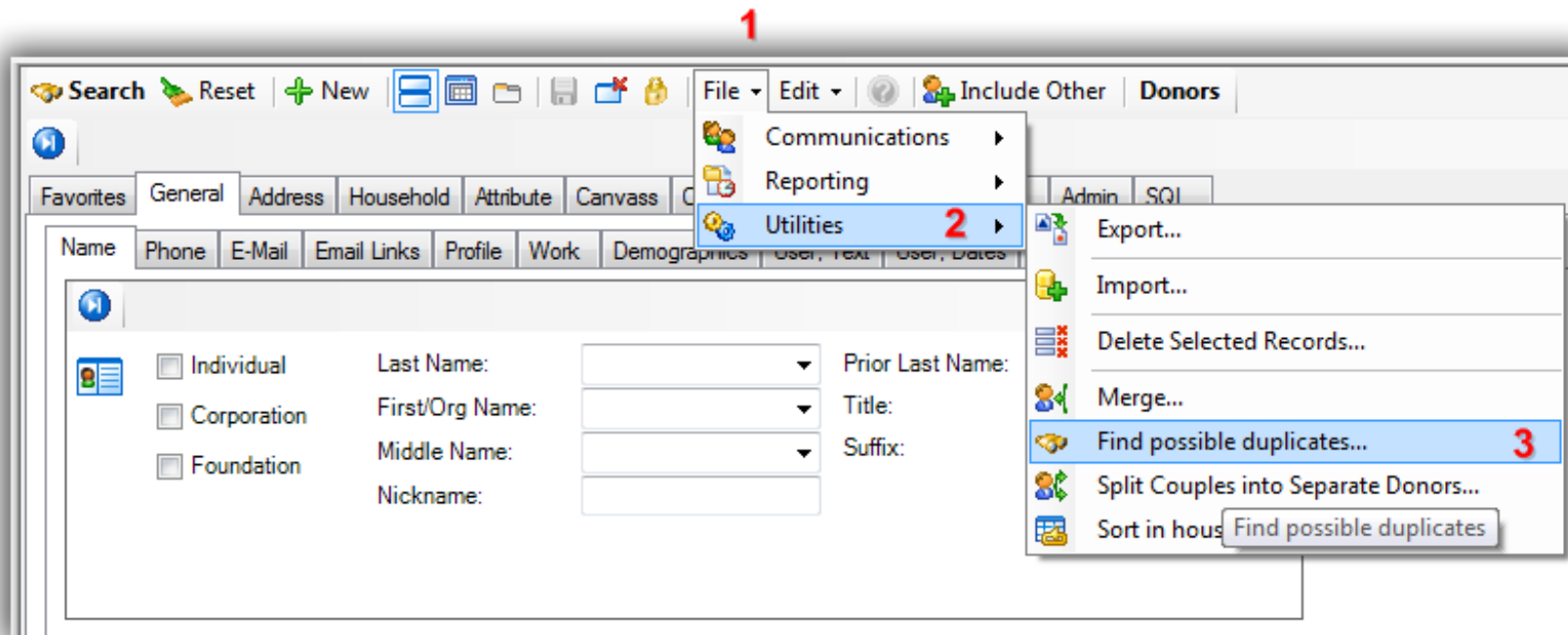
Navigate to your contact list (Voters/Donors/Contacts). *In this example I used a nonprofit database where we renamed **Donors** to **People and Orgs**.* [Click here](#) to learn how to customize labels in your database.



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 – 1Million+ you may want to run this process in different chunks. In my example I loaded all 10,496 records.*



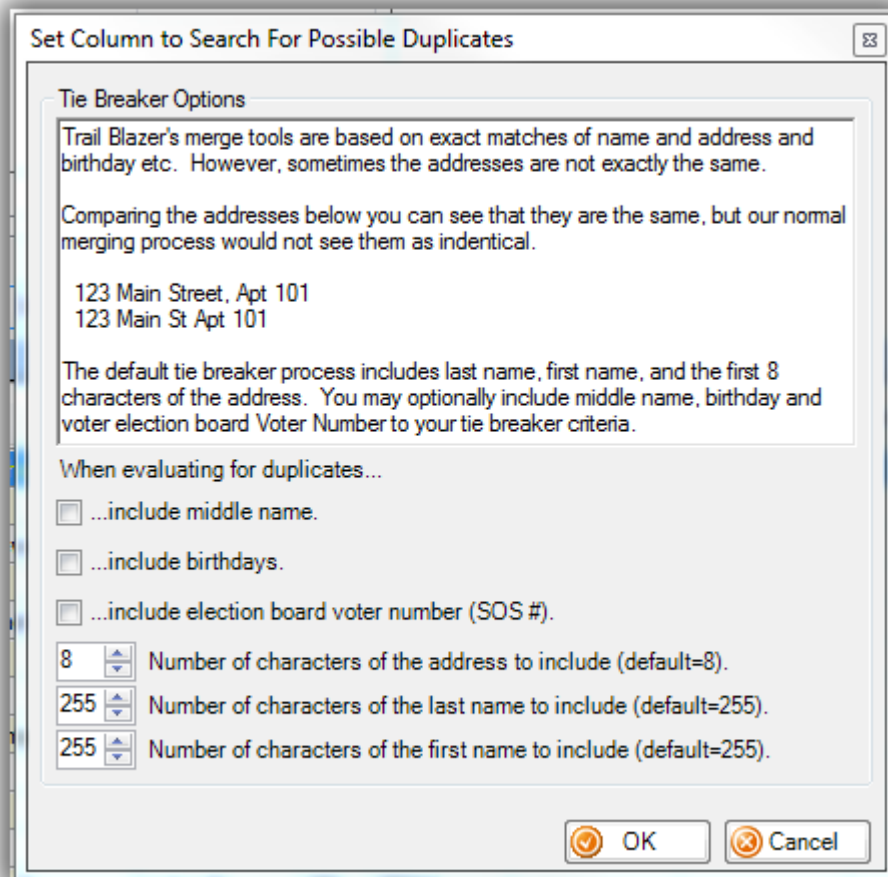
Click **[File] > Utilities > Find Possible Duplicates**



The ="tie breaker" columns include:

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

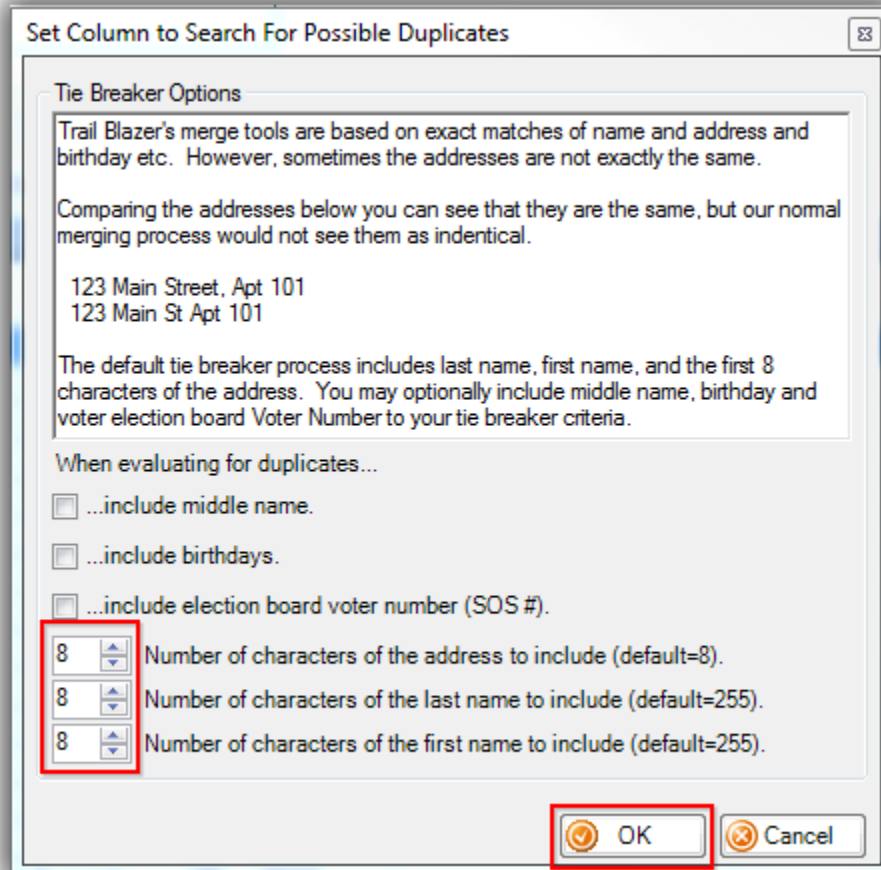
Example: If you select only name and address, people with different middle names will be listed as a possible duplicates.



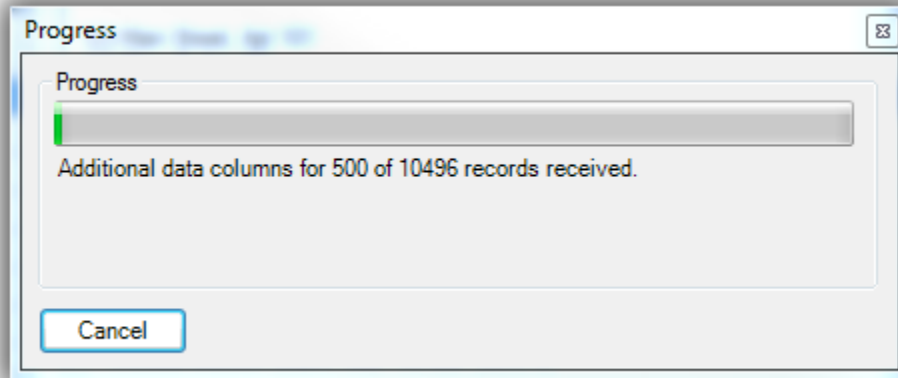
You can change around the options to fit your needs – every time you run the process you will need to start with a new contact list.

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.

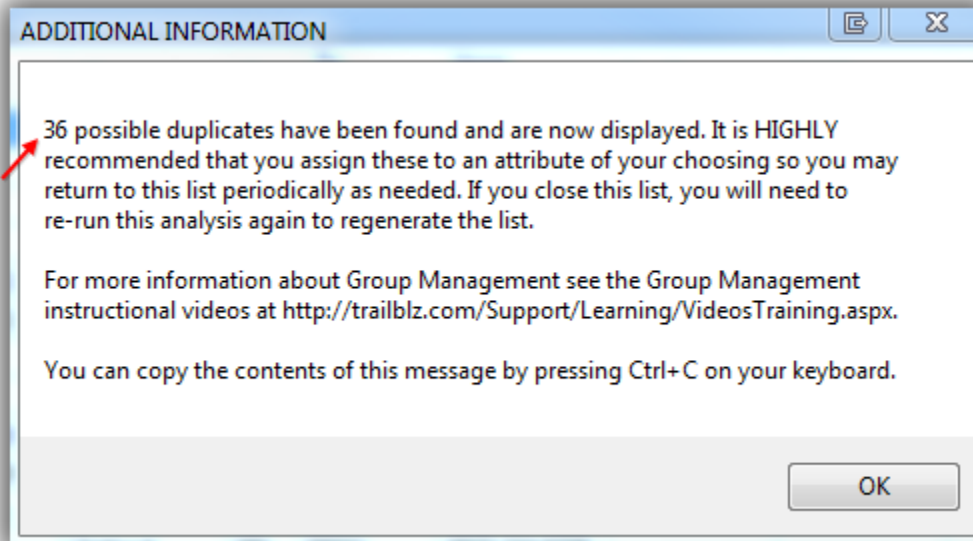


Trail Blazer will display a progress bar, if you're working with millions of records it will of course take some time and you may want to launch a separate session of TBZ.



Once complete it will prompt you with the results and a recommendation to assign this list an attribute of “Possible Duplicates”. [Click here](#) 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.



Click **[OK]** to finish.

Here's a sample snapshot of my duplicates:

Possible Duplicates

Donors [36 records found]								
Incl	ID	Last Name	First Name	Address	City	State	Zip Code	
<input checked="" type="checkbox"/>	12366	Clark	Patti	9903 Tree Farm Rd	Eden Prairie	MN	55347	
<input checked="" type="checkbox"/>	9423	Clark	Patti	9903 Tree Farm Rd	Eden Prairie	MN	55347	
<input checked="" type="checkbox"/>	8143	Swanberg	John	7969 Island Rd	Eden Prairie	MN	55347	
<input checked="" type="checkbox"/>	8144	Swanberg	John	7969 Island Rd	Eden Prairie	MN	55347	
<input checked="" type="checkbox"/>	1051	Burton	Michael	706 Bellows St	Saint Paul	MN	55107	
<input checked="" type="checkbox"/>	1052	Burton	Michael	706 Bellows St	Saint Paul	MN	55107	
<input checked="" type="checkbox"/>	9650	Markovic	David	697 George Kennedy	Belle River	ONT...	N0R1A0	
<input checked="" type="checkbox"/>	10334	Markovic	David	697 George Kennedy	Belle River	ONT...	N0R1A0	
<input checked="" type="checkbox"/>	5280	McDem...	Patrick	6470 129th St W	Apple Valley	MN	55124	
<input checked="" type="checkbox"/>	5281	McDem...	Patrick	6470 129th St W	Apple Valley	MN	55124	
<input checked="" type="checkbox"/>	73	Alden	John	6217 France Ave S	Edina	MN	55410	
<input checked="" type="checkbox"/>	74	Alden	John	6217 France Ave S	Edina	MN	55410	
<input checked="" type="checkbox"/>	10947	Mortola	Cosimo	555 z st	Mobile	AL	36604	
<input checked="" type="checkbox"/>	11510	Mortola	Cosimo	555 z st	Mobile	AL	36604	
<input checked="" type="checkbox"/>	2314	Foster	Michael	5061 Golden Valley Rd	Golden Valley	CT	06500	
<input checked="" type="checkbox"/>	9447	Foster	Michael	5061 Golden Valley Rd	Golden Valley	MN	55422	
<input checked="" type="checkbox"/>	4218	Kamm	Daniel	4130 140th St NE	Prior Lake	MN	55372	
<input checked="" type="checkbox"/>	4219	Kamm	Daniel	4130 140th St NE	Prior Lake	MN	55372	

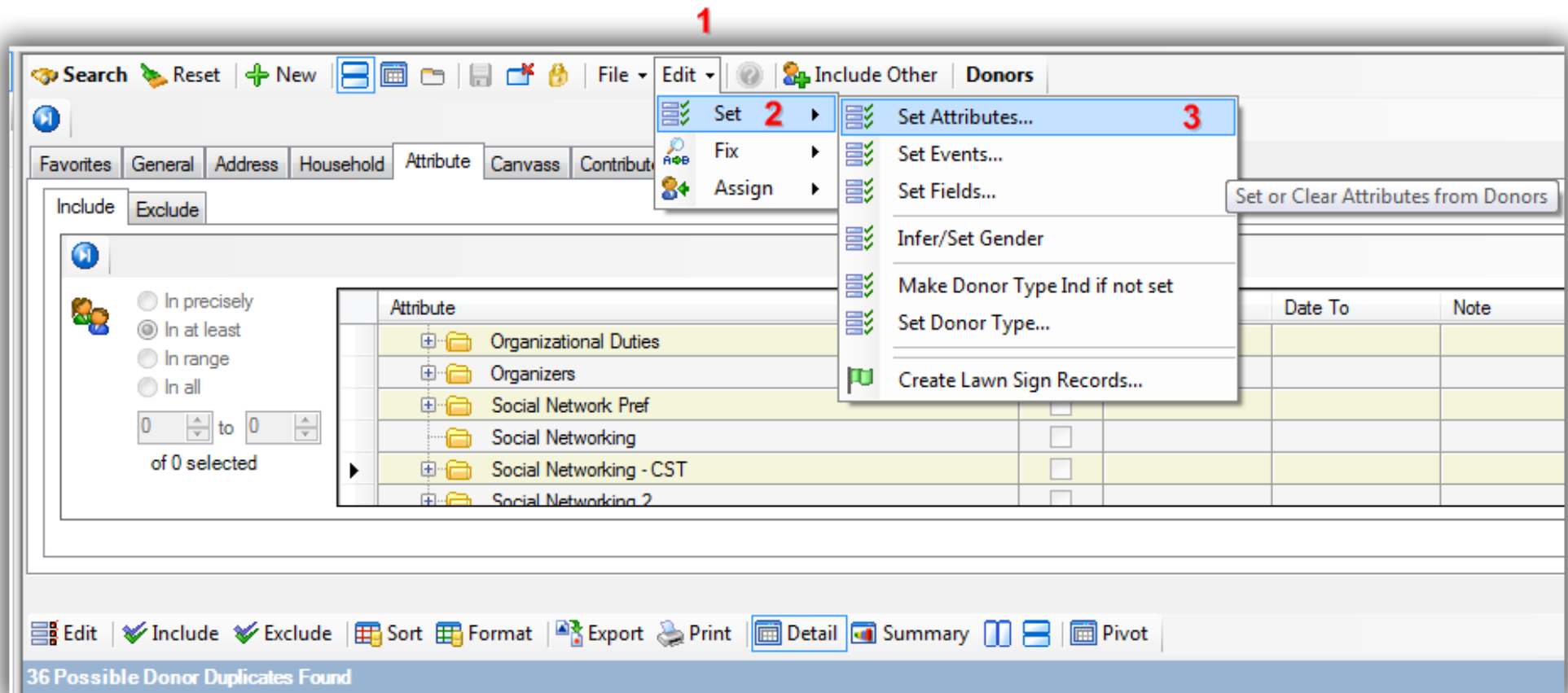
From here it's at your discretion how to proceed. Some options would include:

- 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"

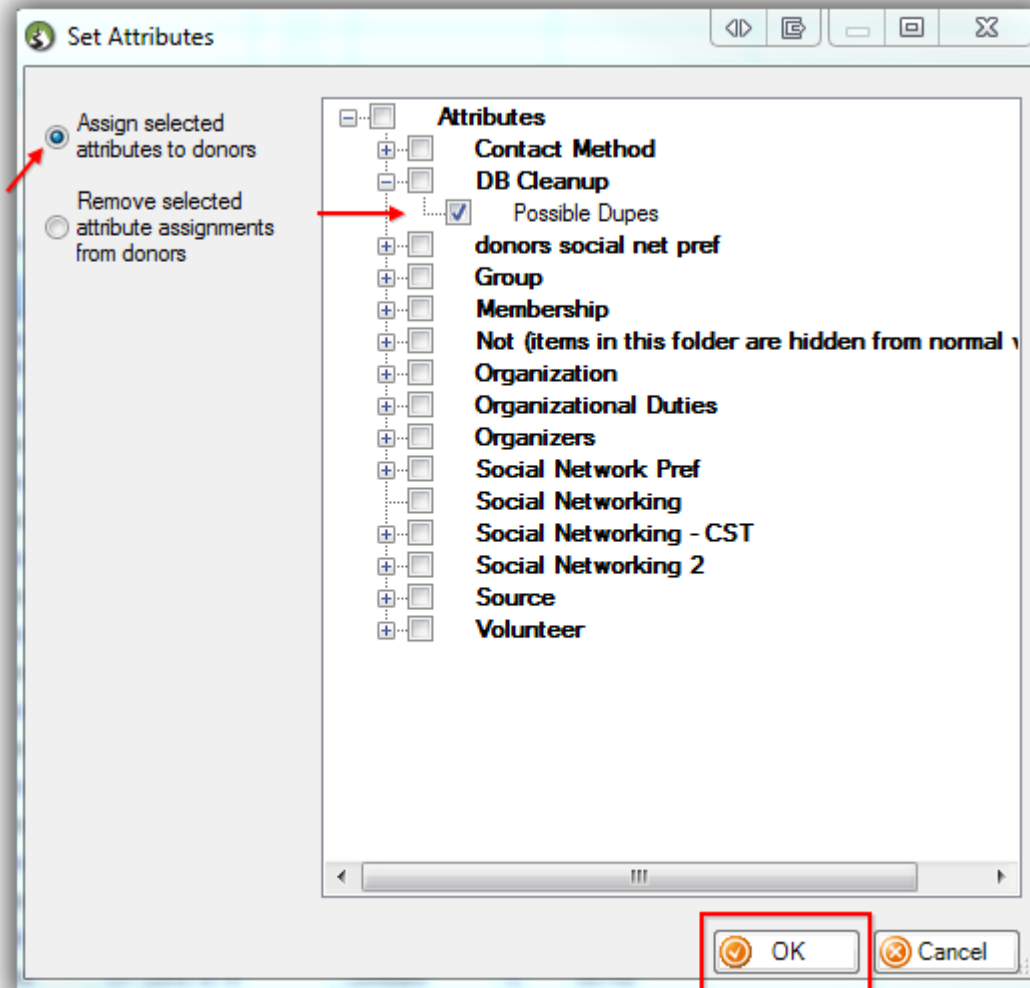
In my example I chose to assign these records to an attribute called “Possible Dupes” en masse – the next section walks through that process.

#2 Assign Possible Duplicates to an Attribute En Masse

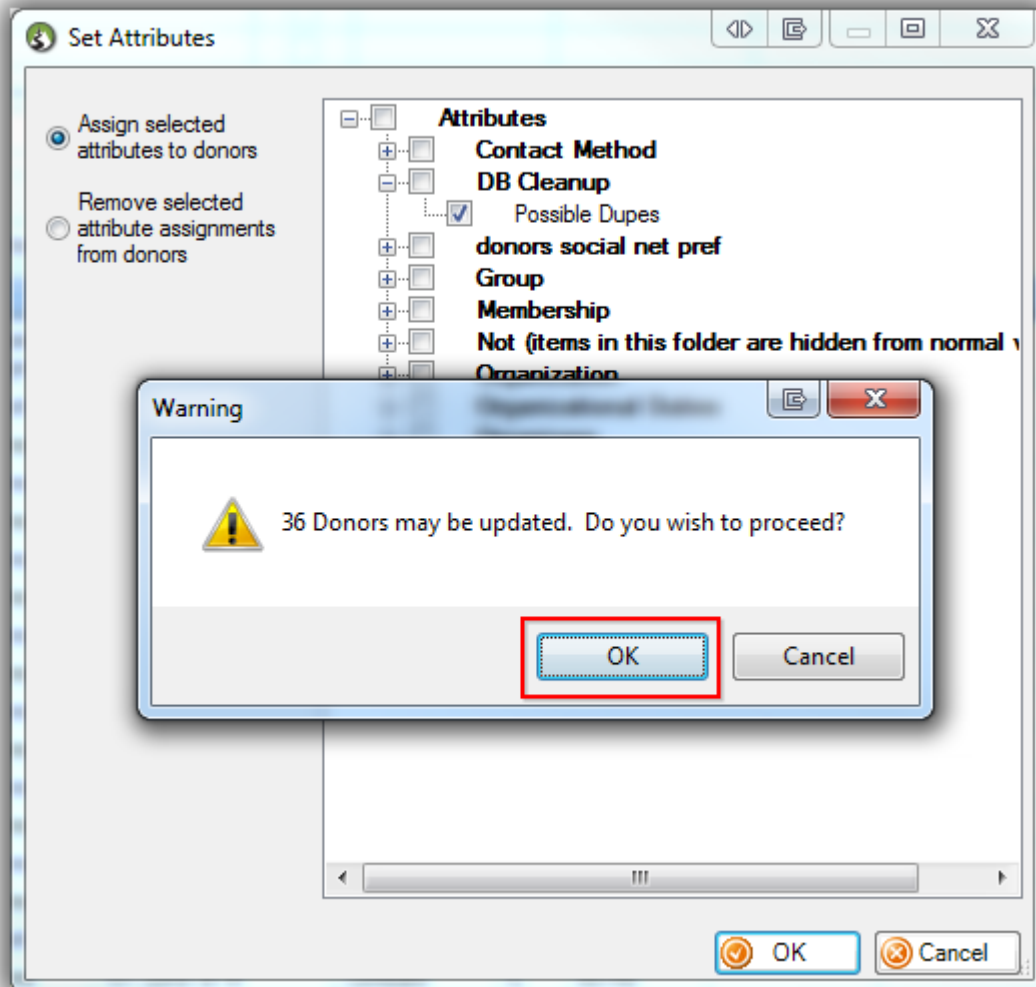
After you’ve got the list of possible duplicates on your screen click **[Edit] > Set > Set Attributes**



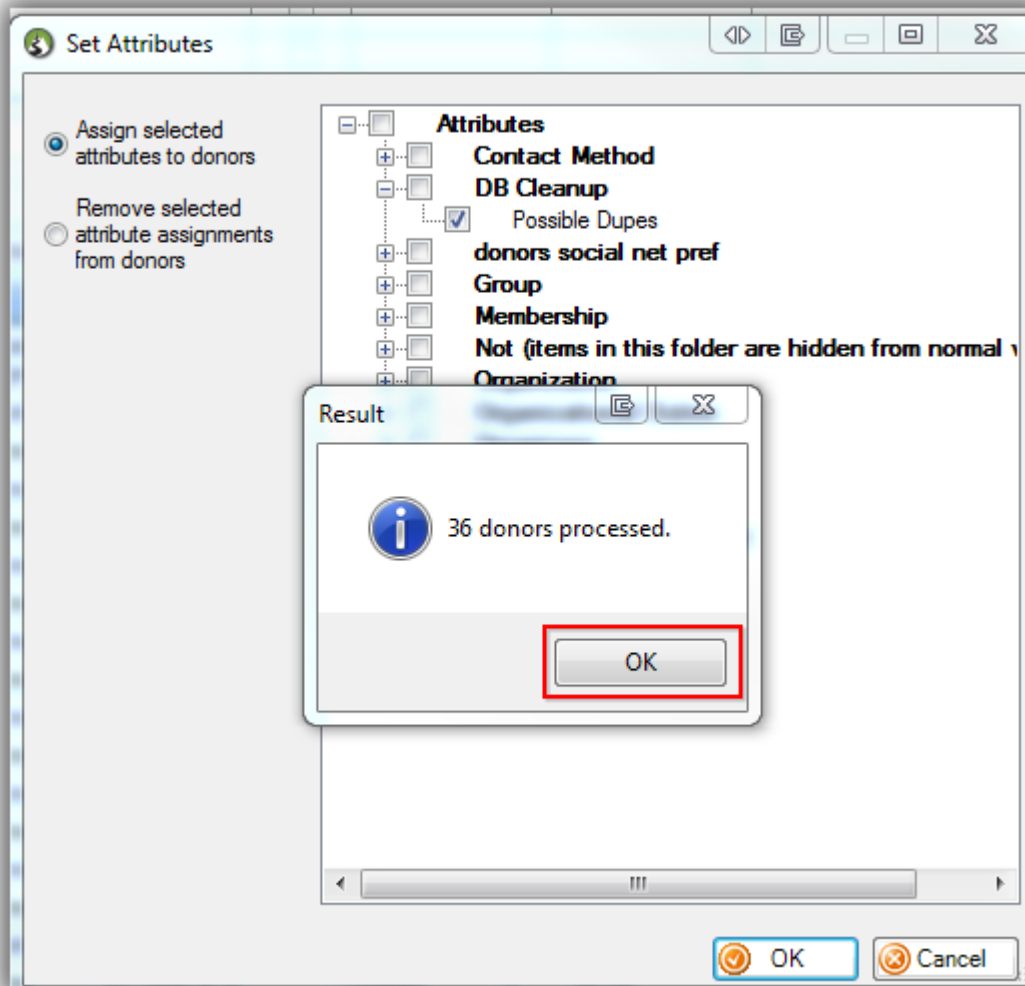
Click the **Assign selected attributes to donors** radio button and check the box of the attribute you want to set. **Attribute would have needed to be created previously, [click here](#) to learn how.*



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



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



Search Reset New [Icons] File Edit Include Other Donors

[Favorites](#)
[General](#)
[Address](#)
[Household](#)
[Attribute](#)
[Canvass](#)
[Contribute](#)
[Pledge](#)
[Event](#)
[Log](#)
[Admin](#)
[SQL](#)

[Include](#)
[Exclude](#)

☐ In precisely
☒ In at least
☐ In range
☐ In all
 1 to 0 of 1 selected

Attribute	Yes	Date From
[-] Attributes	<input checked="" type="checkbox"/>	
[-] Contact Method	<input type="checkbox"/>	
[-] DB Cleanup	<input checked="" type="checkbox"/>	
[-] Possible Dups	<input checked="" type="checkbox"/>	
[-] donors social net pref	<input type="checkbox"/>	
[-] Group	<input type="checkbox"/>	

[Edit](#)
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Donors [36 records found]



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- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

#3 Related Resources

Article: [Regular Maintenance – Best Practices](#)

Article: [Merge Contact Records](#)

Video: [How to Manage Duplicates](#)

Video: [Attributes – Assign en masse](#)

3rd Party Learning Resource: [How to Find Duplicates in Excel](#)

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