

# Displaying and Merging Duplicate Contact Records in WorkCenter

In this flash video we will show you how to identify duplicate contact records in your WorkCenter. We will also show you how to review the contact records for pertinent information and then merge individual contact records and data into one of the duplicate contact records.

Before you start this process, we suggest that you backup your database. To do this, click on TOOLS, DATABASE and select BACKUP. Once the database backup is completed, you will see a pop-up box appearing indicating the backup process was successful.

**Step #1: Identifying duplicate contact records:** Open WorkCenter and make sure your contacts are listed down the left side of your screen view. Point your mouse at one of the contact records, right click and select the option: "Show Duplicates". You will see WorkCenter list all of your duplicate contact records.

**Step #2: Review individual duplicated contact records:** Start with the first duplicated records by double clicking on the first record. Review this contact for pertinent data such as contact information and loans listed under the loan tab. You want to review each of these duplicate records to determine which contact record you wish to merge the other record or records into.

**Step #3: Merging the contact records:** Click on the contact record that you decided in step #2 to be the base contact record of the duplicate. This is the one you will merge the duplicate record into. Hold down your "Ctrl" keyboard key and then left click on the contact record you wish to merge into the first record selected. Release the "Ctrl" key and click on "CONTACTS" and then select "MERGE TO" option.

WorkCenter will show you a pop-up warning box asking you if you wish to continue. Click on the YES box to complete the merging process. Once the contact record has been merged, those records will disappear and you will have your contact record updated. Repeat the process for the additional duplicate contact records.

When you have finished with all duplicate records, WorkCenter may need to be closed and opened again to update your database properly.