

# PlanPlus™ Online

## 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

The screenshot shows the PlanPlus Online interface. At the top, there is a navigation bar with tabs for Home, Organization, Contact, Opportunity, Calendar, and My Account. Below this is a secondary navigation bar with links for Summary, New, Manage Views, Reports, Lists, By Product, and Advanced Search. The 'Advanced Search' link is highlighted in yellow, and a red arrow points to it with the text 'Click to Search'. Below the navigation bar, there is a search input field with the text 'search contacts' and a search button. To the left of the search input field, there is a notification for a '12 Reminder & Alert: Appointment Reminder: three day recurring'. Below the search input field, there is a 'Add New Contact' form with fields for Contact Of, Job Title, First Name, Last Name, Classification, Business Phone, Mobile Phone, Business Fax, Home Phone, Email, Web Page, Address Lin 1, Address Lin 2, City, State, Postal Code, and Country. To the right of the search input field, there is a table of contacts with columns for Contact Name, Source, First Name, Last Name, and Main Phone. The table contains the following data:

Contact Name	Source	First Name	Last Name	Main Phone
Adam Adamson		Adam	Adamson	(801) 555-8888
Dave Baldwin	private	Dave	Baldwin	(801) 555-9999
Ward Cleaver		Ward	Cleaver	
George Cloony		George	Cloony	
John Davidson		John	Davidson	(972) 572-8443
Vin Diesel		Vin	Diesel	
Roger Federer		Roger	Federer	
Harrison Ford		Harrison	Ford	
Zack Johnson		Zack	Johnson	
Tom Lehman		Tom	Lehman	
Andrew McLaine	private 3-12	Andrew	McLaine	
Maria Sharapova		Maria	Sharapova	

Pick an empty search criteria – i.e. select NO search criteria, then at the bottom of the page Click Search.

The screenshot shows the search criteria form in PlanPlus Online. It contains the following fields:

- String: [dropdown menu]
- Sold Oppitys: [dropdown menu]
- OrgRet: [dropdown menu]
- Position: [dropdown menu]
- zllow: [dropdown menu]
- Address: [dropdown menu]
- city: [dropdown menu]
- Blogfeed: [dropdown menu]
- Groups: [dropdown menu]

At the bottom of the form, there is a Search button, a Save As field with the text 'New Search 03/18/2008', and a search input field.

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

search contacts | search at

12 Reminder & Alert Appointment Reminder: Webinar

Advanced Search:  
[Turn On/Off Explanations](#)

Special Searches | Saved Searches | Recent Searches

- Sync List
- Search Contact by Title
- Search Contact by Organization
- Search Contact by Opportunity
- Search Contact by Product
- Search Contact by Assets
- Custom Field Value / Period

Search Criteria: > [ # > 1 ]

Search Result:

<input checked="" type="checkbox"/>	#	Contact Name	Address	Main Phone	Email
<input checked="" type="checkbox"/>	7461	Adam Adamson	222 7th ave, slc, UT 84103, USA	(801) 555-8888	
<input checked="" type="checkbox"/>	7460	adam adamson		(801) 555-8888	
<input checked="" type="checkbox"/>	7451	Harrison Ford			
<input checked="" type="checkbox"/>	7450	Ward Cleaver			
<input checked="" type="checkbox"/>	7449	Tiger Woods			
<input checked="" type="checkbox"/>	7448	Vin Diesel			
<input checked="" type="checkbox"/>	7446	George Clooney			
<input checked="" type="checkbox"/>	7439	Robert Redford			

Go to the bottom of the results and click Update Value

<input checked="" type="checkbox"/>	7420	Phil Baldwin		(801) 555-9999	
<input checked="" type="checkbox"/>	7418	Andrew McLeine			am@acsl.com
<input checked="" type="checkbox"/>	7417	Stewart Cook		(801) 555-1483	SC@acsl.com
<input checked="" type="checkbox"/>	7416	Vanessa Goldberg		8014555990	
<input checked="" type="checkbox"/>	6428	Ansel Cabrera		(866) 999-4321	ac@acsl.com
<input checked="" type="checkbox"/>	6427	David Baldwin			
<input checked="" type="checkbox"/>	6426	Billy Maxwell	123 Mayfar drive, ...	(801) 555-6969	maxb.baldwin@conquest.net

Click on table headers to sort. 1 - 20 of 82

For Selected Entities: Add / Remove Team Member | Batch Assign | **Update Value** | Mark For Sync | Add To List | Mail & Print | Delete

Print Report | Create New | Back To Summary

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

PlanPlus™ Online

Home | Organization | **Contact** | Opportunity | Calendar | My Account |   
March, 2011  
7:01 Day (2:00 Left) Week 1  
[Settings & Profile](#)  
Summary | New | Manage Views | Reports | Lists | By Product | Advanced Search  
Welcome Phil Baldwin | Preferences | Email Center | Help | Login

|

12 Reminders & Alerts: 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
<input checked="" type="checkbox"/>	Aden Adams ( 7461 )	aden.adams@ ( 7460 )

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