

data8 duplicare™ documentation

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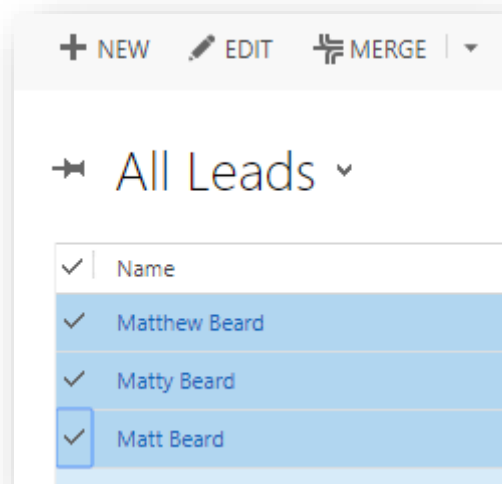
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End User Documentation

This section of the documentation is designed for day-to-day users of the data8 duplicare™ tool in order to aid their usage of Dynamics and improve data quality throughout the system.

Merge +

The Data8 Merge + feature directly replaces the standard Dynamics Merge functionality on the ribbon. In order to merge two or more records, choose them by selecting them on the left side of the grid and click “Merge” on the ribbon.



This will pop open a new tab or window on your web browser, which is where you will perform the merge.

Description	Output	Matthew Beard	Matt Beard
1	2	3	
Header		Make Master	Master
Lead Source	-- None --	Select All	Select All
Rating	Warm	Warm	Warm
Status Reason	New	New	New
Owner	CRM Administrator	CRM Administrator	CRM Administrator
CONTACT		Select All	Select All

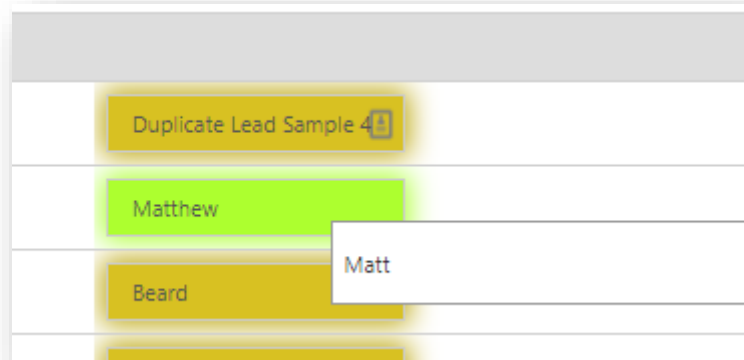
The window that opens up will be made up as follows:

1. A list of the fields, as defined by the latest form you used for that entity.
2. A guessed master version of the records, made up of a combination of all records included in the merge.
3. All the records included in this merge.

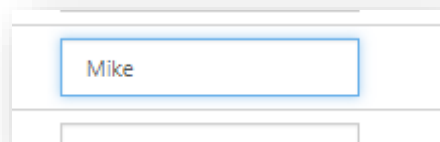
The purpose of this window is now to produce an output record you are happy with and click “Merge”.

Whilst the Data8 Merge + tool will take a best guess for your output record, you may decide there is a better option so you can manually edit the output record in a number of ways.

- You can drag and drop from an existing record. When you hover over a field and click to drag, the fields within the output record that will accept that value will highlight. You are only able to input the same data types in any field – for example, you are unable to drag a drop down value to a text field.

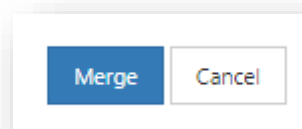


- You can manually edit a field if none of the supplied values are relevant to your output record. N.B. You are not currently able to manually select a different related record.



A final stage you need to complete is ensure you are happy with the master record. The master record will be the only record that will be kept active, all other records will be merged into the master record, and a reminder will be shown on the subordinate records should you view them again.

Once you are happy with your output record, you can commit the change by clicking the “Merge” button at the bottom right of the window.



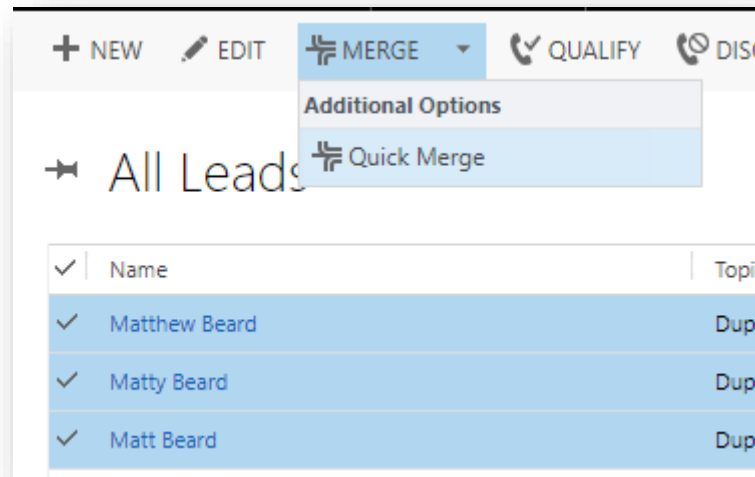
Once the merge has completed, the tab or window will close.

Quick Merge

Quick Merge will only show if your system administrator has provided you with Quick Merge functionality. Please refer to the administration documentation for more information on how to apply this permission.

If you have two or more records where you are confident the automatically generated output record will be correct, you can bypass the Merge screen entirely.

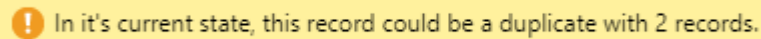
By selecting the records you wish to merge, you can press the arrow next to “Merge” on the ribbon and click “Quick Merge”.



This will automatically merge all the selected records and refresh the grid; giving you immediate confirmation the merge was successful.

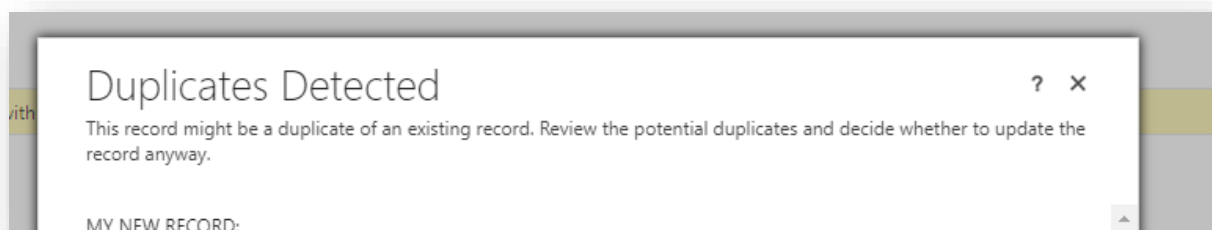
Duplicate Detection +

When you are entering data into a Dynamics system that has been set up with Data8 duplicare™, you will be informed of potential duplicates as early as possible in order to prevent duplicates. As you type and change fields, you will be prompted as soon as a duplicate is found even if the record has not been saved.



! In it's current state, this record could be a duplicate with 2 records.

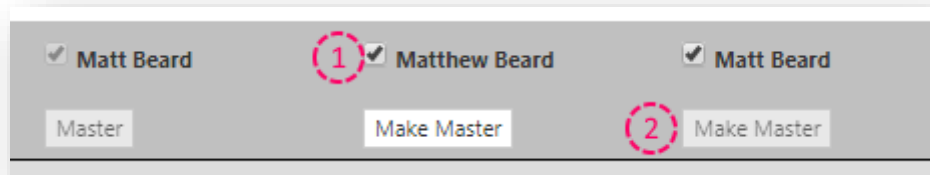
You are still able to continue through this record, ignoring the warning. When you try save the record, you will see the “Duplicates Detected” window that you normally see within Dynamics.



At this point, you do one of the following

- If you are sure the record is not a duplicate, you can save anyway by clicking “Save”.
- You can click “Cancel” and discard all your changes
- You can click “Cancel” and press “Merge” in the ribbon. Clicking this will open up the merge screen prepopulated with an output record, the records that were identified as duplicates and also the record you are currently inputting.

For more information on the merge screen, please see earlier in the documentation – there are two additional parts on this merge screen that will only show at this point.



1. We have automatically made suggestions on the duplicates found; you may find one or more records does not belong in this grouping. If this is the case, you can deselect the record by unticking the column.
2. If you are creating a new record rather than updating an existing one, you will be unable to make the new record the master as it does not actually exist yet.