Purpose

The purpose of this instruction is to resolve duplicate records by merging customer data into one BP record while maintaining the history from all records.

Trigger

Perform this procedure when Duplicate Check validation identifies potential duplicates for merge from the create or maintain processes.

Prerequisites

- Business Partners are identified as potential duplicates from the Duplicate Check Validation.
- Business Partners are not in process of a merge or cleansing case.

Helpful Hints

- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

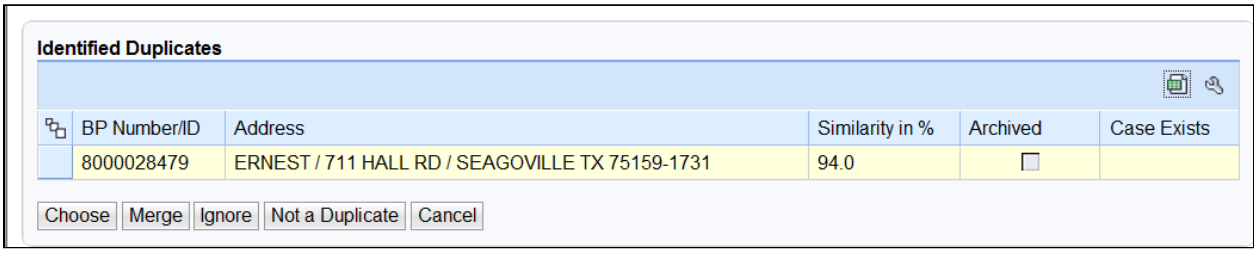
Note type	Icon	Description
A **general** note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A **cautionary** note		Use this note to communicate to the end-user of something that **MUST** be completed or another trigger that should be started and is related to the procedure.
A**critical** note		Use this note to specify something that **MUST NOT** be done during the

		procedure.
Contact someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A **reference** is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

Procedure

1. Start the transaction from the Duplicate Check pop-up.

Duplicate Check



2. Select the duplicate identified row.

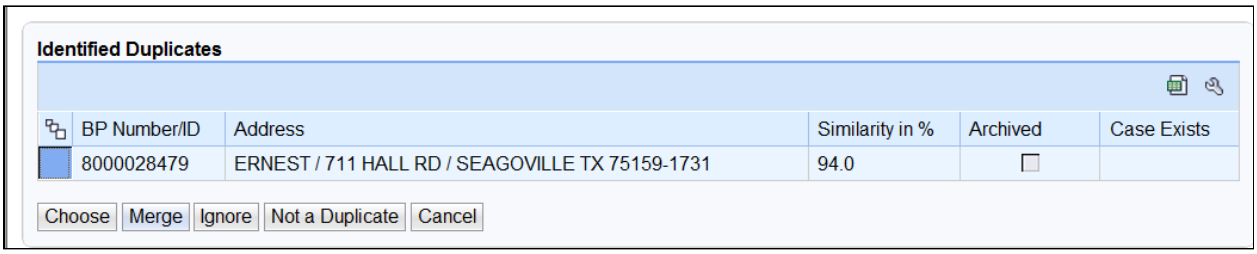
The Duplicate Check screen is a result of several different triggers. The transaction below can be triggered via the Potential Duplicates Report located in the Reports section of the BP Accounts Screen or editing/maintaining a Business Partner customer record. This pop-up will generate when making even a simple change to the record, such as editing a zip code or phone number.

The following steps detail how to merge to records in the event that a true duplicate has been found and should be merged.

The Identified Duplicates screen is displayed with information about the identified potential duplicate:

- BP Number and Address relate to the identified duplicate(s).
- Similarity in % is based on a combination of Name (business, first, middle
  and last), Suffix, zip code and date of birth.
- Archived indicates that the record has been Archived, in other words was the losing record in a previous merge.
- Case Exists indicates that a merge has been initiated and a Cleansing case has been created.

Duplicate Check

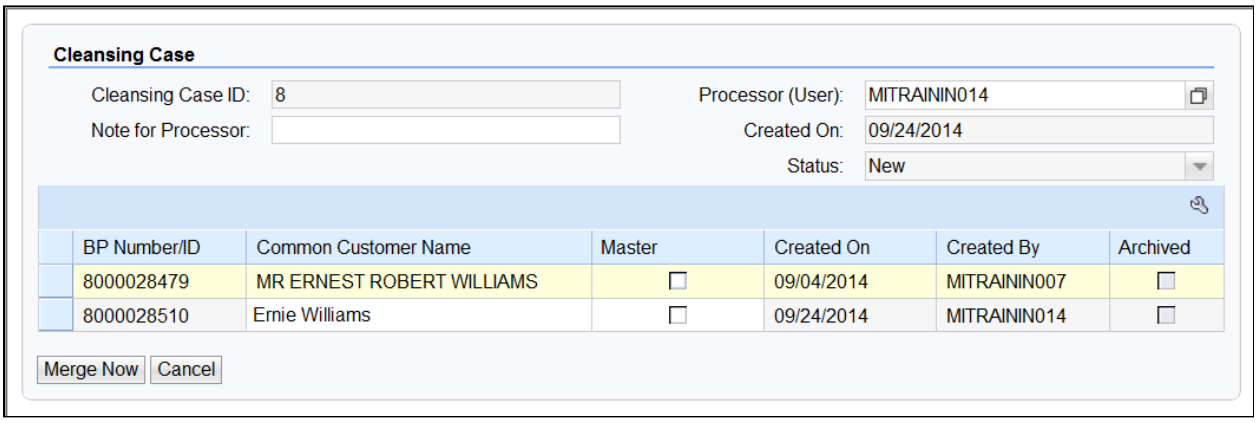


3. Click the **Merge** Merge button to create the Cleansing Case.

The following actions can be selected by the user:

- **Choose** allows the user to select an existing duplicate record and cancels the creation of the new record. *If the record is determined to be the same customer, the user should select this, and not create the new record.*
- **Merge** begins the process of combining the new and existing record. *This choice is rarely necessary when creating a new customer.*
- **Ignore** allows the new BP record to be saved but Duplicate check will validate the record each time that it is viewed. *Allows user to temporarily bypass the decision.*
- **Not a Duplicate** creates the new BP record and prevents Duplicate check from validating the record in the future. *Identifies the new record as a unique customer.*
- **Cancel** allows the user to return to the record and update the customer information.

Duplicate Check

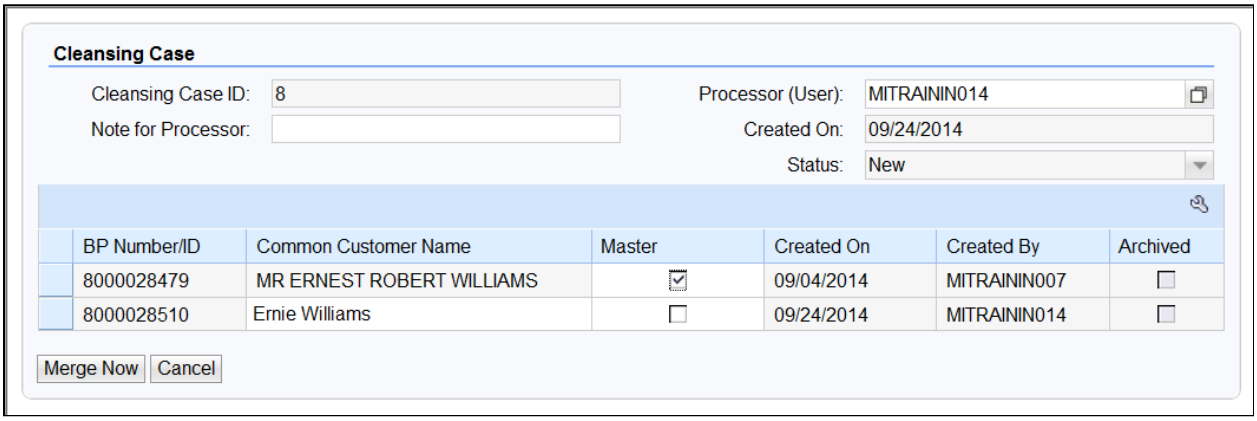


4. Click the **Master** check box ☐ to identify the Master record.

The Master record is also known as the 'Winning' record.

A BP record that is a part of an SSN Family is always the Master record.

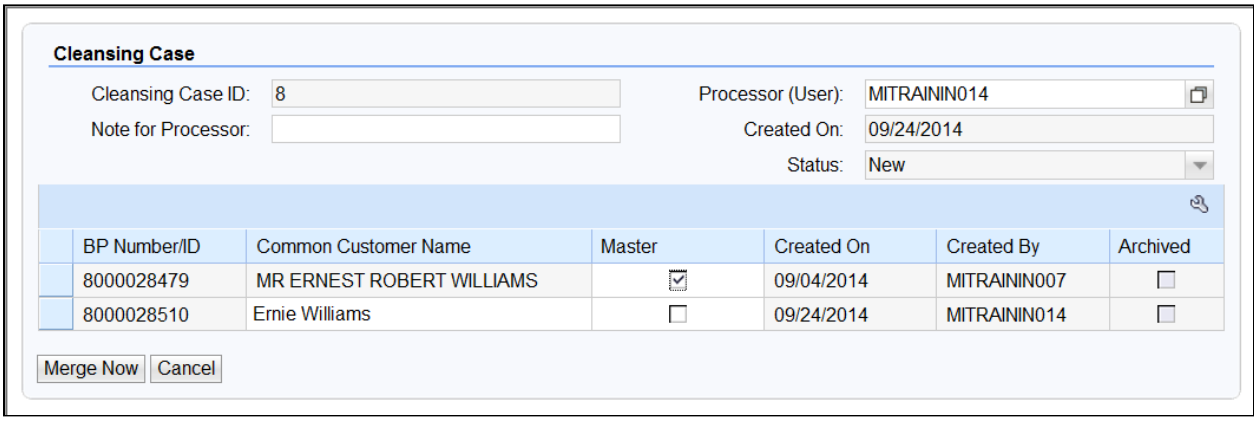
Duplicate Check



5. Click the **Note for Processor**: field to instruct the SSO.

The initiated cleansing case will be processed and completed by a State Security Officer (SSO)/ State Specialist.

Duplicate Check

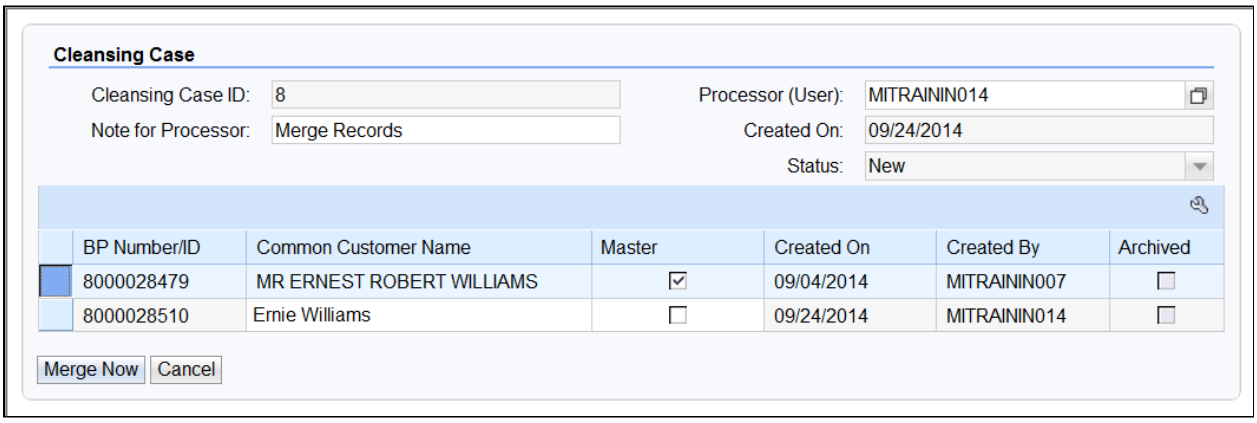


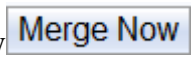
6. As required, complete/review the following fields:

Field	R/O/C	Description
Note for Processor:	R	Notes to the State Specialist regarding merge **Example:** Merge Records

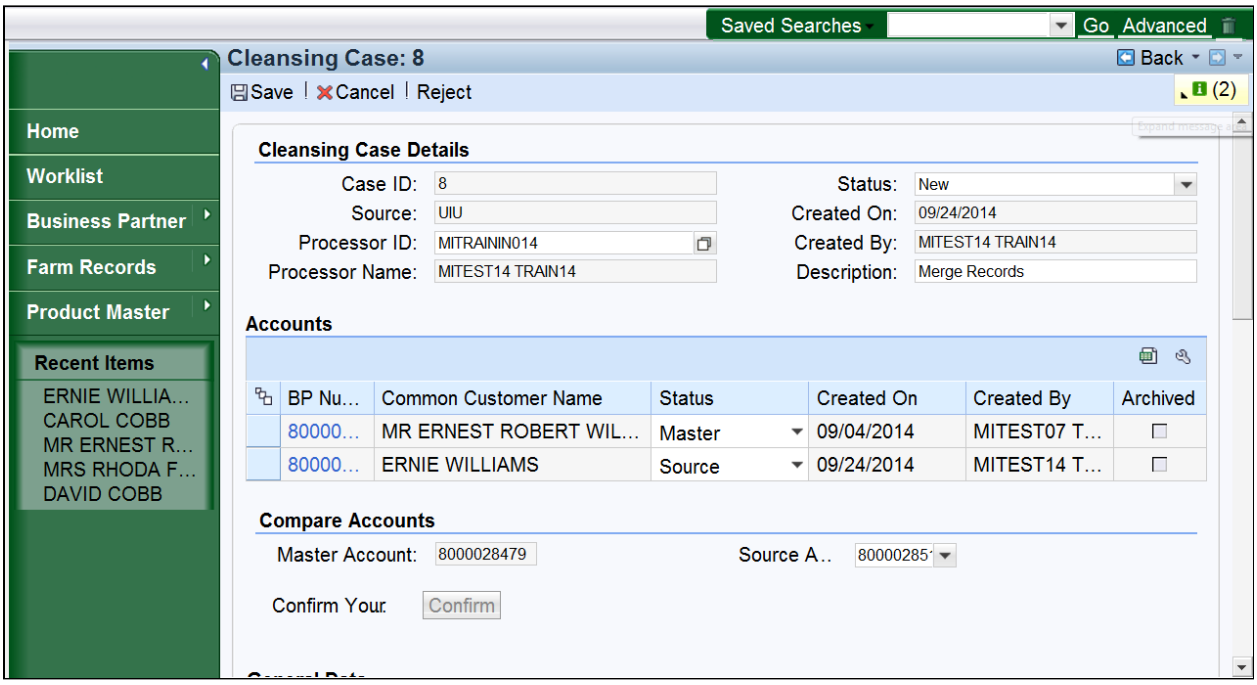
User will need to enter detailed information about the reason the merge is necessary, for the SSO to review.

Duplicate Check



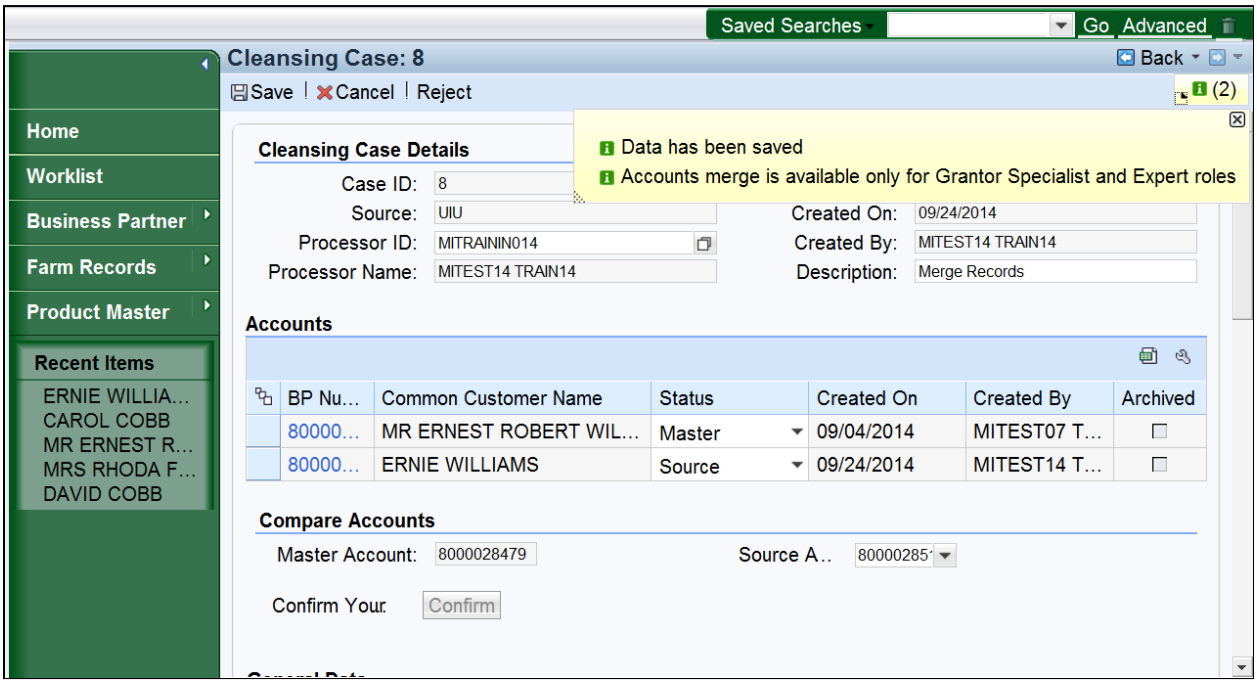
7. Click the **Merge Now**  button to continue to the Cleansing Case details.

Cleansing Case: 8



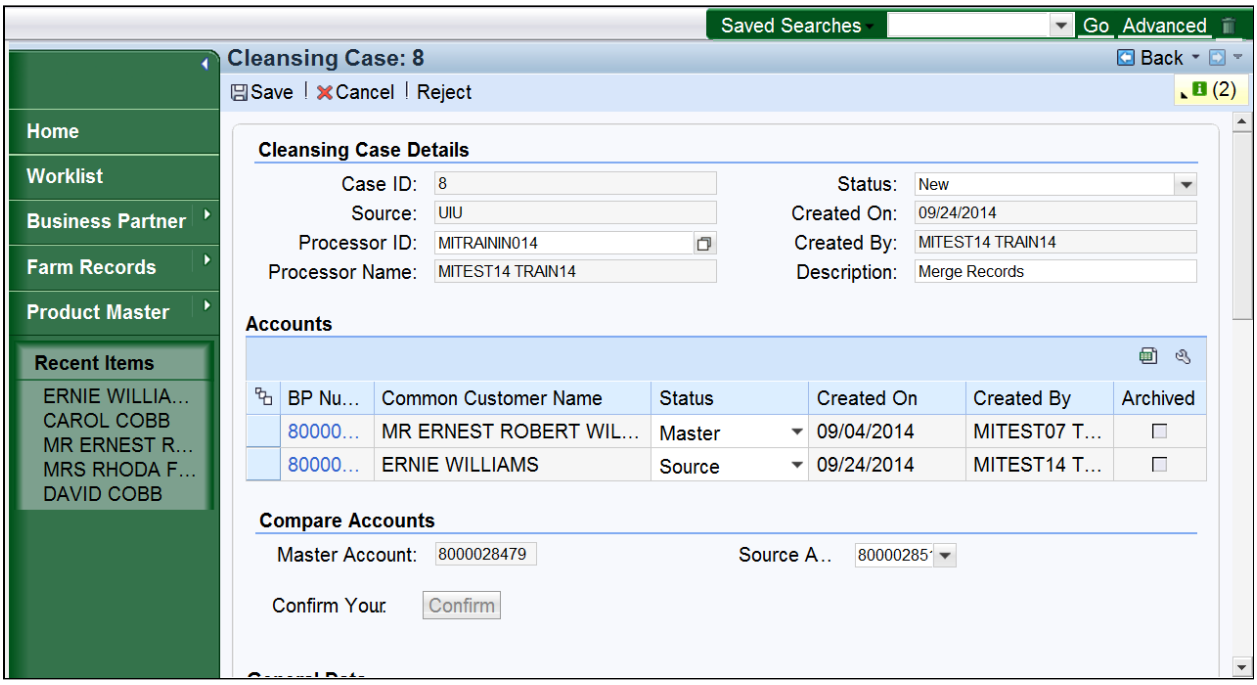
8. Click the **Expand message area** button.

Cleansing Case: 8



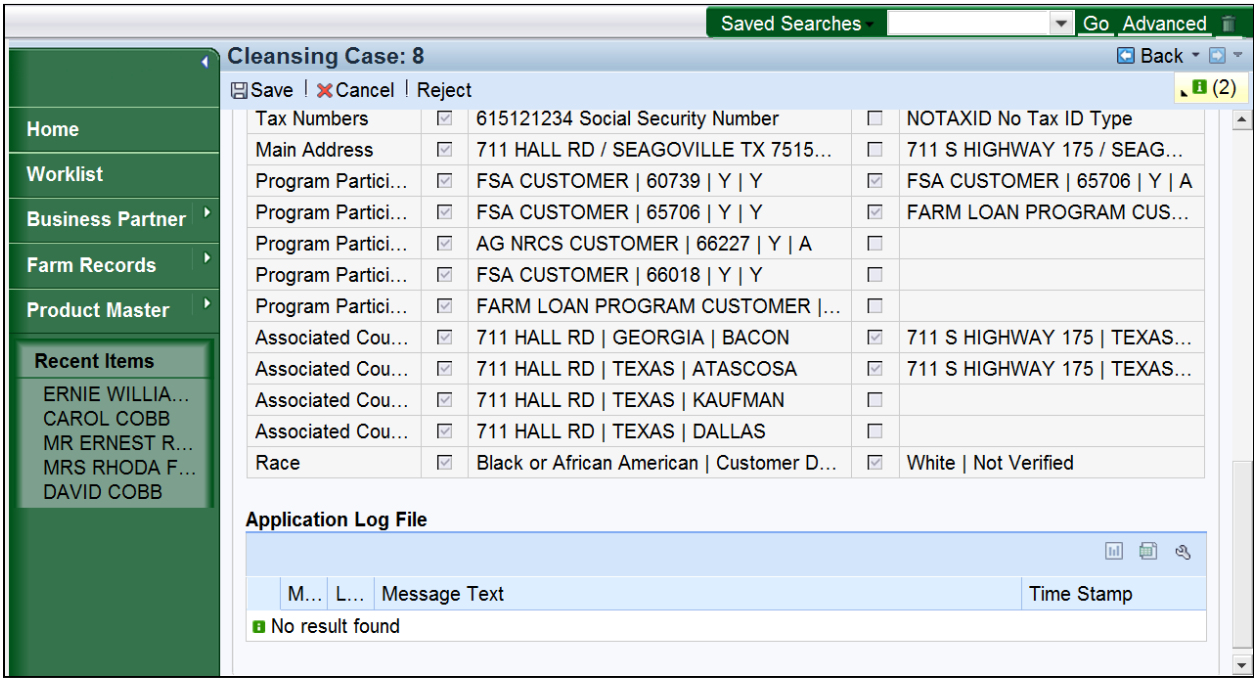
9. Click the **Collapse message area** button.

Cleansing Case: 8



10. Scroll down to view the Cleansing Case .

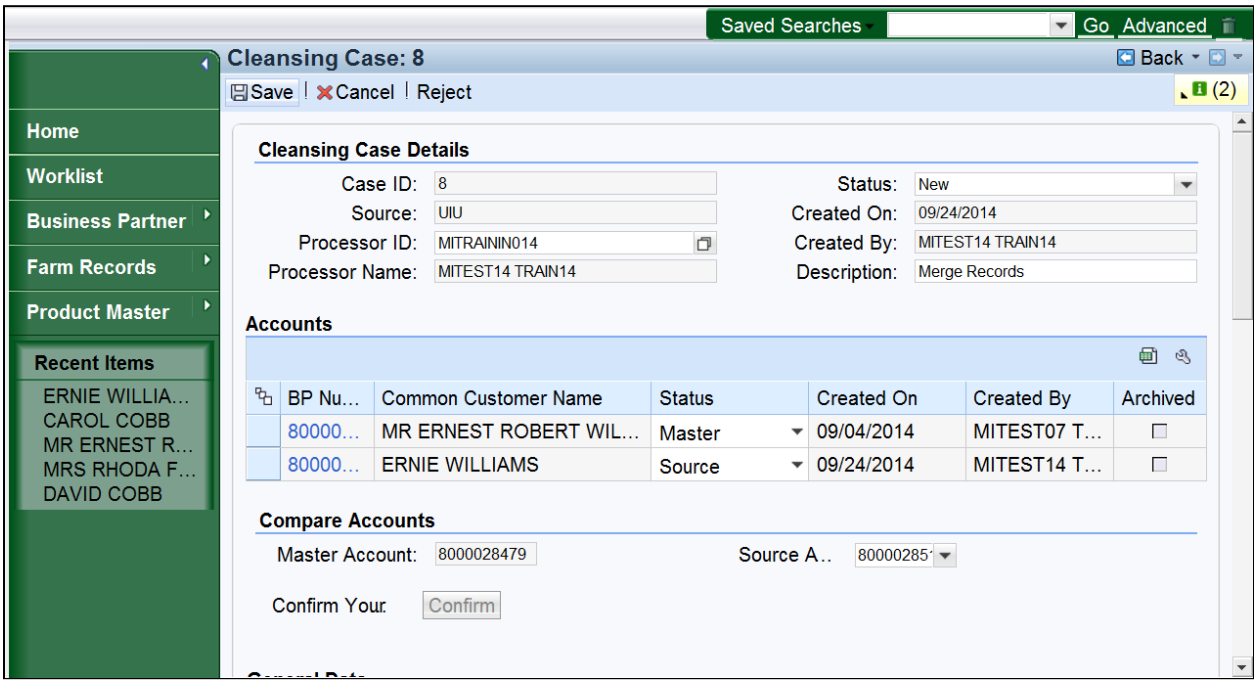
Cleansing Case: 8



11. Scroll up to Save the Cleansing Case.

The Cleansing Case displays the data from the Master and Source BP records. The State Security Officer (SSO)/State Specialist will select the data to retain in the Master record.

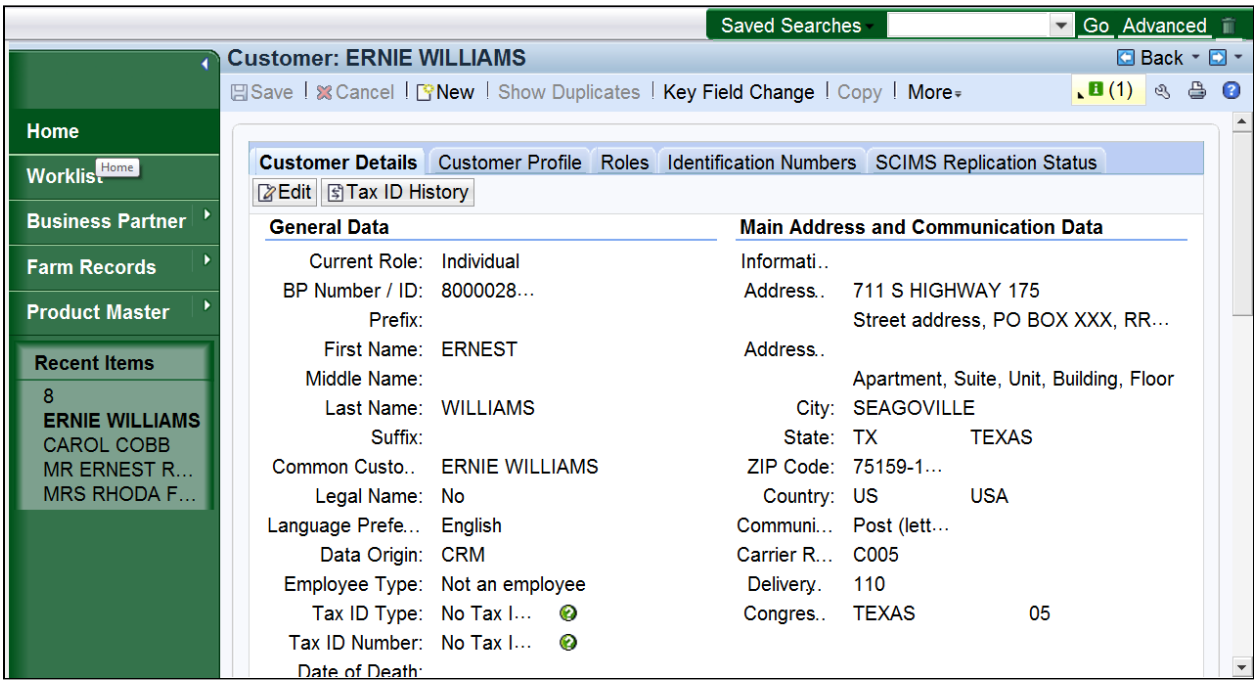
Cleansing Case: 8



12. Click the **Save** Save button.

You must click Save to create the workflow for the State Security Officer. Failure to click Save will result in the notifcation not being generated.

Customer: ERNIE WILLIAMS



13.

Click the Home

button. You have completed the transaction.

All State Specialists with the appropriate credentials will receive the workflow alert. However, only the State Security Officer (SSO) shall take action on the cleansing case and merge the BP records.

Information on both records is available in the change history and on the Identification Numbers tab and the losing record will be archived.

Result

You have initiated a merge of two BP customer records.