

Purpose

The purpose of this process is to view a report listing potential duplicate Business Partner Customer Records.

Trigger




Perform this procedure when a scan of the system for potential duplicates is needed.



Prerequisites

- None

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:

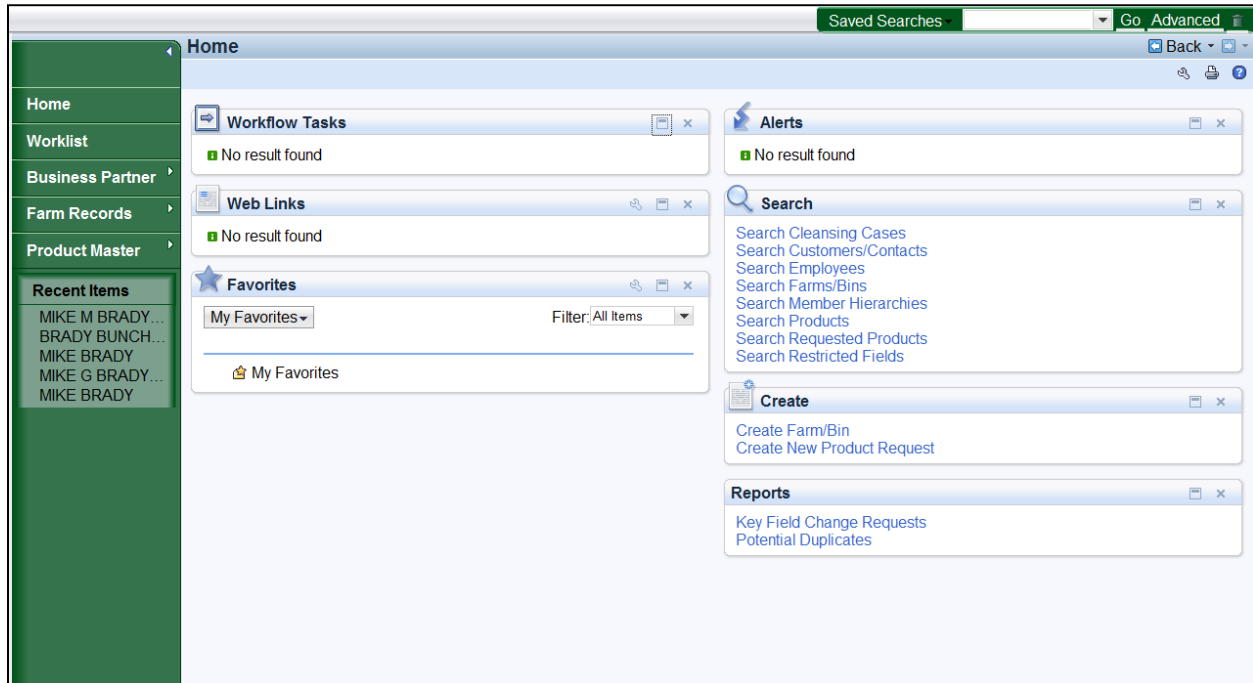
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the 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 MIDAS CRM Home Page.

Home



2. Click the **Reports** **Reports** Assignment Block heading.



Potential Duplicates report can be opened from the Reports Assignment Block on the CRM Home page or the Business Partner Accounts page.




Home

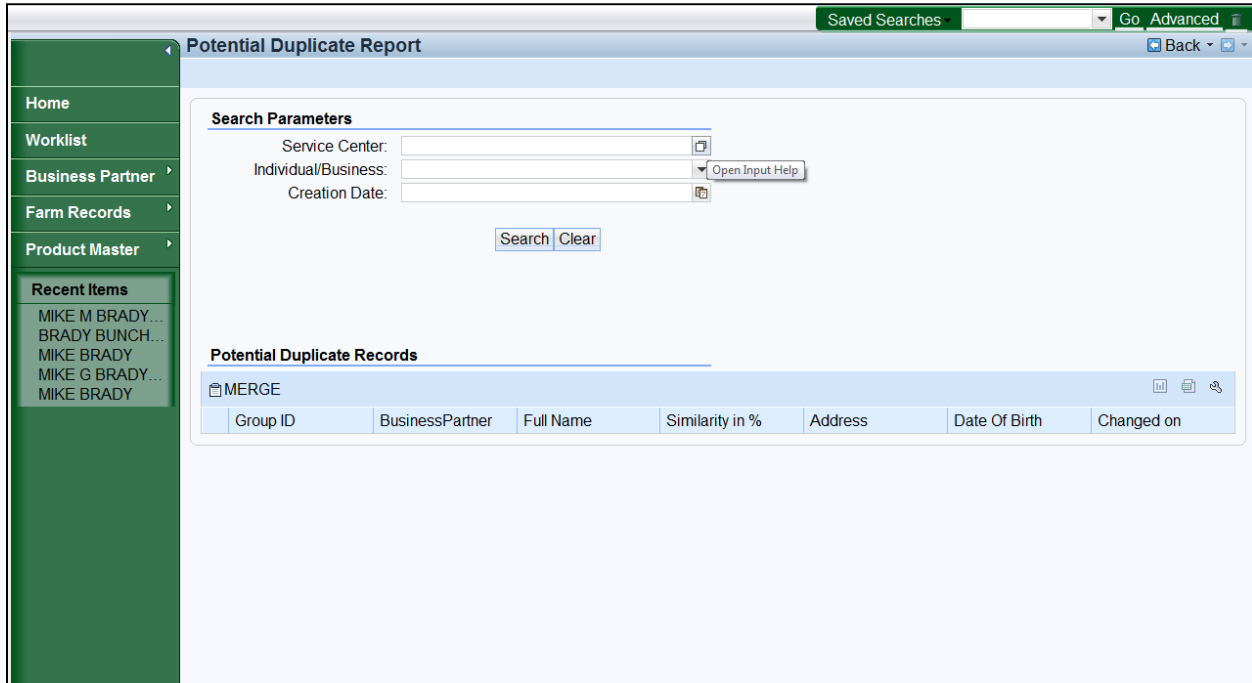
3. Click the **Business Partner** **Business Partner** button.


Accounts


4. Click the **Potential Duplicates** [Potential Duplicates](#) link.

 Initially, the Potential Duplicates report will be used to confirm and merge the existing accounts that have been identified as potential duplicates.

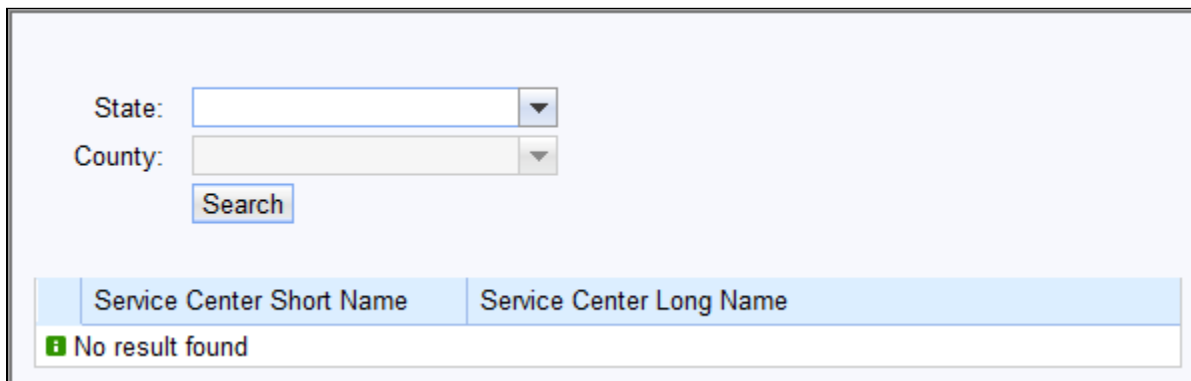
Potential Duplicate Report



5. Click the **Service Center** field Open Input Help  button.

 You can search by State, County, Service Center, Business Partner role or Creation date.

Service Center Search





6. Click the **State:** dropdown list icon button.

Service Center Search

The screenshot shows a web form with a 'State:' dropdown menu open, displaying a list of states including PENNSYLVANIA, PUERTO RICO, RHODE ISLAND, SOUTH CAROLINA, SOUTH DAKOTA, TENNESSEE, and TEXAS. The 'County:' field is empty. A 'Service Center Search' button is visible, and a message below the form reads 'No result found'. A 'Name' input field is also present.

7. Select **TEXAS** from the **State** list.

Service Center Search

The screenshot shows the 'State:' dropdown menu set to 'TEXAS'. The 'County:' dropdown menu is also visible. A 'Search' button is located below the dropdowns. Below the search area, there is a table header with 'Service Center Short Name' and 'Service Center Long Name', and a message below it that reads 'No result found'.

8. Click the **County:** dropdown list icon button.

Service Center Search

The screenshot shows the 'County:' dropdown menu open, displaying a list of counties including JOHNSON, JONES, KARNES, KAUFMAN, and KAUFMAN. The 'State:' dropdown menu is set to 'TEXAS'. A 'Search' button is located below the dropdowns. Below the search area, there is a table header with 'Service Center Short Name' and 'Service Center Long Name', and a message below it that reads 'No result found'.



9. Select **KAUFMAN** **KAUFMAN** from the dropdown list.

Service Center Search

State:	TEXAS	▼
County:	KAUFMAN	▼
<input type="button" value="Search"/>		
Service Center Short Name		Service Center Long Name
No result found		

10. Click the **Search** button.

Service Center Search

State:	TEXAS	▼
County:	KAUFMAN	▼
<input type="button" value="Search"/>		
Service Center Short Name		Service Center Long Name
		66018

11. Double-click the **Service Center Short Name** field.



Potential Duplicate Report

12. Click the **Individual/Business:**  dropdown icon button.

Potential Duplicate Report



13. Select **Individual** from the **Individual/Business:** list.

Potential Duplicate Report

The screenshot shows a web application interface for a 'Potential Duplicate Report'. On the left is a green sidebar with navigation links: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items (listing MIKE M BRADY, BRADY BUNCH, MIKE BRADY, MIKE G BRADY, and MIKE BRADY). The main content area has a title bar with 'Potential Duplicate Report' and a 'Back' button. Below the title bar is a 'Search Parameters' section with three input fields: 'Service Center' (66018), 'Individual/Business' (Individual), and 'Creation Date'. There are 'Search' and 'Clear' buttons below these fields. Below the search parameters is a 'Potential Duplicate Records' section with a table header. The table has columns: Group ID, BusinessPartner, Full Name, Similarity in %, Address, Date Of Birth, and Changed on. A 'MERGE' button is visible above the table.

Group ID	BusinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
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14. Click the **Search** button.



Potential Duplicate Report

Potential Duplicate Report

Search Parameters

Service Center: 66018
 Individual/Business: Individual
 Creation Date:

Search Clear

Potential Duplicate Records

Group ID	BusinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
0000007115	8000028399	BENJAMIN PIE...	95.0	BENJAMIN / 1...	01/28/1968	09/12/2014
0000007115	8000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014
0000007121	8000028484	WOODY WOOD...	94.0	WOODY / 17604...	01/02/1950	09/04/2014
0000007121	8000028486	WOODROW W...	94.0	WOODROW / 1...	01/02/1950	
0000007122	8000028479	MR ERNEST R...	94.0	ERNEST / 711 H...	07/11/1958	09/04/2014
0000007122	8000028483	MR ROBERT E...	94.0	ROBERT / 711...	07/11/1958	
0000007123	8000028488	WILL GIBBONS	94.0	WILL / 9841 CO...	09/02/1969	09/08/2014
0000007123	8000028503	WILLIAM GIBBO...	94.0	WILLIAM / 1201...	09/02/1969	

15. Click the **Full Name** [BEN PIERCE](#) link to review the BP Record.

Customer: BEN PIERCE

Customer: BEN PIERCE

Save | Cancel | New | Show Duplicates | Key Field Change | Copy | More

Customer Details | Customer Profile | Roles | Identification Numbers | SCIMS Replication Status

Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Information Li...
BP Number / ID: 8000028423	Address Line1: WINNING DR
Prefix:	Street address, PO BOX XXX, RR X BOX XXX, H...
First Name: BENNIE	Address Line 2:
Middle Name: H	Apartment, Suite, Unit, Building, Floor
Last Name: PIERCE	City: OWINGS MILLS
Suffix:	State: MD MARYLAND
Common Customer Na... BEN PIERCE	ZIP Code: 21117-4776
Legal Name: No	Country: US USA
Language Preference: English	Communicati... Post (letter)
Data Origin: CRM	Carrier Route: R002
Employee Type: Not an employee	Delivery Bar: 013
Tax ID Type: No Tax ID Type	Congression: MARYLAND 07
Tax ID Number: No Tax ID Nu...	
Date of Death:	
Death Confirmed: <input type="checkbox"/>	

Notes



16. Click the **Back**  **Back** button.

Potential Duplicate Report

Saved Searches
Go **Advanced**

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

- BEN PIERCE
- MIKE M BRADY...
- BRADY BUNCH...
- MIKE BRADY
- MIKE G BRADY...

Potential Duplicate Report

Search Parameters

Service Center:

Individual/Business:

Creation Date:

Potential Duplicate Records

MERGE

Group ID	BusinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
0000007115	8000028399	BENJAMIN PIE...	95.0	BENJAMIN / 1...	01/28/1968	09/12/2014
0000007115	8000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014
0000007121	8000028484	WOODY WOOD...	94.0	WOODY / 17604...	01/02/1950	09/04/2014
0000007121	8000028486	WOODROW W...	94.0	WOODROW / 1...	01/02/1950	
0000007122	8000028479	MR ERNEST R...	94.0	ERNEST / 711 H...	07/11/1958	09/04/2014
0000007122	8000028483	MR ROBERT E...	94.0	ROBERT / 711...	07/11/1958	
0000007123	8000028488	WILL GIBBONS	94.0	WILL / 9841 CO...	09/02/1969	09/08/2014
0000007123	8000028503	WILLIAM GIBBO...	94.0	WILLIAM / 1201...	09/02/1969	

17. Select a Business Partner to merge.

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Potential Duplicate Report

Potential Duplicate Report

Search Parameters

Service Center: 66018
 Individual/Business: Individual
 Creation Date:

Search Clear

Potential Duplicate Records

Task MERGE	BusinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
	0000007115	8000028399	BENJAMIN PIE...	95.0	BENJAMIN / 1...	01/28/1968 09/12/2014
	0000007115	8000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968 09/10/2014
	0000007121	8000028484	WOODY WOOD...	94.0	WOODY / 17604...	01/02/1950 09/04/2014
	0000007121	8000028486	WOODROW W...	94.0	WOODROW / 1...	01/02/1950
	0000007122	8000028479	MR ERNEST R...	94.0	ERNEST / 711 H...	07/11/1958 09/04/2014
	0000007122	8000028483	MR ROBERT E...	94.0	ROBERT / 711...	07/11/1958
	0000007123	8000028488	WILL GIBBONS	94.0	WILL / 9841 CO...	09/02/1969 09/08/2014
	0000007123	8000028503	WILLIAM GIBBO...	94.0	WILLIAM / 1201...	09/02/1969

18. Click the **MERGE** button.

Select one BP record to merge. Every potential duplicate record will be available to select in the merge.

Duplicate Check

Identified Duplicates

BP Number/ID	Address	Similarity in %	Archived	Case Exists
8000028484	WOODY / 17604 FM 548 / FORNEY TX 75126-5639	94.0	<input type="checkbox"/>	
8000028486	WOODROW / 17605 17605 FM 548 / FORNEY TX 75126-5644	94.0	<input type="checkbox"/>	

Select table row

19. Select the identified duplicates to merge.



Duplicate Check

Identified Duplicates

BP Number/ID	Address	Similarity in %	Archived	Case Exists
8000028484	WOODY / 17604 FM 548 / FORNEY TX 75126-5639	94.0	<input type="checkbox"/>	
8000028486	WOODROW / 17605 17605 FM 548 / FORNEY TX 75126-5644	94.0	<input type="checkbox"/>	

Merge Cancel

20. Click the **Merge** button.



The Identified Duplicates screen is presented and you will follow the Initiate Customer Merge steps. To review:

Percentage is based on a combination of Name (business, first, middle and last), Suffix, zip code and date of birth.

Archived indicates that the record is in Archived status.

Case Exists field indicates that a merge has been initiated and a Cleansing case has been created.

Duplicate Check

Cleansing Case

Cleansing Case ID: Processor (User):

Note for Processor: Created On:

Status:

BP Number/ID	Common Customer Name	Master	Created On	Created By	Archived
8000028484	WOODY WOODPECKER	<input type="checkbox"/>	09/04/2014	MITRAININ007	<input type="checkbox"/>
8000028486	WOODROW W WOODPECKER	<input type="checkbox"/>	09/04/2014	MITRAININ007	<input type="checkbox"/>

Merge Now Cancel

21. Click the **Master** check box to identify the Master or Winning record.



Duplicate Check

Cleansing Case

Cleansing Case ID: Processor (User):

Note for Processor: Created On:

Status:

BP Number/ID	Common Customer Name	Master	Created On	Created By	Archived
8000028484	WOODY WOODPECKER	<input type="checkbox"/>	09/04/2014	MITRAININ007	<input type="checkbox"/>
8000028486	WOODROW W WOODPECKER	<input checked="" type="checkbox"/>	09/04/2014	MITRAININ007	<input type="checkbox"/>

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

Field	R/O/C	Description
Note for Processor:	R	Notes to the State Specialist regarding merge Example: Woodrow Woodpecker is the Master record

Duplicate Check

Cleansing Case

Cleansing Case ID: Processor (User):

Note for Processor: Created On:

Status:

BP Number/ID	Common Customer Name	Master	Created On	Created By	Archived
8000028484	WOODY WOODPECKER	<input type="checkbox"/>	09/04/2014	MITRAININ007	<input type="checkbox"/>
8000028486	WOODROW W WOODPECKER	<input checked="" type="checkbox"/>	09/04/2014	MITRAININ007	<input type="checkbox"/>

23. Click the Merge Now button.



Cleansing Case

Cleansing Case Saved Searches Go Advanced

Save | Cancel | Reject (1)

Cleansing Case Details

Case ID:	<input type="text" value="7"/>	Status:	<input type="text" value="New"/>
Source:	<input type="text" value="UIU"/>	Created On:	<input type="text" value="09/18/2014"/>
Processor ID:	<input type="text" value="MITRAININ014"/>	Created By:	<input type="text" value="MITEST14 TRAIN14"/>
Processor Name:	<input type="text" value="MITEST14 TRAIN14"/>	Description:	<input type="text" value="Woodrow Woodpecker is the Master record"/>

Accounts

BP Num...	Common Customer Name	Status	Created On	Created By	Archived
80000284...	WOODROW W WOODPECKER	Master	09/04/2014	MITEST07 TRAIN07	<input type="checkbox"/>
80000284...	WOODY WOODPECKER	Source	09/04/2014	MITEST07 TRAIN07	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Se...	Master	Se...	Source
External number	<input checked="" type="checkbox"/>	66	<input type="checkbox"/>	64
First Name	<input checked="" type="checkbox"/>	WOODROW	<input type="checkbox"/>	WOODY
Middle Name	<input checked="" type="checkbox"/>	W	<input type="checkbox"/>	
Gender Determination	<input checked="" type="checkbox"/>	Customer Declared	<input type="checkbox"/>	Not Verified

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

Cleansing Case

Cleansing Case Saved Searches Go Advanced

Save | Cancel | Reject (1)

Cleansing Case Details

Case ID:	<input type="text" value="7"/>	Status:	<input type="text" value="New"/>
Source:	<input type="text" value="UIU"/>	Created On:	<input type="text" value="09/18/2014"/>
Processor ID:	<input type="text" value="MITRAININ014"/>	Created By:	<input type="text" value="MITEST14 TRAIN14"/>
Processor Name:	<input type="text" value="MITEST14 TRAIN14"/>	Description:	<input type="text" value="Woodrow Woodpecker is the Master record"/>

Accounts

BP Num...	Common Customer Name	Status	Created On	Created By	Archived
80000284...	WOODROW W WOODPECKER	Master	09/04/2014	MITEST07 TRAIN07	<input type="checkbox"/>
80000284...	WOODY WOODPECKER	Source	09/04/2014	MITEST07 TRAIN07	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Se...	Master	Se...	Source
External number	<input checked="" type="checkbox"/>	66	<input type="checkbox"/>	64
First Name	<input checked="" type="checkbox"/>	WOODROW	<input type="checkbox"/>	WOODY
Middle Name	<input checked="" type="checkbox"/>	W	<input type="checkbox"/>	
Gender Determination	<input checked="" type="checkbox"/>	Customer Declared	<input type="checkbox"/>	Not Verified

Accounts merge is available only for Grantor Specialist and Expert roles



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

Cleansing Case

Saved Searches
Go Advanced

Cleansing Case
Back

Save | Cancel | Reject
(1)

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

- BEN PIERCE
- MIKE M BRADY...
- BRADY BUNCH...
- MIKE BRADY
- MIKE G BRADY...

Cleansing Case Details

Case ID: 7	Status: New
Source: UIU	Created On: 09/18/2014
Processor ID: MITRAININ014	Created By: MITEST14 TRAIN14
Processor Name: MITEST14 TRAIN14	Description: Woodrow Woodpecker is the Master record

Accounts

BP Numb...	Common Customer Name	Status	Created On	Created By	Archived
80000284...	WOODROW W WOODPECKER	Master	09/04/2014	MITEST07 TRAIN07	<input type="checkbox"/>
80000284...	WOODY WOODPECKER	Source	09/04/2014	MITEST07 TRAIN07	<input type="checkbox"/>


Compare Accounts

Master Account: 8000028486 Source Account: 8000028484

Confirm Your Changes:

General Data

Data	Se...	Master	Se...	Source
External number	<input checked="" type="checkbox"/>	66	<input type="checkbox"/>	64
First Name	<input checked="" type="checkbox"/>	WOODROW	<input type="checkbox"/>	WOODY
Middle Name	<input checked="" type="checkbox"/>	W	<input type="checkbox"/>	
Gender Determination	<input checked="" type="checkbox"/>	Customer Declared	<input type="checkbox"/>	Not Verified

26. Click the **Save**  **Save** button.

You must click Save to trigger an alert for the State Specialist.

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Potential Duplicate Report

Saved Searches
Go **Advanced**
Back

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

7

BEN PIERCE

MIKE M BRADY...

BRADY BUNCH...

MIKE BRADY

Potential Duplicate Report

Search Parameters

Service Center:

Individual/Business:

Creation Date:

Potential Duplicate Records

MERGE

Group ID	BusinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
0000007115	8000028399	BENJAMIN PIER...	95.0	BENJAMIN / 1 WI...	01/28/1968	09/12/2014
0000007115	8000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014
0000007121	8000028484	WOODY WOOD...	94.0	WOODY / 17604...	01/02/1950	09/04/2014
0000007121	8000028486	WOODROW W...	94.0	WOODROW / 17...	01/02/1950	
0000007122	8000028479	MR ERNEST RO...	94.0	ERNEST / 711 H...	07/11/1958	09/04/2014
0000007122	8000028483	MR ROBERT E...	94.0	ROBERT / 711 H...	07/11/1958	
0000007123	8000028488	WILL GIBBONS	94.0	WILL / 9841 CO...	09/02/1969	09/08/2014
0000007123	8000028503	WILLIAM GIBBONS	94.0	WILLIAM / 12011...	09/02/1969	

27. Click the **Clear** button. You have completed the transaction.

Clear the search criteria to begin a new query.



Result

You have successfully run the Potential Duplicate Report.