How to Find Duplicate Contact Records by Identical *Primary* Email Address, and Automatically Merge them Together

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Overview

This article walks through the steps to find duplicate contact records in your database by **Primary E-Mail Address** - which is a new feature that was released in 2015. It also shows how to quickly merge those duplicates where **First Name** and **Primary E-Mail Address** are ***Identical***.

Tip: If you've never cleaned up the duplicates in your database take a look at these few articles to keep your database as tidy as possible:

- (Video) Households – What To Do B4 Householding!!
- (Video) How to Manage Duplicates
- (Article) Address Management
- (Article) Automatically Conform Addresses
- (Article) Auto-Merging Duplicate Address Records

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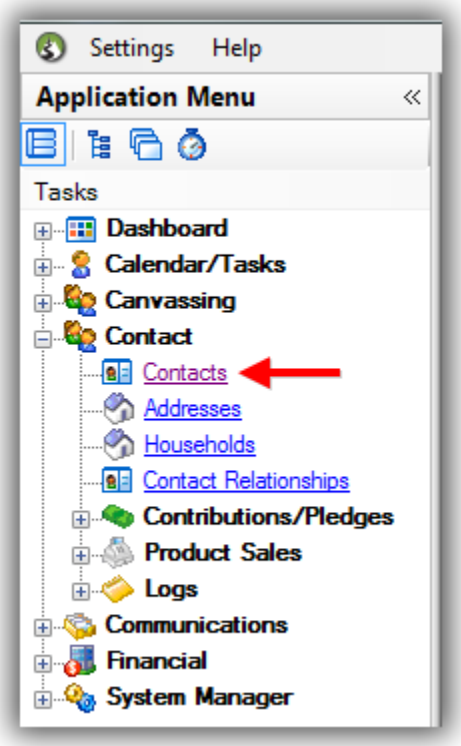
Steps

Navigate to your **Contacts** (*Donors/Voters*) list.



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Navigate to the **General** > **E-Mail** tabs, **plug-in** the tab, **uncheck** the **Alternate** box, **uncheck** all of the email flag checkboxes, and click **[Search]** > **(Load All)**

*The image below shows my query which produced **5,851** contacts.*

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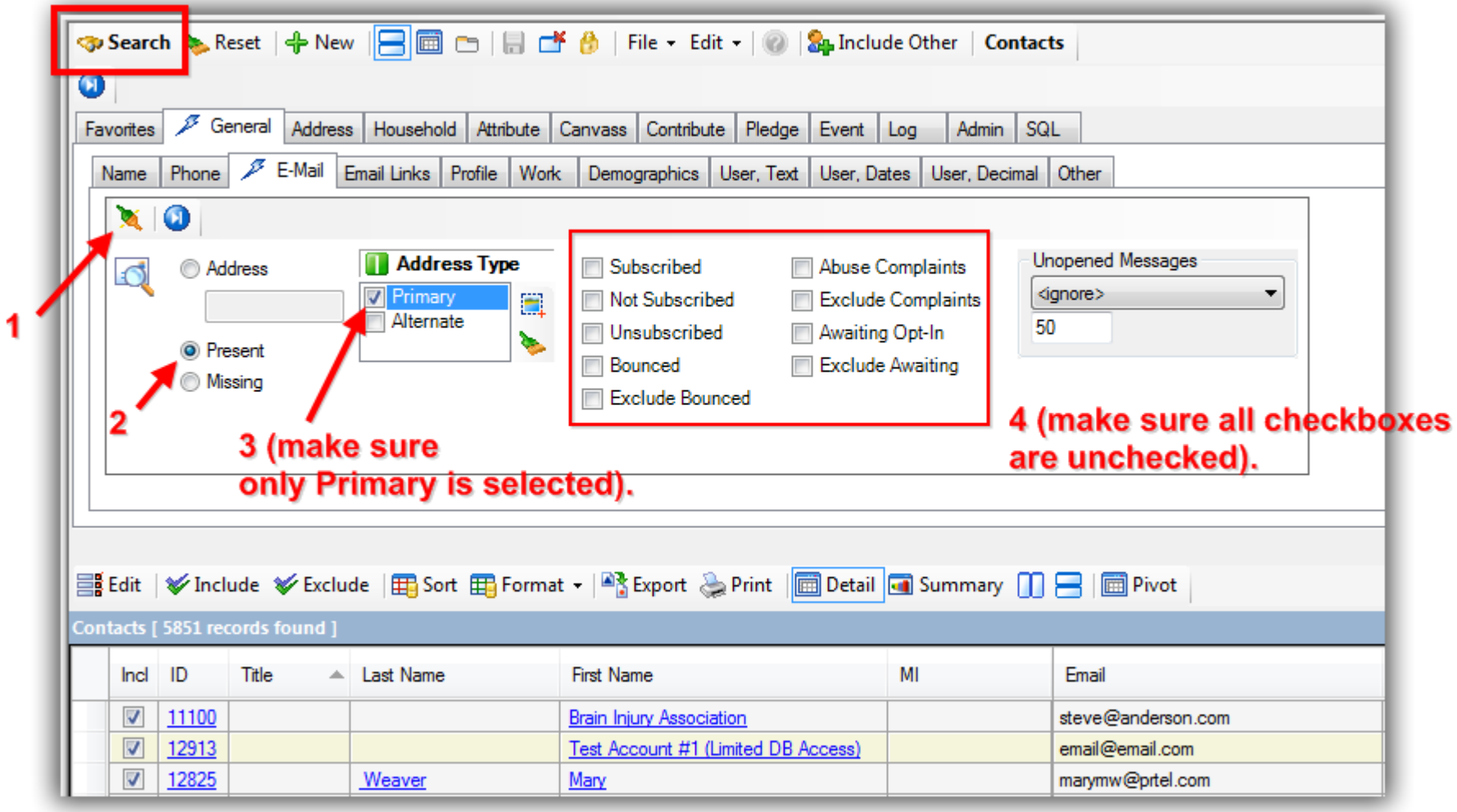

Select **File** > **Utilities** > **Find Possible Duplicates**

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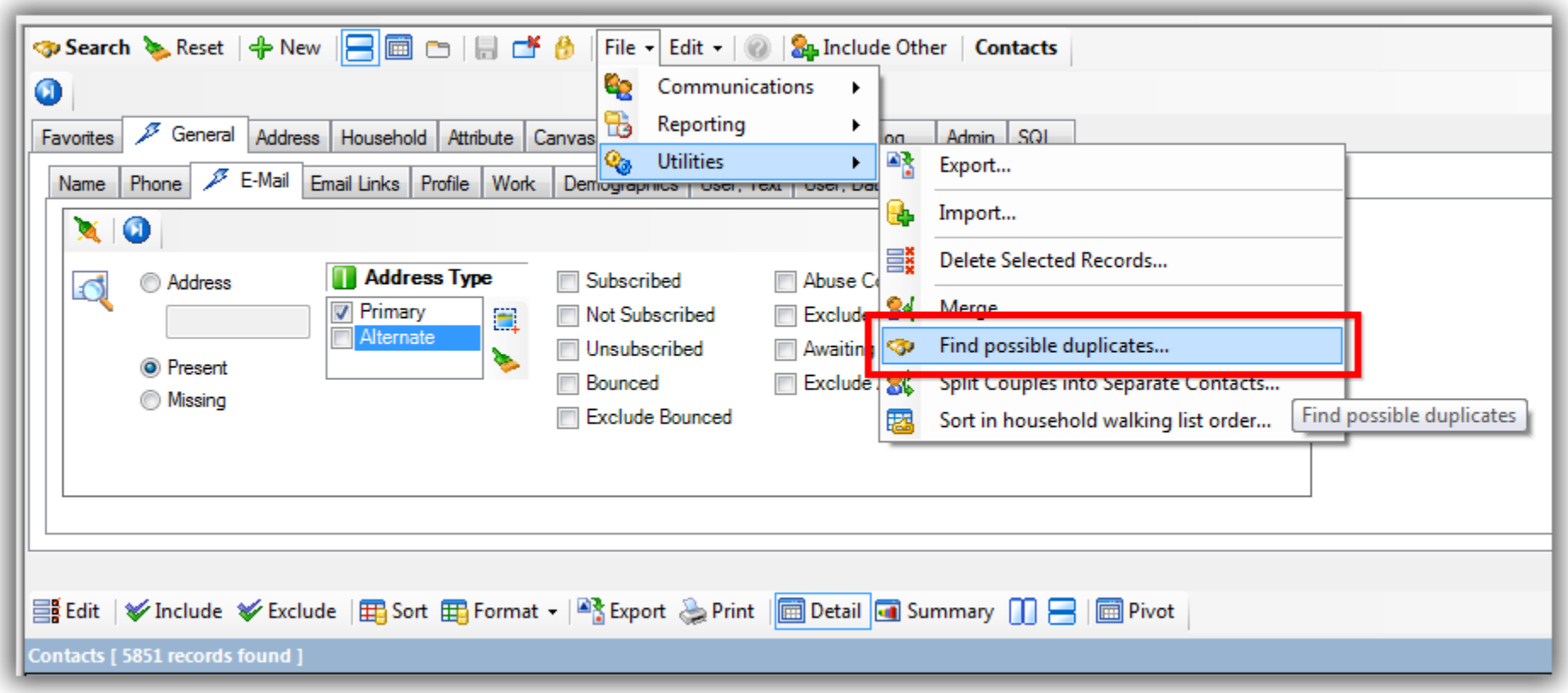

Check the box for **Email ONLY, Primary Email only**, and click **[OK]**.

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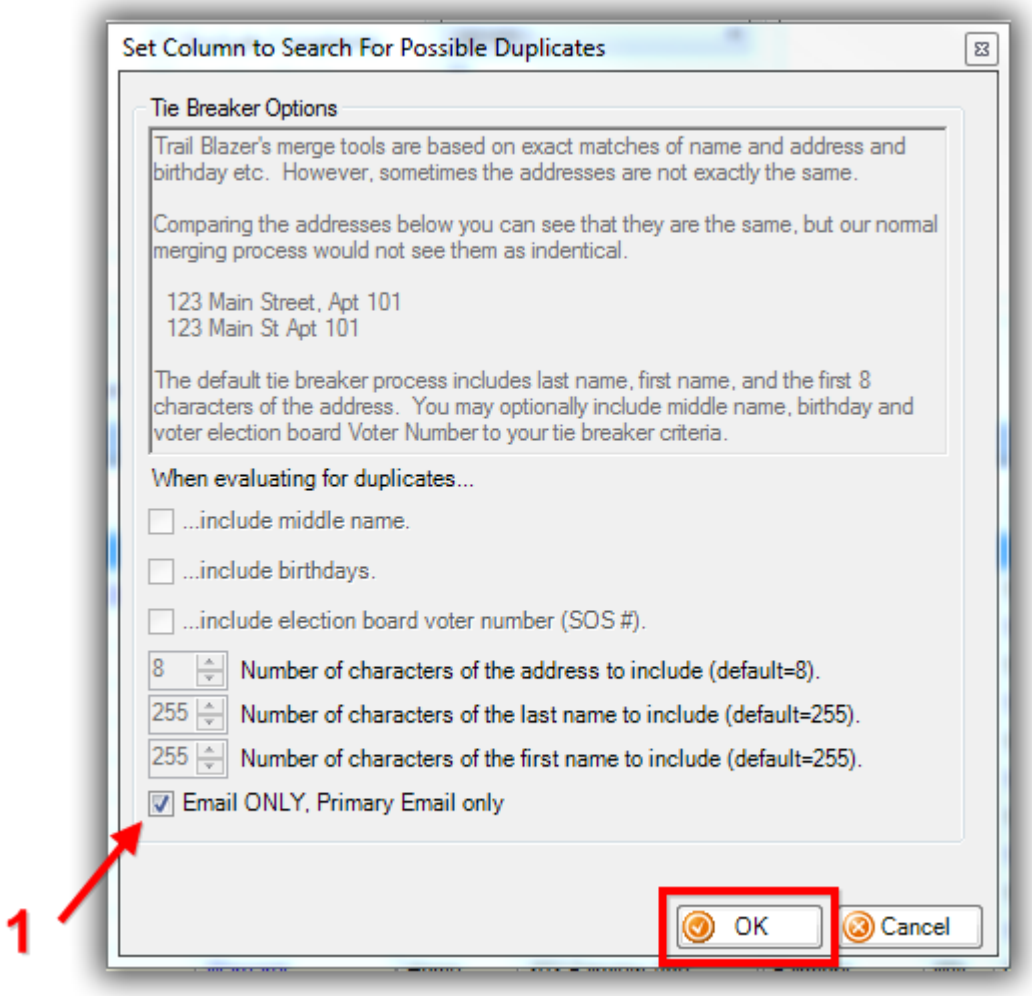

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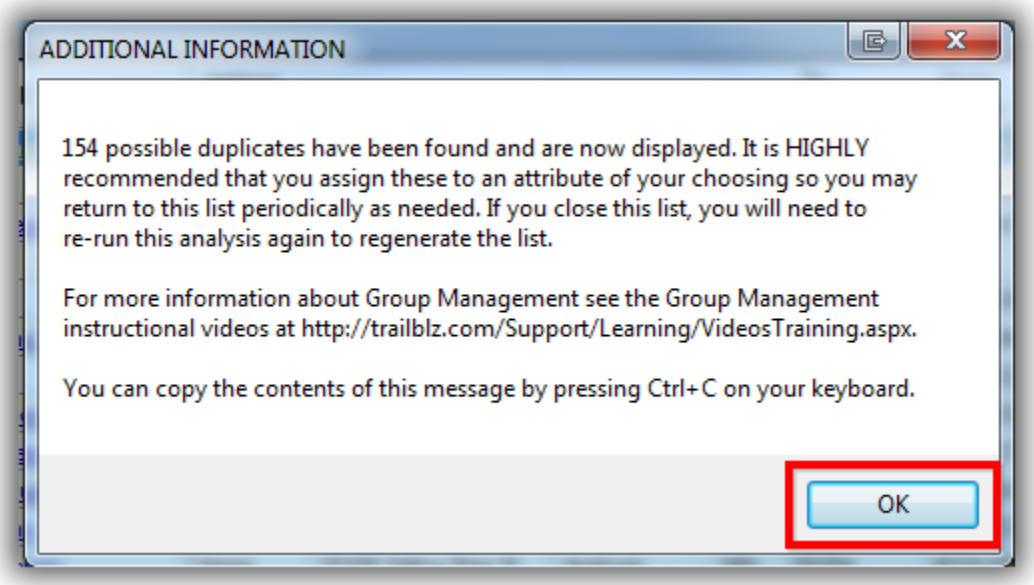
This will run the process on all contacts that are **in the list** and provide you with the final count. *My example results are below where the system found **154**.*



Click **[OK]** to finish.

At this point you have a couple of options. You could set an attribute for everyone in the list labeling them as a possible duplicate to cleanup at a later time, or you could go through the automated merge process.

*I opted to auto-merge any contact that had an **identical First Name and Primary E-Mail address.***

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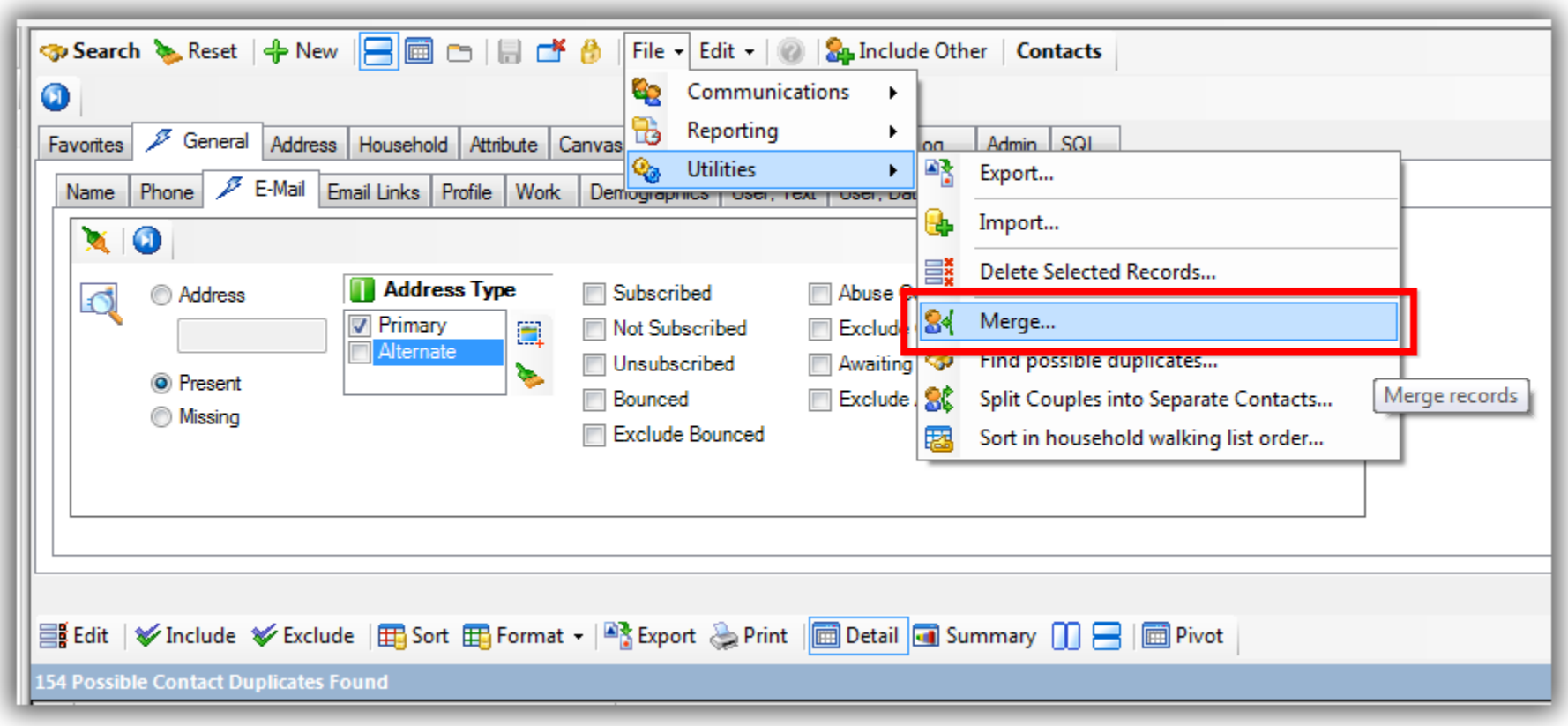
Follow **File > Utilities > Merge**.



Select **Merge contacts where email address and name match**, and click **[OK]**.

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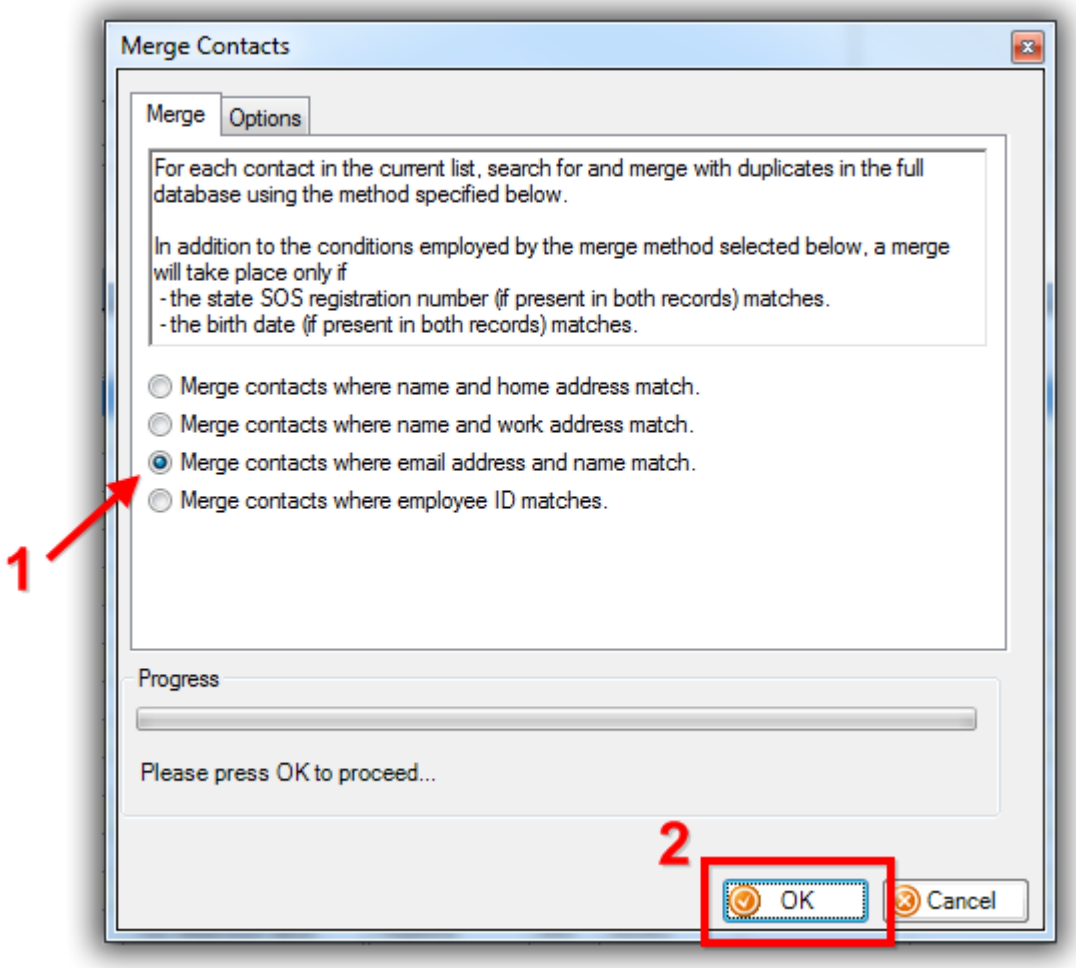

This system will update you with the results once it's complete. For any records that didn't merge you'll need to either fix their name/address data so that it's exactly the same and run the process again, or drag-and-drop merge the duplicates.

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Related Resources

Article: Manually Merging Contact Records
Article: Auto-Merge Duplicate Contact Records
Video: How to Manage Duplicates

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