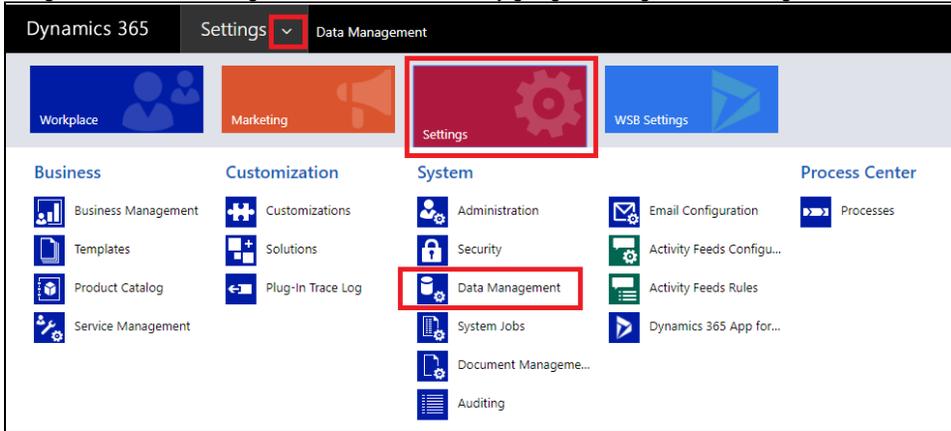# Set Up Duplicate Detection Job

This article outlines how to set up a duplicate detection job. These jobs can be set up to run once or on a recurring basis.
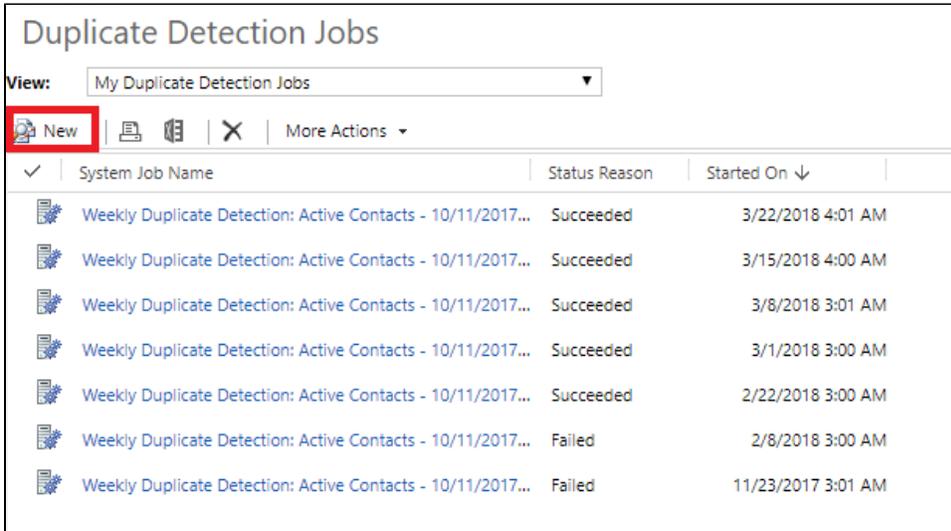
Step-by-step guide

1. Navigate to the "Data Management" menu within LRM by going to Settings > Data Management.

2. Select "Duplicate Detection Jobs."

3. Select "New."

4. Select next, and then select "Contacts" from the dropdown on the next screen. From here, you can either use the dropdown for "Use Saved View" to select an already created advanced find, or you can create one to use for this detection job. Always make sure to include "Status = Active" in the query.

Select Records   ？Help

Specify the entity to check. To limit the records checked, specify additional criteria.

Select Contacts   Select the advanced find to use

Look for: Contacts ▼   **Use Saved View:** [new] ▼

🗂 Clear | ⬚ Group AND ⬚ Group OR

    Select

OR create the advanced find to use.
Always make sure to include Status =
Active.

Preview Records

                                    Back   Next   Cancel

5. Once the query is selected/created, click next.
6. On the final page, you will select the time and/or frequency you would like this job to run at. You can also select different users you would like to have notified when the job runs (this is especially helpful to remind yourself/someone of the recurring detection jobs).

Select Options

Specify the name of the duplicate detection job, and scheduling and notification options.

Name:

Duplicate Detection: BBA: BEL Outreach (Change Import Date) - 3/23/2018 1:27:09 PM

Start time:

3/23/2018   1:27 PM

☐ Run this job after every

30   days

Email options:

☑ Send an email to me (dean.mcinerney@wisc.edu) when this job is finished

Also notify:

| Back | Next | Cancel |

7. Once the timing and emails are selected, hit next. On the final page, hit submit.
8. On the main page of the duplicate detection jobs, you can see if the job succeeded or failed. Failed jobs typically run on large quantities of data and found too many duplicates.

Duplicate Detection Jobs

View: My Duplicate Detection Jobs

New   More Actions ▾

✓	System Job Name	Status Reason	Started On ↓
	Weekly Duplicate Detection: Active Contacts - 10/11/2017...	Succeeded	3/22/2018 4:01 AM
	Weekly Duplicate Detection: Active Contacts - 10/11/2017...	Succeeded	3/15/2018 4:00 AM
	Weekly Duplicate Detection: Active Contacts - 10/11/2017...	Succeeded	3/8/2018 3:01 AM
	Weekly Duplicate Detection: Active Contacts - 10/11/2017...	Succeeded	3/1/2018 3:00 AM
	Weekly Duplicate Detection: Active Contacts - 10/11/2017...	Failed	2/8/2018 3:00 AM
	Weekly Duplicate Detection: Active Contacts - 10/11/2017...	Failed	11/23/2017 3:01 AM

9. Clicking on the job you would like to examine will open it in a new window. In this window, select "View Duplicates" on the left.
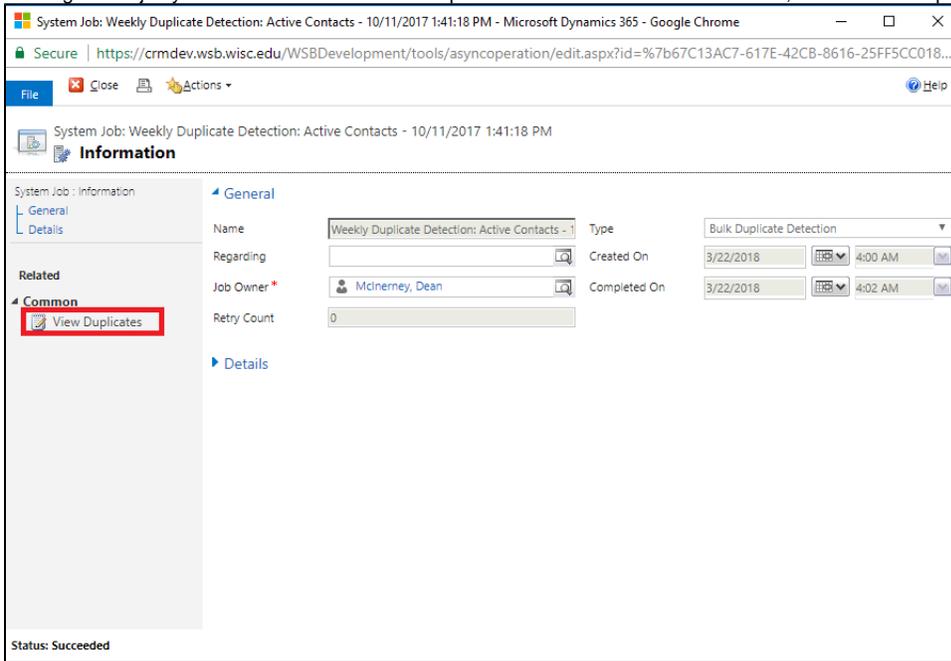
10. The top box will include a list of contacts the system believes it found a duplicate for. The bottom box will include all of the potential duplicates for the selected contact the system believes it has found.
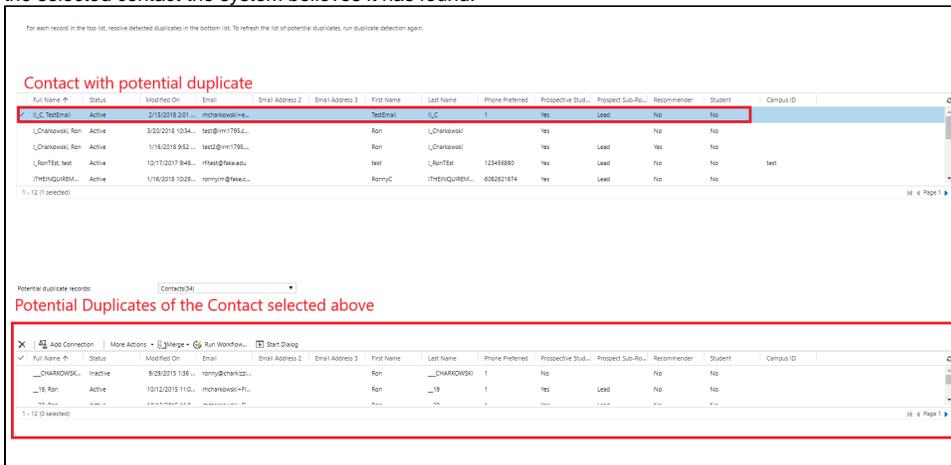
11. Once you have verified two records are duplicates, record these duplicates and report them to the LRM team via support.wsb.wisc.edu.

Related articles

- Manage Lead Interest With Data Import Interest Expire Workflow
- LRM (Life-long Relationship Management) Knowledge Base
- Duplicate Record
- ClickDimensions/LRM Email Marketing Support
- Admissions Application Management