

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

MANAGING DUPLICATES: PREVENTION & CLEANUP STRATEGIES

PRESENTED BY

Jeffery Tenbusch, Data Migration Specialist

akoyago

DON'T BE DUPED BY DUPLICATES

Objectives

1. Prevent duplicates using data policies and establish best practices for maintaining clean and accurate data
2. Understand how duplicate detection rules work and how to customize them
3. Learn how to run duplicate detection jobs to identify existing duplicates
4. Gain hands-on experience in merging records safely and efficiently

DATA POLICIES AND BEST PRACTICES

Prevent duplicates using data policies and establish best practices for maintaining clean and accurate data.

DATA POLICIES AND BEST PRACTICES

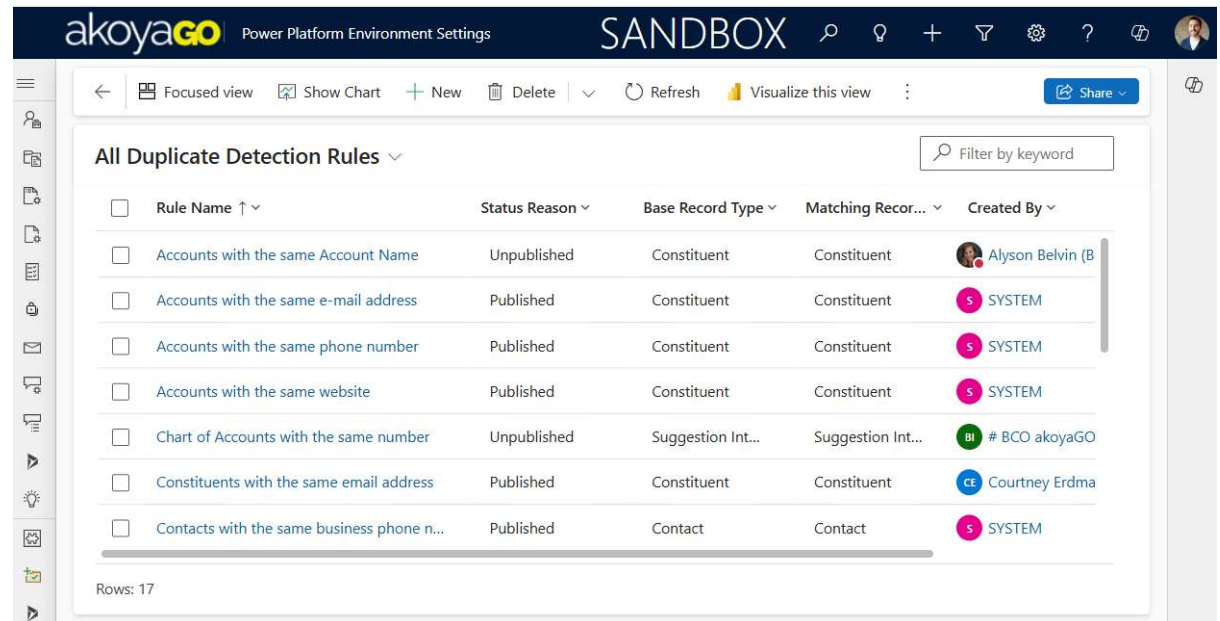
- Define Data Entry Standards
 - Prefixes, Abbreviations, Punctuation
 - Saint, St, St., Ste
 - Street, St., St
 - Mr. Jeffery and Mrs. Danielle Tenbusch vs. Jeff & Dani Tenbusch
- Robust Searches
 - Make use of Nickname and AKA
 - Edit Lookup Views
- End user updates from GOapply, GOfund, and GODO donate

DUPLICATE DETECTION RULES

Understand how duplicate detection rules work and how to customize them

DUPLICATE DETECTION RULES

- Located under Advanced Settings>Data Management>Duplicate Detection Rules
- By default, they run
 - When a record is created or updated
 - When Dynamics for Outlook goes from offline to online
 - During data import



The screenshot shows the 'akoyago Power Platform Environment Settings' interface in a 'SANDBOX' environment. The main content area displays 'All Duplicate Detection Rules' with a search filter and a table of rules. The table has columns for Rule Name, Status Reason, Base Record Type, Matching Record Type, and Created By. The rules listed are:

Rule Name	Status Reason	Base Record Type	Matching Record Type	Created By
Accounts with the same Account Name	Unpublished	Constituent	Constituent	Alyson Belvin (B)
Accounts with the same e-mail address	Published	Constituent	Constituent	SYSTEM
Accounts with the same phone number	Published	Constituent	Constituent	SYSTEM
Accounts with the same website	Published	Constituent	Constituent	SYSTEM
Chart of Accounts with the same number	Unpublished	Suggestion Int...	Suggestion Int...	# BCO akoyago
Constituents with the same email address	Published	Constituent	Constituent	Courtney Erdma
Contacts with the same business phone n...	Published	Contact	Contact	SYSTEM

Rows: 17

DUPLICATE DETECTION RULES

- Name
- Base Record
- Matching Record
- Exclude inactive matching records
- Base Entity
- Criteria
- No. Of Characters
- Ignore Blank Values

The screenshot shows a web-based configuration interface for creating a new duplicate detection rule. The interface includes a top navigation bar with icons for back, home, save, save and close, new, publish, unpublish, and flow. Below the navigation bar, the title 'New Duplicate Detection Rule' is displayed, followed by tabs for 'General', 'Administration', and 'Notes'. The 'General' tab is active and contains the following fields and options:

- Name***: Request with Same Applicant, Decision, Program, Title
- Status Reason***: unpublished
- Description**: (Empty text area)
- Rule Criteria**: (Section header)
- Base record type***: Request (dropdown)
- Matching Record Type***: Request (dropdown)
- case-sensitive
- Exclude inactive matching records
- Clear**: (button)

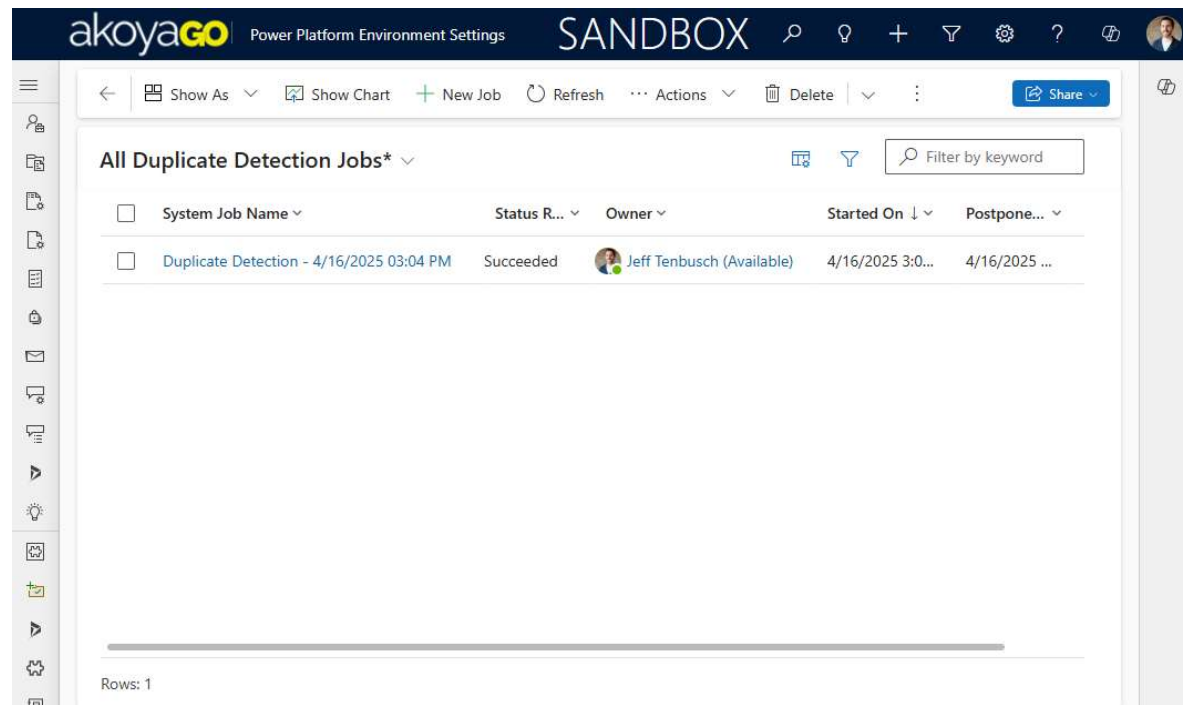
	Base Entity	Criteria	No. Of Characters	Ignore Blank Values
<input type="checkbox"/>	Applicant	Exact Match	null	<input type="checkbox"/>
<input type="checkbox"/>	Decision Date	Same Date	null	<input type="checkbox"/>
<input type="checkbox"/>	Program	Exact Match	null	<input type="checkbox"/>
<input type="checkbox"/>	Title	Same First Characters	10	<input type="checkbox"/>

DUPLICATE DETECTION JOBS

Learn how to run duplicate
detection jobs to identify
existing duplicates

DUPLICATE DETECTION JOBS

- Advanced Settings>
Data Management>
Duplicate Detection Jobs
- Runs all currently published duplicate detection rules for a table and identifies records that break the rules



The screenshot displays the 'akoyago' Power Platform Environment Settings interface for a 'SANDBOX' environment. The main content area is titled 'All Duplicate Detection Jobs*' and features a table with the following columns: System Job Name, Status R..., Owner, Started On, and Postpone... A single job is listed: 'Duplicate Detection - 4/16/2025 03:04 PM' with a status of 'Succeeded', owned by 'Jeff Tenbusch (Available)', and started on '4/16/2025 3:0...'. The interface includes a search bar, a 'Filter by keyword' input, and a 'Rows: 1' indicator at the bottom.

System Job Name	Status R...	Owner	Started On	Postpone...
Duplicate Detection - 4/16/2025 03:04 PM	Succeeded	Jeff Tenbusch (Available)	4/16/2025 3:0...	4/16/2025 ...

MERGING DUPLICATES

Gain hands-on experience in merging records safely and efficiently

MERGING DUPLICATES

Built-in Merge Functionality

- Dynamics 365 has a built-in function for merging duplicate records on the **Contact** and **Constituent** tables

Coming in the August 2025 Update

- akoyaGO has created a custom tool that replicates this merge process on the Donor table

When Merging Records

- One record becomes the master (primary) record
- Primary record inherits all child records
- The other becomes the subordinate (merged) record and is deactivated
- Gives user the ability to choose which field values to retain in the primary record

THANK YOU

Presented by:

Jeff Tenbusch
Data Migration Specialist