

12. Clients Duplicates

The **Duplicates** action identifies cases where a client registers more than once, typically using the same email or other key data. This can happen if a client forgets they already have an account or signs up again via different marketing campaigns.

Use Cases

1. Tracking Re-Registrations

View duplicate entries to understand why a client signed up multiple times, whether due to forgotten credentials or different marketing campaigns.

2. Maintaining Complete Client Records

Ensure all client sign-ups are accurately tracked and linked to a primary record, preserving a full registration history.

3. Identifying Duplicate Accounts

Only clients with multiple registrations will appear in the **Duplicates** section, allowing for efficient detection and resolution.

How It Works

1. Automatic Detection

As soon as a new registration matches an existing email (or another unique identifier), the system flags it as a duplicate behind the scenes—no manual setup required.

2. Duplicates Icon

In the main **Clients** table, any row with flagged duplicates displays the **Duplicates** icon in the **Actions** column:

Note: Clicking this icon opens a page showing all known duplicate accounts associated with that primary record.

3. Details

Clicking the icon takes you to a dedicated **Duplicates** screen for that primary client. Here you'll see all associated accounts lined up side by side, with:

Callout	Field	Description
1	Email	The duplicated email address.

Callout	Field	Description
2	Description	Key metadata (e.g., affiliateID, deskLabel, projectKey) to distinguish each record.
3	Created	Timestamp of when each duplicate account was first created.

Next Steps: Resolving Duplicates

1. **Audit Each Record:** Click into individual client profiles to compare personal details, activity logs, and transaction history.
2. **Merge or Deactivate:**
 - Merge:** Consolidate contacts, balances, and documents into the primary profile.
 - Deactivate:** If merging isn't appropriate, deactivate the extra accounts to prevent confusion.
3. **Monitor Over Time:** Periodically revisit the **Duplicates** view to catch new re-registrations and ensure ongoing data hygiene.

Conclusion

By leveraging the **Duplicates** feature, you can:

1. Keep your client database **clean** and **reliable**
2. Preserve a **comprehensive history** of every registration
3. Prevent fragmented support or billing records

Regular use of this tool ensures that every client interaction is tied back to a single canonical profile—boosting data accuracy and operational efficiency.

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