Dynamics: Duplicate Contacts

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New items added	n/a

Searching for contacts

When someone contacts the Support Line, we should search the system to see if they've contacted us before, you can do this by:

1. Select the first letter of their first name from the alphabet at the bottom of the screen. You may need to view more pages of contacts to find the one you're looking for. You can do this by clicking the arrow to the right of 'Page 1' at the bottom right of the screen.

   Or

2. Use the 'Search this view' box in the top right of the screen. You can search for people by using their telephone number, full name, or even the first few letters of their first or last name, for example if we search 'Claire Smithers', they may be in the system as 'Clare', in which case searching 'Cl' or 'Cla' would bring up all contacts whose names include those three letters together, which will make it easier to check if the contact is already on our system.

   The asterisk (* – hold shift and 8 to get this symbol) is a useful tool in this search as it can take the place of any letter, number, space or symbol. For example, if I were to search for a caller's telephone number, I could get a more accurate search if I used the last four digits of the number with an asterisk at the beginning, like this: *8876. This would then bring up all the contacts whose telephone numbers end in 8876 on the system, which could help you to find the contact.

Keep in mind that you can also search the callers last name in the 'Search this View' box, which could be useful if their first name is a popular one. Remember to always ask the caller their postcode, telephone number, address and one piece of information from their previous call to confirm that they are the contact on the system.

Duplicate Contacts

If you're unable to find the contact on the system you should create a new contact. Once you've filled in the contact details of the caller and clicked 'Save', a duplicate alert will pop up if the system suspects that the contact is already in the system. The system will check against the postcode and full name of the individual. (Currently the Duplicate Alert will not

pop up if the name is the same but with different spellings, like Claire or Clare, for example. Which is why we must always ask callers to spell their names for us when they call.)

We can see here that Aaron Burr, postcode SY66 7GH is on the system.
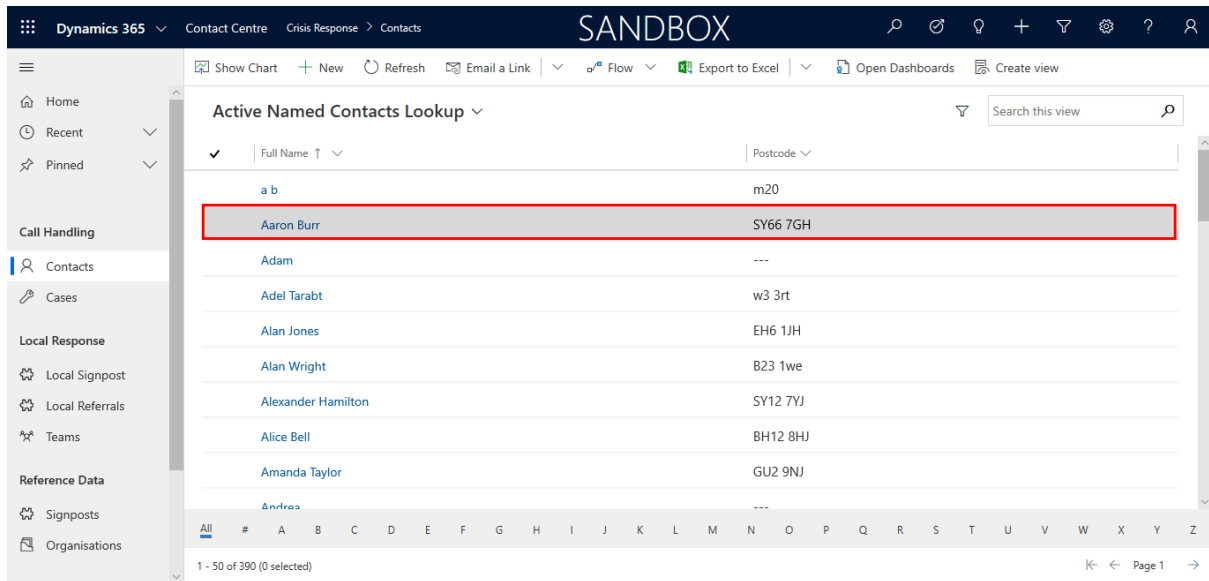
If we try to create another contact with those same details, this duplicate alert will pop up:
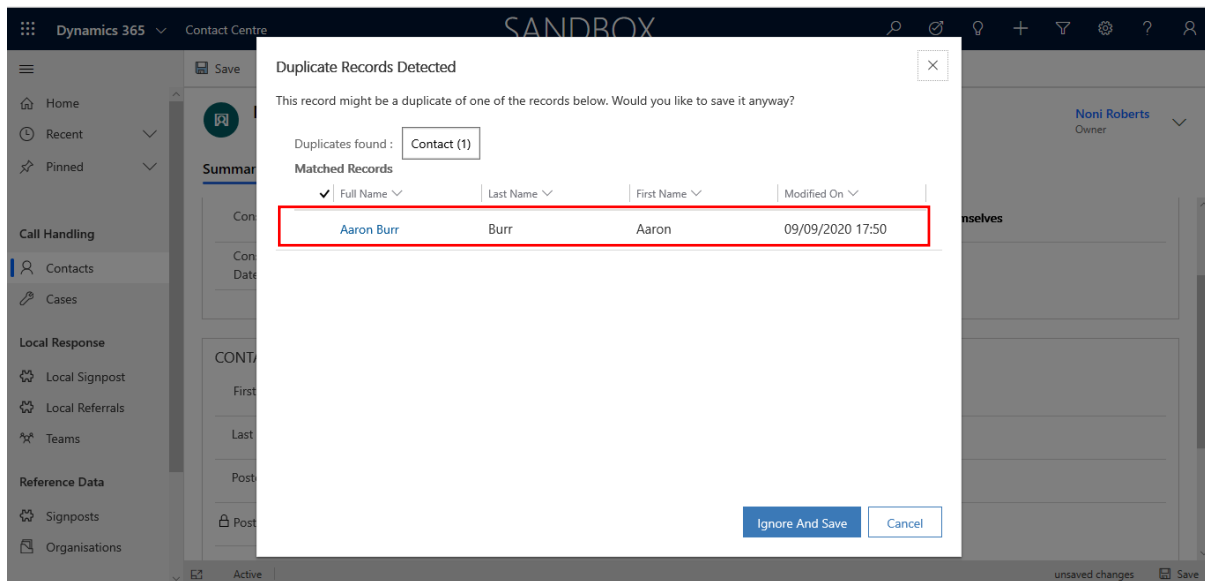

We can't see any other information about Aaron Burr in this section (for example a telephone number or full address), but the alert will only pop up if the name and postcode are the same.

However, if we do want to check this information, we can double click on the contact within the alert that's outlined above.

When we double click on this contact, a warning pops up to tell us we're about to navigate away from the page. We should click OK here.
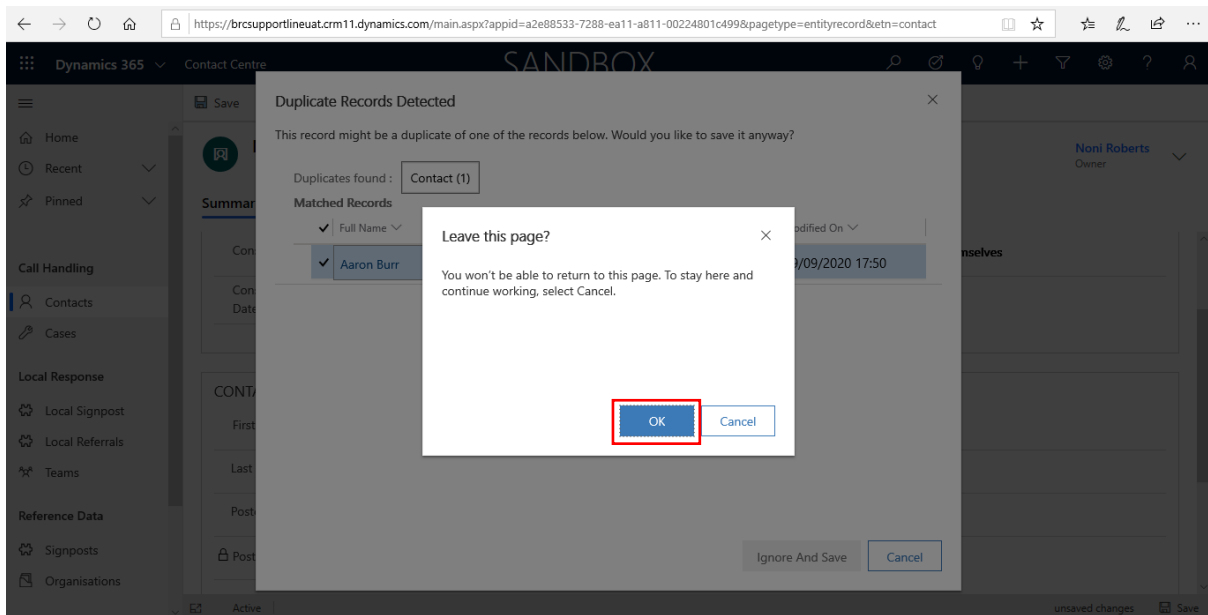
Once we click OK another warning will pop up asking if we're sure about navigating away as our changes will be lost. Click 'Discard Changes' here.
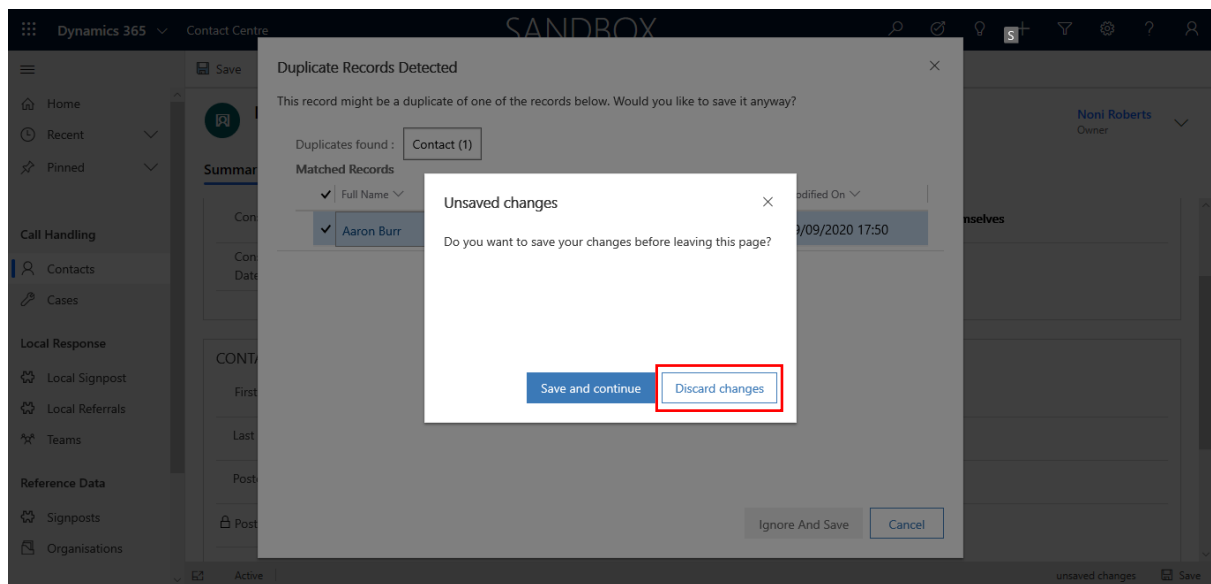

If we click 'Save and Continue' here, we will be saving another record of the contact on the system which will clutter the system and cause confusion if the caller contacts again, so make sure 'Discard Changes' is selected here.

This will then navigate you to the original contact record for Aaron Burr which will allow you to check the rest of the information you have against the information that's on the system already.

If you were satisfied that the contact is in fact the same, you would either create a new case or add to an existing case, depending on the call.

What if the Duplicate Alert is wrong?

If you find that the contact is in fact different (if there were two Aaron Burr's living next door to each other, for example), then you should click 'Ignore and Save' when the original Duplicate Alert pops up after saving the contact:
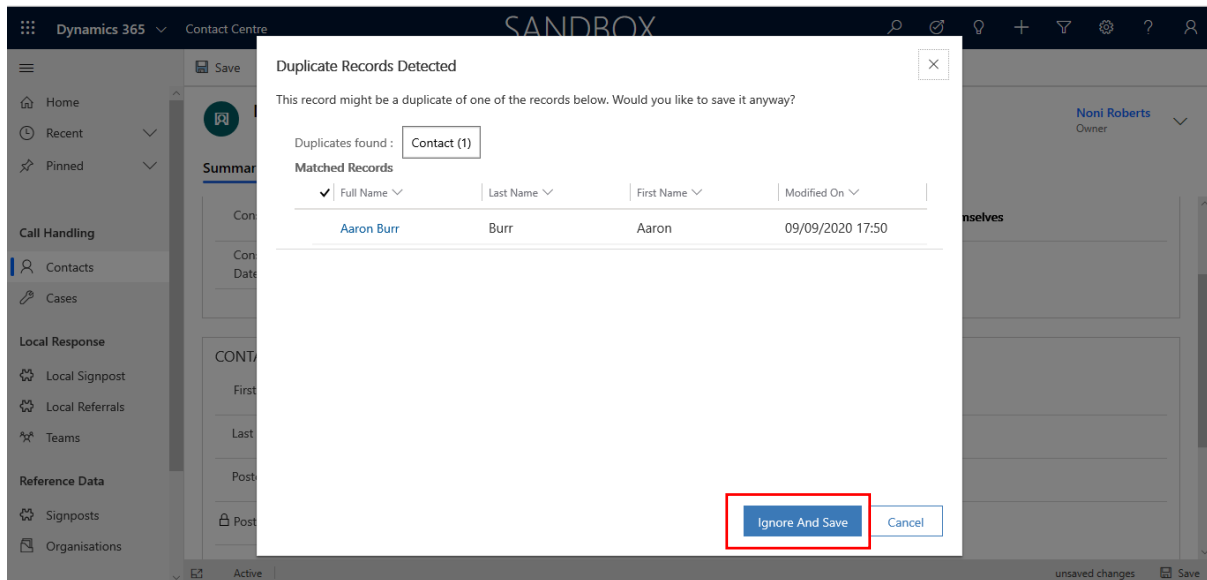
But please keep in mind that this is very rare as it would call for two people of the same name to live in the same postcode.