

Run bulk system jobs to detect duplicate records in Dynamics CRM 2015

To maintain the integrity of system data, you should check for duplicates regularly to make sure that users don't inadvertently create duplicate contacts, accounts, leads, or other types of records.

The Check for Duplicates wizard helps you set up a bulk “job” that finds and cleans up duplicate records. You can schedule the job to run daily, and you can receive an email confirmation when the job finishes.

Note

If you haven't already done so, create and publish duplicate detection rules, and turn duplicate detection on before you run the wizard. More information: [Set up duplicate detection rules to keep your data clean](#).

-
1. Follow the steps for the app you're using.
 - If using the CRM web application
 - If using CRM for Outlook
 2. Click or tap **New**, or click or tap the name of the duplicate detection job you want to run.
You'll see the Check for Duplicates wizard, which helps you create a job to check for duplicates.
 3. Click or tap **Next**.
 4. In the **Look for** drop-down list, select the record type that you want to check for duplicates.

Note

What you see in this list depends on which duplicate detection rules are published. More information: [Set up duplicate detection rules to keep your data clean](#).

-
5. In the **Use Saved View** drop-down list, select a view if you want to limit the records searched to records in that view. For example, select Active Accounts. When you select a view, CRM adds criteria to the criteria grid below.
 6. To further limit the records searched, click or tap **Select** in the criteria grid, and then enter the criteria you want.

Check for Duplicates -- Webpage Dialog

Select Records [Help](#)

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

Look for: Accounts **Use Saved View:** Active Accounts

Clear Group AND Group OR

▼ <u>Status</u>	<u>Equals</u>	<u>Active</u>
▼ <u>Created On</u>	<u>On or After</u>	3/31/2014

[Select](#)

7. Click or tap **Next**.
8. Accept the default name for the job, or type a different name.
9. Enter the start time for the job, and enter how often to run the job in days. (Type 1 to run the job daily.)
10. If you want to receive an email confirmation when the job is completed, select the **Email options** check box. Enter an additional email address, if desired.
11. Click or tap **Next**, and then click or tap **Submit**.