

004. Jobs

How do I remove duplicate third parties?

Removing duplicate customer / repairers / suppliers ... is facilitated in PlanManager by a double-recognition system. The system checks if there are clients with the same name, the same address, the same phone number or the same cellphone number. You can determine which of the proposed doubles, are actual duplicates and have them de-duplicated by the system.

Go to the control panel and navigate to third parties.

In 'Third parties' you can look up the double owners / experts / insurance companies / suppliers / repairers in the system.

Once you have found an owner who is double, open the owner that you know it is right. The other owner is found by the system when you start the duplication.

Once you open the ownerfield, you will see a table at the bottom where the system lists all similar owners. There is also known which fields are similar. In this case, address, zip code and city exactly match, part of the name comes partially match.

Look-Alikes							
	Number	Name	Address	Postcode	Town	Phone	Mobile
<input type="checkbox"/>	19331	A T S	GRENSSTR 0238	2950	KAPELLEN (ANTW.)		
Replace by current							

If the owner is a double you can deduplicate the owner by checking the box on the line and then click the "replace by current" button. The system will then take all the files of that owner and link it to the owner that you have open now.

Note !: This is a process that can not be undone!

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