

Merge Rules Overview

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Overview

The Merge Duplicate Objects feature allows users to merge two objects (a Main object and a Duplicate object), updating the Main object (e.g., Merging duplicate user profiles to create one user profile). When merging the two objects, the Main object gets updated with data based on specific merge rules from the Duplicate object, which is then deleted. This entire transaction can be tracked on the Data Audit trail.

If an object is created or updated using an integration, please verify the impact on integrations that create and update objects before merging duplicates.



Notes:

The Duplicate object's Data Audit Trail, History, and Comment information are not included in the Merge feature. Assessments and Objects scoped in an Assessment (Assessment Clones) can't be merged.

Merge Rule One:

If one of the two objects is empty and the other is filled out. The filled-out object becomes the new (Main) object, and the empty (Duplicate) object is deleted from the system.

Merge Rule Two:

Data from the Main object is kept for the following fields and properties if both objects (Main and Duplicate) contain data in the same field and property:

- **Fields:**

- Numeric
- Data and Time
- Text Single Line
- Select List - Single
- Image

- **Properties:**

- Name
- Description
- Location
- Created By

- Created On
- Unique ID
- Workflow State
- External Reference ID

Example:

Deb Smith has two user profiles. In Deb Smith's Duplicate profile, the **Email Address** field equals Dsith@example.com. The **Email Address** field on the main user profile equals DSmith@email.com. When merging these two records, the email address on the Main object, DSmith@email.com, will be the value kept in the **Email Address** field on the new object.

Merge Rule Three:

Data from the Main object is kept, and data from the Duplicate object is appended to the end of the Main object's data for the following fields. If both the Main and Duplicate objects contain field data in the same fields:

- Text – Multiple
- Text – RTF (Rich Text Field)

Example:

Two Duplicate People Profiles Sam Walker and Samuel Walker each has a different value in the Description field. When merging the two profiles, the Description on the Duplicate object (Samuel Walker) will be added to the end of the Description on the Main object (Sam Walker), updating the Main object's (Sam Walker) Description using both Descriptions and deleting the Duplicate object (Samuel Walker).

Merge Rule Four:

Data from the Duplicate object will be combined (linked) with the data from the Main object (e.g., linking user incidents) for the following fields and properties if both the Main and Duplicate objects contain data in the same fields and properties:

- Attachments
- Relationships
- References
- Roles
- Multi-select List
- Submitter and Emails
 - Submitter properties and emails will be connected to the Main object if the Main or Duplicate object was created using email or the Anonymous Portal.
 - Submitter properties and emails from the Main object will be kept, and the Duplicate

submitter properties and email will be deleted along with the Duplication object if both the Main and Duplicate objects were created using email or the Anonymous Portal.

Example:

- The object type Business Unit is a Main Object and has 30 incidents linked to it. Object type Business Unit 1 is a Duplicate object with 20 incidents linked to it. If the Main object (Business Unit) is merged with the Duplicate object (Business Unit 1). The updated Main object will have 50 incidents linked to it, 30 incidents from the original Main object (Business Unit) and 20 incidents from the Duplicate object (Business Unit 1).