

Merging Duplicate Objects

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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.

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

Additional Information

- Users cannot merge a duplicate object if it has more than 1000 direct relationships.
 - The following objects cannot be merged and will not appear in the search results:
 - Cloned objects
 - A duplicate object that has clones
 - Assessments
 - Objects with workflow states that don't have permission to be merged
 - The duplicate object's Audit trail is not merged to the main object.
 - Comments cannot be merged.
 - The merge duplicates feature is only available when the object form is in full-screen mode.
 - Searching for a duplicate object will return the top 50 results.
 - An organization can only process one merge operation at a time.
 - If a conflict occurs, a warning message will appear.
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User Account Requirements

The user account you use to log into Resolver must have **Merge** permission enabled on the role connected to their user group to access the merge duplicate objects feature.

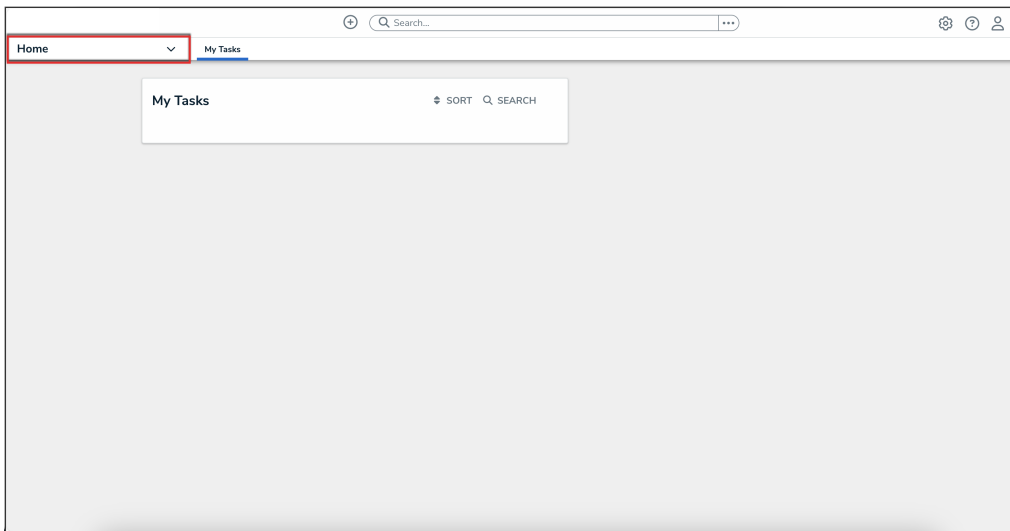
Related Information/Setup

Please refer to the [Merge Rules Overview](#) article for more information on the rules for merging two objects.

Please refer to the [Enabling Merge Object Permissions on an Object Type](#) for more information on enabling the merge duplicate objects feature.

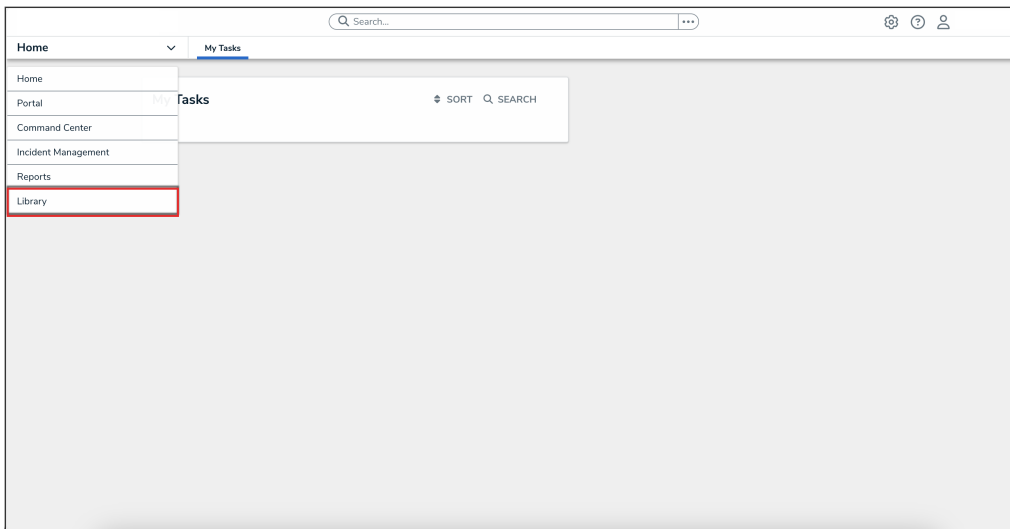
Navigation

1. From the **Home** screen, click the **Home** menu.



Home Menu

2. Click **Library** from the **Home** dropdown menu.



Library

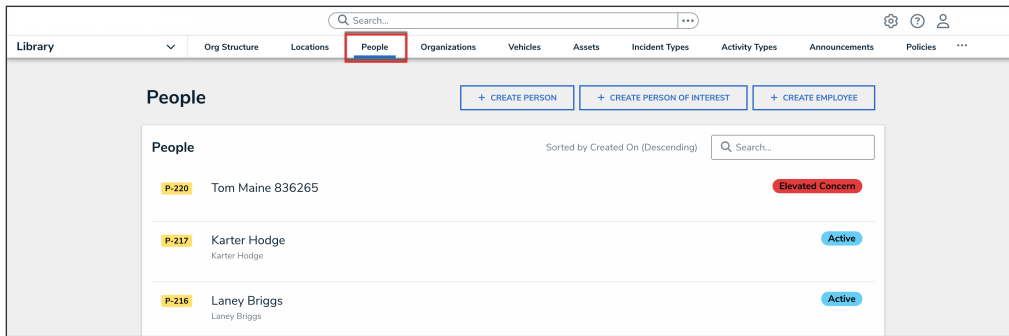
Merging Duplicate Objects



Note:

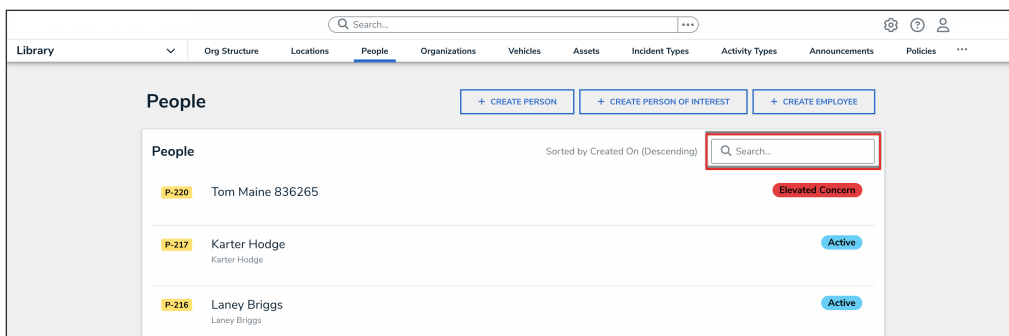
For this example, we will show how to merge two People objects in Resolver.

1. From the **Library** screen, click the **People** tab.



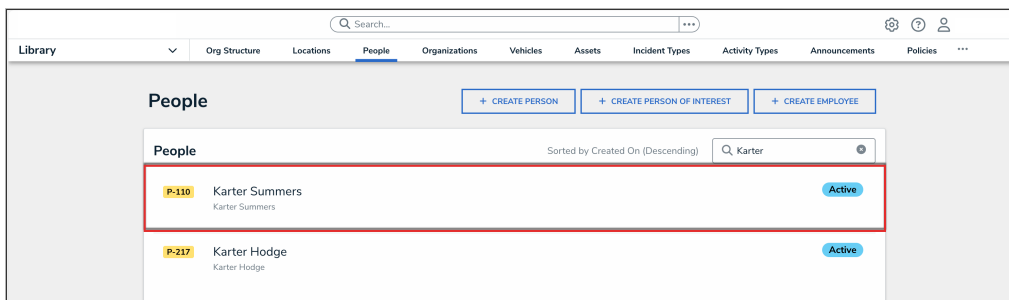
People Tab

2. From the **People** screen, enter the name of one of the duplicate objects (People) in the **Search** field to narrow the search results list.



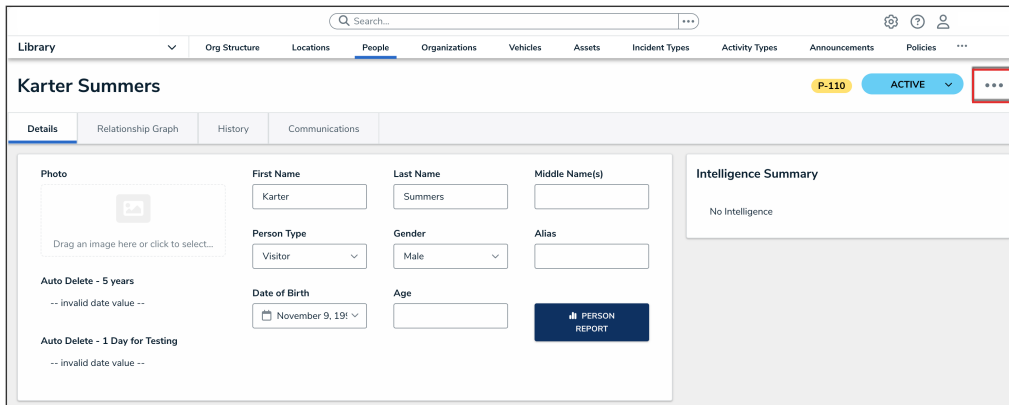
Search Field

3. Click the People object you want to merge.



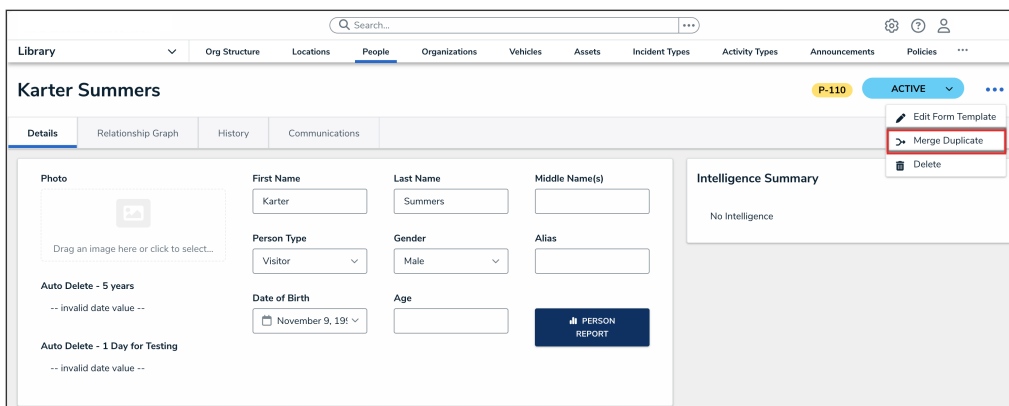
Person Link

4. Click the **More Actions** icon.



More Actions Icon

5. Click **Merge Duplicate** from the **More Actions** dropdown menu.



Merge Duplicate

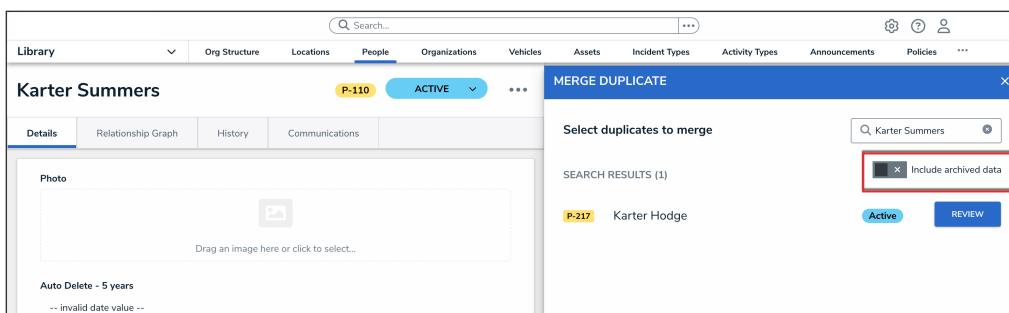
6. The **Merge Duplicate** pop-up will appear, listing all duplicate objects. The search results are displayed based on the main object's name.



Note:

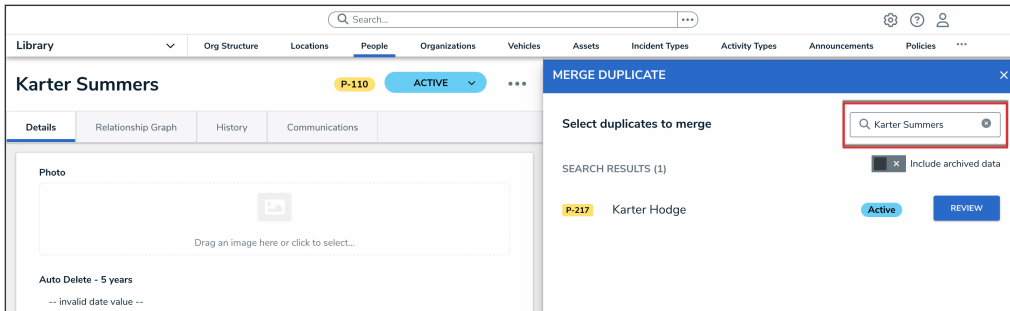
Objects will only appear in the search results if you can merge them.

7. **(Optional):** Click the **Include archived data** toggle switch to include archived objects.



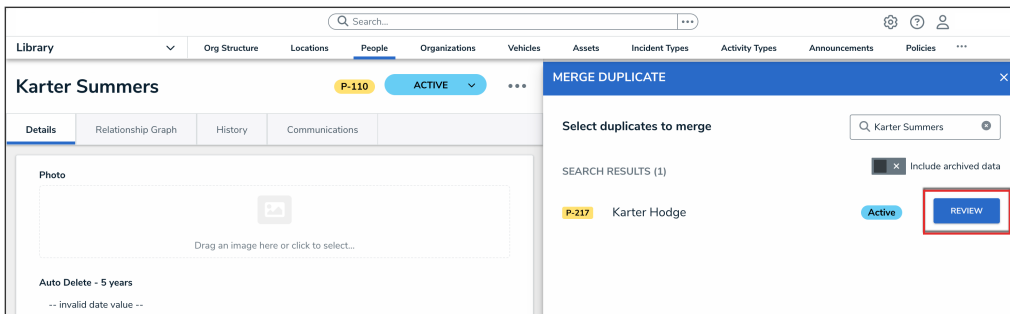
Include Archived Data Toggle Switch

8. **(Optional):** Enter alternate text in the **Search** field to search for additional duplicate objects.



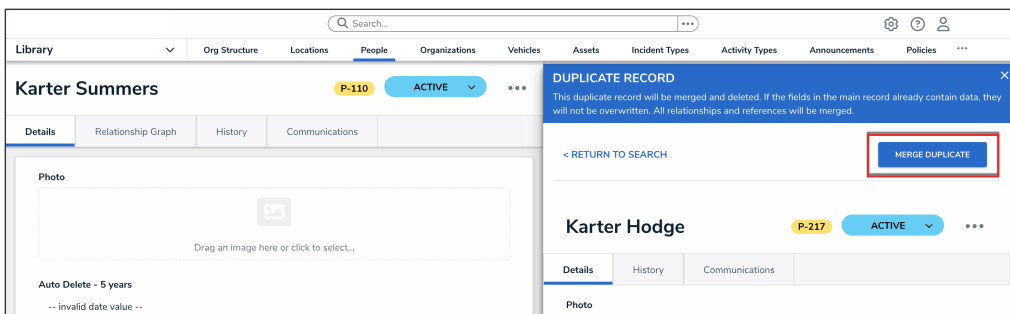
Search Field

9. Click the **Review** button next to the duplicate object you want to merge into the main object.



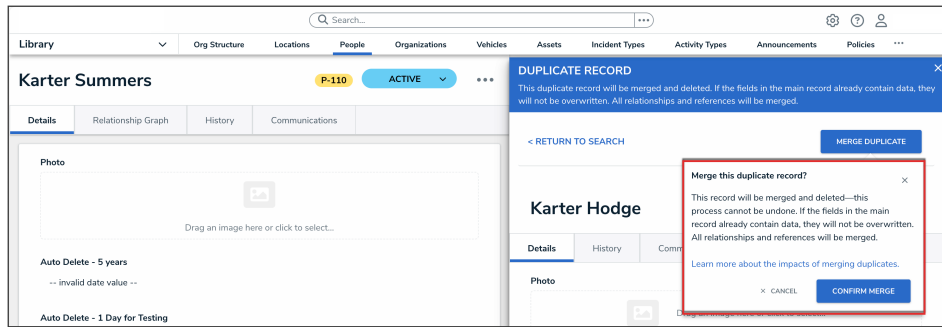
Review Button

10. From the **Duplicate Record** pop-up, review the information on the object, then click the **Merge Duplicate** button.



Merge Duplicate Button

12. From the **Merge this duplicate record?** pop-up, click the **Confirm Merge** button to merge the duplicate object into the main object and delete the duplicate object from the system.



Confirm Merge Button



Note:

If another merge operation is in progress, a **Notifications** pop-up will be displayed indicating another merge in progress.

Once the merge is complete, you will be returned to the **Merge Duplicate** pop-up so you can merge another object.

15. When the merge is complete, a merge record will appear in the **Data Audit Trail**.