Merging Duplicate Objects

Last Modified on 04/05/2024 3:46 pm EDT

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.

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.
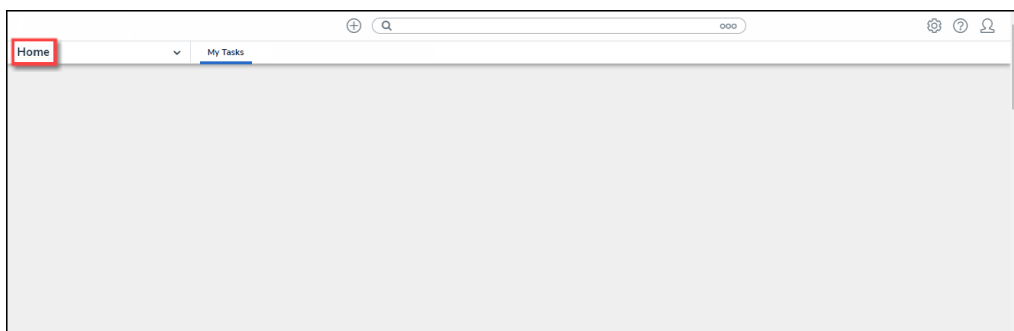
Related Information/Setup

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.

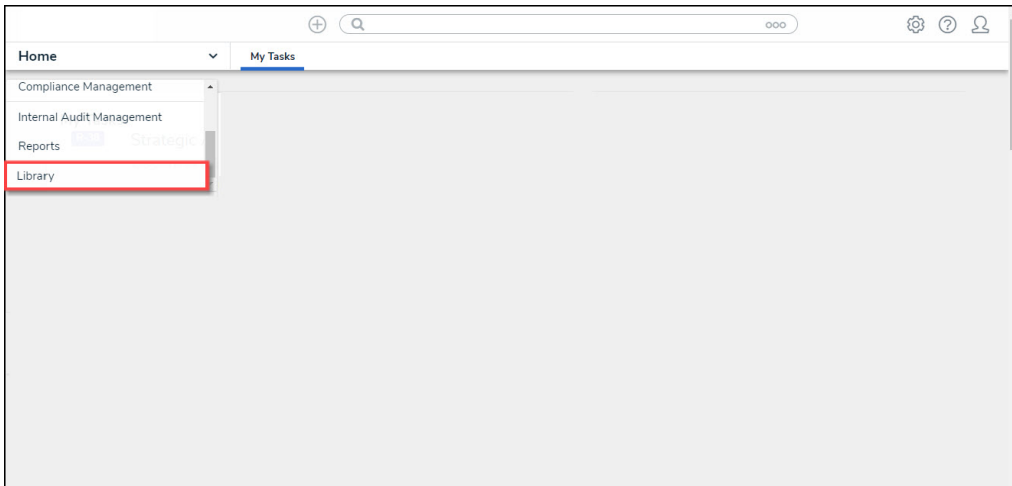# Navigation

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

Home Menu

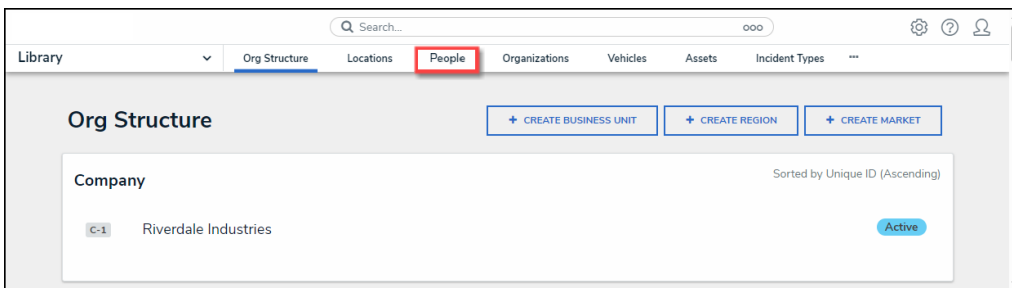2. Click the **Library** link from the **Home** dropdown menu.

Library Link
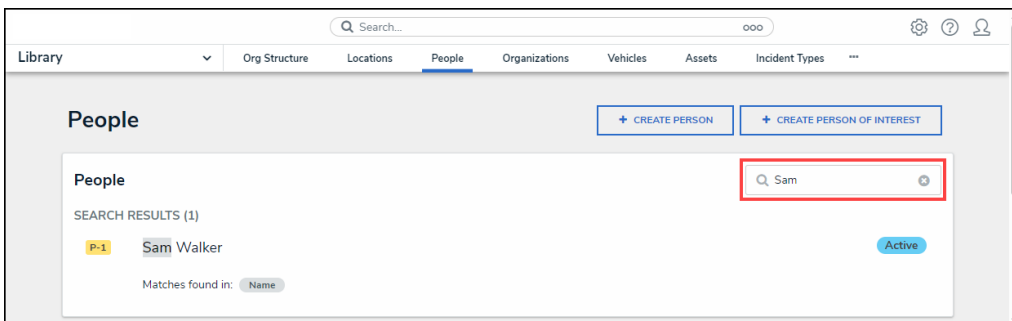
Merging Duplicate Objects

For illustration purposes, we will merge two people.

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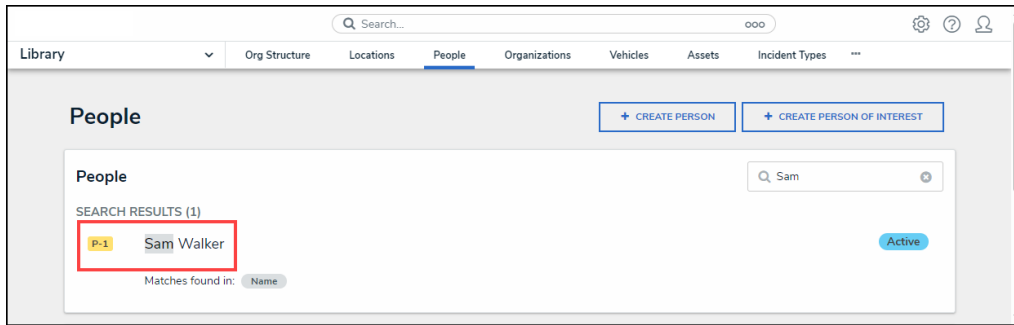

People Tab

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.
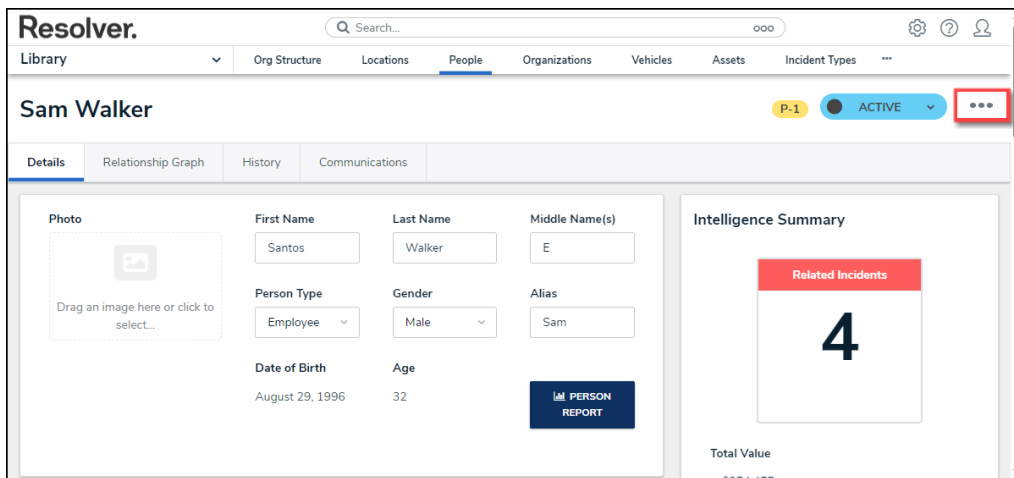

Search Field

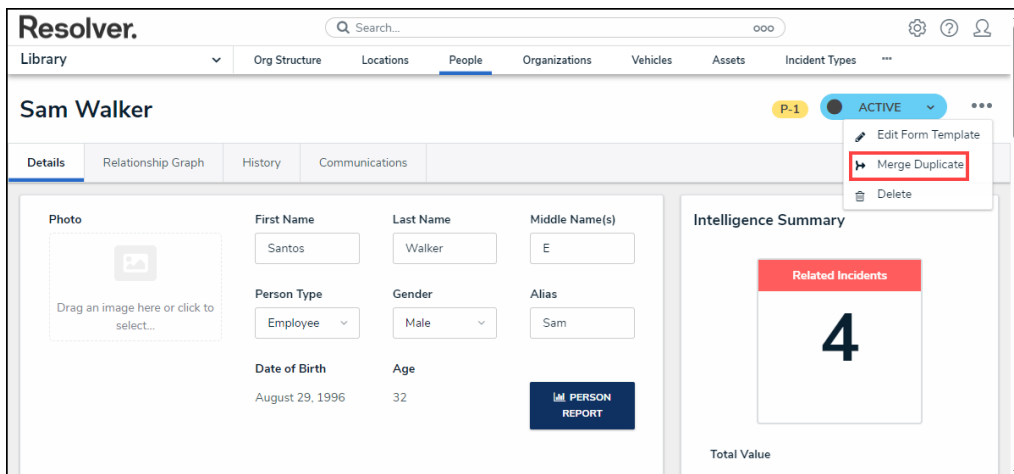3. Click the **Person** link you want to merge.

Person Link

4. From the ***Person: Details*** screen, click the **More Information** icon.

More Information Icon

5. Select the **Merge Duplicate link** from the **More Information** dropdown menu.

Merge Link

6. The ***Merge Duplicate*** pop-up will appear, listing all duplicate objects. The search results are displayed based on the Main object's name.
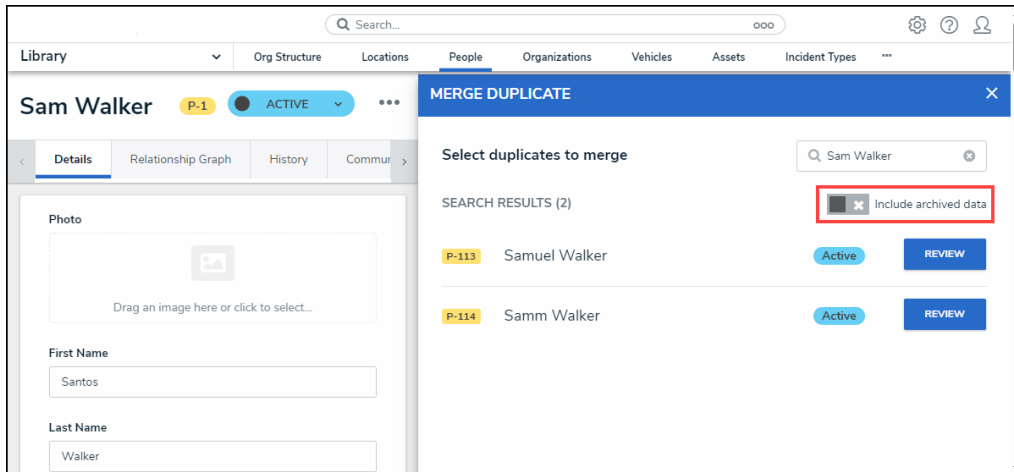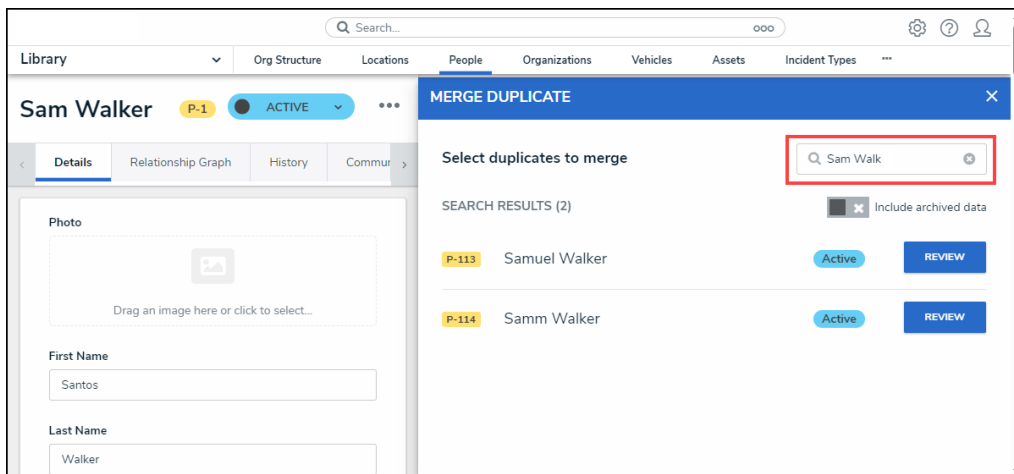
7. **(Optional)** Click the **Include archived data** toggle switch to include archived objects.
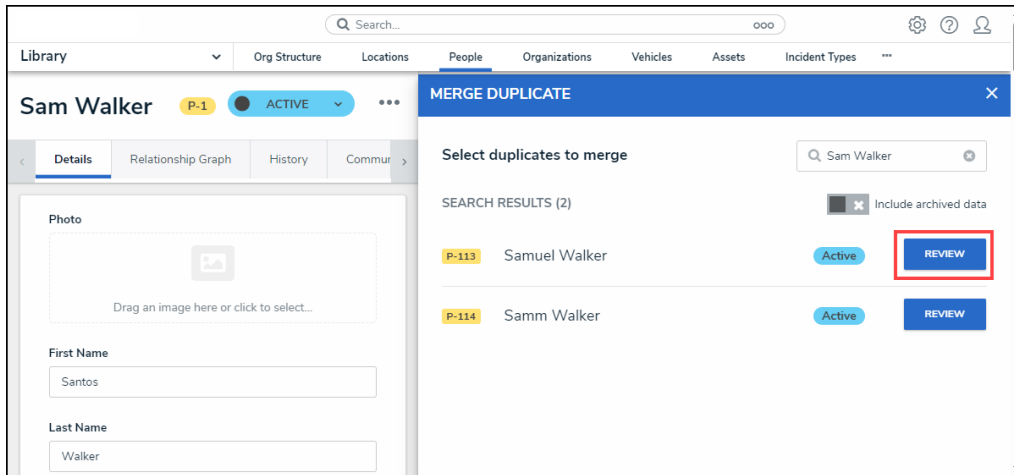

Include Archived Data Toggle Switch

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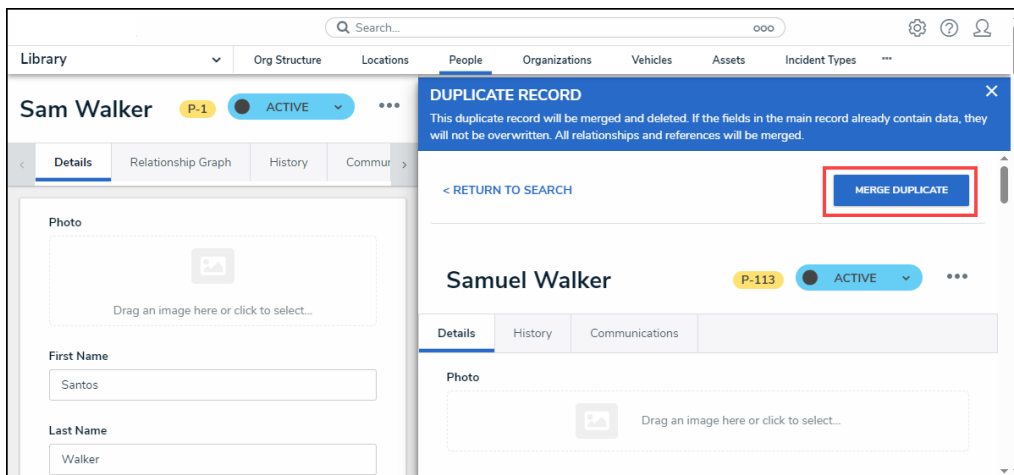

Search Field

9. Click the **Review** button next to the Duplicate object you want to merge into the Main object.
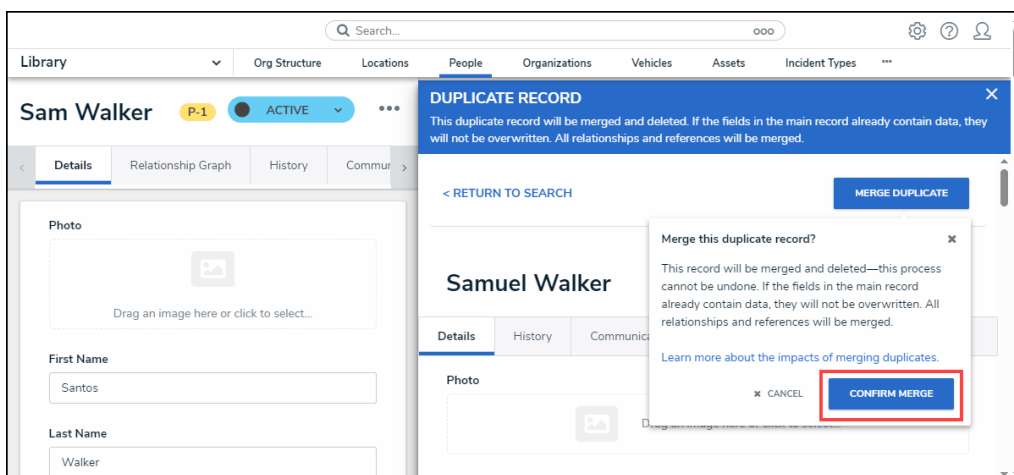
Review Button

10. From the **Duplicate Record** pop-up, review the information on the object.

11. Click the **Merge Duplicate** button.

Merge Duplicate Button

12. From the **Confirmation** screen, click the **Confirm Merge** button to merge the Duplicate object into the Main object and delete the Duplicate object from the system.
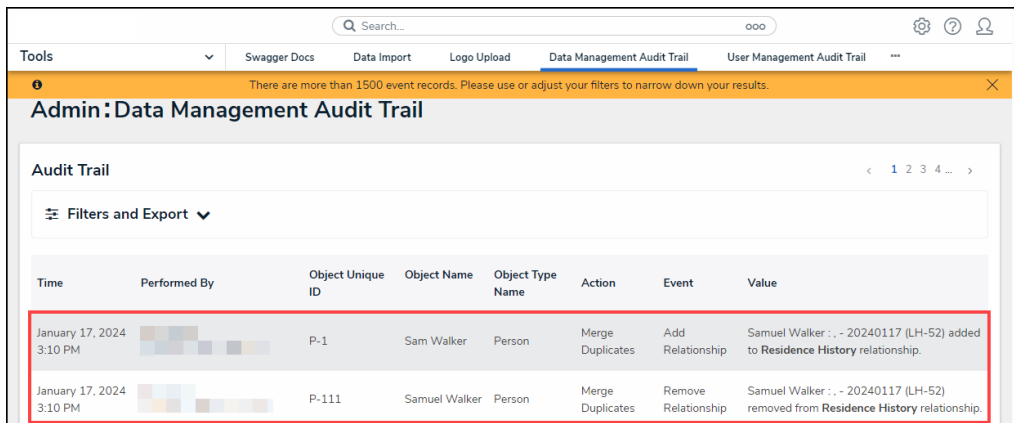
13. If another merge operation is in progress, a **Notifications** pop-up will be displayed indicating another merge in progress.

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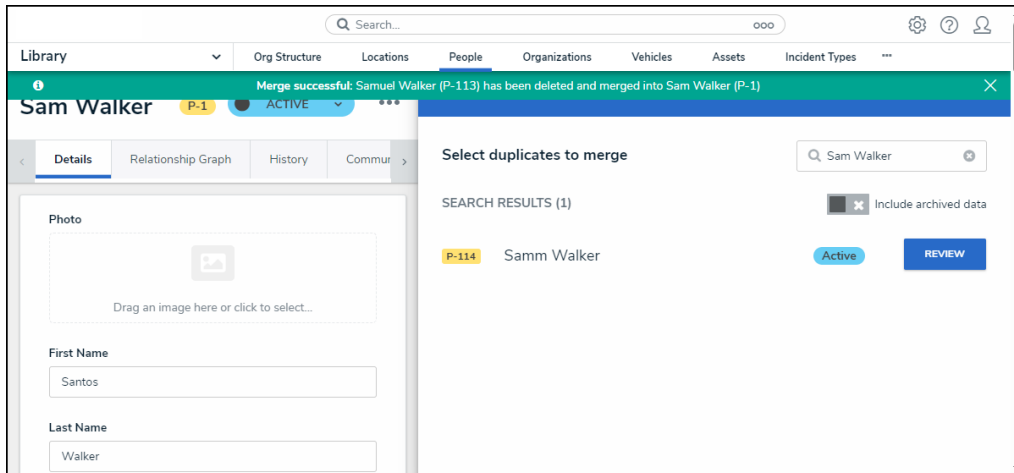
Merge Duplicate Pop-up

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

Data Audit Trail Screen