

# Duplicate Records Merging:

This feature allows user to find duplicate records in a particular module and can merge. Vtiger providing merge facility for the modules Accounts, Contacts, Potentials, Leads, Products, HelpDesk, and Vendors.

Merging can be applied at two places,

- 1. For all modules which has this feature will have a merge icon mini icons list. This will provide a UI to select the fields(Merge criteria) depending on which CRM will returns duplicates records. Next time when the user again come to this UI it will gives last selected criteria. When you click on merge it will return all duplicated records. Here user should select one record as parent record and can merge.

The screenshot shows the Vtiger CRM interface. At the top, there is a navigation bar with tabs for 'My Home Page', 'Marketing', 'SALES', 'Support', 'Analytics', 'Inventory', 'Tools', and 'Settings'. Below this is a secondary navigation bar with links for 'Leads', 'Accounts', 'Contacts', 'Potentials', 'Quotes', 'Sales Order', 'Invoice', 'Products', 'Price Books', and 'Notes'. The main content area is titled 'Sales > Leads' and contains a 'Merging Criteria Selection' dialog box. This dialog box has two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes Salutation, First Name, Phone, Last Name, Mobile, Company, Fax, Designation, Email, and Lead Source. The 'Selected Fields' list includes Last Name, Salutation, First Name, Phone, Mobile, and Company. Below the lists are 'Find Duplicates' and 'Cancel' buttons. At the bottom of the dialog, there are buttons for 'Delete', 'Send Mail', 'Change Owner', and 'Change Status'. Below the dialog is a table showing a list of duplicate records. The table has columns for 'Last Name', 'First Name', 'Company', 'Phone', 'Website', and 'Email'. The first two rows show duplicate records for 'Brown, Elizabeth' from 'X-ceed inc 99' with phone '(058) 109-7785' and website 'www.x-ceedinc99.com'. The remaining three rows show the same name and company but with empty phone and website fields.

	Last Name	First Name	Company	Phone	Website	Email
<input type="checkbox"/>	Brown	Elizabeth	X-ceed inc 99	(058) 109-7785	www.x-ceedinc99.com	elizabeth_brown@comp
<input type="checkbox"/>	Brown	Elizabeth	X-ceed inc 99	(058) 109-7785	www.x-ceedinc99.com	elizabeth_brown@comp
<input type="checkbox"/>	Brown		X-ceed inc 99			
<input type="checkbox"/>	Brown		X-ceed inc 99			
<input type="checkbox"/>	Brown		X-ceed inc 99			

2. Second is when a user imports records to a module. In import step3 there are two options manual merge and automatic merge.

**Step 3 of 4 : Duplicate Merging** (Select this option to enable and set duplicate merging criteria)

**Select Criteria For Duplicate Records Handling**

- Manual Merging
- Auto Merging

### Merging Criteria Selection

Select the fields to find duplicate records

Available Fields		Selected Fields
No Of Employees		Last Name
Assigned To		
Yahoo Id		
Street	>>	
Postal Code		
City	<<	
Country		
State		
Po Box		
Description		

[Back](#)

[Import Now](#)

3. If user select manual merge it show all duplicate records in imported records with existing records. While merging user can not select just now imported record as parent record.

**Duplicate Leads**

**Delete**

<input type="checkbox"/>	recordid	Last Name	Entity Type	SelectRecords (max: 3)	Action
<input type="checkbox"/>	36	Brown	Existing	<input type="checkbox"/>	<input type="button" value="Merge"/>
<input type="checkbox"/>	491	Brown	Imported Now	<input type="checkbox"/>	
<input type="checkbox"/>	37	Davis	Existing	<input type="checkbox"/>	<input type="button" value="Merge"/>
<input type="checkbox"/>	492	Davis	Imported Now	<input type="checkbox"/>	
<input type="checkbox"/>	33	Johnson	Existing	<input type="checkbox"/>	<input type="button" value="Merge"/>
<input type="checkbox"/>	493	Johnson	Imported Now	<input type="checkbox"/>	
<input type="checkbox"/>	35	Jones	Existing	<input type="checkbox"/>	<input type="button" value="Merge"/>
<input type="checkbox"/>	494	Jones	Imported Now	<input type="checkbox"/>	
<input type="checkbox"/>	38	Miller	Existing	<input type="checkbox"/>	<input type="button" value="Merge"/>
<input type="checkbox"/>	495	Miller	Imported Now	<input type="checkbox"/>	

4. But if user select auto merge it will show two options I. Skip duplicate record – which will skip all duplicate records in imported file. II. Overwrite duplicate records - will overwrite the existing duplicate record with imported record.

**Step 3 of 4 : Duplicate Merging** (Select this option to enable and set duplicate merging criteria)

**Select Criteria For Duplicate Records Handling**

- Manual Merging
- Auto Merging
  - Ignore the duplicate import records
  - Overwrite the duplicate records

**Merging Criteria Selection**  
Select the fields to find duplicate records

Available Fields		Selected Fields
Salutation	»	Last Name
First Name		
Phone	«	
Last Name		
Mobile		
Company		
Fax		
...		

5. While merging two records main information is stored according to users choice, but related module information will be combined and will be saved in with parent record.

6. Finding and merging duplicate records is optional while importing. In importstep3 user can select merge option otherwise it will work like normal import.

**Step 3 of 4 : Duplicate Merging** (Select this option to enable and set duplicate merging criteria)

**Select Criteria For Duplicate Records Handling**

Manual Merging

Auto Merging

Ignore the duplicate import records

Overwrite the duplicate records

  

### Merging Criteria Selection

Select the fields to find duplicate records

Available Fields		Selected Fields
Salutation	<input style="margin-bottom: 5px;" type="button" value=" &gt;&gt; "/> <input style="margin-bottom: 5px;" type="button" value=" &lt;&lt; "/>	Last Name
First Name		
Phone		
Last Name		
Mobile		
Company		
Fax		

7. We can add/remove the permissions to find duplicates for a particular profile. The modules which supports duplicates merging will have an extra utility called 'Duplicates Handling'.

Set Privileges for each Module					
modules to be shown		Edit Permissions			Fields & Tools Settings
		Create/Edit	View	Delete	
<input checked="" type="checkbox"/>	Dashboard				
<input checked="" type="checkbox"/>	Potentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>Fields to be shown</b>					
<input checked="" type="checkbox"/>	Potential Name	<input checked="" type="checkbox"/>	Amount	<input checked="" type="checkbox"/>	Account Name
<input checked="" type="checkbox"/>	Expected Close Date	<input checked="" type="checkbox"/>	Type	<input checked="" type="checkbox"/>	Next Step
<input checked="" type="checkbox"/>	Lead Source	<input checked="" type="checkbox"/>	Sales Stage	<input checked="" type="checkbox"/>	Assigned To
<input checked="" type="checkbox"/>	Probability (%)	<input checked="" type="checkbox"/>	Campaign Source	<input checked="" type="checkbox"/>	Created Time
<input checked="" type="checkbox"/>	Modified Time	<input checked="" type="checkbox"/>	Description		
<b>Tools to be shown</b>					
<input checked="" type="checkbox"/>	Import	<input checked="" type="checkbox"/>	Export	<input checked="" type="checkbox"/>	DuplicatesHandling
<input checked="" type="checkbox"/>	Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Points to be observe:

1. Custom fields wouldn't come in available field list for merge criteria.
  2. Ticket comments wont be available in merge criteria.
  3. If a pick list value have access for admin user only and not for a nonadmin user. Now if you merge with non admin user, that picklist value will be displayed as not accessible ,because if we ignore it while merging we may lose the data.
  4. While displaying duplicate records, if a group have more records to display at page limit, these will split into two groups. (Ex: If a group has 3 records and only two can be displayed in first page then 3<sup>rd</sup> one goes to second page.).
  5. If you directly going to some other page from duplicate records list view second page , and come back to same page it will stay in same second page.
  6. When you are merging two records, but one of them is already deleted then one message will come with a Back link, but link wont do any functionality.
  7. Finding duplicate records is not respect to custom views.
  8. If any merge criteria field related to some other module, then the duplicate records will be dispalyed for the particular record but not to the other record having same name.
  9. In leads module, title is given as designation in merge criteria.
1. Ticket comments wont be available in merge criteria.
  2. If a pick list value have access for admin user only and not for a nonadmin user. Now if you merge with non admin user, that picklist value will be displayed as not accessible ,because if we ignore it while merging we may lose the data.
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  4. If you directly going to some other page from duplicate records list view second page , and come back to same page it will stay in same second page. Actually its requested behaviour it won't behave like list view.
  5. When you are merging two records, but one of them is already deleted then one message will come with a Back link, but link wont do any functionality.
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  7. If any merge criteria field related to some other module, then the duplicate records will be dispalyed for the particular record but not to the other record having same name.
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