

# Duplicates

Find and merge duplicates

Version 7.17



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# Find and merge duplicates

PRODUCTS: [ALL CREATIO PRODUCTS](#)

**Duplicate records** may appear whenever you add new records to Creatio sections. Find and merge duplicates to maintain the quality of your Creatio data.

- [Bulk duplicate search](#) is run for the entire database, manually or [on schedule](#).
- [Local duplicate search](#) is run for a particular new record automatically when you save the record.

You can also [merge](#) any duplicate records manually without running the search. This option is available for all sections.

By default, duplicate search is available in the [ *Accounts* ], [ *Contacts* ] and [ *Leads* ] sections. Creatio uses a set of pre-configured [rules](#) to search for duplicates. For example, duplicates may be identified by identical phone numbers or email addresses. Creatio lets you customize these rules in several ways:

- Customize out-of-the-box **contact, account, and lead** duplicate search rules to suit your specific needs.
- Create custom rules for **any Creatio section**, including custom sections.

You can search for duplicates manually in any section that has at least one duplicate search rule. For example, the [ *Contacts* ] section includes the [ *Show duplicate 'Contacts'* ] action. Once the search is complete, Creatio will display a list of records identified as duplicates.

**Attention.** To ensure the correct operation of bulk duplicate search, on-site users must install additional components. Learn more in a separate article: [Bulk duplicate search](#).

## Find and process duplicates

To open the duplicates, you must have permissions to read and edit the records of the section where you search for duplicates, as well as permission to the “Duplicates search” (the “CanSearchDuplicates” code) system operation. Learn more in a separate article: [System operation permissions](#).

## Bulk duplicate search

Creatio displays the duplicate search results on the found duplicates page (Fig. 1). To set up the columns of the duplicate list, click [ *View* ] → [ *List setup* ] in the top right.

Fig. 1 The duplicate search results in the [ *Contacts* ] section

Duplicates search in the 'Contacts' section

**CLOSE** ACTIONS ▾ VIEW ▾

Jane Russel (Select all) Merge Not duplicates

Name	Account	Job title	Mobile phone	Email
<input type="checkbox"/> Jane Russel	Nova Pharmaceuticals	CEO	+44 (0) 121 414 6351	russel@np.com
<input type="checkbox"/> Russel Jane	Nova Pharmaceuticals	CEO	+44 (0) 121 414 6351	russel@n-pharm.com

Barber Andrew (Select all) Merge Not duplicates

Name	Account	Job title	Mobile phone	Email
<input type="checkbox"/> Barber Andrew	Infocom	Specialist	+1 206 587 1036	a.barber@gros.com
<input type="checkbox"/> Andrew Barber	Axiom			a.barber@gros.com
<input type="checkbox"/> Andrew Barber				andrew@infocom-global.com

## Go to the page

There are several ways to open this page:

- Select [ *Show duplicates* ] in the [ *Actions* ] menu of the section (Fig. 2).

**Note.** The [ *Show duplicates* ] action is available if the section has at least one duplicate search rule.

Fig. 2 Go to the found duplicates page using the section actions

Products ☰ 📊

**NEW PRODUCT** ACTIONS ▾

Filters/folders ▾

**Motherboards**

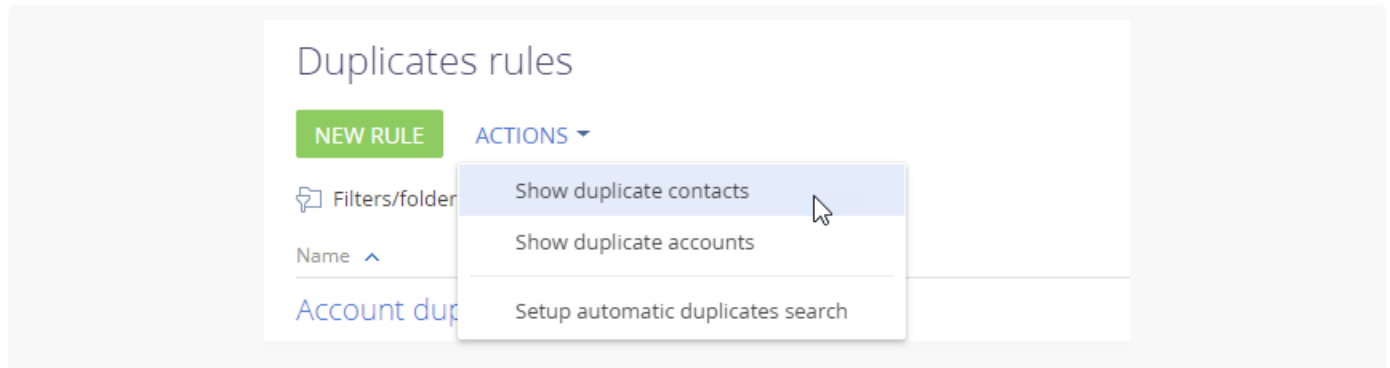
Type  
Motherboards

- Select multiple records
- Select all
- Export to Excel
- Data import
- Show duplicate 'Products'**
- Set up product catalog
- Set up product types and filters

- Open the System Designer by clicking and click [ *Setup duplicates rules* ]. This will open a new page. Select the [ *Show duplicate accounts* ] or [ *Show duplicate contacts* ] option in the [ *Actions* ] menu of the page

(Fig. 3). This option is available for the [ *Contacts* ] and [ *Accounts* ] sections.

Fig. 3 Go to the found duplicates page using the [ *Setup duplicates rules* ] section



## Find and merge duplicates

To search for duplicates:


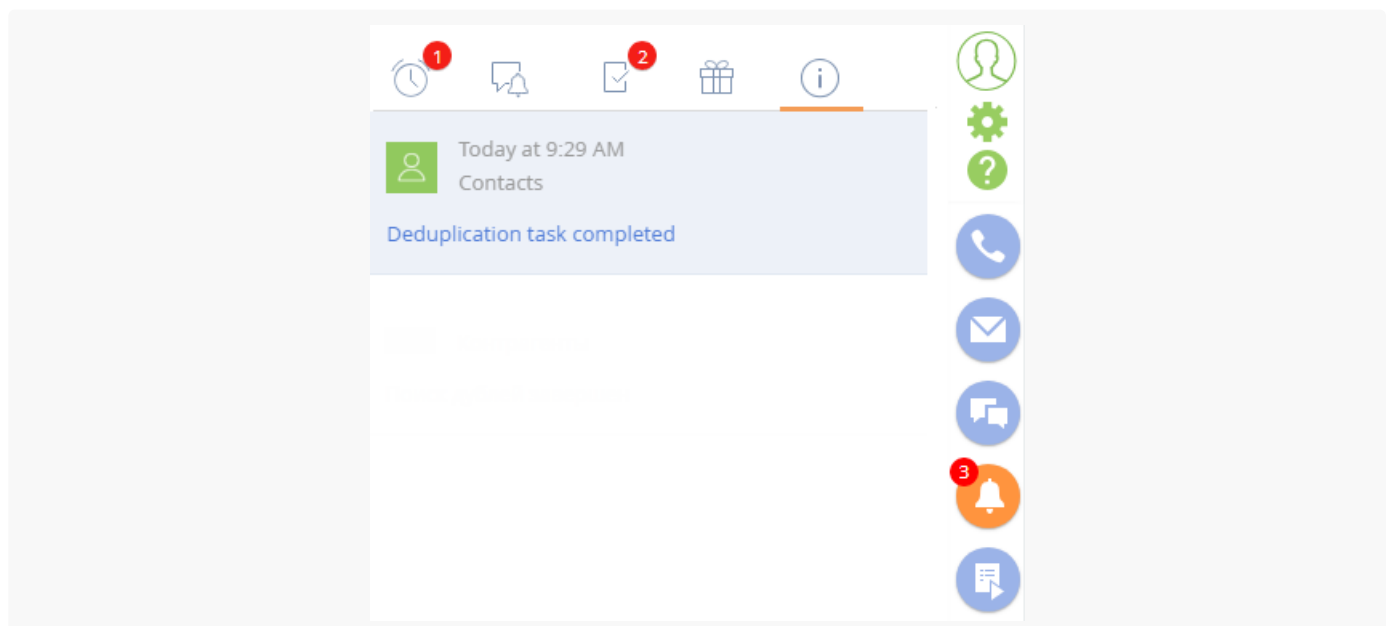
1. Open a section where you want to search for duplicates. For example, the [ *Contacts* ] section.
2. Select [ *Show duplicate 'Contacts'* ] in the [ *Actions* ] menu (Fig. 2).
3. A found duplicates page will open. If the duplicate search was performed earlier (e. g., automatically), the page will display its results. You can process the previous duplicate search results before searching again.
4. Select [ *Run duplicate search* ] in the [ *Actions* ] menu of the found duplicates page.
5. Creatio will search for duplicates in the background. In the meantime, you can continue working in the system.
6. Once the duplicate search is complete, you will receive a notification on the  tab of the notification center (Fig. 4).

Fig. 4 The notification about the completed duplicate search

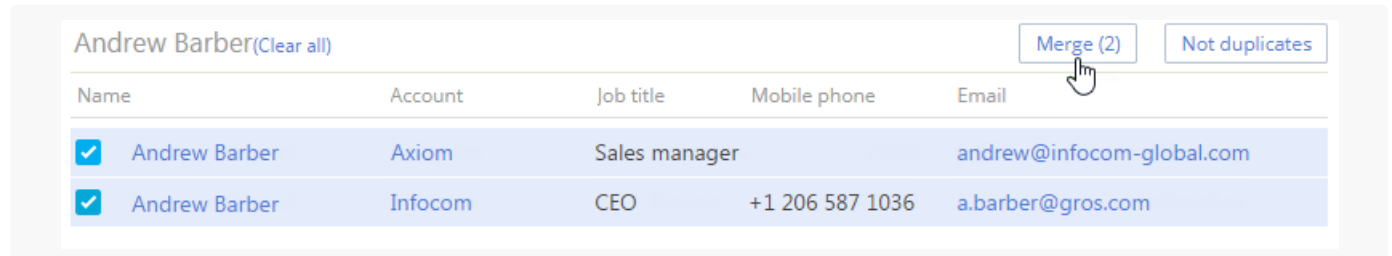


7. Click the link in the notification to view the duplicate search results. You can also go to the results page in several other ways (Fig. 2, Fig. 3).

The results list displays the duplicate records found based on the active search rules. The records are grouped by similarity (Fig. 5).

You can merge each group of records into a single record or indicate that the records in the group are not duplicates. In the latter case, Creatio will add the records to the exception list for the next search.

Fig. 5 Select the duplicates to merge



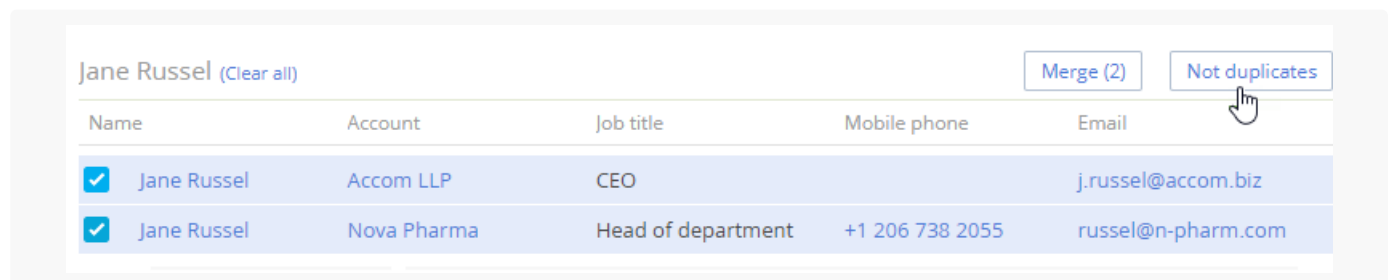
8. To merge duplicates, select the necessary records and click [ *Merge* ].

As a result, Creatio will merge the selected records in the group into one record that contains the unique data from the merged records. If the selected records have different data in the same field, Creatio will prompt you to select the data to save.

9. To add records to the exception list, click the [ *Not duplicates* ] button for the group that contains unique records (Fig. 6).

As a result, Creatio will not consider the records in the group as duplicates for the next duplicate search.

Fig. 6 The records that are not duplicates



## Local duplicate search

Creatio runs a local duplicate search when you save a new record. If a duplicate search page opens while saving a new record in the mini page or record page, it is likely that the record already exists.

**Note.** The opened page will display all similar records, even if you do not have the corresponding access permissions. However, you will be able to see only the columns that have matching data according to the active duplicate search rules.

You can return to editing the record or save it. If you save the record, Creatio will display it in the bulk duplicate search results in the future.

## Merge duplicates

## Merge records

You can merge several records both after the bulk duplicate search and at any other time without running the bulk search. You can merge both **section records** and **lookup values**.

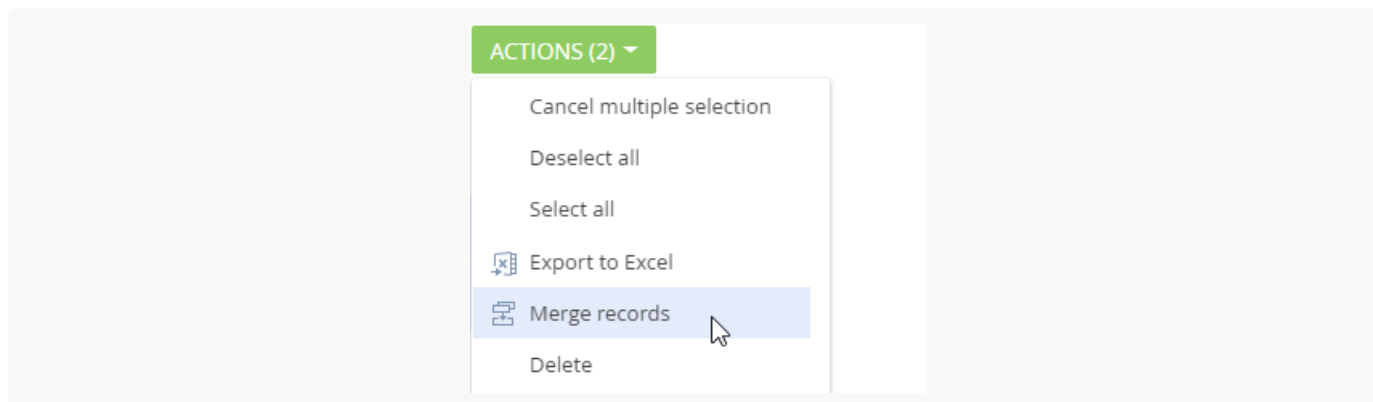
To do this:

1. Enable the multiple selection mode by running the [ *Select multiple records* ] action in the relevant section list or lookup.

**Note.** You can also select multiple records in the section list by pressing Ctrl or Shift. Hold down Ctrl to select multiple records in an arbitrary order. Hold down Shift to select a range of adjacent records.

2. Select the records to merge.
3. Select [ *Merge records* ] in the [ *Actions* ] menu (Fig. 7).

Fig. 7 Merge the lookup values



**Note.** By default, the [ *Merge records* ] action is available only to system administrators. You must grant permission to other users. To do this, open the “Duplicates search” system operation (the “CanSearchDuplicates” code) in the [ *Operation permissions* ] section, go to the [ *Operation permission* ] detail, and grant permission to the relevant users/roles.

Creatio will merge the selected records. If the records have different values in the same fields, the duplicate merge box will open. Select the values to save in the merged record and click [ *Merge* ].

Creatio will send you a notification once the merge is complete. Refresh the page to view the results in the record list. A single merged record will remain.

When you click [ *Merge* ] on the duplicate page, Creatio will save the unique data from all merged records to one resulting record automatically. As a result:

- The resulting record will be based on the earliest created record.
- Creatio will save the unique detail and field values of duplicate records in the resulting record. This means all activities, calls, leads, etc. connected to the merged records will be available on the details of the resulting record.
- Creatio will not duplicate identical phone numbers even if they have different types. For example, the same phone is listed as business and mobile.



- Creatio will not duplicate identical communication options, addresses, and noteworthy events.
- If some field values are different (e.g., full name, phone numbers, etc.), you will be able to select the values to save in the resulting record. You can also select the text note to keep after merging.
- All external links that point to the merged duplicate records will point to the resulting record.
- Creatio will save the feed posts of all merged records in the resulting record.
- If the records of other sections reference any of the merged records, e. g., in the [ *Primary contact* ] field or [ *Contacts of accounts* ] detail of the [ *Accounts* ] section, the resulting record will keep the connections to the records of other sections.

## Example of the merged record data

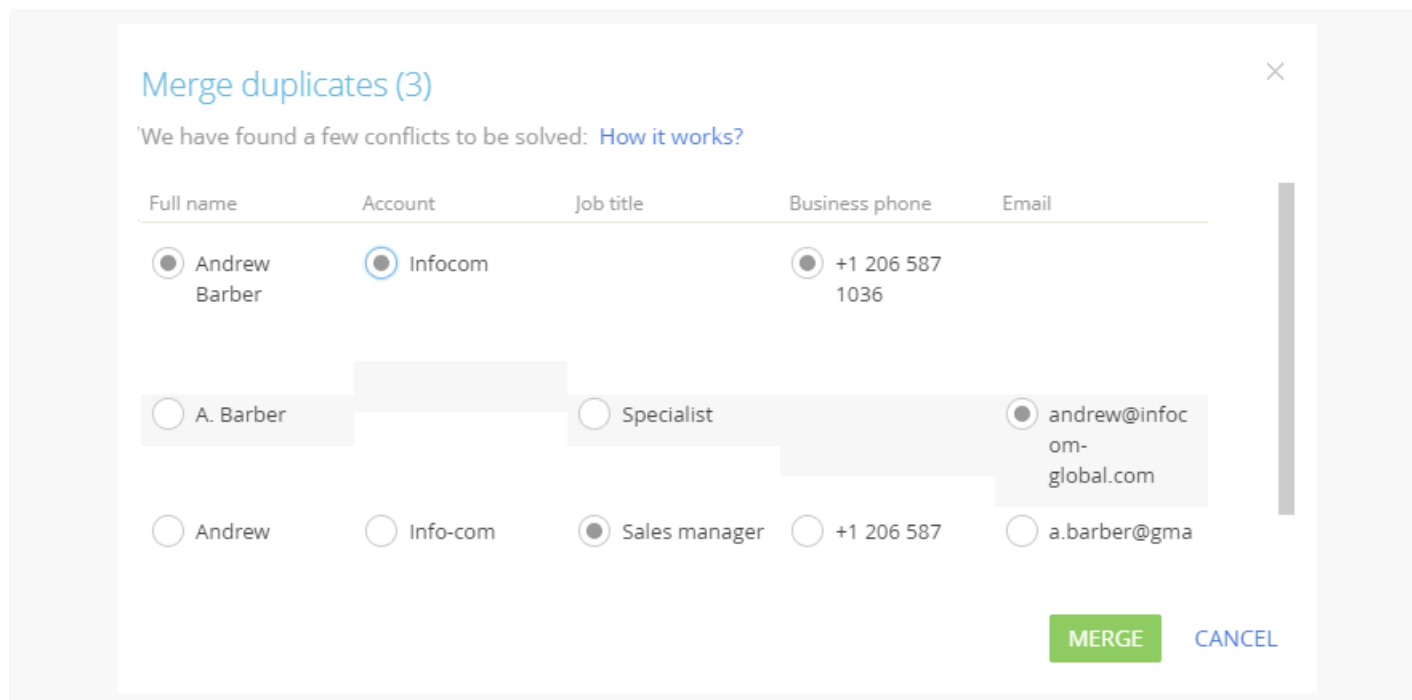
If the merged records contain different values in the same field, specify which data to save in the resulting record as part of the merge.

For example, Creatio has duplicate records that have the following data:

Field	Duplicate 1	Duplicate 2	Duplicate 3	Resulting record
[ <i>Full name</i> ]	Andrew Barber	Barber Andrew	A. Barber	Decided by the user
[ <i>Type</i> ]	-	Customer	Contact person	Decided by the user
[ <i>Account</i> ]	-	Infocom	-	Infocom
[ <i>Mobile phone</i> ]	-	+1 206 5871036	+1-206-587-10-36	Decided by the user
[ <i>Business phone</i> ]	+1 206 480-3801	-	+1 206 480-3801	Decided by the user
[ <i>Email</i> ]	a.barber1981@gmail.com	a_barber1981@gmail.com	-	Decided by the user
[ <i>Skype</i> ]	barber_andrew	-	-	barber_andrew

If you try to merge the records, Creatio will open the Merge duplicates box (Fig. 8).

Fig. 8 Resolve deduplication conflicts



Select the  button next to the values to save in the resulting record and click [ Merge ].

As a result, a single Creatio record will remain. All objects connected to the merged records will now be connected to this record. For example, if you select the buttons as shown on the Fig. 8, the resulting record will contain the following data:

- [ Full name ]: Andrew Barber
- [ Account ]: Infocom
- [ Job title ] Sales Manager
- [ Business phone ] +1 206 5871036
- [ Email ] andrew@infocom-global.com

## The duplicate search procedure

The duplicate search mechanism is identical to the global search mechanism.

Creatio indexes data to remove all special characters and divide the remaining letters and numbers into sets of two or three characters. The characters are recorded in the index that the search mechanism uses.

Creatio does not modify the section records as part of the indexing.

The **local duplicate search** procedure is as follows:

1. The user creates and saves a new record.
2. Creatio processes new data (removes all special characters, divides the remaining data into sets of two or three characters) and requests Elasticsearch to search for records that contain the characters the user entered.
3. Creatio displays the matches according to at least one active duplicate search rule that has the [ Use this rule on save ] checkbox selected. Matches that have a different word order will be displayed as well.

Creatio runs the **bulk duplicate search** in a similar way and takes the active duplicate search rules into account.

The phone numbers are compared to each other regardless of their field: [ *Business phone* ], [ *Mobile phone* ], [ *Home phone* ], etc.

**Note.** The duplicate list does not display the records excluded via the [ *Is not a duplicate* ] button earlier.

If the field contains several words, Creatio will consider records that have both full and partial matches as duplicates. For example, if you search using the “Contact duplicates, contact name” condition, “John Best” and “John” contacts will be considered as duplicates.

If the search conditions overlap, Creatio will search for duplicates using the stricter rule. For example, you have the following duplicate search rules configured: “Contact duplicates, contact name,” “Contact duplicates. Contact name, Phone.” Creatio will consider only the records that have matching full names as duplicates since the corresponding rule is stricter.

## Set up the duplicate search

Creatio checks for duplicates using the existing search rules. The [ *Accounts* ], [ *Contacts* ], and [ *Leads* ] sections include the duplicate search rules out-of-the-box.



You can perform the following actions in Creatio:

- Create new duplicate search rules based on a text or a lookup field in any section.
- Enable or disable individual rules.
- Specify the rules to use while saving a record.
- Remove unused rules.

**Note.** Default rules that search for contact and account duplicates in leads cannot be deleted. However, you can [disable](#) these rules.

## Add a duplicate search rule

**Attention.** Learn more about setting up the service for Creatio on-site in a separate article: [Bulk duplicate search](#).

1. Click the  button in the top right to open the System Designer.
2. Go to the “System setup” block and click “Setup duplicates rules.”
3. Click the [ *New rule* ] button.
4. Fill out the following fields on the rule setup page (Fig. 9):
  - a. Select a section that will use this rule in the [ *Rule type* ] field. For example, “Products.” You can create a rule for sections that have the [ *Indexing for full-text search* ] checkbox selected in the Section Wizard.
  - b. Click  on the [ *Attributes* ] detail and add one or more columns by which to search for duplicates. Keep in mind that the [ *Attributes* ] detail accepts only text and lookup fields.

If you select multiple attributes in a single rule, e. g., “Code” and “Name,” the duplicate search will combine them using the “AND” operator. I. e., Creatio will look for records that contain both duplicate code and name. If you create several rules that have only one attribute, e.g., “Code” in the first rule and “Name” in the second rule, the duplicate search will combine them using the “OR” operator. I. e., the search will display records that contain either duplicate code or duplicate name.

Fig. 9 Create a new duplicate search rule

The screenshot shows the configuration page for a duplicate search rule titled "Product duplicates. Code". At the top right, there is a search bar with the text "What can I do for you?". Below the title bar, there are four buttons: "SAVE" (green), "CANCEL", "ACTIONS" (with a dropdown arrow), and "VIEW" (with a dropdown arrow). The main configuration area contains the following elements:


- Rule type\***: A dropdown menu currently set to "Product".
- Active**: A checked checkbox.
- Use this rule on save**: An unchecked checkbox.
- Attributes**: A section with a plus sign and a list of attributes. The attribute "Code" is selected.

5. Select the [ *Active* ] checkbox.
6. Select the [ *Use this rule on save* ] checkbox to use this rule while saving the mini page or record page.
7. Click [ *Save* ].

Creatio will notify you that the changes will apply upon your next login. After your next login, Creatio will use the new rule for the duplicate search. The [ *Show duplicates* ] action will appear in the corresponding section.

## Disable a duplicate search rule


You can deactivate a rule permanently or temporarily. Creatio will not use it to search for duplicates. To do this:

1. Click the  button in the top right to open the System Designer.
2. Open the “Setup duplicates rules” link.
3. Select a rule to deactivate and click [ *Open* ].
4. Clear the [ *Active* ] checkbox.
5. Click [ *Save* ].

As a result, Creatio will not use the rule to search for duplicates. You can reactivate it at any time.

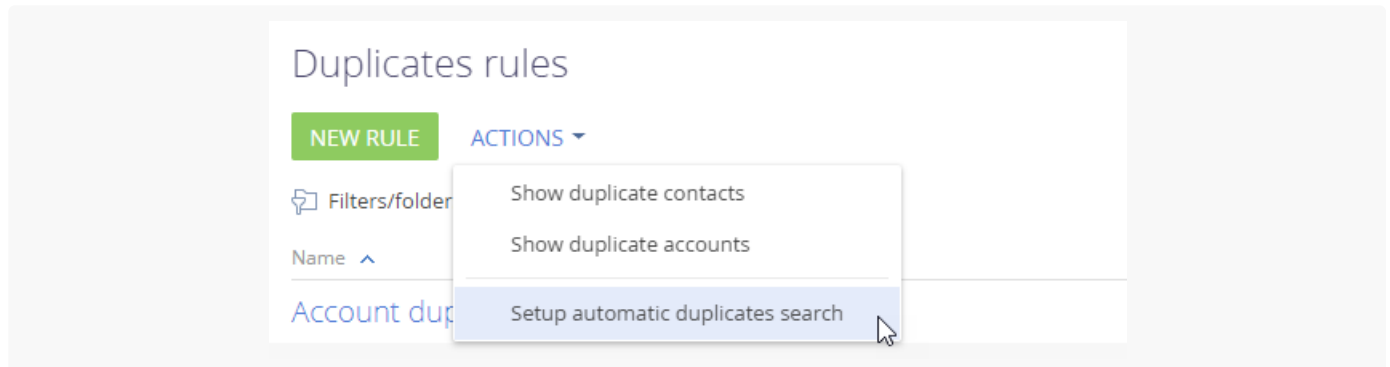
## Schedule the automatic duplicate search

In Creatio, you can schedule an automatic duplicate search. For example, run it three times a week. To do this:

1. Click the  button in the top right to open the System Designer.

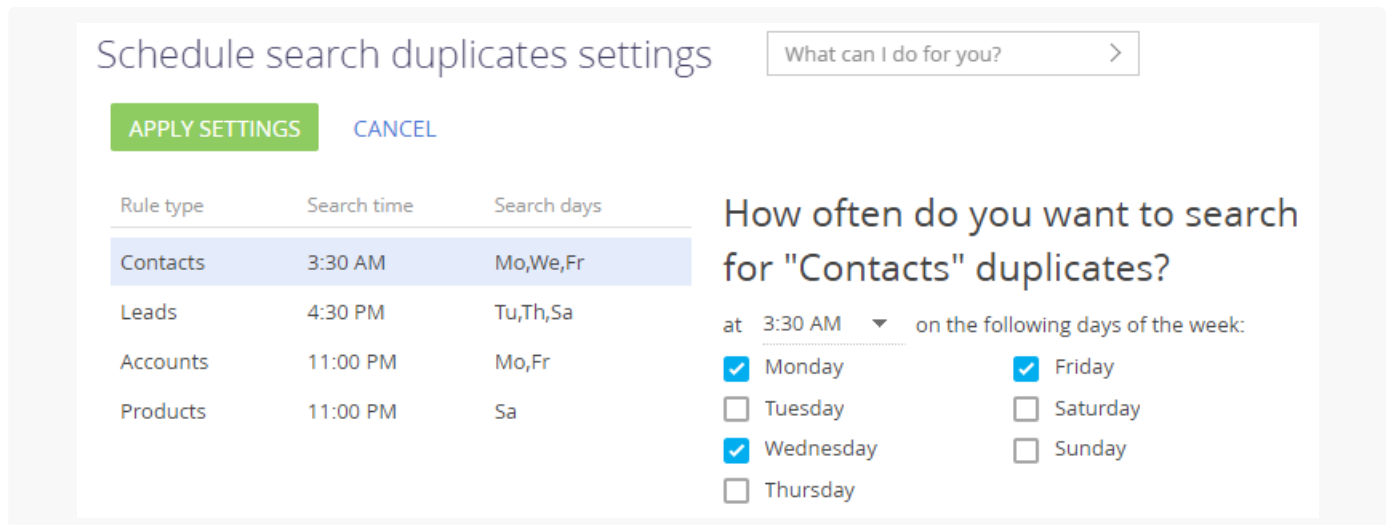
2. Open the "Setup duplicates rules" link.
3. Select [ *Setup automatic duplicate search* ] from the [ *Actions* ] menu on the duplicate search rule page (Fig. 10).

Fig. 10 Open the automatic duplicate search setup window



4. Set up the parameters of the automatic bulk duplicate search on the [ *Schedule search duplicates settings* ] page (Fig. 11):

Fig. 11 Schedule the duplicate search



- a. Select a section for which to schedule the search. The list displays only the sections that have at least one duplicate search rule configured.
- b. Select the time to run the search.
- c. Select the day of the week to run the search.
- d. Click [ *Apply* ].

As a result, Creatio will search for duplicates automatically on the selected days at the set time using the active rules. Keep in mind that Creatio does not merge duplicates automatically. You must process the found duplicates manually.

To disable the automatic duplicate search, clear the time field or the checkboxes next to the days of the week and click [ *Apply settings* ]. Both options will disable the automatic duplicate search.