

Merge Entries Overview

The Merge Tool can be used to combine metadata and references from multiple entries into a single entry, eliminating duplicate records. Only users in a User Group that includes the **Merge Entries** capability will have access to merge entries from the Tools dropdown in the OnePlace Web Portal. When you navigate to **Tools > Merge Entries**, the landing page will feature a grid. The grid includes the List name, the List type (Category), and the count of all entries for the List.

To the left of each list are three icons: **Edit De-Duplication Preferences*** **Check for Duplicates*** **See All Entries**

	NAME	CATEGORY	COUNT
	Billing Clients	Entity	62
	Campaign Groups	Entity	1
	Campaigns	Entity	0
	Companies	Entity	75
	Company Affiliations	Entity	20
	Contacts	Person	135
	Countries	Aggregation	250
	Documents	Document	0
	Emails	Activity	4
	Firm Offices	Entity	2
	Firm Users	Person	8
	Global Geographies	Aggregation	18
	Global States	Aggregation	2,141
	Goals	Entity	33
	Marketing Campaign Types	Entity	4
	Marketing Campaigns	Entity	6
	Marketing Subscribers	Entity	6

Edit De-Duplication Preferences*

The de-duplication preferences modal allows you to set how entries within the List will be compared to one another for purposes of suggesting duplicates during the "Check for Duplicates" process. The preferences can be modified as necessary to either tighten or loosen the de-duplication criteria.

Check for Duplicates*

Hitting this icon runs the duplicate check process and produces a list of suggested groups of duplicates for you to review. The suggested duplicates returned are surfaced based on the de-duplication preferences for the selected List.

See All Entries

Use this icon to see all entries for the List. This is typically the first step taken when you are in the process of merging known duplicates. From the list of all entries, you can filter for the known duplicates to then merge.

Screenshot of Merge Entries Page (Tools > Merge Entries)

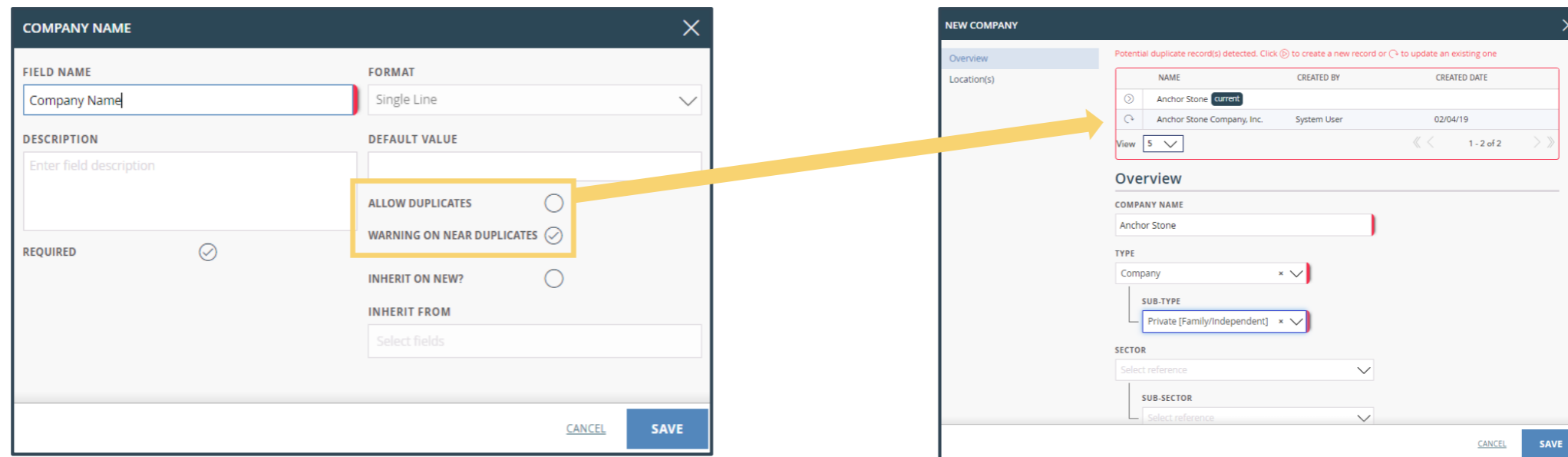
**De-Deduplication Preferences: The first time you run the "Check for Duplicates" process, you will be prompted to save your De-Duplication Preferences. The defaults that load can be saved as is and then adjusted as needed if the duplicate check does not return desirable results.*

Tools > List Management (Field Settings)

For Lists with "text" Name type, there are two settings under the Name field that determine 1) If duplicate values are allowed 2) If a warning should appear on near duplicates. These two settings are **"Warning on Near Duplicates"** and **"Allow Duplicates"**. The selection for these fields affects the process of saving new entries.

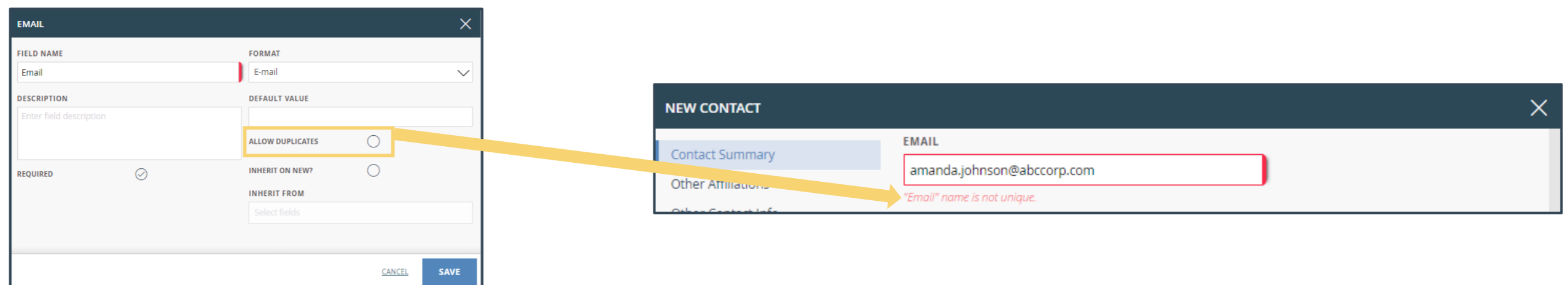
Warning on Near Duplicates

The Companies List is typically configured such that users entering in a Company Name similar to that of an existing entry are warned at the point of attempting to enter a Company Name similar to an entry or entries that already exist in Intapp OnePlace.



Allow Duplicates

For the Contacts List, the email field is typically configured to not allow duplicates. When attempting to save a new Contact with an email address that is the same as the email address for an existing Contact, the new entry will not save and the Email field on the entry form will highlight in red and provide the message **"Email name is not unique."**



Merging Known Duplicates

If you are aware of the specific duplicate entries you need to merge, you can utilize the Merge Entries functionality to locate the duplicate records and merge them from **Tools > Merge Entries**. Follow the steps below:

Navigate to **Tools > Merge Entries** and locate the relevant List from the grid (i.e. Companies or Contacts.) Click the **See All Entries** icon to view all entries for the List.

1. Either scroll through the list to locate and select the duplicates to merge or use the **Filters** icon to create an applicable filter to narrow down the list of entries to then select the duplicate records from (i.e. Company Name starts with "ABC Co" or Contact Full Name contains "Smith".)
2. Once all duplicate records are selected, click **Continue** at the bottom right of the list of entries.
3. Use the following screen to select which fields should prevail for the merged entry. A preview of the merged entry appears on the right hand side.
4. Click **Merge** and confirm you are ready to merge the selected entries by clicking **OK** on the confirmation popup window.

A green confirmation will flash at the top of the page verifying that the merge was successful.



Checking for Duplicates

As part of routine data maintenance, it is a best practice to proactively check for duplicate records that reside in Intapp OnePlace. The icon next to the List name on the **Tools > Merge Entries** page runs the duplicate check process and produces a list of suggested groups of duplicates for you to review. The suggested duplicates returned are surfaced based on the de-duplication preferences for the selected List.

Navigate to **Tools > Merge Entries**. Locate the relevant List from the grid (i.e. Companies or Contacts.) Click the **Check for Duplicates** icon . The matching service will check for duplicates using your current de-duplication preferences. A page listing groups of suggested duplicates displays. From here, you have two options for selecting and merging entries.

Option A:

- 1) Select the entries to merge for each group one by one
- 2) Click the **Launch Icon** to launch the side-by-side field comparison screen. Make your selections for the prevailing fields to keep for the merged entry
- 3) Click **Merge** and **OK** to confirm the merge of the selected entries for that group. Continue this process for each group that has presented actual duplicate records.

Option A (Select Duplicates, Launch the Merge Screen)

The screenshot shows the 'MERGE COMPANIES' interface. On the left, a table lists duplicate groups. Group 0 contains 'A10 Networks' and 'A10 Networks Inc.'. Group 1 contains 'Lakind and Szaferman Inc' and 'Lakind and Szaferman'. A yellow box highlights the 'Launch Icon' (a square with a diagonal arrow) next to the 'A10 Networks' entry. An arrow points from this icon to a side-by-side comparison screen. This screen shows two columns of fields for 'A10 Networks' and 'A10 Networks Inc.', with radio buttons for selecting which value to keep. A third yellow box highlights the 'Merge Data' button at the bottom right of the comparison screen. A dialog box titled 'Merge Data' is overlaid on the right, with the text: 'You are about to merge 2 entries into a single entry. Selected data will be preserved in the Merged Entry, and all references to the old entries will be re-directed to the Merged Entry.' It has 'CANCEL' and 'OK' buttons.

Option B (Select Duplicates, Mark Primary Entries, Bulk Merge)

The screenshot shows the 'MERGE COMPANIES' interface. A yellow box highlights the 'Star Icon' (a star) next to the 'A10 Networks' entry in Group 0. An arrow points from this icon to a 'Merge Confirmation' dialog box. The dialog box contains the following text: 'PRESERVE BLANK FIELDS' (checked) and 'OVERWRITE BLANK FIELDS' (unchecked). Below this, it says: 'Selected groups will merge and overwrite blank fields. In groups of 2+ entries, where the losing entries have conflicting values, the winning entry will remain blank and the losing values will be lost.' It also states: '- 4 entries will be merged into 2 entries. Any associated entries like notes, emails, and documents tagged to merged entries will all point to the remaining entry.' At the bottom, it asks 'Are you sure you want to merge? These actions cannot be undone.' and has 'CANCEL' and 'PROCEED' buttons.

Option B:

1. Select the duplicate entries to merge for each group. Use the **Star Icon** to mark the primary entry (the "winning entry") among the select entries for each group. This will be the record that all references and metadata are merged to.
2. You can collapse or delete groups from this session to clear them from the view.
3. Click **Merge Data** once you have addressed each group. You will be prompted with an option to 1) **Preserve Blank Fields** or 2) **Overwrite Blank Fields**. This enables a more streamlined bulk merge experience, allowing for you to opt to overwrite any blank fields on the winning entry (the starred entry) with values if they exist for the losing entry (without having to do a side-by-side field comparison.)

In groups of 3+ entries, where the losing entries have conflicting values, the winning entry field(s) will remain blank and the losing values will be lost when merged.

De-Duplication Preference De-duplication preferences

As part of routine data maintenance, it is a best practice to proactively check for duplicate records that reside in Intapp OnePlace. The icon next to the List name on the **Tools > Merge Entries** page runs the duplicate check process and produces a list of suggested groups of duplicates for you to review. The suggested duplicates returned are surfaced based on the de-duplication preferences for the selected List. If the groups of suggested duplicates is not desirable, you can adjust the **De-Duplication Preferences** and re-run the duplicate check process.

1. After checking for duplicates, if you need to adjust the criteria for suggested duplicates, click the **Pencil Icon** to edit the De-Duplication Preferences at the top of the list.
2. Adjust which fields are included in the preferences, set minimum similarity and weight values for each field and apply a threshold score. Click **Save**.

The duplicate check will run again and now reflect an updated list of suggested duplicates based on the newly saved preferences. The new count of suggested duplicates will reflect at the bottom right.

Continue with this process as needed to produce desirable results so that you can then proceed with the merge process.

a Field

There will be at least one field included by default (i.e. the List name field), but additional fields can be added by clicking the plus icon to the right of the Weight column. A dropdown of all fields for the List appears.

b Matching Type

The selection here defines the field type and which rules the duplicate check should apply to that field. Name fields are normally set to Name type, Email fields to Email type, etc. "General" type does not apply any special rules.

c Min. Similarity

The value entered here (between 0 and 1) assigns a minimum similarity score two strings must have in order to receive any points during the duplicate check. A higher score means the two text values are more similar.

d Weight

The weight designates by what the string similarity score should be multiplied. Must be an integer. A higher weight indicates more "reliability" or "importance" on that field. All weights added together must equal 100.

e Threshold

Minimum score a pair must receive to be suggested as duplicates. A higher threshold will exclude more duplicate suggestions, whereas a lower threshold will generate more suggestions.