

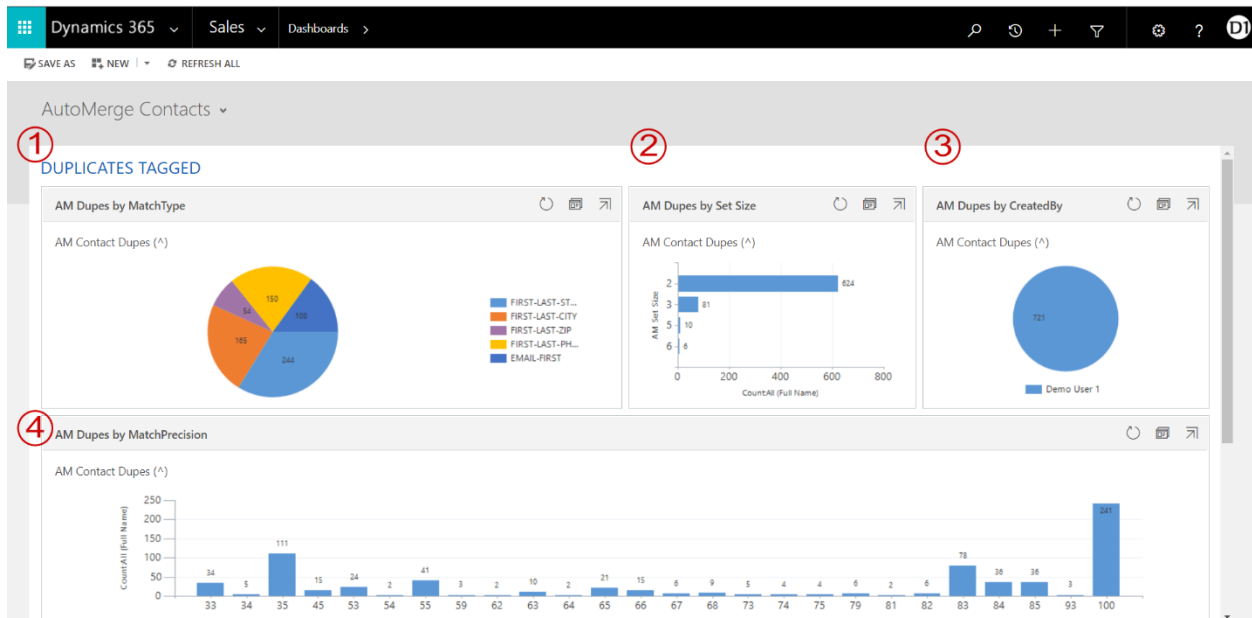
# AutoMerge User Guide

How to Use AutoMerge within your CRM to View and Merge Duplicates

## "AutoMerge Contacts" Dashboard View

The "AutoMerge Contacts" view in your dashboard shows the following high level stats:

1. How many duplicates you have and how they were found (MatchType)
2. How large your duplicate sets are (# records per set)
3. Who has been creating the duplicate records
4. What precision numbers your duplicate sets fall into from **0 (loosely matched)** to **100 (closely matched)**, according to your customizable precision rules



## "AM Contact Dups" List Views

The "AM Contacts Dups" views groups your duplicate records and gives each grouping/set a rank. Each set will have 2 or more records, all of which can be AutoMerged with a single mouse click.

The **AM Contact Dups(^)** view sorts your data where the high precision sets are shown at the top. The **AM Contact Dups(v)** view sorts your data where the low precision sets are shown at the top.

To see either of these views, go to your Contacts and open the "AM Contacts Duples (^)" or the "AM Contacts Duples (v)" view.

The screenshot shows the Dynamics 365 interface for the 'AM Contact Duples (^)' view. The table has the following columns: Rank, Precision, Match Type, First Name, Last Name, Company Name, Email, Email Address 2, Mobile Phone, Business Phone, and Home Phone. The 'Rank' column is highlighted with a red box, and the 'Match Type' column is highlighted with a green box. The table contains several rows of duplicate contact records.

RANK	PRECISION	MATCH TYPE	First Name	Last Name	Company Name	Email	Email Address 2	Mobile Phone	Business Phone	Home Phone
1	85	FIRST-LAST-STREET	Peter	Iacona			truemetsfam@co...			3406 E
2	85	FIRST-LAST-STREET	PETER	IACONA						3406 E
1	85	FIRST-LAST-STREET	Ofelia	Allman		tane_19@hotmail.net			(320)224-7477	1351 E
2	85	FIRST-LAST-STREET	OFELIA	Allman		ofelia.inurriaga@yaho...	ofelia.inurriaga@y...	(320)507-0322	(320)507-0322	1351 E
1	85	FIRST-LAST-STREET	Sarah	Youngblood		karlthedof@aok.com	karlthedof@aok.c...	(370) 225-5612	(370) 225-5612	(370) 446-6680
2	85	FIRST-LAST-STREET	Sarah	Youngblood			syounblooc@cls...	(370)722-1332	(370)722-1332	1143 E
1	84	FIRST-LAST-STREET	BENNY	YARBRO				5224364836	5224364836	3311 W
2	84	FIRST-LAST-STREET	Bennie	Yarbro				5228280604	5228280604	3311 W
1	83	FIRST-LAST-STREET	Billy	Younger II		wyounger6269@gmai...	darcie_younger5...		(502)404-5530	(370)873-7818
2	83	FIRST-LAST-STREET	Billy	Younger						10541 E
1	83	FIRST-LAST-STREET	Lucie	Yeomans		sunr@yeomansfamil...	ticketmasteq@ye...		3706626257	8815 E
2	83	FIRST-LAST-STREET	Lucie H	Yeomans		ticketmasterlucid@ye...	ticketmasterlucid...		3706626257	8815 E

The 1st column is the **Rank**. The record with a Rank of 1 is the winner-designate and will remain active, but will disappear from this list view of duplicates after you AutoMerge the set.

The 2nd column is the **Precision**. After the analysis finds the duplicate sets, it compares a configurable set of fields across all records of the set to determine a Precision %. The Precision % can range from 0 (loosely matched) to 100 (closely matched.)

The 3rd column is **Match Type**. This column tells you how we first found the match. Note that the records of a duplicate set may match in several ways, but this field only tells you one of them (the first match rule that applied.)

These views may not have all the fields you wish to compare, so feel free to make a copy of our default view either as a System View (requires System Administrator privileges) or an Advanced Find.

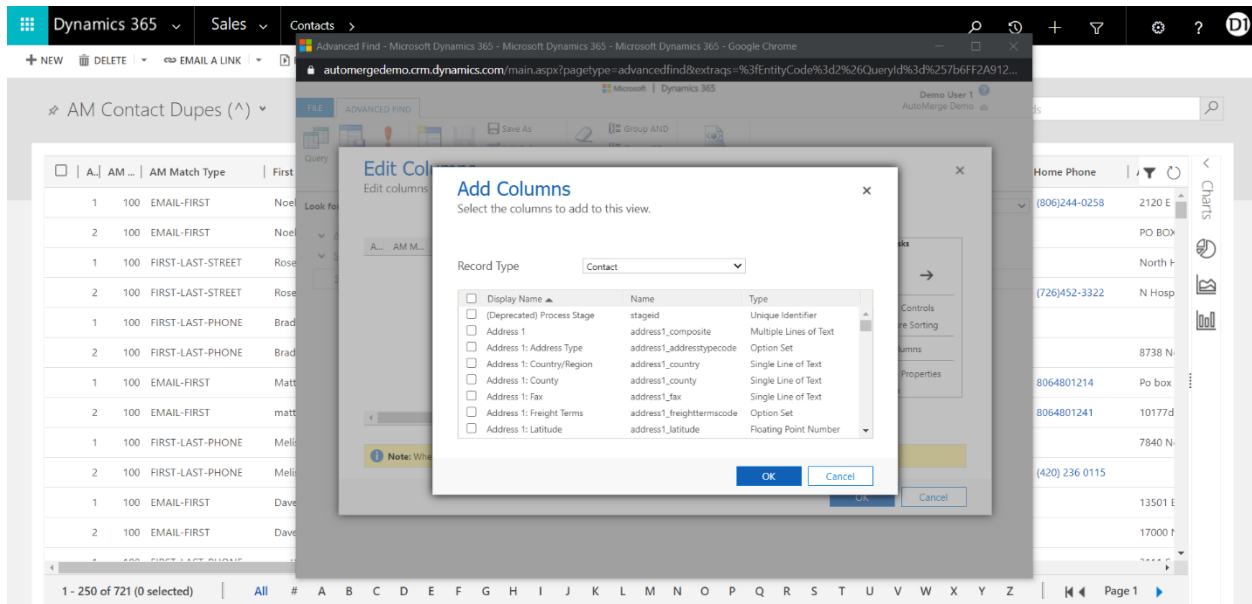
## Modifying "AM Contact Duples" Views to Your Needs

First, make a copy of one of the "AM Contact Duples" views and add your own columns to help you validate the duplicate sets and if the sets are sorted properly.

While on the "AM Contact Duples" view:

1. Click the **Advanced Find button** (🔍) at the upper right.
2. In the new window, switch the **"Use Saved View:"** to "AM Contact Dups."
3. Click **"Edit Columns"** button and add columns as necessary. Click **"OK"** to close the "Add Columns" dialog.
4. Click **"OK"** to close the "Edit Columns" dialog.
5. Finally, click the **"Save As"** button and give your new personal view a name.
6. Go back to your main window and click **refresh (F5)** to see your new personal view in the list.

**Warning:** Be careful not to change the Filters or the Sorting of any Duplicates View. Changing the filters and/or sorting behavior will cause duplicate sets to not be grouped together. You don't want to AutoMerge a set of duplicates when one or more of the records aren't shown with the others.



## Viewing Potential Duplicates Before AutoMerging

Using the "AM Contact Dups" list views above are a great way to quickly validate and AutoMerge a lot of duplicate sets at once, but doing that is a usually performed as a one-off activity by users who don't necessarily *own* those records. Instead, you may want to flag potential duplicates to your end users in the course of their daily work flow. This is where the **"Potential Duplicates"** web resource can help.

Dynamics 365 Sales Contacts > Noelle Umbarger

AutoMerge analysis found 1 potential duplicate(s) of this Contact, see section below.

Summary

**CONTACT INFORMATION**

Full Name: Noelle Umbarger

Job Title:

Account Name:

Email:

Business Phone: (806)244-0258

Mobile Phone:

Preferred Method of C: Any

Address: 2120 E Palmer Wasilla Hwy  
Wasilla, AK 99543  
USA

**Potential Duplicates (current record in BOLD)**

Select the value of each column/field to be set on the Winner when you click the AutoMerge button. The first non-NULL value of each column is

AutoMerge	Rank	Match Type	Precision	% First Name	Last Name	Email	Mobile Phone	Business Phone	Home Phone	Street 1	City	ZIP/PO
<b>Make Winner</b>	<b>1</b>	<b>Ignore</b>	<b>EMAIL-FIRST 100</b>	<b>Noelle</b>	<b>Umbarger</b>			<b>(806)244-0258</b>	<b>(806)244-0258</b>	<b>2120 E Palmer Wasilla Hwy</b>	<b>Wasilla</b>	<b>99543</b>
	4											

**AutoMerged Contacts**

First Name	Last Name	AM Winner	Modified On	AM R...	AM ...	AM ...	AM Match Type	Email	Email Ac
No Contacts found for this Contact. Select Add (+).									

Active

[Click here to learn how to customize the Potential Duplicates Subgrid/WebResource to your needs.](#)

## AutoMerging Duplicates

Now you can select records from multiple sets and AutoMerge them all at once.

You may select any (or all) records from any (or all) sets on the page and AutoMerge all sets with a single click. The behavior is the same no matter what records you've selected from each duplicate set. The record with a Rank of 1 is the winner-designate and will remain active, but will disappear from this list view of duplicates after you AutoMerge the set.

### AutoMerge Set Primary

If you want to change the winner of a particular duplicate set, simply select that record (Rank>=2) and click the **AutoMerge Set Primary** button. That record will move to the #1 position and the other records will shift down in order.

### AutoMerge Ignore

If you want to remove record(s) from their set(s), select the record(s) and click the **AutoMerge Ignore** button. The selected records will be removed from the view and be ignored from future analyses. If you ignore all but one record from a duplicate set, the remaining record will indeed be included in future analyses, but it

nonetheless disappear from the view because it no longer has other matched records associated with it.

**NOTE:** Ignored records can be UN-Ignored at any time with a Bulk Edit or by submitting an “Unignore All” request in the AutoMerge Management App.

Now that you understand how matching and ranking are being performed via your requirements, you can start to AutoMerge large numbers of duplicates quickly. Once ready, select the whole page of duplicate sets and click the **AutoMerge** button. Be prepared to wait several seconds for the synchronous process to complete.

## Viewing AutoMerged History

### In Contacts View

To view the deactivated AutoMerged records, switch over to the "AM Contact History (Losers)" View. In the highlighted column, you have links to the remaining active winner records.

First Name	Last Name	AM Winner	Modified On	AM ...	AM ...	AM ...	AM Match Type	Email	Email Address 2	Mobile Phone	Business Phone
Brad	Zellers	<a href="#">Brad Zellers</a>	8/19/2020 12...	2	100	100	FIRST-LAST-PHONE		brady@bolthome...	(502) 748-3770	
Rose	Yaslund	<a href="#">Rose Yaslund</a>	8/19/2020 12...	2	100	100	FIRST-LAST-STREET		yazrosd@yahoo.n...		(726)452-3322
Noelle E	Umbarger	<a href="#">Noelle Umbarger</a>	8/19/2020 12...	2	100	100	EMAIL-FIRST	umbarger2002@yaho...	umbarger2002@y...		8062461886
Farrukh	Zaidi	<a href="#">Farrukh Zaidi</a>	8/13/2020 11...	2	100	100	FIRST-LAST-PHONE			(816) 501 2423	(816) 501 2423
Debra	Yazzie	<a href="#">Debra Yazzie</a>	8/13/2020 11...	3	100	100	EMAIL-FIRST	debra.yazzid@apr.com	d_a_yazzid@yahoo...		
Debra	Yazzie	<a href="#">Debra Yazzie</a>	8/13/2020 11...	2	100	100	FIRST-LAST-PHONE			701-248-0308	701-248-0308
Mike	Yates	<a href="#">Mike Yates</a>	8/6/2020 4:0...	2	100	100	FIRST-LAST-PHONE				(522) 824-6161
DENNIS	YANCEY	<a href="#">Dennis Yancy</a>	8/6/2020 4:0...	2	100	100	EMAIL-FIRST		dyancey75@com...		(310) 455-4223
Aaron	Zeper	<a href="#">aaron zeper</a>	8/6/2020 4:0...	2	100	100	FIRST-LAST-PHONE			(370) 252-2410	(370) 252-2410
Steven	Ingersoll	<a href="#">Steve Ingersoll</a>	8/6/2020 4:0...	2	100	100	FIRST-LAST-PHONE	skiddspb@cow.net	skiddspb@cow.net	(502) 337 3351	
Maria	Iniguez	<a href="#">maria iniguez</a>	8/6/2020 4:0...	2	100	100	EMAIL-FIRST		miniguez06@gm...		
CAROL	YACAVONE	<a href="#">Carol Yacavone</a>	8/6/2020 4:0...	2	100	100	EMAIL-FIRST	carolyacavond@hotmail...	carolyacavond@h...		(502)366 8855

### In Active Winner Record

In the winner record, you can see the **AutoMerged Contacts** subgrid and the loser record for historical reference (until you decide to recover the space by bulk deleting the inactive Contacts in your CRM.) By default, all fields not populated on the winner will be pulled from the first loser, according to increasing rank.

**CONTACT INFORMATION**

Full Name: Noelle Umbarger

Job Title:

Account Name:

Email: umbarger2002@yahoo.com

Business Phone: (806)244-0258

Mobile Phone:

Preferred Method of C: Any

Address: 2120 E Palmer Wasilla Hwy  
Wasilla, AK 99543  
USA

**Potential Duplicates (current record in BOLD)**

Select the value of each column/field to be set on the Winner when you click the AutoMerge button. The first non-NULL value of each column is

#	Rank	Match Type	Precision %	First Name	Last Name	Email	Mobile Phone	Business Phone	Home Phone	Street 1	City	ZIP/PostalCode
No record found												

**AutoMerged Contacts**

First Name	Last Name	AM Winner	Modified On	AM R...	AM ...	AM ...	AM Match Type	Email	Email Ac
Noelle E	Umbarger	Noelle Umbarger	8/19/2020 1...	2	100	100	EMAIL-FIRST	umbarger2002@yah...	umbar

We added the **AutoMerged Contacts** subgrid to the OOB form for our demo. You won't see it on your OOB Contact form after importing our managed solution. Someone with customization privileges will have to add it to the form you are using.

## Common AutoMerge Errors

Various errors can occur while you are AutoMerging duplicates. Timeout or configuration errors are the most common.

Here's a quick reference to the common errors and how to troubleshoot them:

[AutoMerge Errors and Troubleshooting Resources](#)