

Duplicate Manager

Find duplicates with your own rules, review them side by side, merge safely, and undo if you need to.

Duplicate Records

[< Back](#)
DG-000069
[Open](#)

Fields to show

Different

Field	Result After Merge	Donald KnuthDemo Principal Contact Confidence: 100 ☒ Keep this record Remove From Group	Donald KnuthDemo Contact Confidence: 100 ☐ Keep this record Remove From Group	Donald KnuthDem Contact Confidence: 100 ☐ Keep this reco Remove From G
FULL NAME	Donald KnuthDemo	Donald KnuthDemo	Donald KnuthDemo	Donald KnuthDemc
CONTACT DESCRIPTION COMBINE	DM Demo	DM Demo	DM Demo	DM Demo
BUSINESS PHONE	(555) 020-0105 Changed		(555) 020-0105	
CONTACT ID	003gK000018CwOHQA0	003gK000018CwOHQA0	003gK000018CwOIQAO	003gK000018CwO
PHOTO URL	/services/images/photo/003gK000018CwOHQA0	/services/images/photo/003gK000018CwOHQA0	/services/images/photo/003gK000018CwOIQAO	/services/images/pl
TITLE	Engineer Changed		Engineer	Engineer
Related Records				
Case (Cases)	3	2	1	0

[Recheck](#)
[Dismiss](#)
[Not a Duplicate](#)

Undo

for merges and syncs, from a backup taken first

3

save warnings: stop it, ask once, or save and flag

5

languages: English, German, Spanish, French (CA), Portuguese (BR)

Duplicate Manager **builds on your org's own duplicate rules** and adds its own match rules for any object. It lists the duplicate groups for review, and lets people **merge, sync or convert a Lead into the Contact it matches**. Merges and syncs take a **backup first**, so they can be undone. It can also warn people as they save a record that looks like a duplicate.

Duplicates cost trust, time and revenue. Cleaning them up should be safe.

Duplicate rules can flag a duplicate, but resolving it is slow, manual and risky: which record survives, what happens to related records, and what if it was a mistake? Many teams leave duplicates alone because a bad merge cannot be taken back.

1

Merge with confidence

Review each group side by side, pick the record to keep and see the **result after the merge** before you commit. Merges and syncs are backed up so they can be **undone**.

2

Use the matching you already trust

Rules listen to your **org's duplicate rules**, so nothing is replaced. Match Rules add scoring on **any object**, with a preview before going live.

3

Stop duplicates at the door

Warning rules act when a record is saved: stop it, ask once, or save it and flag it.

4

Convert Leads to the right Contact

When a Lead matches an existing Contact, convert it into that Contact from the review screen.

5

Runs on a schedule

Scans run hourly in the background by rule, with pause switches and retention settings.

6

Control who can do what

Eight custom permissions separate merge, sync, convert, dismiss, run scan, undo and manage rights. By default people can only act on records they could already edit and delete.

Without Duplicate Manager

- Duplicates flagged, then left in place because merging is risky
- No clear view of what a merge will do to related records
- A wrong merge cannot be reversed
- Duplicates keep arriving because saves are not checked

With Duplicate Manager

- A review screen with the result after merge
- Related records counted per candidate
- Backup first, with Undo from History
- Warnings as the record is saved

WHAT IT DOES

Review, resolve and prevent

Every duplicate group in one list

Filter by status, object, rule and period, see group counts, and take bulk actions.

Duplicate Records

History

Open Groups10

Too Large0

Failed0

Resolved in 30 Days0

StatusOpen

ObjectAll objects

RuleAll rules

SearchSearch record names

☐	Group	Records	Object	Rule	Count	Confidence	Found	Status
☐	DG-000069	Donald KnuthDemo, Donald KnuthDemo, Donald KnuthDemo	Contact	DM Demo Contacts	3	100	10/14/2026	OpenReview
☐	DG-000068	Barbara LiskovDemo, Barbara LiskovDemo	Contact	DM Demo Contacts	2	100	10/14/2026	OpenReview
☐	DG-000067	Edsger DijkstraDemo, Edsger DijkstraDemo, Edsger DijkstraDemo	Contact	DM Demo Contacts	3	100	10/14/2026	OpenReview
☐	DG-000066	Alan TuringDemo, Alan TuringDemo	Contact	DM Demo Contacts	2	100	10/14/2026	OpenReview
☐	DG-000065	Grace HopperDemo, Grace HopperDemo, Grace HopperDemo	Contact	DM Demo Contacts	3	100	10/14/2026	OpenReview
☐	DG-000064	Ada LovelaceDemo, Ada LovelaceDemo	Contact	DM Demo Contacts	2	100	10/14/2026	OpenReview
☐	DG-000003	DM Demo Item 3, DM Demo Item 3, DM Demo Item 3	DM Test Item	DM Demo Items	3	100	10/13/2026	OpenReview
☐	DG-000002	DM Demo Item 2, DM Demo Item 2	DM Test Item	DM Demo Items	2	100	10/13/2026	OpenReview

The Records tab.

Duplicate Records

Back

DG-000069

Open

Fields to showDifferent

Field	Result After Merge	Donald KnuthDemo Contact Confidence: 100 Keep this record Remove From Group	Donald KnuthDemo Contact Confidence: 100 Keep this record Remove From Group	Donald KnuthDemo Contact Confidence: 100 Keep this record Remove From Group
FULL NAME	Donald KnuthDemo	Donald KnuthDemo	Donald KnuthDemo	Donald KnuthDemo
CONTACT DESCRIPTION COMBINE	DM Demo	DM Demo	DM Demo	DM Demo
BUSINESS PHONE	(555) 020-0105 Changed		(555) 020-0105	
CONTACT ID	003gK000018CwOHQA0	003gK000018CwOHQA0	003gK000018CwOHQA0	003gK000018CwOJQA0
PHOTO URL	/services/images/photo/003gK000018CwOHQA0	/services/images/photo/003gK000018CwOHQA0	/services/images/photo/003gK000018CwOHQA0	/services/images/photo/003gK000018CwOHQA0
TITLE	Engineer Changed		Engineer	Engineer
Related Records				
Case (Cases)	3	2	1	0

Review a group before merging.

Side-by-side review

See each candidate with its confidence, choose the record to keep, and see the Result After Merge, with changed fields marked and related records counted.

History with Undo

Every merge, sync and convert is recorded with who did it and when. Merges and syncs can be undone from their backup.

Duplicate Records

Groups

TypeAll

StatusAll

RuleAll

PeriodLast 30 days

Action	Records	What Changed	Rule	Status	By	When
UndoACT-000023	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	Restored (Undelete), 1 related records moved back	DM_Demo_Items	Done	John Lawton	10/20/2026, 1:17:14 AM
MergeACT-000022	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	1 merged away, 1 related records moved, 1 fields changed	DM_Demo_Items	Undone	John Lawton	10/20/2026, 1:17:11 AM
UndoACT-000021	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	Restored (Undelete), 1 related records moved back	DM_Demo_Items	Done	John Lawton	10/14/2026, 12:48:23 AM
MergeACT-000020	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	1 merged away, 1 related records moved, 1 fields changed	DM_Demo_Items	Undone	John Lawton	10/14/2026, 12:48:19 AM
UndoACT-000019	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	Restored (Undelete), 1 related records moved back	DM_Demo_Items	Done	John Lawton	10/13/2026, 10:58:33 PM
MergeACT-000018	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	1 merged away, 1 related records moved, 1 fields changed	DM_Demo_Items	Undone	John Lawton	10/13/2026, 10:58:28 PM
UndoACT-000017	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	Restored (Undelete), 1 related records moved back	DM_Demo_Items	Done	John Lawton	10/13/2026, 9:42:47 PM
MergeACT-000016	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	1 merged away, 1 related records moved, 1 fields changed	DM_Demo_Items	Undone	John Lawton	10/13/2026, 9:42:44 PM
UndoACT-000015	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	Restored (Undelete), 1 related records moved back	DM_Demo_Items	Done	John Lawton	10/13/2026, 9:11:55 PM
MergeACT-000014	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	1 merged away, 1 related records moved, 1 fields changed	DM_Demo_Items	Undone	John Lawton	10/13/2026, 9:11:55 PM
UndoACT-000013	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	Restored (Undelete), 1 related records moved back	DM_Demo_Items	Done	John Lawton	10/13/2026, 9:10:17 PM
MergeACT-000012	DM Demo Item 0, DM Demo Item 0, DM Demo Item 0	1 merged away, 1 related records moved, 1 fields changed	DM_Demo_Items	Undone	John Lawton	10/13/2026, 9:10:13 PM

History.

WHAT IT DOES, CONTINUED

Rules you control

The screenshot shows the 'Match Rules' editor. At the top, it says 'Match Rules' and 'New Match Rule'. There's a toggle for 'Active' which is currently 'Off'. Under the 'Basics' section, there are fields for 'Name' (set to 'Opportunities: Same Account and Name'), 'Object' (set to 'Opportunity'), and a 'Description' box containing the text: 'Finds Opportunities on the same Account with a similar name, confirmed by amount and close date. Uses Match Rules, so it needs no Salesforce duplicate rule.' Below this are 'Match Threshold' (85) and 'Most Records to Compare With' (25). The 'Fields to Compare' section has a note: 'Each field adds to the score by its weight. The score is the weighted average of how alike the two records are in each field, from 0 to 100.' It shows 'Field 1' with 'Name (Name)' selected for 'Compare With Object' (set to 'This object') and 'How to Compare' (set to 'Fuzzy'). There are also 'Also Compare With' (set to 'None') and 'Weight' (set to '1') options.

The Match Rule editor.

Warnings at save time

Warn when a record being saved looks like a duplicate, and choose how firmly: stop, ask once or flag. A banner on the record offers Review, Find and Merge, or Check Now.

The screenshot shows a warning banner with a red 'X' icon. The text says: 'We found 1 potential duplicate of this Contact.' To the right are three buttons: 'Review', 'Find and Merge', and 'Check Now'. Below the text, it says 'DM Demo Contacts (DG-000064)' and 'Ada LovelaceDemo Contact Match 100'.

A duplicate warning on a record.

The screenshot shows the 'Duplicate Manager Rules' editor. It says 'Edit Rule' and has an 'Active' toggle which is 'On'. Under the 'Basics' section, 'Name' is 'DM Demo Contacts' and 'Object' is 'Contact'. The 'Description' box says: 'Finds Contacts that share a name and email address, keeps the one with the most related records, and combines their descriptions.' The 'Matching' section has a note: 'Matching is done by your org's duplicate and matching rules. This rule chooses which of them it uses.' It shows 'Matching engine' (set to 'Salesforce duplicate rules') and 'Duplicate Rules' (set to 'Standard Contact Duplicate Rule').

The Rule editor.

Match Rules for any object

Choose the fields to compare, how closely they must agree and how much each counts, then preview before anything goes live.

Rules and settings

Choose which duplicate rules to listen to, which records are in scope, what happens to a group, who survives and when it runs.

HOW IT WORKS

Up and running in four steps

1. Enable objects

In Settings, choose the objects Duplicate Manager covers.

2. Create a rule

Pick the duplicate rules to listen to, the scope, the survivor and the schedule.

3. Review groups

Scans find groups. Review them side by side.

4. Resolve

Merge, sync or convert. Merges and syncs are backed up and can be undone.

Who it is for

- **Data stewards and Salesforce admins.** clean up duplicates in bulk with a safety net.
- **Sales operations and marketing.** convert Leads to the Contacts they match and stop new duplicates.
- **Compliance and data quality leads.** a history of who merged what, with a backup behind each merge.

Built for trust

- **Native to Salesforce.** It works with the platform's own duplicate and matching rules.
- **Backup before a merge or sync,** so either can be undone from History. Converting a Lead cannot be undone, so it has its own permission.
- **Four permission sets and eight custom permissions** for fine-grained control.
- **In-app Administrator and User guides** in five languages.

Everything included

- | | |
|---|--|
| ✓ Rules that listen to your org's duplicate rules | ✓ Save warnings: stop, ask once, or flag |
| ✓ Match Rules with scoring on any object, with preview | ✓ Record-page component: Review, Find and Merge, Check Now |
| ✓ Duplicate groups with filters and bulk actions | ✓ Hourly scheduler with pause switches |
| ✓ Side-by-side review with Result After Merge | ✓ Backup and group retention settings |
| ✓ Merge, sync mapped fields, convert Lead to matching Contact | ✓ Elevated access option for data stewards |
| ✓ Backup before merge and sync, Undo from History | ✓ Admin, User, Read Only and Save Warnings sets |
| ✓ Dismiss and Not a Duplicate | ✓ In-app guides in five languages |

See your duplicates, safely

Duplicate Manager is built, tested and documented. Ask for a walk-through on one object with a rule built from your own duplicate rules.