

Duplicates, Mass Updates & Cleanup

Finding & merging duplicates

- The CRM flags likely duplicates when records are created, and you can hunt for them with filtered/sorted list views (by name or email).
- To merge: select two or more records in a list → **Merge** → choose which values to keep → confirm. Merging combines them into one and preserves their links.

“ Merging is **not easily undone**. Double-check you're merging the right records and keeping the right values.

Mass updates

- Select records in a list view → **Mass Update** → choose the field(s) and the new value → apply to **all selected**.
- Handy for bulk reassignment, status changes, or team changes.

“ A mass update changes **every selected record at once**. Check your **filter and selection** before applying. Sandbox-test anything large or unfamiliar.

Mass delete

- Select records → **Remove**.

⚠ **Deletion is the most dangerous bulk action.** Confirm the exact filter and selection. Prefer **deactivating or closing** records where the record type allows it. For anything beyond a few obvious junk rows, **Sandbox-test the exact filter first** and take an **export as a backup** immediately before deleting.

If you delete something by mistake

Stop making changes. Recovery usually means **restoring from backup**, which is time-sensitive — the sooner you raise it, the more recoverable it is. See [Troubleshooting & Recovery](#) and [Getting Help and Next Steps](#) right away.

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