

Step 1.

Select a board and groups to get started. The current board is selected by default but you can change it.

Select a group or multiple groups to include in the search. When you select multiple groups, the “Treat selected groups as a collective” shows up, by default checked.

Treat selected groups as a collective

This allows you to handle each group independently or as one big group.

For example, if you would like to find duplicate names in two groups, say Group A and Group B with both having an item called Item 1, when the checkbox is unchecked, the app would not find any duplicate at the end of the search because both groups will be treated independently.

With the checkbox checked, a duplicate will be found because both groups will now be treated as one group

Step 2

Select the columns you would like to include in the search

Search Options

Match at least one

This option allows for “**OR**” operations.

For example, in your board, you would like to find duplicate clients either by name or phone number. If this option is unchecked, then two clients will have to have both the same name and phone number to be considered a duplicate.

If checked, clients will be considered as duplicates if they have either the same name or the same phone number or both.

Ignore inner spaces

This option ignores the number of spaces between characters.

Therefore, the name John Doe with two multiple spaces between John and Doe will be considered the same as the one with a single space between the names

Exclude empty cell items

This option excludes items with at least one empty column of the selected columns from the search.

For example, if searching for duplicate client name and address, should the client have no address in the address column, the client will be excluded from the search.

Exclude empty cells

This option excludes empty selected columns from the search.

For example, if searching for duplicate client name and address, should the client have no address in the address column, only the client’s name will be included in the search with the address ignored.

Please note that, this option is not available if you select the “Match at least one” option.

Case sensitive

This option includes case sensitivity during the search.

Therefore, if checked the name “John Doe” and “John doe” will be considered as different.

Ignore character order

If checked, this option will ignore the order in which the characters of the selected columns are arranged.

Therefore, the name “John Doe” will be considered the same as “Doe John”.

Step 3

Data Find Type

Please note that items are sorted by their creation date and not by their location or position on the board.

Multiple

Duplicates but exclude the first instance

This searches for duplicates in your board and performs the selected action on all but the first found duplicate.

If you have 3 duplicates in your board and would like to delete any found duplicates, the last two duplicates will be deleted leaving the first one.

For example, say you have items A, B, B, B, C. The final result will be B, B

Duplicates but exclude the last instance

This searches for duplicates in your board and performs the selected action on all but the last found duplicate.

If you have 3 duplicates in your board and would like to delete any found duplicates, the first two duplicates will be deleted leaving the last one.

For example, say you have items A, B, B, B, C. The final result will be B, B

All duplicates

This searches for duplicates in your board and performs the selected action on all of the found duplicates.

If you have 3 duplicates in your board and would like to delete any found duplicates, all of the 3 duplicates will be deleted.

For example, say you have items A, B, B, B, C. The final result will be B, B, B.

This option is mostly used for the Merge option, since in most cases you would like to merge all duplicates of a particular item into one.

Unique values

This searches for only unique values in your board.

An item is considered to be unique if all the selected columns do not exist anywhere else in all the selected groups.

For example, say you have items A, B, B, C. The final result will be A, C.

Deduplicated values

This searches for unique values in your board regardless of whether or not duplicates exist for those unique values.

For example, say you have items A, B, B, C. The final result will be A, B, C.

Deduplicated values with first duplicate instance

This searches for unique values in your board regardless of whether or not duplicates exist for those unique values together with their first duplicates.

For example, say you have items A, B, B, B, C. The final result will be A, B, B, C.

Any

This option returns any item or items found in all your selected groups.

Useful for copying or moving items to different groups or boards,

Single

Please note that this section will always return only a single item.

Only first duplicate

Searches for all duplicates and returns only one of the first duplicates

For example, say you have items A, B, B, B, C. The final result will be B

Only last duplicate

Searches for all duplicates and returns only one of the last duplicates

For example, say you have items A, B, B, C, C, D. The final result will be C

Only first unique instance

Searches for all unique values and returns only one of the first unique values.

For example, say you have items A, B, B, B, C. The final result will be A

Only last unique instance

Searches for all unique values and returns only one of the last unique values.

For example, say you have items A, B, B, B, C. The final result will be C

Any last

Returns the last value in the selected groups, whether it is a duplicate or not.

For example, say you have items A, B, B, B, C. The final result will be C.

Filter results

Get all values

Does not filter any of the found values.

For example, if you have the “Duplicates but exclude the first instance” selected, this option will not further filter the results and return all the duplicates found

Get values with item name of:

Filters the found results by the specified item name

For example, if you have the “Duplicates but exclude the first instance” selected, this option will further filter the found results by the specified item name and return only duplicates which have the item name specified in the input box

Step 4

Found Results Actions

Use status column

Create or use an existing status column to identify the results found.

- **Select existing:** Select an existing status column in your board
- **Create new:** The app will create a new status column in your board to show the found results. If after completion you can't see the created board, please refresh your page or navigate to another board and then navigate back to the original board
- **Use existing column with the same name:** When checked, this will use an existing column in your board if it has the same name specified in the “Create new” input box. If unchecked, it will always create a new column.
- **Status text:** This is the name given to the label that will be used to mark the found results. By default, it is named as “Duplicate”.

Merge duplicates

Merge any found duplicates in your board. This option is only available when you select either “Duplicates but exclude the first instance”, “Duplicates but exclude the last instance” or “All duplicates” in Step 3.

It is advisable to select “All duplicates” in Step 3 so as to merge all the duplicates found for a particular item.

Merge Table

Column

Contains all the supported columns in your board that will be merged

Option

Defines which column value should be maintained, updated or modified.

All column types have these three options:

1. Keep First Non-empty
2. Keep Any First
3. Keep Any Last
4. Keep Last Non-empty

Some columns like the Number, Name, Text, Long Text, Status, Timeline and Date columns also have a “Custom” option.

Keep First Non-empty

This will keep the first found value for that column and not replace it with any incoming new value provided it is not empty. If it is empty, it will replace it with the first incoming value.

Keep Any First

This will keep the first found value for that column and not replace it with any incoming new value provided even if the existing value is empty.

Keep Any Last

This will replace the existing value with any new incoming value, whether the incoming value is empty or not.

Keep Last Non-empty

This will replace the existing value with any new incoming value, only if the incoming value is not empty.

Action

Columns with a “Custom” option have the option to choose an action

Select/Input

This allows you to choose a value in the “Separator/Custom Result” which will always be assigned to the merged item after merge.

Join

This will join all column values for a set of duplicates and assign them to the final merge item.

Separator/Custom Result

In this section, you can specify what value will be used for the “Select/Input” action or select which separator to be used to join all the sets of duplicates.

When completed, you can click on the “save ✓” icon to save your changes or “cancel ✕” to cancel your changes for that row.

Input boxes with an arrow at the end indicate that there are default options you can select for that column or you can write in the input box itself and the written value will be used.

For example, in the image below, which is a custom action for a status column, you can select “Blank-Status” from the dropdown list which will always set a blank status label for the merged item or can write directly in the input box, for example “Merged”. In this case, anytime duplicates are merged, the merged item will be given a label of “Merged”.



The image shows a configuration interface for a custom action. On the left, there is a dropdown menu with the text "Custom" and a downward arrow. To its right is the text "Select/Input". Further right is another dropdown menu with the text "Merged" and a downward arrow. Below this second dropdown, the text "Blank-Status" is visible, indicating it is a selectable option. To the right of the "Merged" dropdown are two icons: a checkmark (✓) and an 'X' (✕).

Options (Merge Options)

Here you can select further options or settings for the merge functionality.

Include Updates

Indicates where or not to merge item updates as part of the merge process

Merge Update Option

- **Join:** This will collect all the updates from a set of duplicates and attach them to the merged item.
For example, if you have a set of updates A, B, C for three items which are duplicates of each other, this option will take the updates of B and C and attach them to A.

- **Keep Any Last:** This will take only the updates from the last duplicate for a set of duplicates and attach those updates to the merged item.
For example, if you have a set of updates A, B, C for three items which are duplicates of each other, this option will take the updates of only C and attach them to A.

Attach Creator Name

By default, after updates are merged, the user who initiated the merge is automatically assigned by monday.com as the creator of the update.

By checking this option, the app can attach the name of the original creator of the update to the footer of the update.

- **Prefix:** This indicates a prefix that can be attached to the name of the original creator of the update. For example, "Created by"

After Merge

Delete duplicates (Default)

This deletes the extra items and leaves the item which contains the merged values after the merge is completed.

Do Nothing

This will leave the extra items together with the merged item after merge

Move duplicates to group

This will move the extra items to a selected group

Move/Copy

The move option moves items between groups in the same board if there is no change to the "Select and Map" section or creates new items with the same parameters as the original and deletes the original item if the Destination board is different from the Source board or if there is a change in the "Select and Map" section. The Copy option always does the latter but without deleting the original item.

Location to move/copy:

- **Use existing board:** Use a board that already exists in your selected workspace(s) where the app is installed.
 - **Use existing group:** Use a group that already exists in the above selected board
 - **Create a new group:** Create a new group in the above selected board
- **Create a new board:** Create a new board in the selected workspace(s) where the app is installed.
Name: Name of the new board to be created
Group name: Group name of the new group to be created in the new board

Include columns

Whether or not to move/copy other columns in the board apart from the name column

Edit

Clicking this button will show a table where you can configure how the columns will be copied or moved over from the Source board to the Destination.

Delete

This will delete any found results.