

Mango Merge

User Guide

Table of Contents:

1. Introduction
2. Features of this Product
3. About this Product
 1. Configuration Page
 2. Mango Merge
 - Search Records
 - View Duplicates
 - Compare Records
 - Confirm Merging



Introduction:

Duplicate records are a challenge faced by all companies on various levels and lead to bad data.

When the word duplicate records occur, there are two questions that are most commonly asked by customers:

1. How do I identify the existing duplicates in my organization?
2. How do I clean up those existing duplicates that I have identified?

Well of course, and it's inevitable that some duplicates will get created and some housekeeping will need to be done around those duplicates, but let's see if we can keep those to a minimum.

Mango Merge is a native salesforce tool that helps users/customers manage duplicates in the organization by merging and deleting them, removing the identified duplicate records.

Features of this Product:

- ❑ Remove potential duplicate records
- ❑ Works for standard and custom object
- ❑ Merge specific fields on duplicate records



Package Installation:

- Package installation link:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4x00000066lm>

A. Steps to install the managed package:

1. Open the managed package link in the browser tab where you are logged into salesforce. Select Install for all users. Click Install.

Install Mango Merge
By Record Merge

⚠ What if existing component names conflict with ones in this package?
☒ Do not install.
☐ Rename conflicting components in package.

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

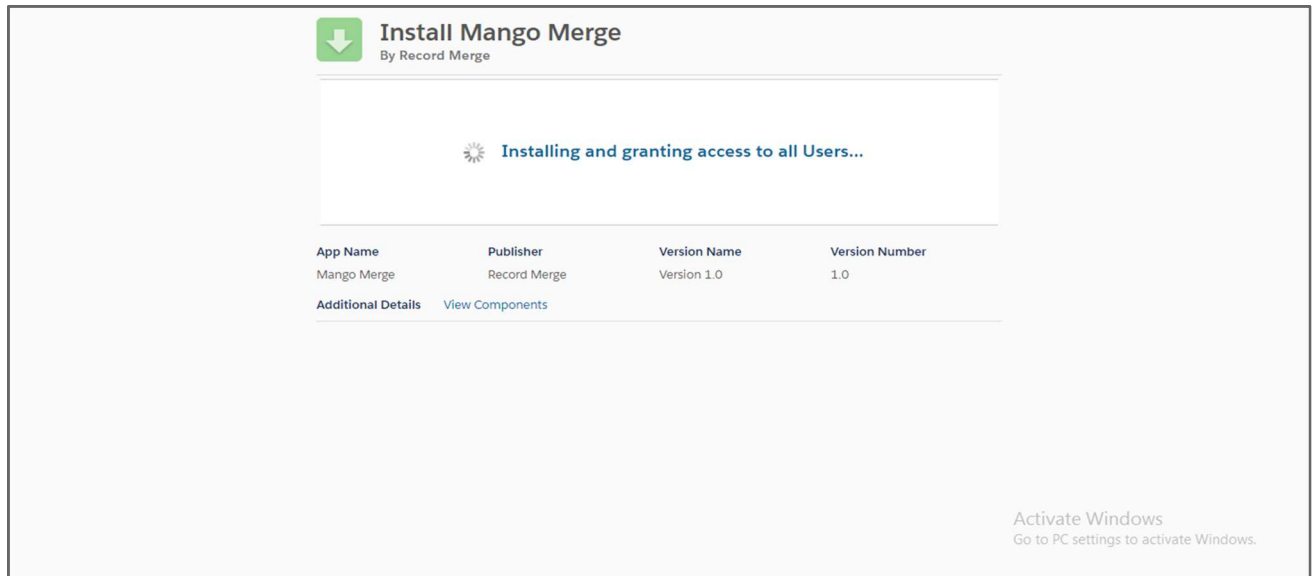
App Name	Publisher	Version Name	Version Number
Mango Merge	Record Merge	Version 1.0	1.0

[Additional Details](#) [View Components](#)

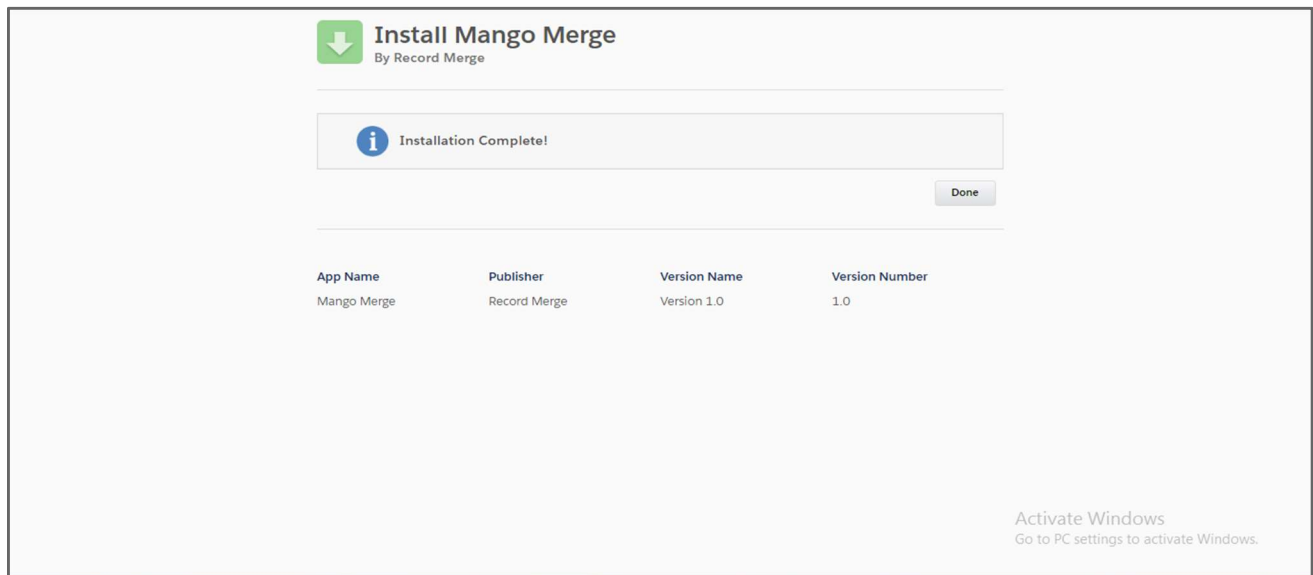
Activate Windows
Go to PC settings to activate Windows.

2. Your package installation will begin please wait for few a seconds.





3. After package is successfully installed click done to complete the process.



4. After clicking on done you can check your package is installed successfully under the installed packages tab in salesforce.



Setup

Home

Object Manager

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Apps

App Manager

AppExchange Marketplace

Connected Apps

Lightning Bolt

Mobile Apps

SETUP

Installed Packages

Help for this Page

Visit AppExchange

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Mango Merge	Record Merge	1.0		N/A	N/A	N/A	N/A	9/25/2021, 2:34 AM	✓	1	2	1	Not Applicable
Uninstall	SmartCurrencyConverter	Astrea IT Services	1.0	AstreaCR	Active	Unlimited	0	Does not Expire	10/28/2020, 10:35 PM		0	0	1	Passed

Uninstalled Packages

No uninstalled package data archives

Activate Windows

Go to PC settings to activate Windows.



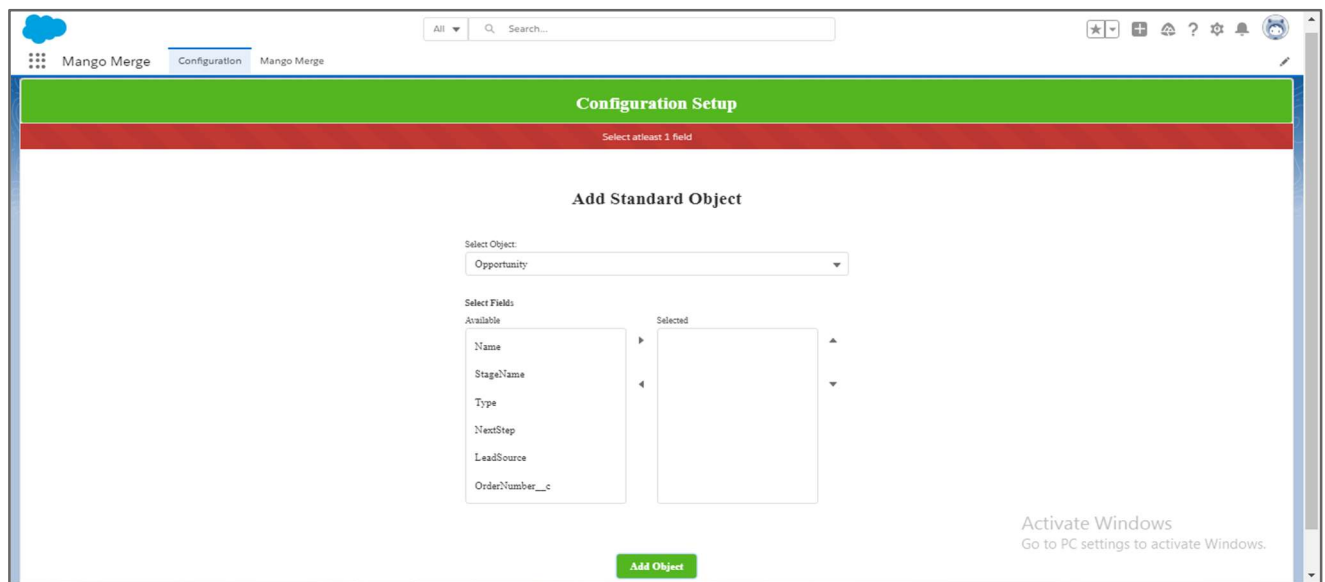
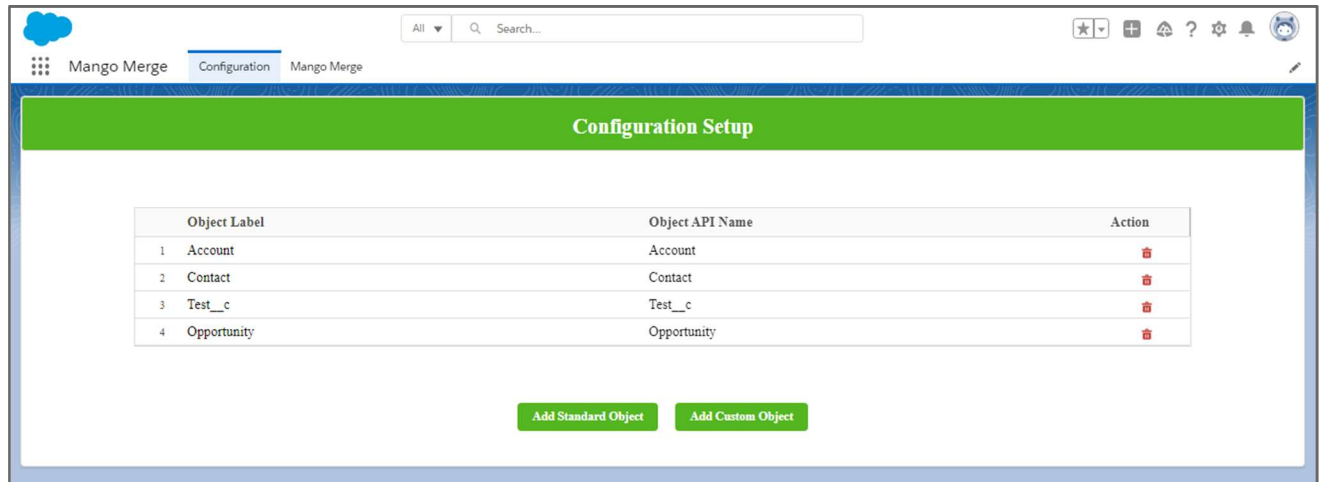
About this product:

Mango merge consists of two lightning tabs:

1. Configuration Page

- a) Before getting your hands on finding duplicates using Mango Merge and performing merge and delete actions, the user needs to set up which object records need to be identified and on what field basis.
- b) After the user enters the configuration page he will notice a table that will have no records and two buttons which are -
 1. Add standard Object
 2. Add custom Object
- c) When a user clicks on Add standard object button he/she will have a picklist from which standard object can be selected. The picklist will contain the following objects:
 - Account
 - Case
 - Contact
 - Lead
 - Opportunity
- d) After selecting the object, a dual-list box will appear from which fields can be selected.
- e) It is mandatory to select a minimum of one field and a maximum of five fields from the dual-list box else the user will not be able to save the object.
- f) After selecting the fields user can click on Add object button to save the object and now the saved object will be visible on the home page table.
- g) There is an option to delete the object, by clicking on the delete icon on the table user can delete the object record.
- h) The same steps can be followed to add the custom object as well, although the user has the option to select all existing custom objects in the organization, unlike standard objects.
- i) After adding the object user can go to the Mango merge tab to perform the merge and delete action on the potential duplicates.





Mango Merge

Configuration
Mango Merge

All
Q Search...

★
+
🏠
?
⚙️
🔔
🐱

Configuration Setup

Add Standard Object

Select Object:

Opportunity

Select Fields

Available

NextStep
LeadSource
OrderNumber__c

Selected

Name
StageName
Type

Add Object

Go To Home

Activate Windows

Go to PC settings to activate Windows.

Mango Merge

Configuration
Mango Merge

All
Q Search...

★
+
🏠
?
⚙️
🔔
🐱

Configuration Setup

Select only 5 fields

Add Standard Object

Select Object:

Opportunity

Select Fields

Available

Selected

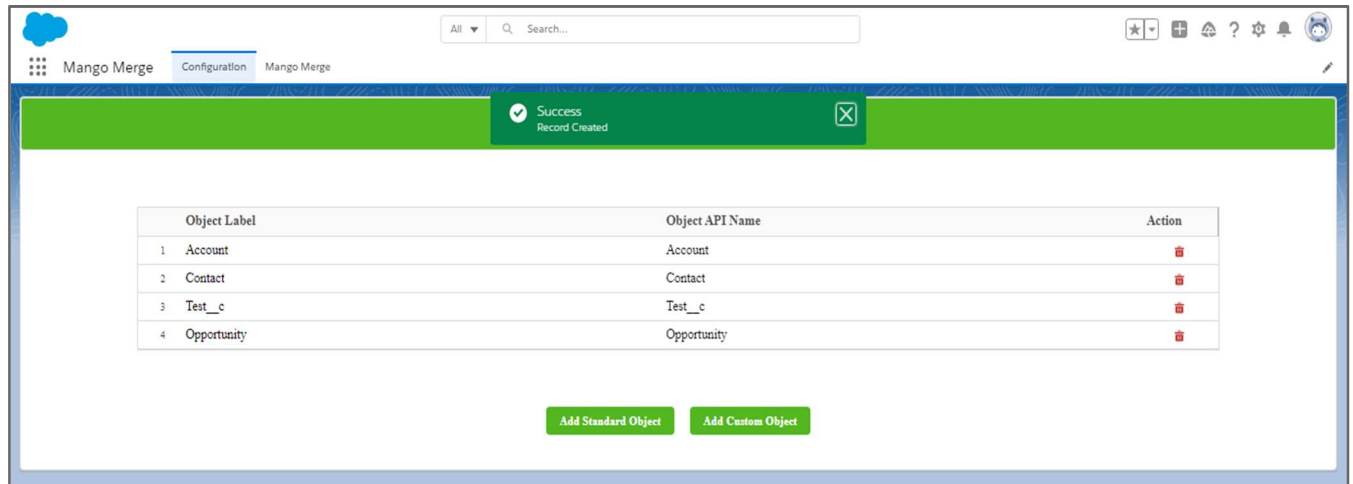
Name
StageName
Type
NextStep
LeadSource
OrderNumber__c

Add Object

Activate Windows

Go to PC settings to activate Windows.





2. Mango Merge

a) After configuring user can switch on to this tab to perform the main functionality to clean up duplicates from the organization.

b) The Mango merge tab consists of four screens.

1. Search Records
2. View Duplicates
3. Compare Record
4. Confirm Merging

Search Records:

- The first screen of the mango merge is basically for providing the search criteria of the records.
- At first user needs to select the object from the select object picklist.
- After selecting the object, the screen will be populated with the fields of that object having a checkbox corresponding to them.

NOTE:

The object and fields visible on this screen are the ones that were added on the configuration setup page. Objects other than that will not be available here to perform searching.

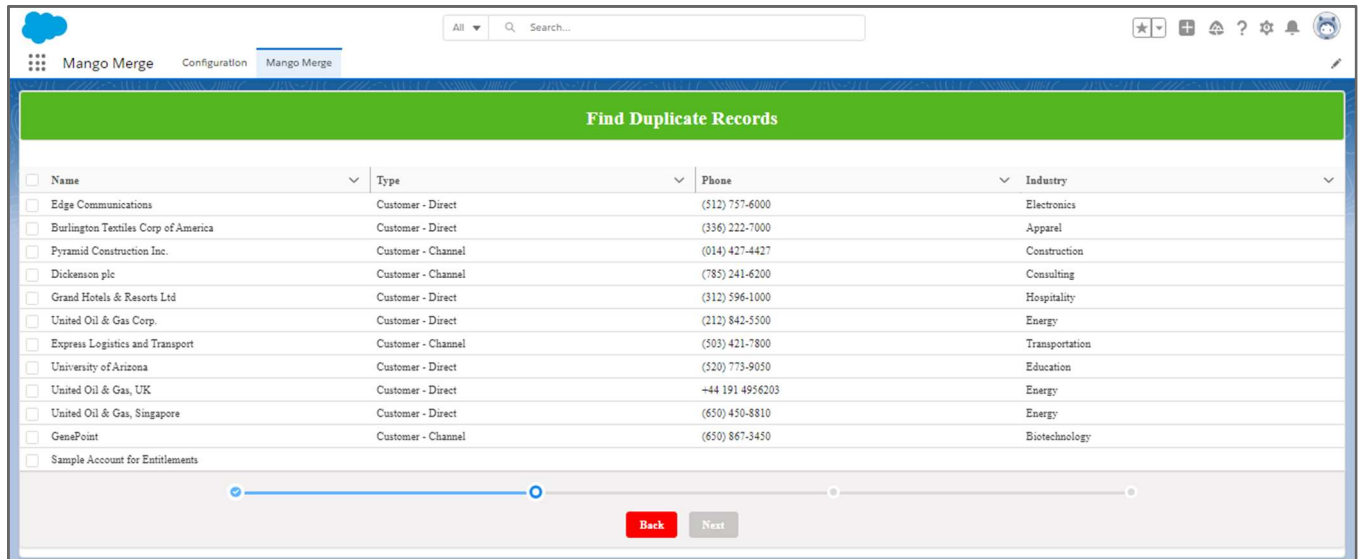


- Now the user has to select the field checkboxes based on which he needs to perform his/her search.
- After selecting the fields user needs to provide search input. Records will be fetched on the basis of provided search input amongst the following fields.
- Click on the next button

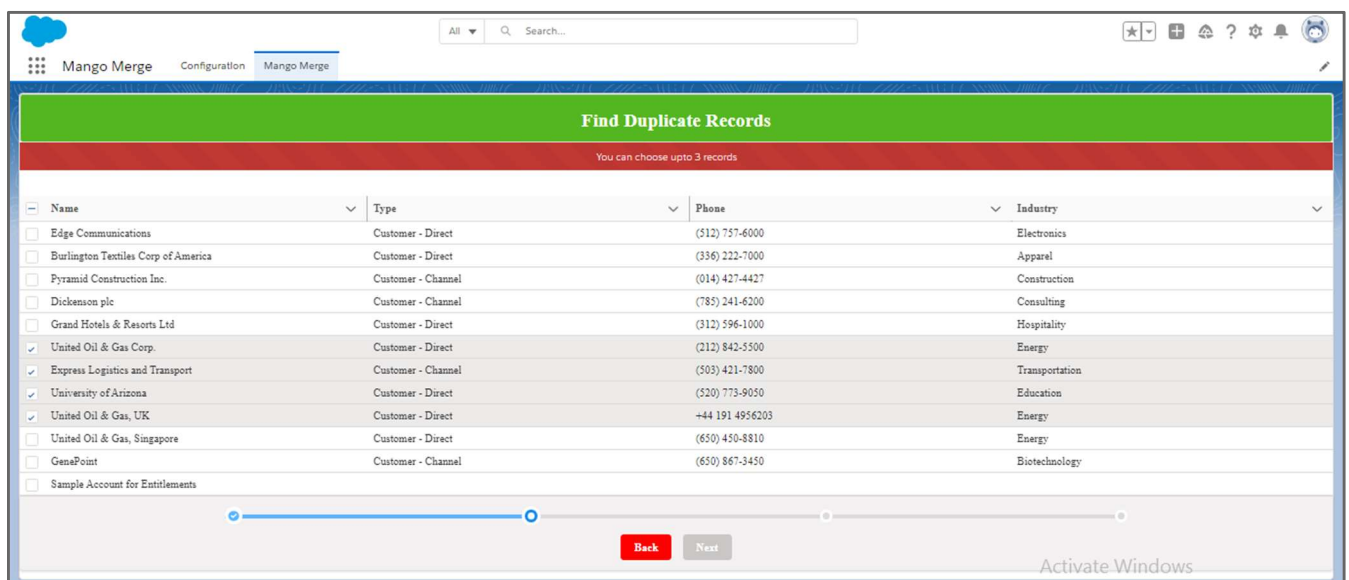
View Duplicates:

- After clicking the next button user will come to the second screen where he/she will be able to see the records based on the search made on the first screen.



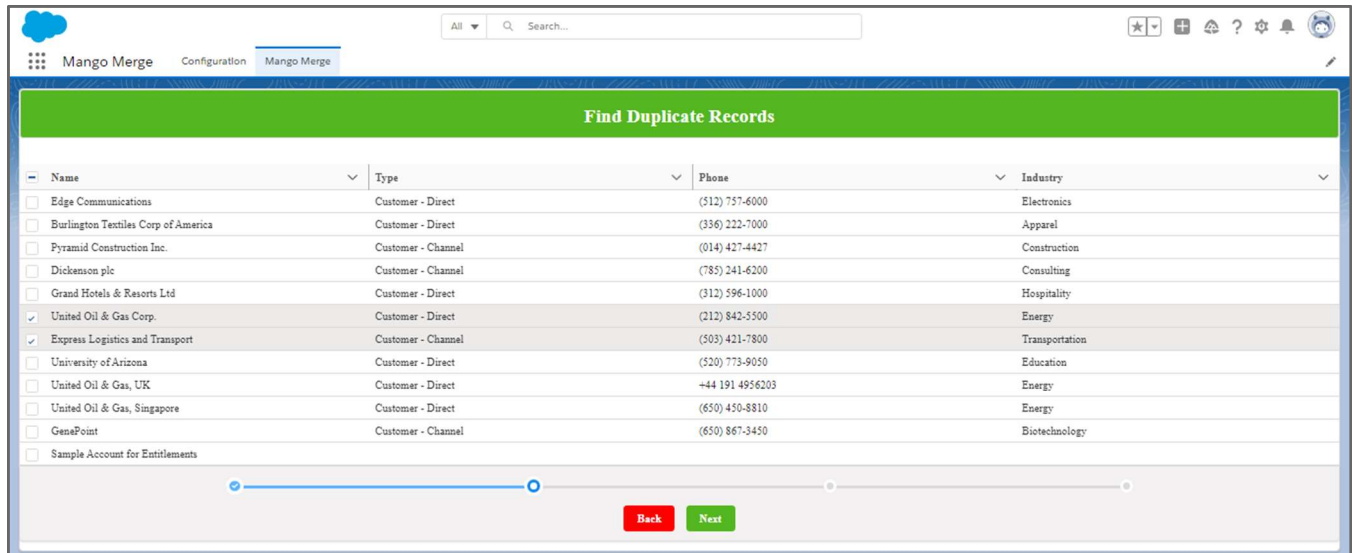


- Now, the duplicates that the user needs to merge & delete can be selected from these fetched records.
- User has the option to select a minimum of two and a maximum of 3 records only.



- After selecting records click on next the button.





Compare Records:

- The third screen is an important one because here the user decides which fields he needs to merge on the duplicate record and delete the other one.
- After clicking next on the third screen all the fields of that object will be fetched, corresponding to which will be the records which were selected on the second screen for merging.



Field Names	United Oil & Gas Corp.	Express Logistics and Transport
Id (Master Record)	☒ United Oil & Gas Corp.	☐ Express Logistics and Transport
Type	☐ Customer - Direct	☐ Customer - Channel
ParentId	☐	☐
BillingStreet	☐ 1301 Avenue of the Americas New York, NY 10019 USA	☐ 620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States
BillingCity	☐ New York	☐ Portland
BillingState	☐ NY	☐ OR
BillingPostalCode	☐	☐
BillingCountry	☐	☐
BillingLatitude	☐	☐
BillingLongitude	☐	☐
BillingGeocodeAccuracy	☐	☐
ShippingStreet	☐ 1301 Avenue of the Americas New York, NY 10019 USA	☐ 620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States
ShippingCity	☐	☐
ShippingState	☐	☐
ShippingPostalCode	☐	☐
ShippingCountry	☐	☐
ShippingLatitude	☐	☐
ShippingLongitude	☐	☐
ShippingGeocodeAccuracy	☐	☐
Phone	☐ (212) 842-5500	☐ (503) 421-7800
Fax	☐ (212) 842-5501	☐ (503) 421-7801
AccountNumber	☐ C0355118	☐ C0047311

- Now the **Id** of whichever object is selected is the one that will get merged, and the other record whose **Id** is not selected is the one from which the field values will be merged onto the first record also this record will get deleted after the merge.

Field Names	United Oil & Gas Corp.	Express Logistics and Transport
Id (Master Record)	☒ United Oil & Gas Corp.	☐ Express Logistics and Transport
Type	☐ Customer - Direct	☒ Customer - Channel
ParentId	☐	☐
BillingStreet	☐ 1301 Avenue of the Americas New York, NY 10019 USA	☒ 620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States
BillingCity	☐ New York	☒ Portland
BillingState	☐ NY	☒ OR
BillingPostalCode	☐	☐
BillingCountry	☐	☐
BillingLatitude	☐	☐
BillingLongitude	☐	☐
BillingGeocodeAccuracy	☐	☐
ShippingStreet	☐ 1301 Avenue of the Americas New York, NY 10019 USA	☒ 620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States
ShippingCity	☐	☐
ShippingState	☐	☐
ShippingPostalCode	☐	☐
ShippingCountry	☐	☐
ShippingLatitude	☐	☐
ShippingLongitude	☐	☐
ShippingGeocodeAccuracy	☐	☐
Phone	☐ (212) 842-5500	☒ (503) 421-7800
Fax	☐ (212) 842-5501	☒ (503) 421-7801
AccountNumber	☐ C0355118	☒ C0047311

- Click the next button after selecting the field values which need to be merged and the duplicate record which is to be deleted.



Confirm Merging:

- The fourth screen is the final screen of the mango merge. To merge the records user will click on the Merge button.
- After clicking the merge button the records will be successfully merged and also the duplicate record will be deleted from the organization.

