

ACCOUNT
 MERGE

Account Merge

De-dup Account & Contacts with unique capabilities!

*User Manual to install app for Salesforce CRM users to merge
account's and contacts as per user needs.*

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About Account merge

AccountMerge App provides functionality to merge up to 5 duplicate and non-duplicate account records at one time. The app comes with a powerful filtering system that enables quick filtering through accounts, so that potential duplicate accounts can be easily identified and merged. One of the key features of the app is its ability to retain important account information, such as addresses and phone numbers from multiple accounts. This means, one can be sure that all-important data is kept intact and that no critical information is lost during the merging process i.e. in a scenario where "A account" is having some important information and "B account" is also having same important information and the same field then both can be retained without worrying about overwriting.

Another highlight of the App is the preview screen functionality. It allows user to see exactly what the merged account will look like before confirming the changes. This gives user the peace of mind of knowing exactly what the changes will look like before saving the changes.

How to download the app

Installation of AccountMerge App from Salesforce App Exchange-

1. Connect your salesforce account to your Trailblazer.me profile.

1.1 In a new browser tab, open **AppExchange**.

1.2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.

1.3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect**.

1.4. If you see the Choose a Username page, click **Log in with a Different Username**.
If you see a login page, skip to the next step.

1.5. Enter your Salesforce username and password, then click **Log In**.

1.6. Click **Link Account**.

2. Steps to Install Application to Salesforce Org-

2.1. In a new browser tab, open **AppExchange**.

2.2. Search for **AccountMerge**.

2.3. Click on **Apply Filters** button and choose Solution type as **Apps** to narrow down search result.

2.4. Click on the **AccountMerge** App Name.

2.5. Now click on **Get it Now** button.

2.6. You will see 2 options **Install in Production** and **Install in Sandbox**.

2.7. In Install in Production you will see all the connected salesforce accounts.

2.8. If you can't find the username for the account in which you want to install, then check **Connect Your Salesforce Account to Your Trailblazer.me Profile** i.e. section 1. .

2.9. Choose the username and click **Install in Production**.

2.10. You will see a page where you can confirm your details.

2.11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to terms and conditions.

2.12. Click on **Confirm and Install**, it will take you to the login screen.

2.13. If you want to Install in Sandbox then click on **Install in Sandbox** button.

2.14. You will see a page where you can confirm your details.

2.15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agreed to the terms and conditions.

2.16. Click on **Confirm and Install** it will take you to the login screen.

2.17. Provide your login credentials and select for which users you want to install the application.

2.18. After that application installation will start.

***We strongly recommend not to use any file that you receive from any unauthorized source or any source not mentioned above.**

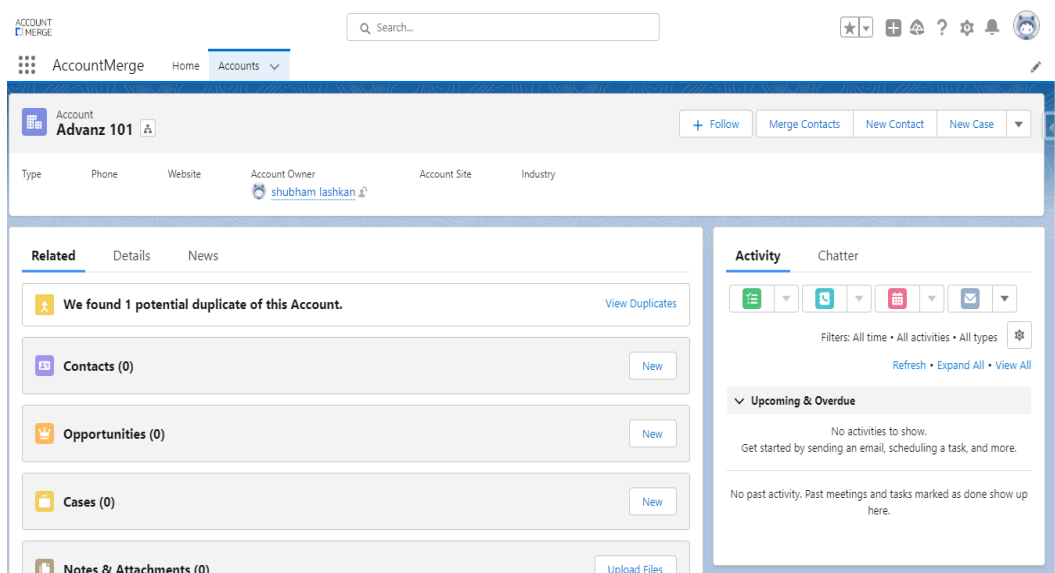
One time App setup before first use.

Note: Please make sure you are not using Salesforce Classic UI. As our App is made to work with Salesforce Lightning Experience.

How to add DuplicateMsg Component to record page.

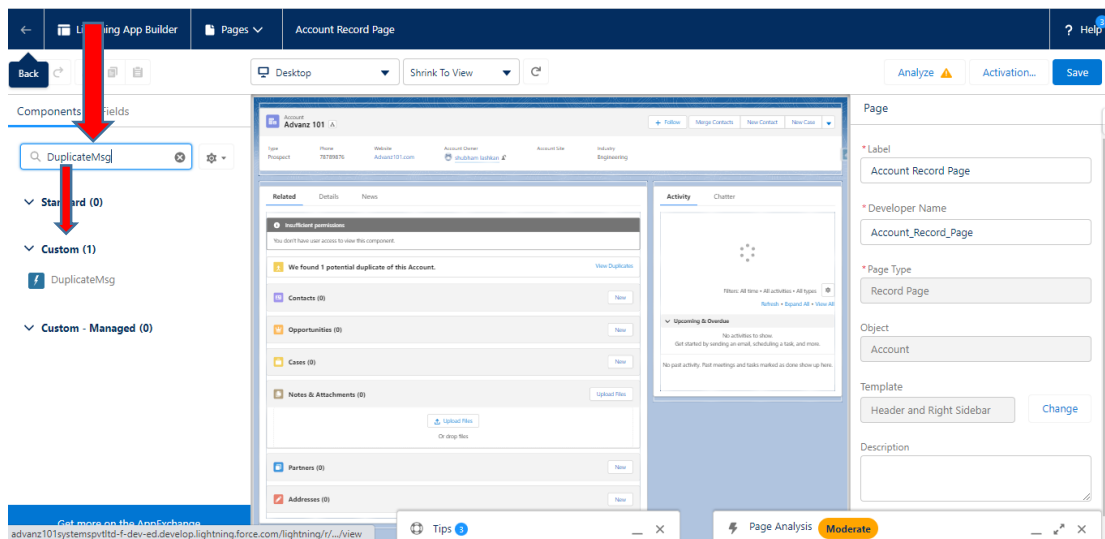
This component is used to find and merge the duplicate or non-duplicate account records. It is important for the user to add the component to the account record page. Without this component, the app cannot be used. Follow the steps below to set it up.

1. Navigate to any account record page.

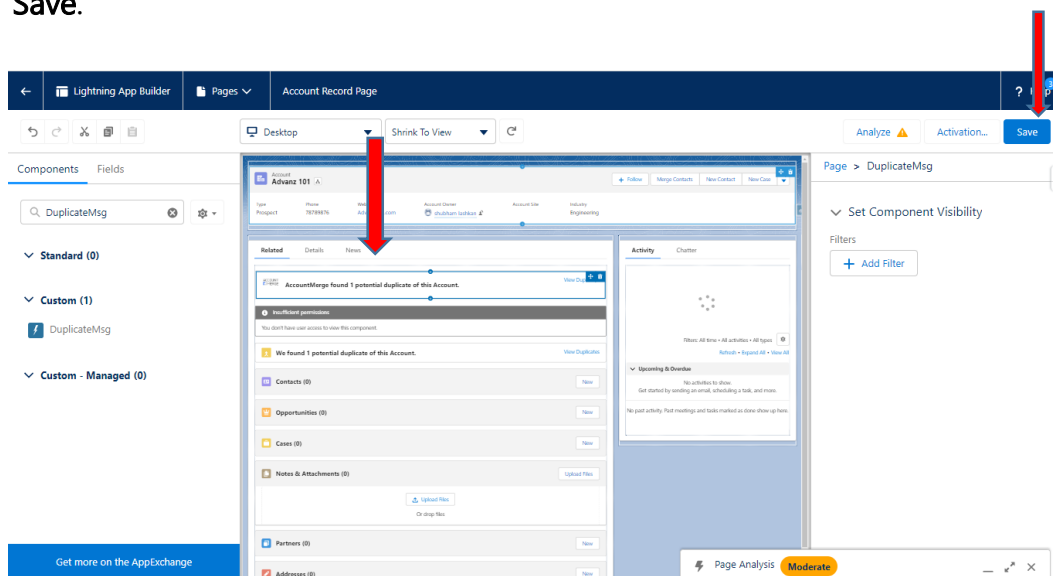


2. Click  and select edit page.

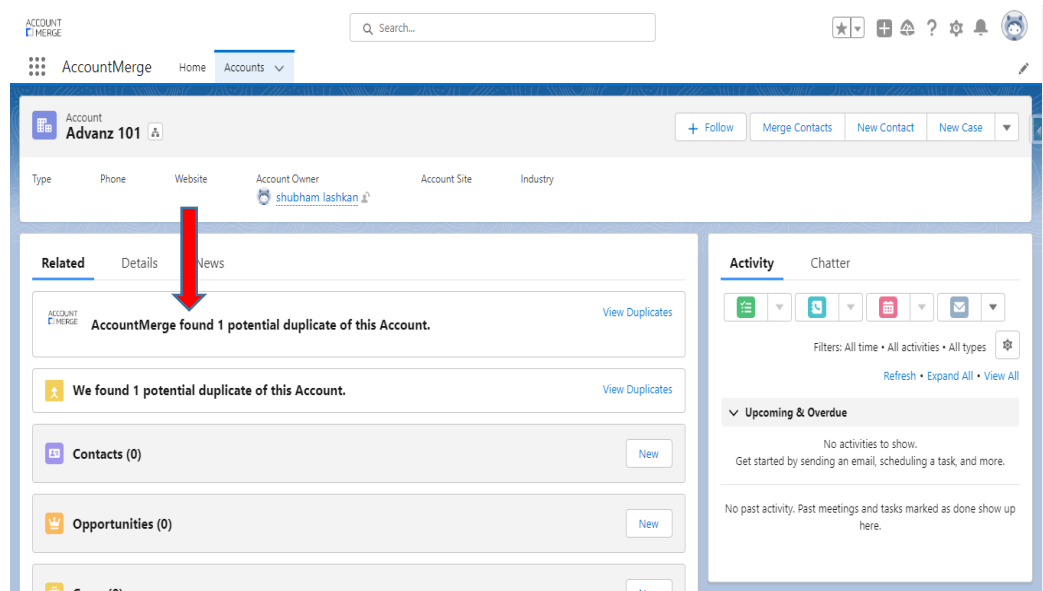
3. Search for **DuplicateMsg** component in the Search bar. **DuplicateMsg** component can be seen on **Custom** section



4. Drag and Drop the Component to the **first row** of Page Layout and Click **Save**.



5. The **Component** can now be seen on related tab.

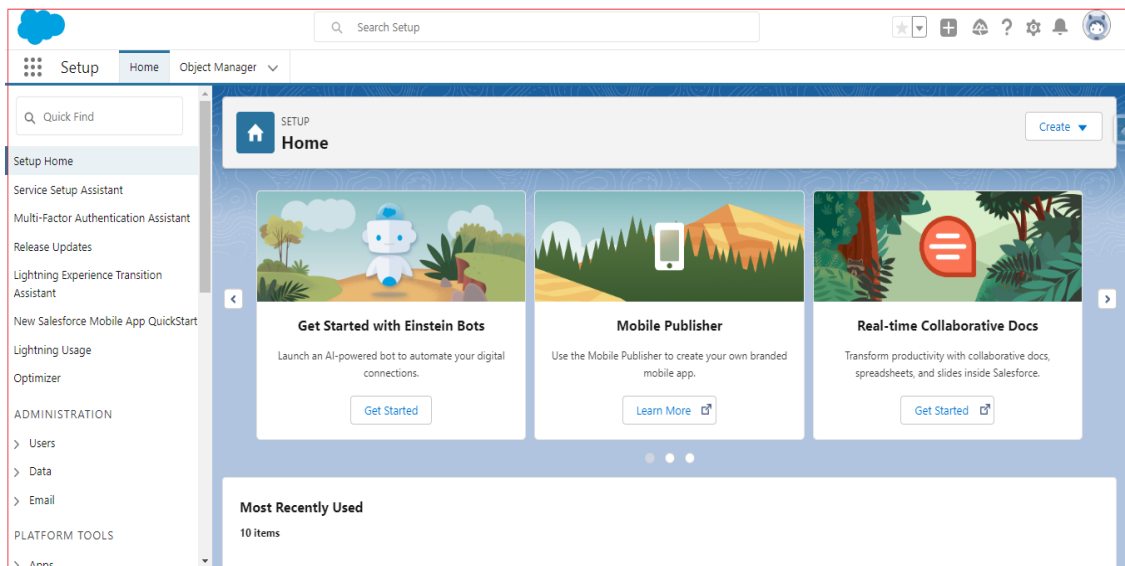


Note: - If system finds any potential duplicate account then the count with the **view duplicate** button will be visible as shown above.

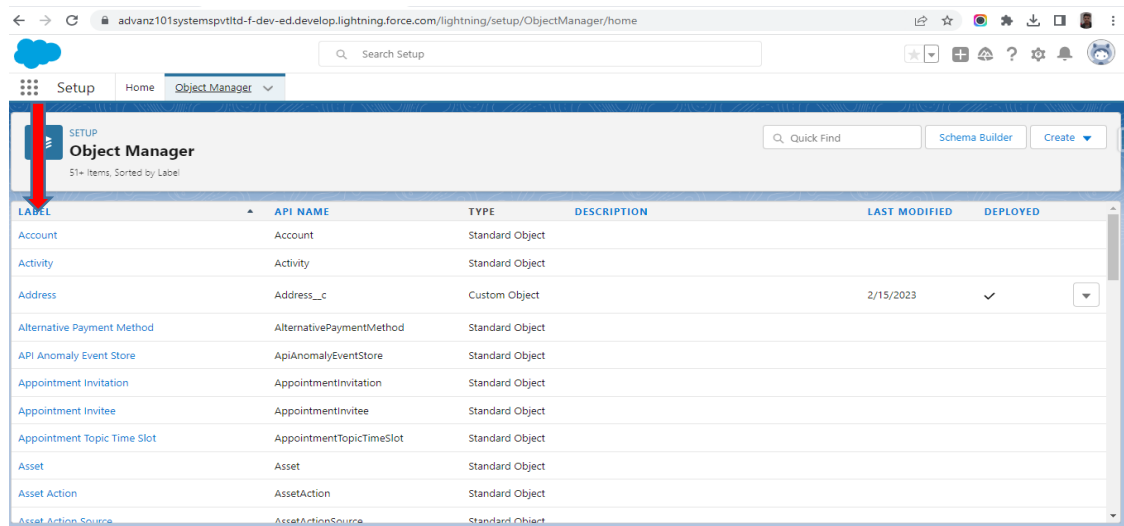
How to add Contact Merge button

Contact merge button is used to find duplicate or non-duplicate contacts for an account. By default, the Merge Contact button is not available in record page. To add button in Account record page you can follow below steps-

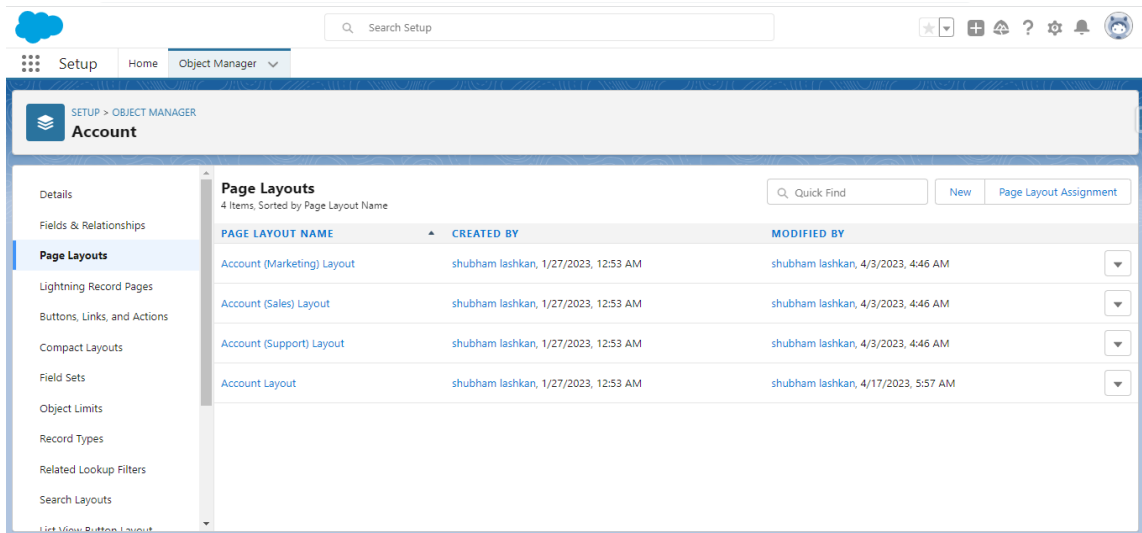
1. Click  and select Setup



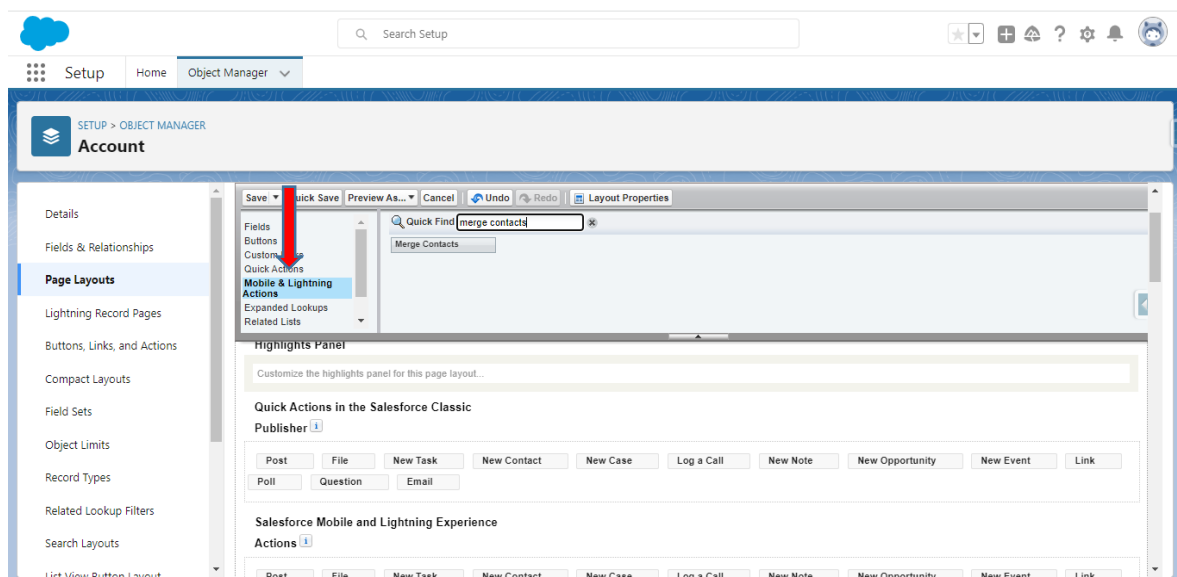
2. Click on Object Manager and select Account Object



3. Click Page Layouts and open **Account Layout** if using default page layout for profiles, if different page layout is created then choose that one.



4. Click on "Mobile and Lightning Actions" search for "Merge Contacts" then drag and drop "Merge Contacts" under Salesforce Mobile & Lightning Experience section and Click Save.



5. Merge Contact button is now added on the account record page.

The screenshot displays the AccountMerge web application interface. At the top, there is a navigation bar with the AccountMerge logo, a search bar, and several utility icons. Below this, a breadcrumb trail shows 'Home' and 'Accounts'. The main content area is titled 'Account University of Arizona'. To the right of the title, there are buttons for '+ Follow', 'Merge Contacts' (highlighted with a red arrow), 'New Contact', and 'New Case'. Below the title bar, account details are listed: Type (Customer - Direct), Phone ((520) 773-9050), Website (www.universityofarizona.com), Account Owner (shubham lashkan), Account Site, and Industry (Education). The interface is divided into two main sections: 'Related' and 'Activity'. The 'Related' section includes a message about duplicate accounts and a list of contacts. The 'Activity' section shows a list of activities and a filter menu.

ACCOUNT MERGE

Search...

AccountMerge Home Accounts

Account University of Arizona

+ Follow Merge Contacts New Contact New Case

Type: Customer - Direct Phone: (520) 773-9050 Website: www.universityofarizona.com Account Owner: shubham lashkan Account Site: Industry: Education

Related Details News

ACCOUNT MERGE AccountMerge found no potential duplicates of this Account. You can manually search for duplicate accounts and merge them. Search Duplicate

We found no potential duplicates of this Account.

Contacts (2) New

abc Title: Email: Phone: 678998776

sajal Yadav Title: Email: Phone:

Activity Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

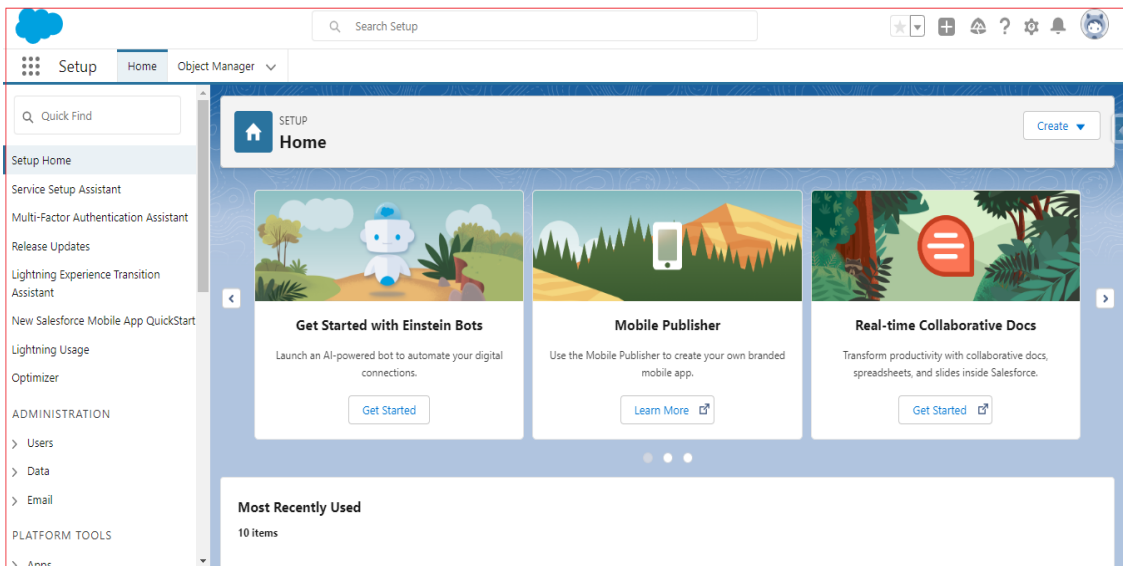
No past activity. Past meetings and tasks marked as done show up here.

How to add Address into related list.

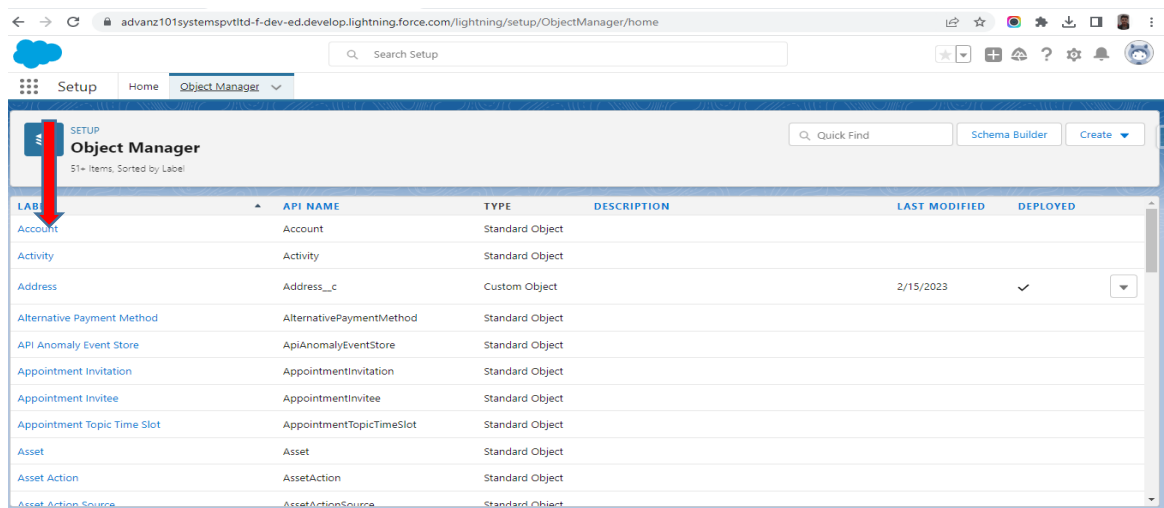
Suppose you are merging two accounts. Account A is your master account, Account B is non-master account. So after merging, all relevant information of account A and account B will be retained in the merged account. But if there is some field such as Address where there are two addresses mentioned, one in account A and different in account B. But both are required to be retained then in such case our App provides you the functionality to retain them. To know more about this feature please refer How Account Merge Works (Points 6 to 11)

Address object is used to preserve the address of records other than master account while merging. By default, the Addresses related list is not available in related tab. To add related tab, follow below steps-

1. Click  and select Setup

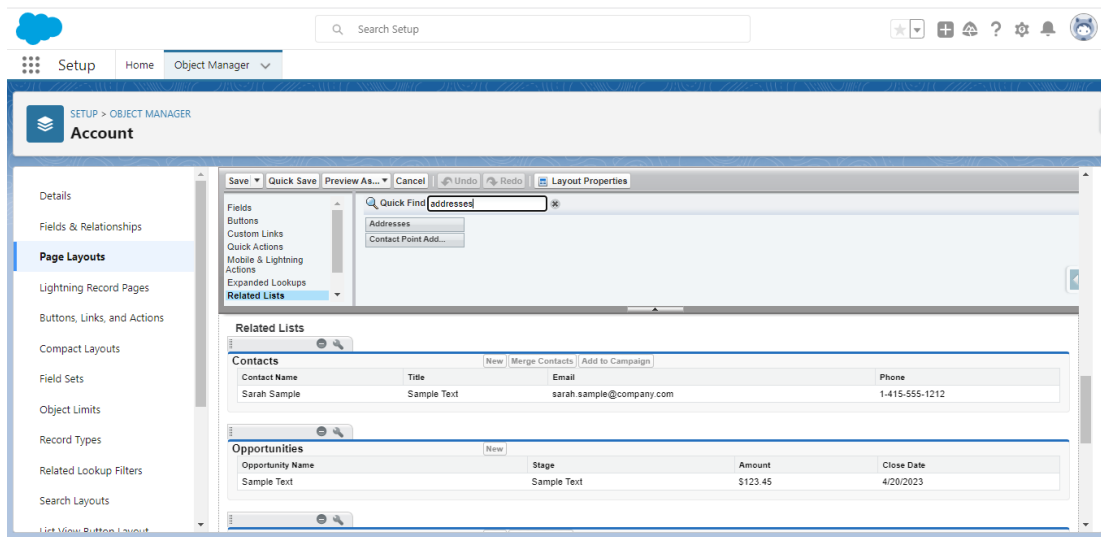


2. Click on Object Manager and select Account Object

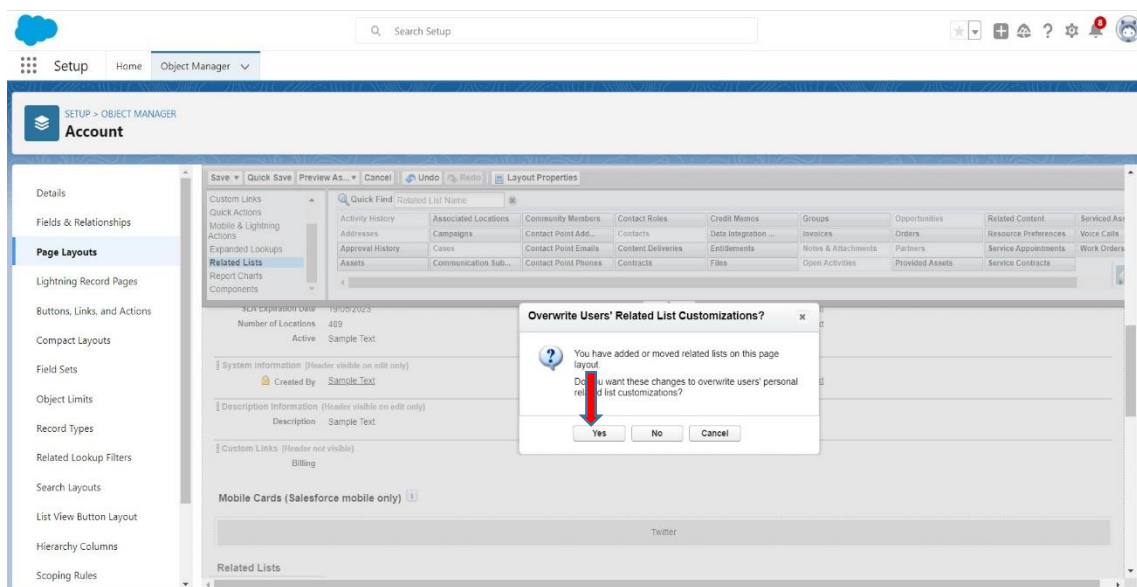


3. Click Page Layouts and open **Account Layout** if using default page layout for profiles, if different page layout is created then choose that one.

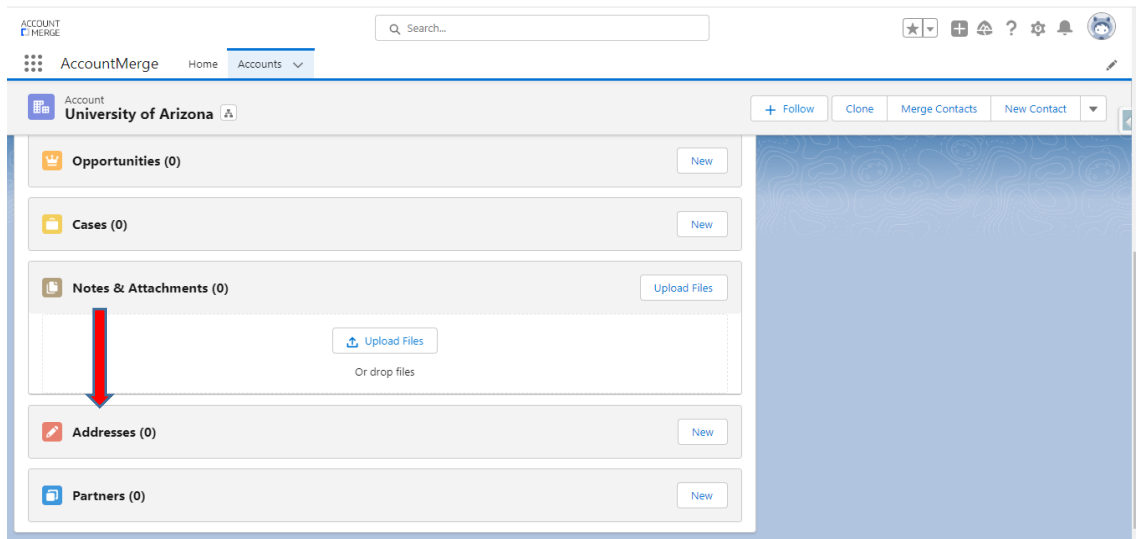
4. Click on **"Related List"** search for **"Addresses"** then drag and drop **"Addresses"** under Related List section and Click **Save**.



5. Now a pop up will appear. Click on **Yes**.



6. Addresses related list can now be seen on **related tab** of account record.

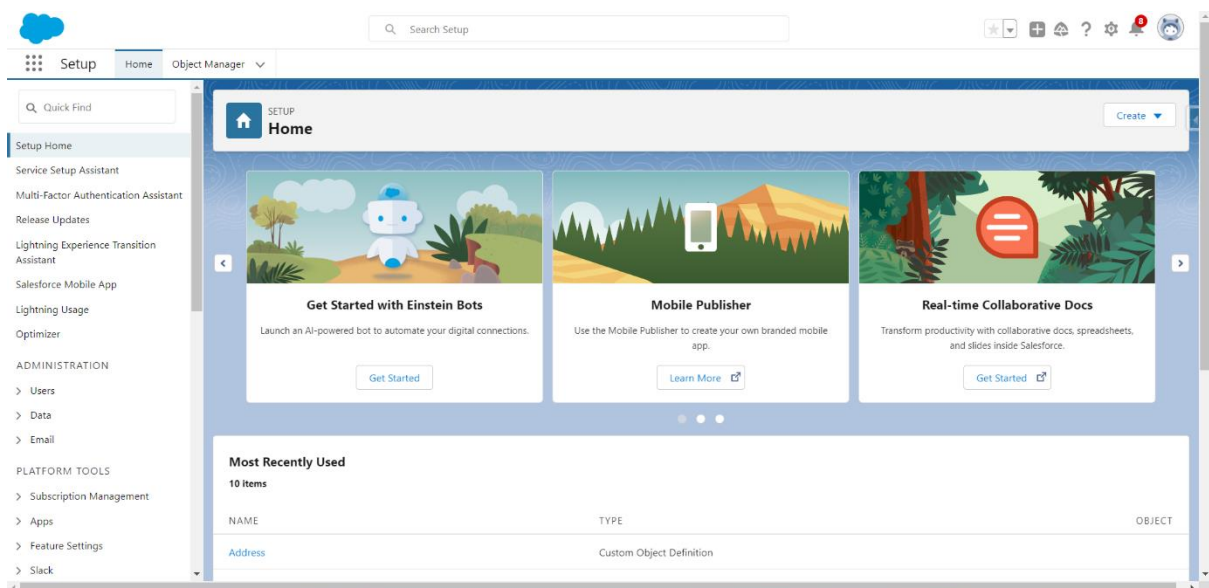


Note:- In order to add addresses related list for Contact Record one can follow the similar steps as mentioned above. In this case, user has to choose Contact Object instead of Account Object(Refer step 2).

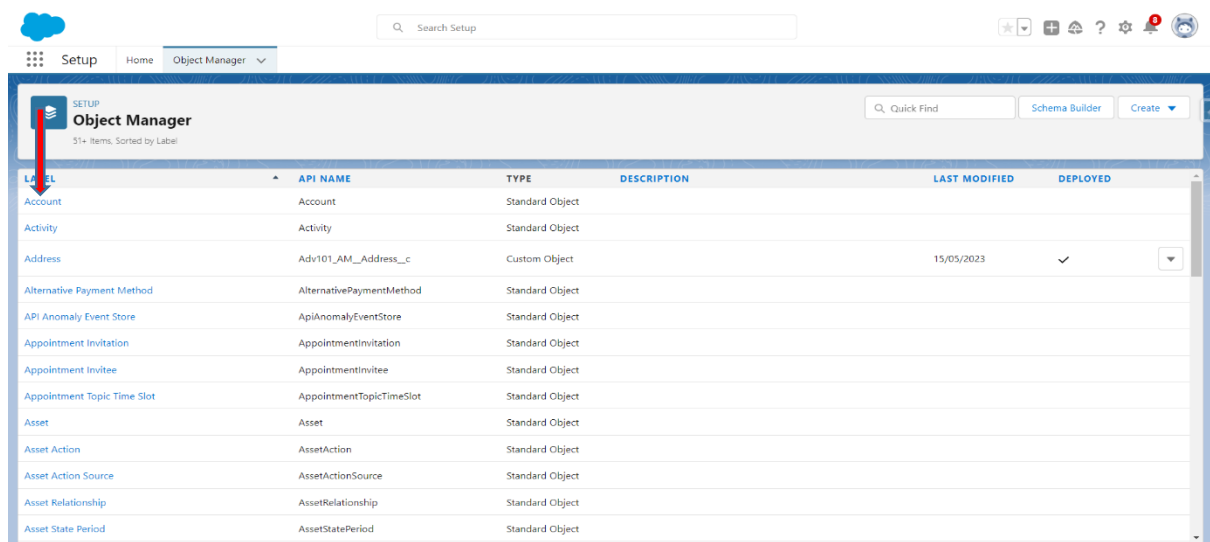
How to add retained phone field into record detail page

“Retained phone” field is used to preserve the phone number during merging of records. It is used in scenarios where multiple accounts have multiple phone numbers that are required to be retained in the merged account. Follow steps below to set it up.

1. Click  and select Setup

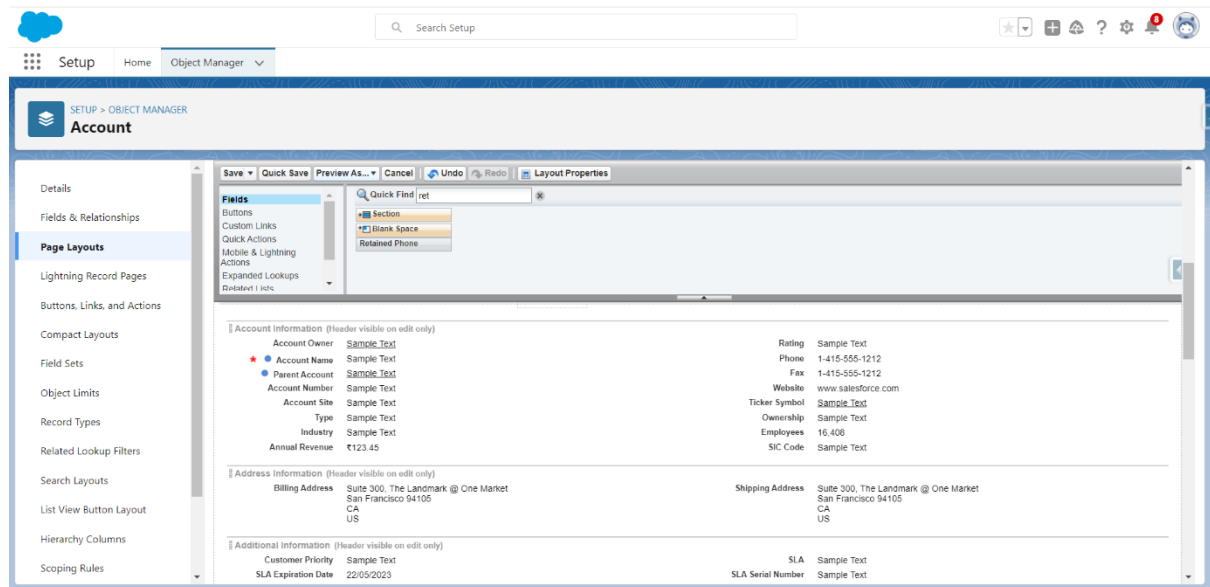


2. Click on Object Manager and select **Account Object**

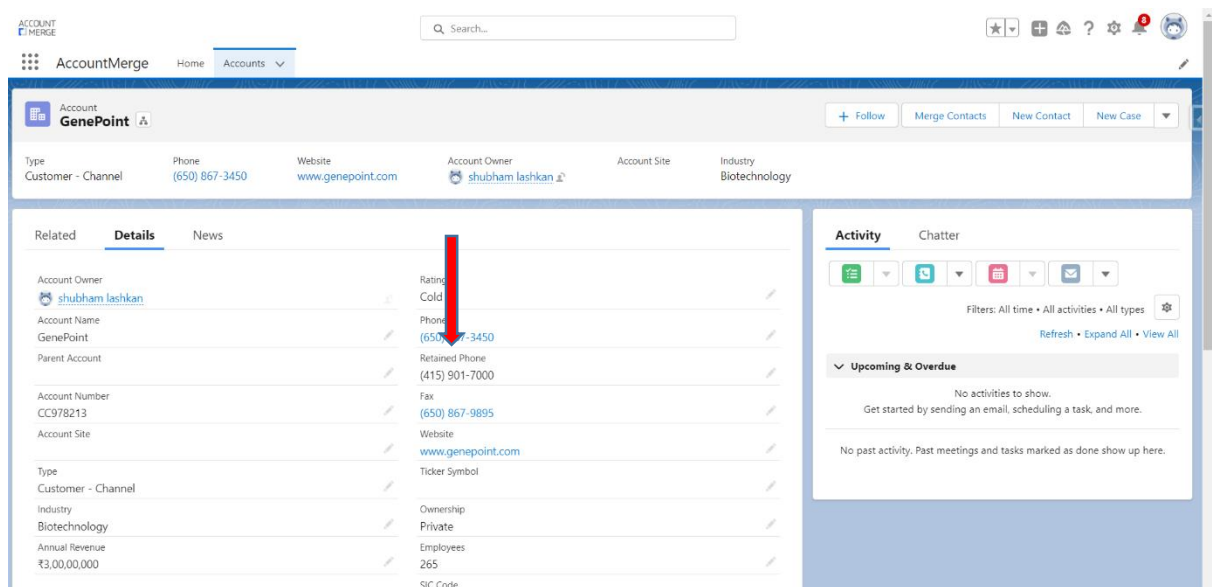


3. Click Page Layouts and open **Account Layout** if you are using default page layout for your profiles. If you have created different page layout for your user then choose that one.

4. Click on **"Fields"** search for **"Retained Phone"** then drag and drop **"Retained Phone"** under account information section and Click **Save**.



5. Retained Phone field can be seen on record detail page



Note:- In order to add retained phone field for Contact Record one can follow the similar steps as mentioned above. In this case, user has to choose Contact Object instead of Account Object

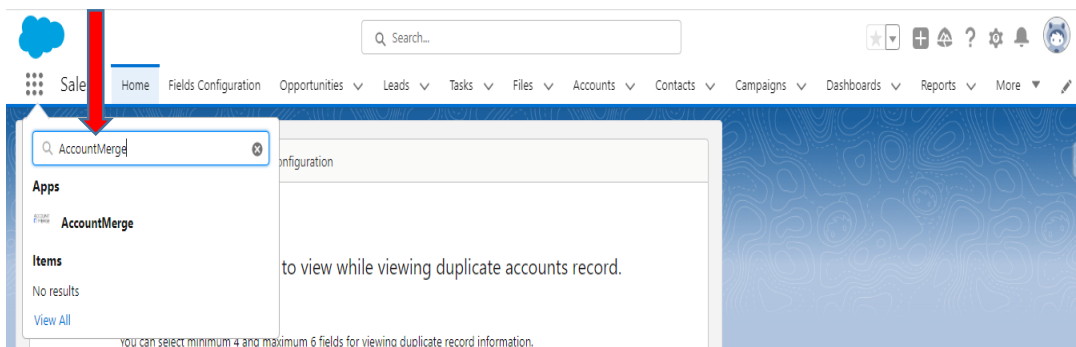
Account and Contact Field Configuration

AccountMerge App provides the functionality to choose fields that a User wants to see while trying to identify multiple accounts/contacts for merging. On field configuration screen minimum 4 and maximum 6 fields can be selected for Account & Contact field configuration. Of which 4 fields are defaulted and can be replaced as per user's preference. Below steps can be used to set this functionality as per needs-

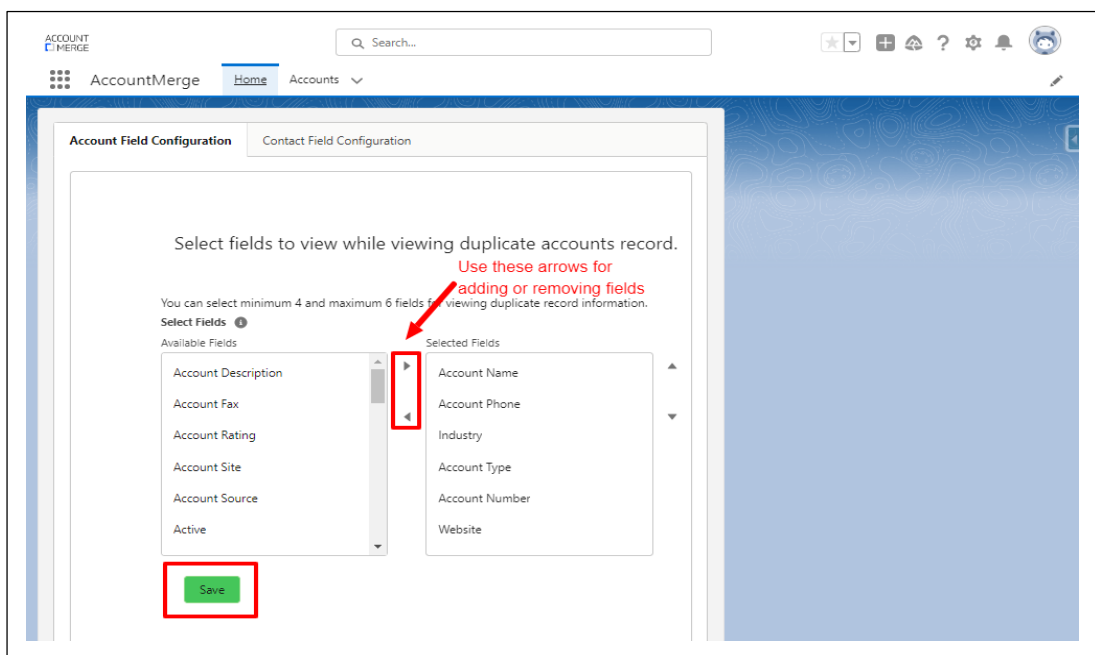
Note- Fields which will be defaulted for Account: Account Name, Account Phone, Account Site, Owner ID

Fields which will be defaulted for Contact: Name, Business Phone, Email, Department

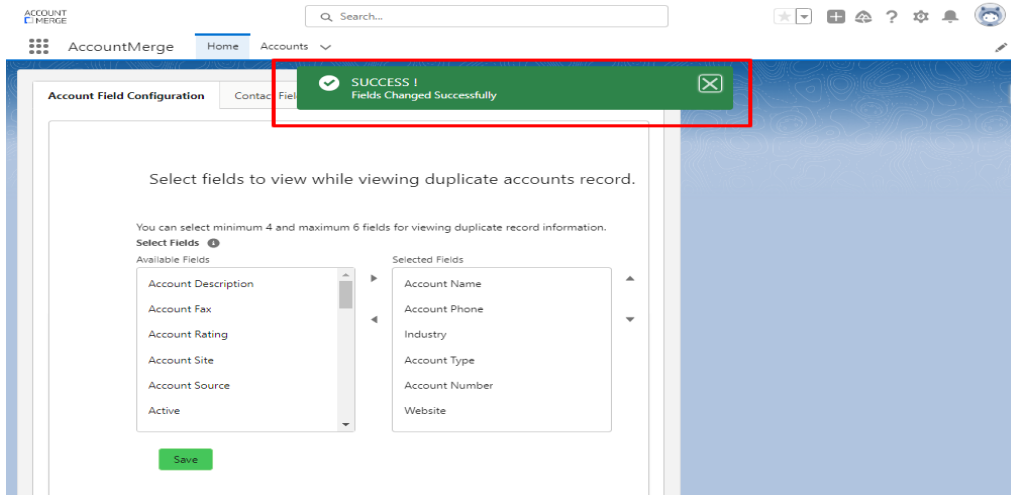
1. Click on **"AppLauncher"** and **search** for **"AccountMerge"** click on the AccountMerge and open the App, click on Home.



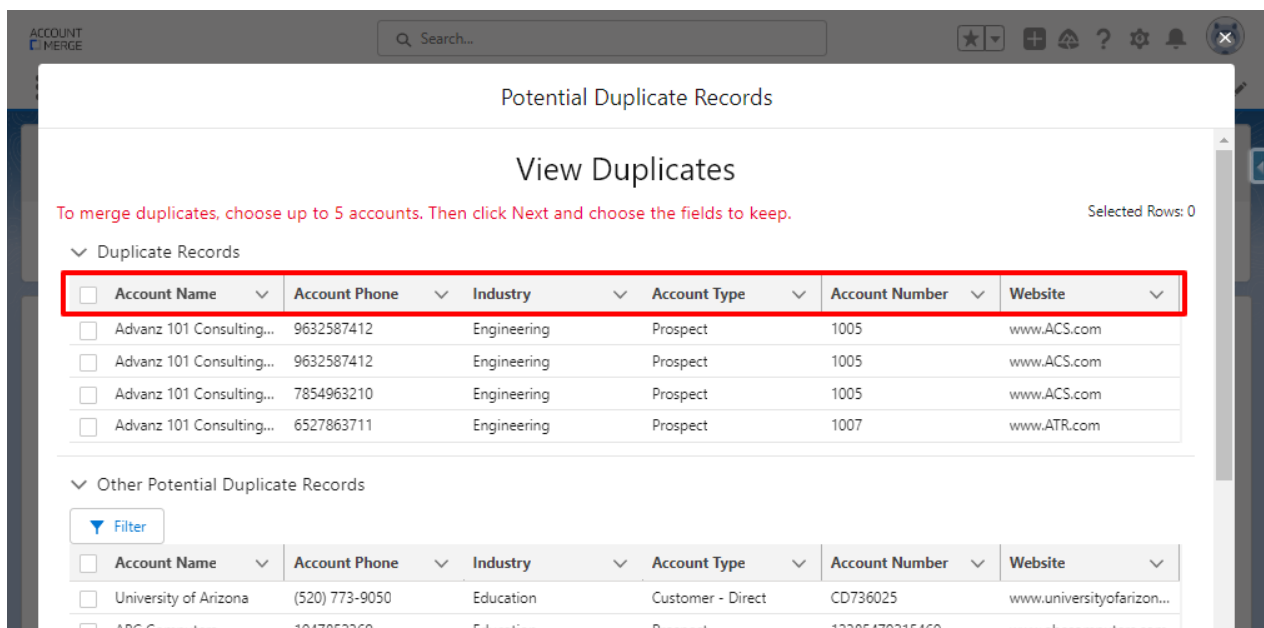
2. Select a field and click **arrow** button to add or remove the fields that will be visible while merging Accounts/Contacts, then click **Save** button.



3. Fields are added Successfully



The selected fields can be seen on the screen after clicking **View Duplicates/Search Duplicates**.



Note- Follow similar steps in order to configure the **Contact** fields.

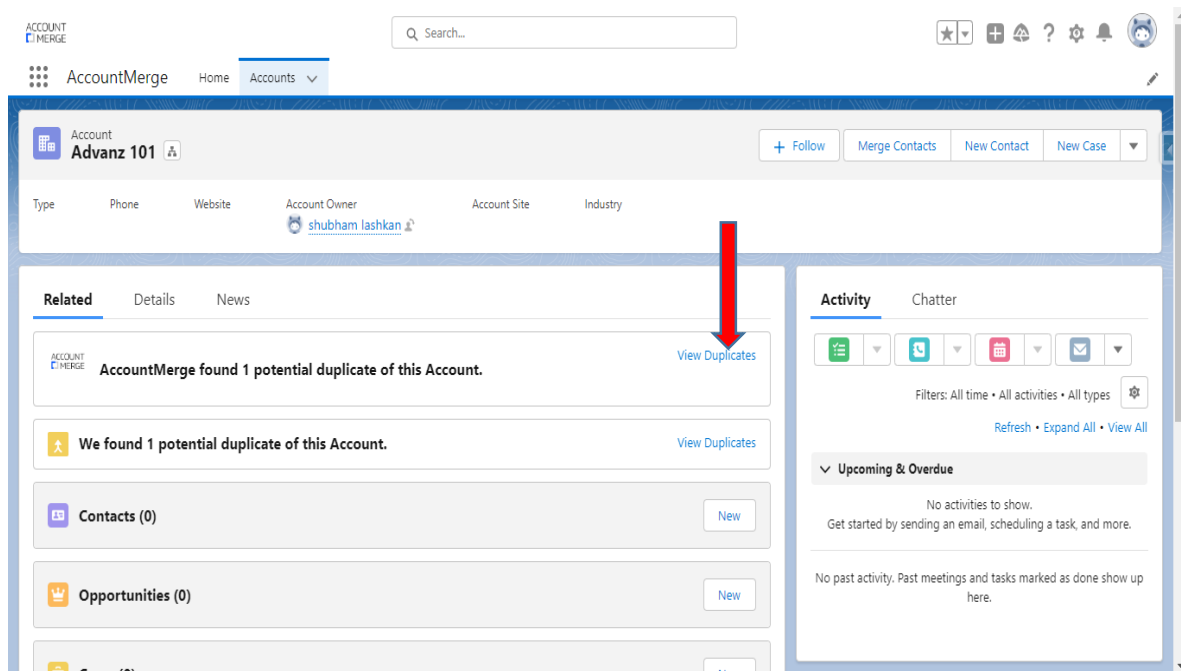
The above steps are pre-requisite to install the app and need to be performed only once.

How AccountMerge Works

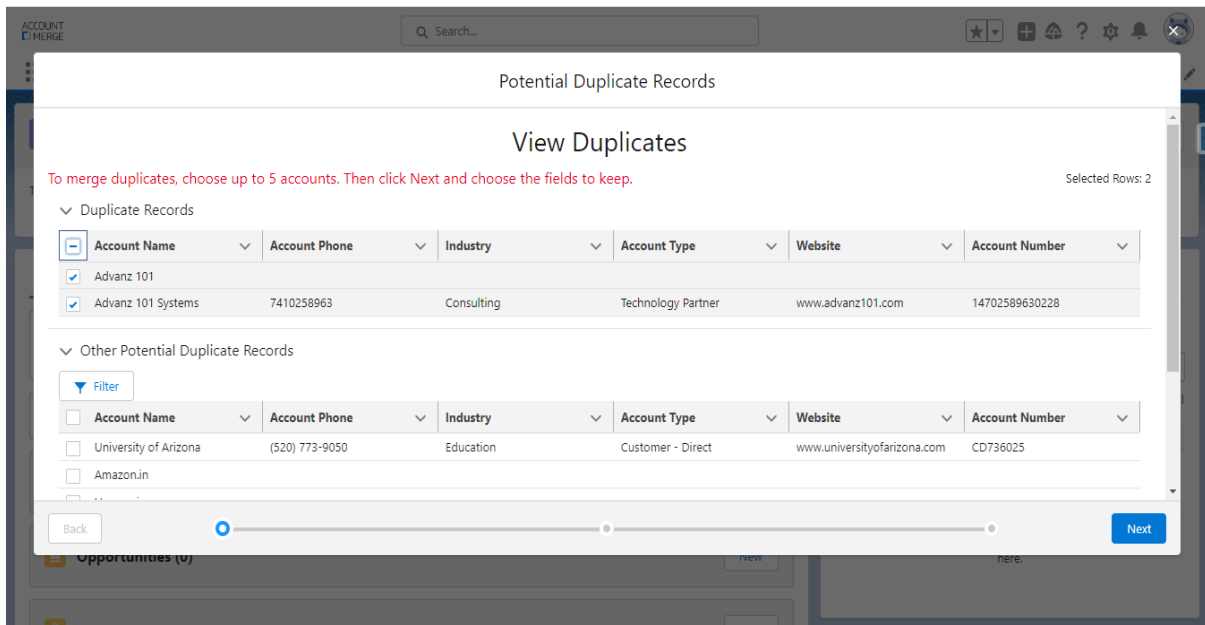
Once done with installation steps defined in last section, now the App is ready to be used.

1. Navigate to Account record and click on **View Duplicates**.

Note:-If the Salesforce organization (ORG) contains duplicate accounts for selected account, the AccountMerge will display them based on the **duplicate rules** configured in the system.



2. Now select the **Duplicate account** (At a time maximum 5 duplicate account can be selected) after this Click **Next**.



Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 5 accounts. Then click Next and choose the fields to keep.

Selected Rows: 2

▼ Duplicate Records

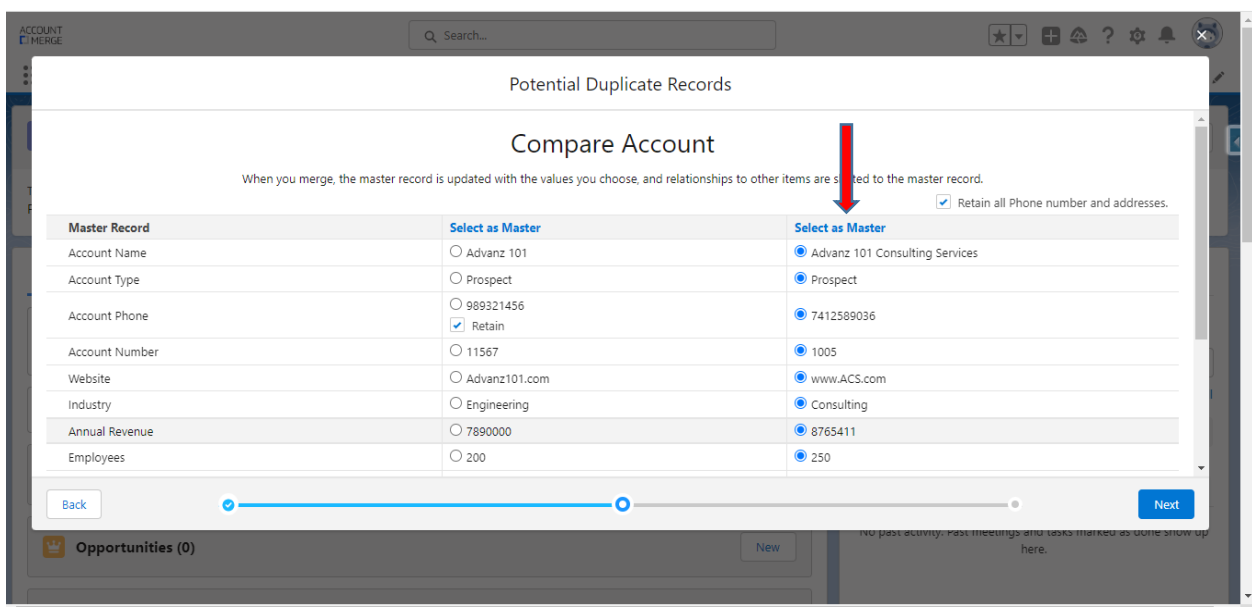
Account Name	Account Phone	Industry	Account Type	Website	Account Number
☒ Advanz 101					
☒ Advanz 101 Systems	7410258963	Consulting	Technology Partner	www.advanz101.com	14702589630228

▼ Other Potential Duplicate Records

Account Name	Account Phone	Industry	Account Type	Website	Account Number
☐ University of Arizona	(520) 773-9050	Education	Customer - Direct	www.universityofarizona.com	CD736025
☐ Amazon.in					

Note: - If user wants to change the column fields in the data table, then refer to [Account and Contact field configuration](#).

3. Now compare the duplicate accounts and select one master record by clicking on **"Select as Master"** and the record which is selected as Master will be the **Primary Record**.



Potential Duplicate Records

Compare Account

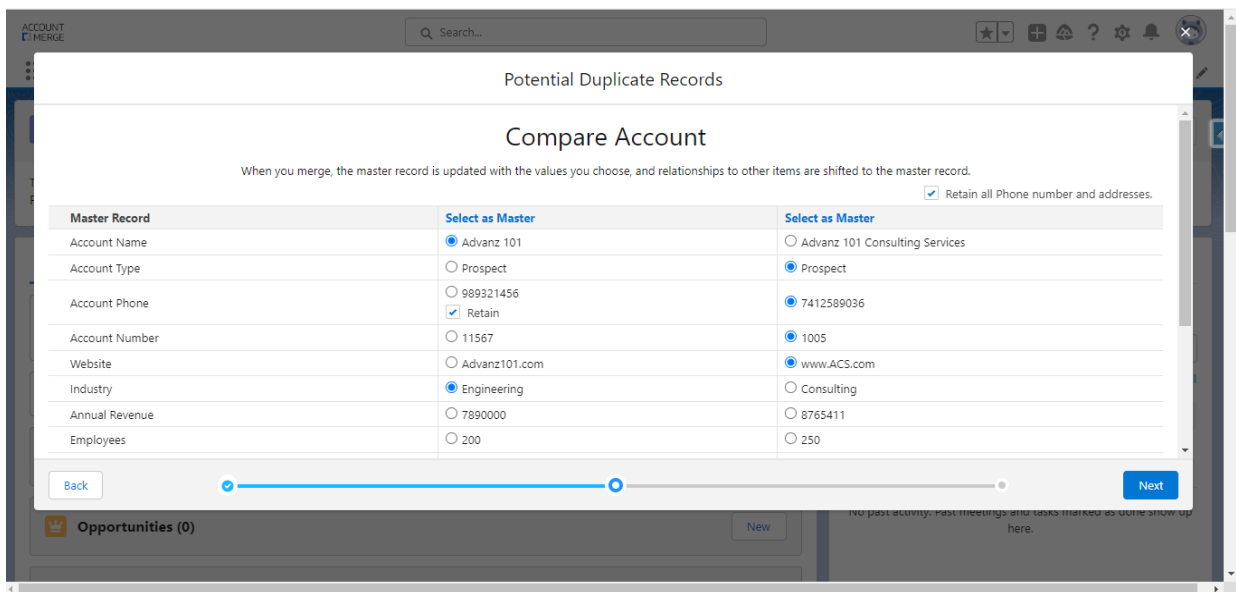
When you merge, the master record is updated with the values you choose, and relationships to other items are moved to the master record.

☒ Retain all Phone number and addresses.

Master Record	Select as Master	Select as Master
Account Name	☐ Advanz 101	☒ Advanz 101 Consulting Services
Account Type	☐ Prospect	☒ Prospect
Account Phone	☐ 989321456 ☒ Retain	☒ 7412589036
Account Number	☐ 11567	☒ 1005
Website	☐ Advanz101.com	☒ www.ACS.com
Industry	☐ Engineering	☒ Consulting
Annual Revenue	☐ 7890000	☒ 8765411
Employees	☐ 200	☒ 250

4. Preserve the values by **clicking** the **radio** buttons as it provides you flexibility to choose fields other than that from the master record column.

E.g. Here we have selected multiple fields to preserve from the two different accounts to be merged into a master Account record named as Advanz 101.



Potential Duplicate Records

Compare Account

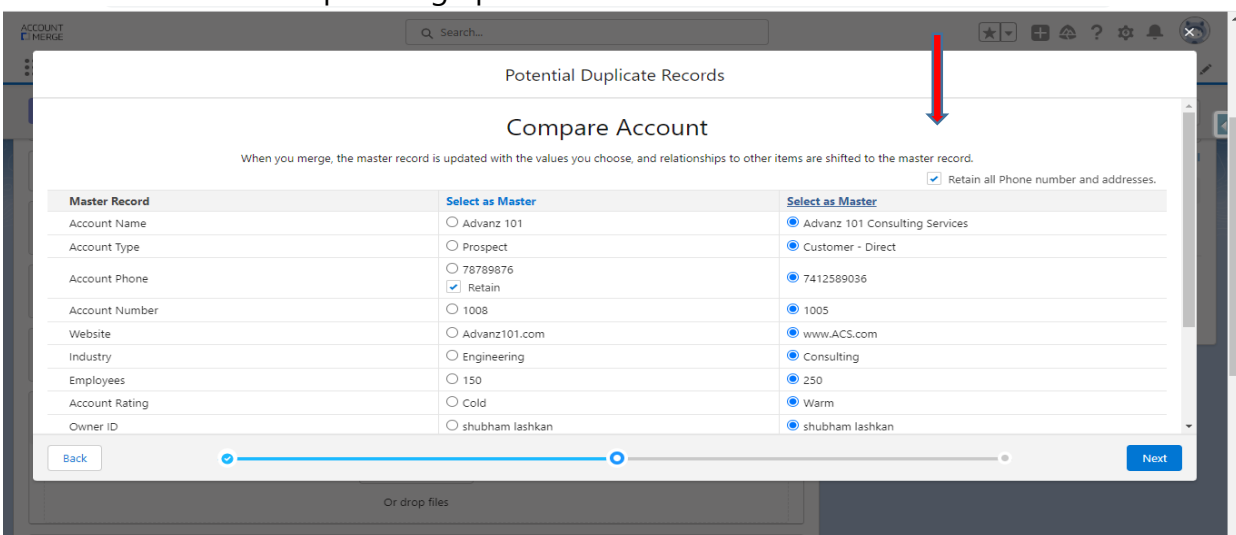
When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

☒ Retain all Phone number and addresses.

Master Record	Select as Master	Select as Master
Account Name	☒ Advanz 101	☐ Advanz 101 Consulting Services
Account Type	☐ Prospect	☒ Prospect
Account Phone	☐ 989321456 ☒ Retain	☒ 7412589036
Account Number	☐ 11567	☒ 1005
Website	☐ Advanz101.com	☒ www.ACS.com
Industry	☒ Engineering	☐ Consulting
Annual Revenue	☐ 7890000	☐ 8765411
Employees	☐ 200	☐ 250

Back Next

5. Generally speaking, for each field, information of only one Account will be retained. But for some special field like Phone Number and Address, multiple records can be retained. To retain the addresses and phone values, click the **"Retain"** checkbox and click on **Next** to navigate to the next screen. This will save extra information that is needed which otherwise would be lost in a simple merge process.



Potential Duplicate Records

Compare Account

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

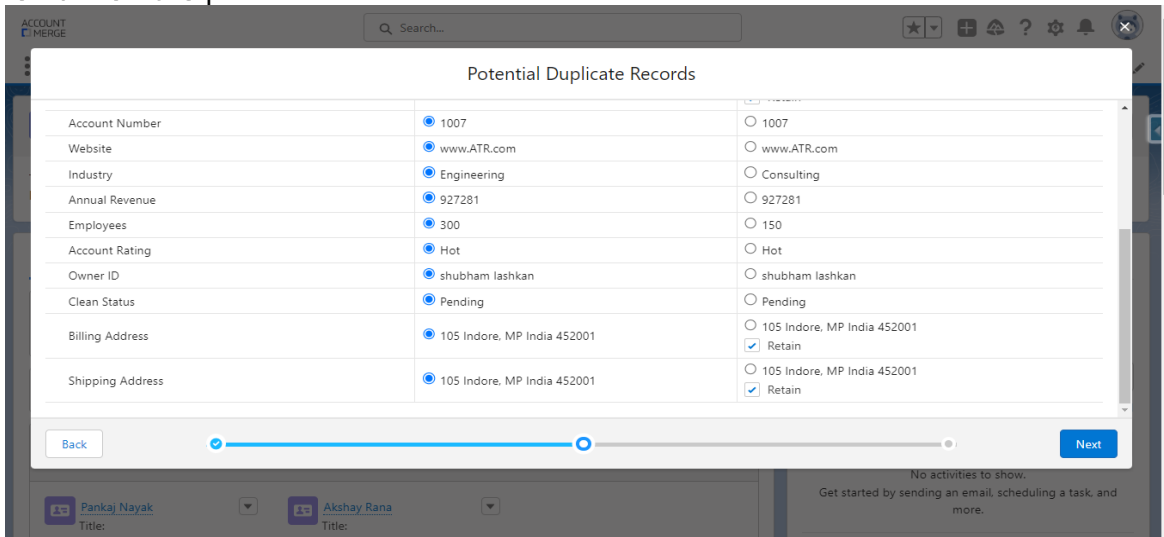
☒ Retain all Phone number and addresses.

Master Record	Select as Master	Select as Master
Account Name	☐ Advanz 101	☒ Advanz 101 Consulting Services
Account Type	☐ Prospect	☒ Customer - Direct
Account Phone	☐ 78789876 ☒ Retain	☒ 7412589036
Account Number	☐ 1008	☒ 1005
Website	☐ Advanz101.com	☒ www.ACS.com
Industry	☐ Engineering	☒ Consulting
Employees	☐ 150	☒ 250
Account Rating	☐ Cold	☒ Warm
Owner ID	☐ shubham lashkan	☒ shubham lashkan

Back Next

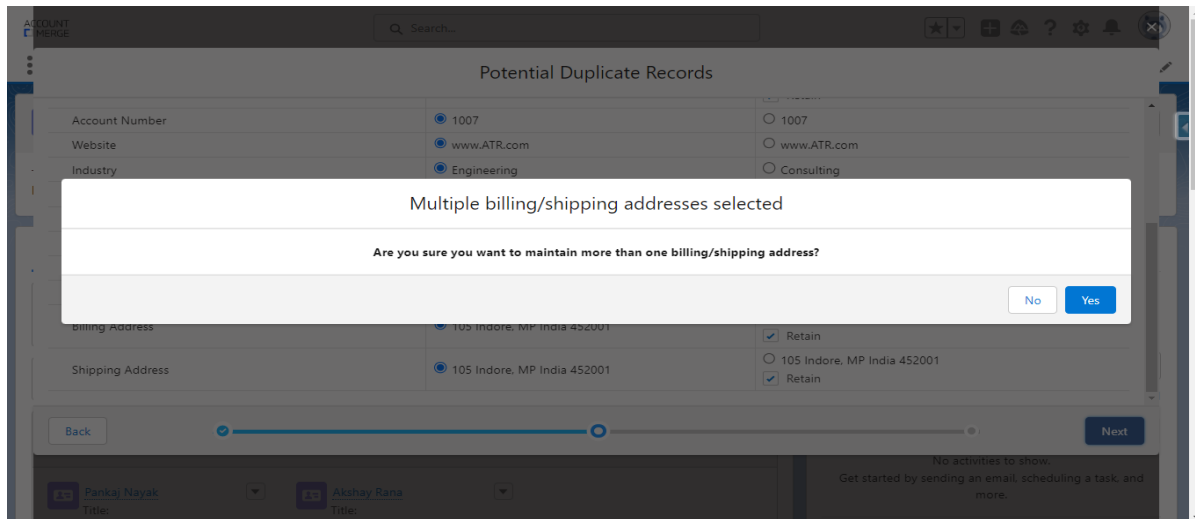
6. If multiple billing/ shipping addresses are selected to be retained, then after clicking Next button a Pop-up screen will appear.

Click on Yes button, to navigate to the next screen and click on the No button to remain on the previous screen



Potential Duplicate Records		
Account Number	☒ 1007	☐ 1007
Website	☒ www.ATR.com	☐ www.ATR.com
Industry	☒ Engineering	☐ Consulting
Annual Revenue	☒ 927281	☐ 927281
Employees	☒ 300	☐ 150
Account Rating	☒ Hot	☐ Hot
Owner ID	☒ shubham lashkan	☐ shubham lashkan
Clean Status	☒ Pending	☐ Pending
Billing Address	☒ 105 Indore, MP India 452001	☒ Retain
Shipping Address	☒ 105 Indore, MP India 452001	☒ Retain

Back Next



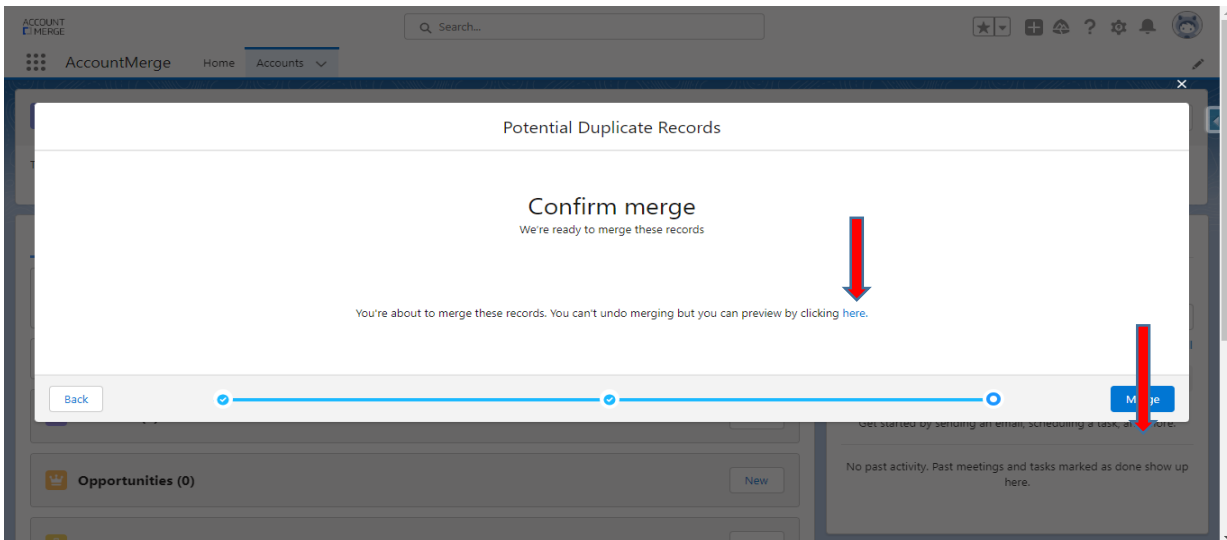
Potential Duplicate Records

Multiple billing/shipping addresses selected

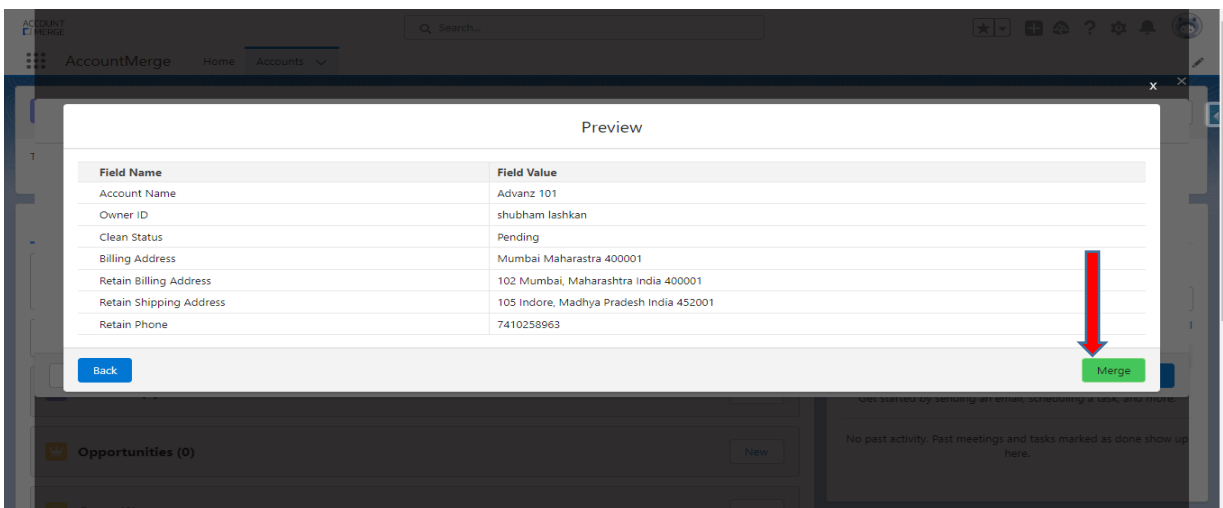
Are you sure you want to maintain more than one billing/shipping address?

No Yes

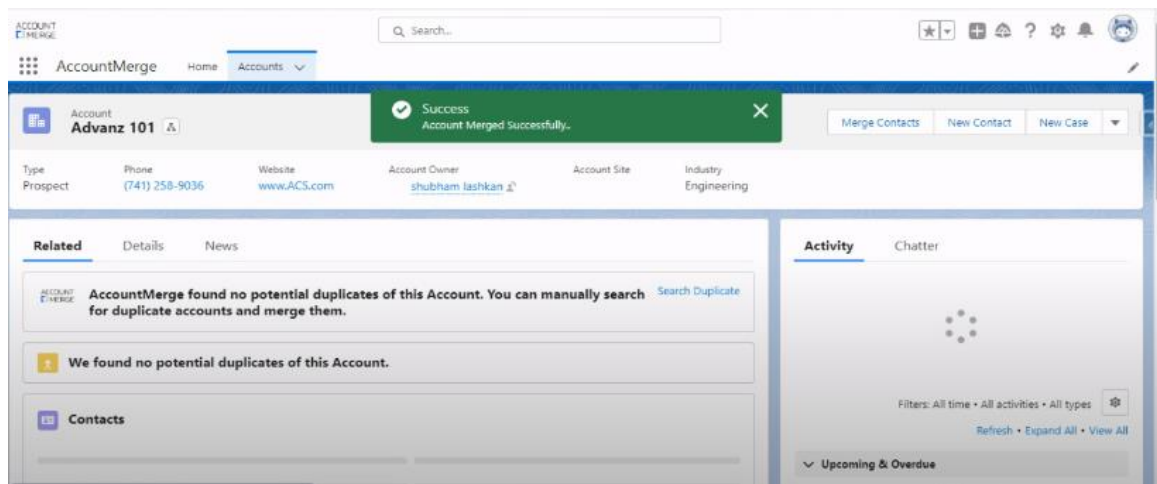
7. Records can now be merged by clicking the **Merge** Button. As merging cannot be reversed we have provided the Preview view so that user can confirm the outcome before actual merge commences. Preview by clicking the link "[here](#)".



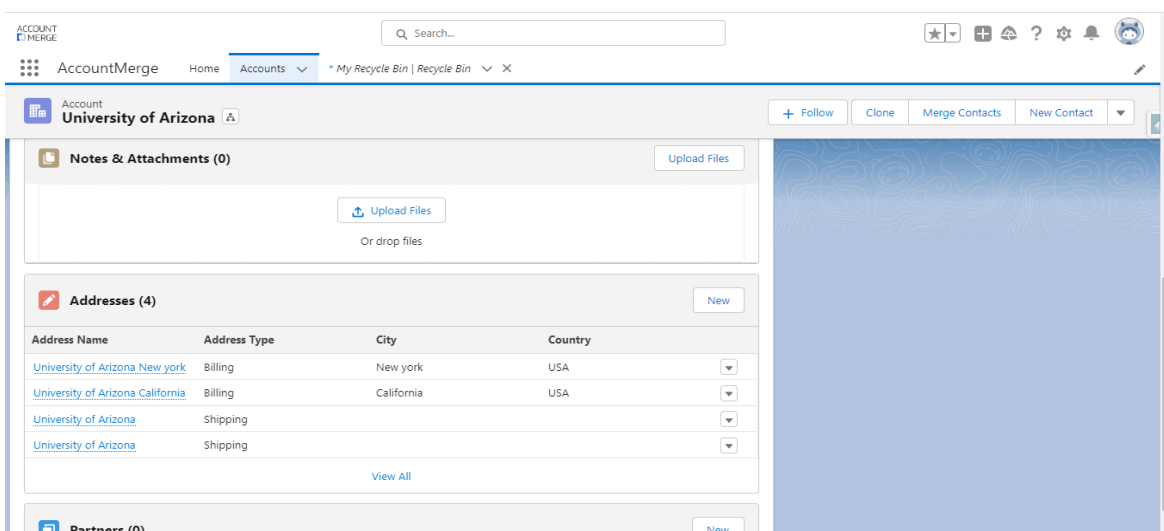
8. On the Preview Screen, fields that will be saved on selected Master record will be visible and can be previewed before clicking the Merge Button. In case any correction is needed, you can click the back button and do the changes needed in the previous screen.



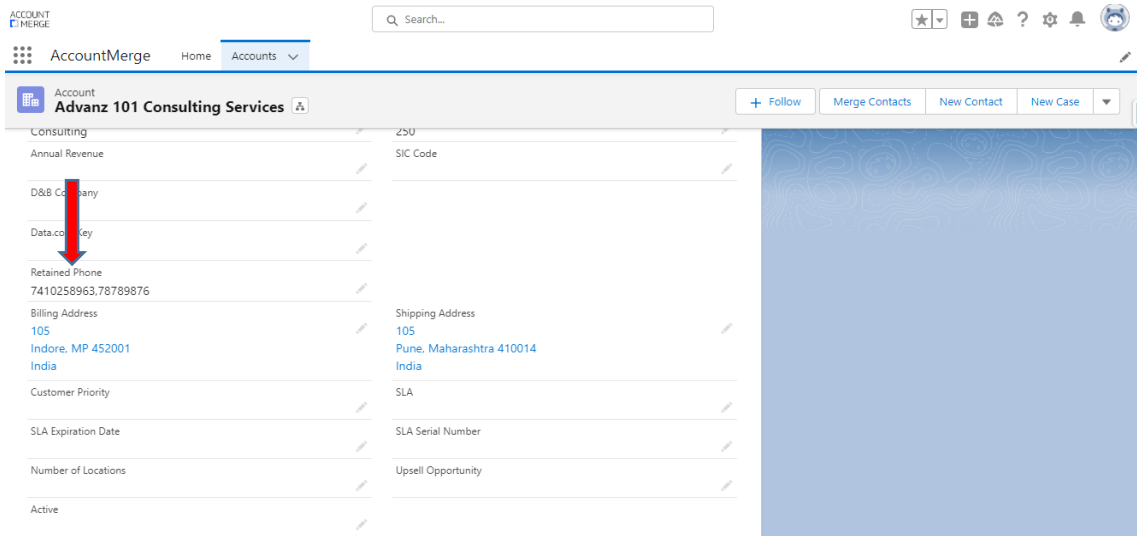
9. After clicking the **Merge** button, the records will be **merged**, and the user will be redirected to the Master Account Record selected. A notification will also appear indicating that the account has been merged successfully.



10. To access the addresses retained, navigate to the Addresses list visible under the related tab of the Account record page.



11. To access the retained phone numbers navigate to the Account record detail page and see under the retained phone field.



The screenshot shows the 'AccountMerge' interface. At the top, there is a search bar and navigation icons. Below the search bar, the 'Accounts' tab is selected. The main area displays the account details for 'Advanz 101 Consulting Services'. A red arrow points to the 'Retained Phone' field, which contains the number '7410258963,78789876'. Other fields visible include 'Consulting', 'Annual Revenue', 'D&B Company', 'Data.co Key', 'Billing Address', 'Customer Priority', 'SLA Expiration Date', 'Number of Locations', 'Active', 'ZSU', 'SIC Code', 'Shipping Address', 'SLA', 'SLA Serial Number', and 'Upsell Opportunity'.

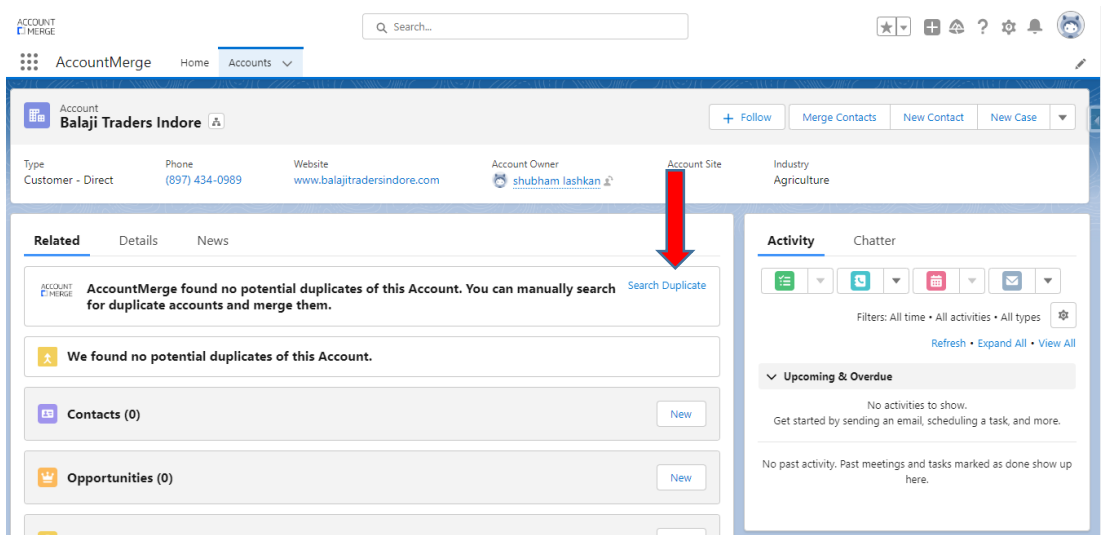
Special Notes-

1. Accounts/Contacts once merged cannot be unmerged again.
2. If duplicate Accounts/Contacts are more than 5 then merging process can be completed in multiple steps.

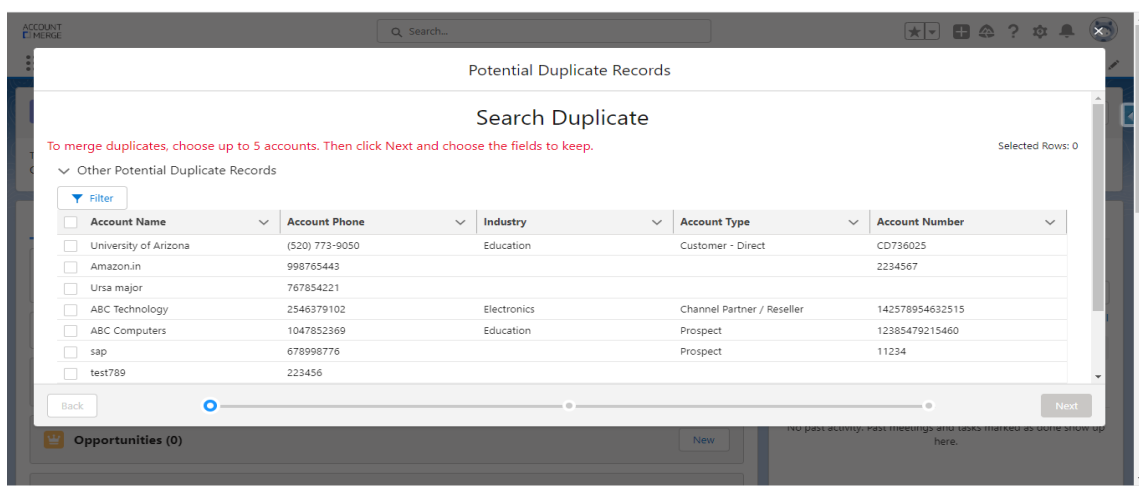
How to Manually Find and Merge Duplicate Accounts

Along with systematically identified potential duplicate records, user can select few more record manually as per their specific criteria. Users can follow below steps-

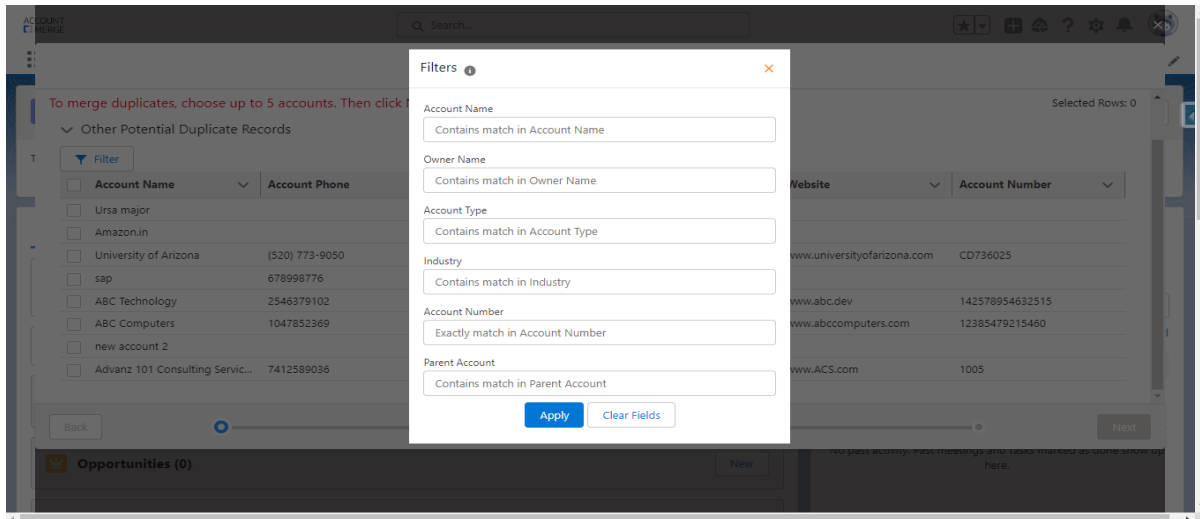
1. Navigate to Account Record and Click on Search Duplicate.



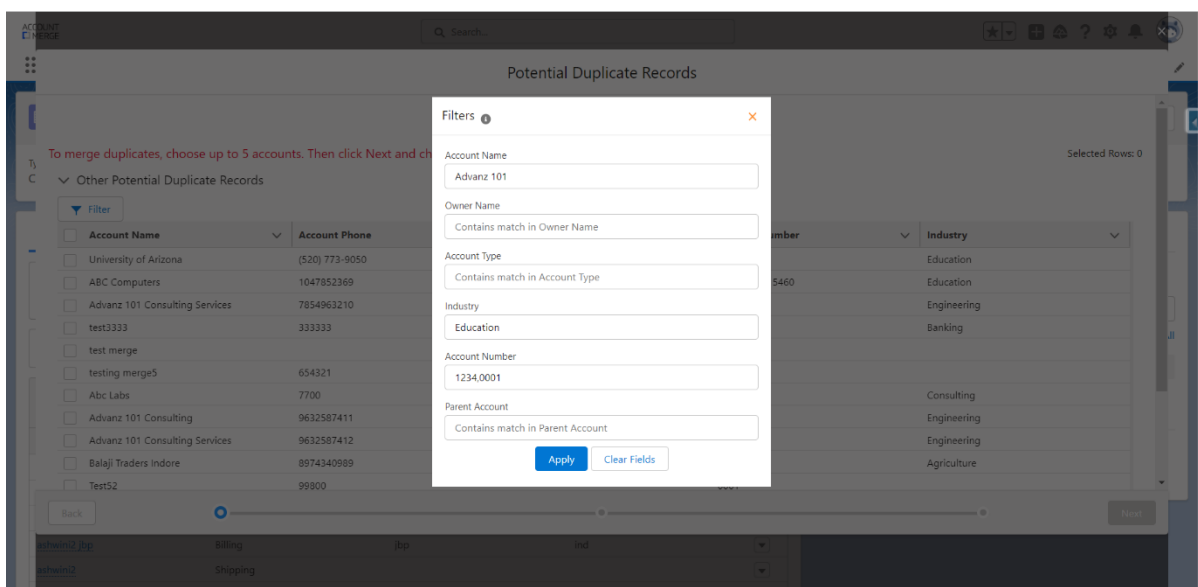
2. Now all the account records available in the org will be visible.



3. To facilitate searching and selection of accounts manually we can use different available filters to zero in on the required accounts. Click on the **Filter** button and from various available filtering options such as Account Name, Account Number, Industry, Account Type, Parent Account, and Owner Name use the required filters. Once selected, click on **Apply** to set the filter.

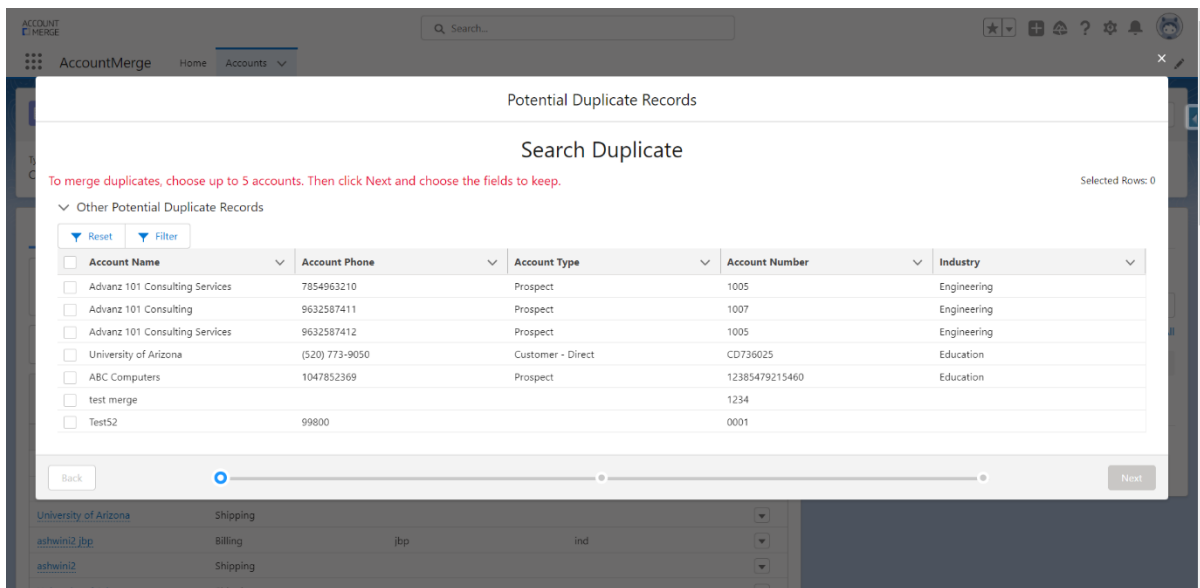


E.g. Here Advanz101 set as Account Name and Education as industry and 1234,0001 as Account Number



Note:- Use comma between account numbers to filter out multiple account numbers in one go.

The Filtered Results will be displayed as below-



Potential Duplicate Records

Search Duplicate

To merge duplicates, choose up to 5 accounts. Then click Next and choose the fields to keep.

Selected Rows: 0

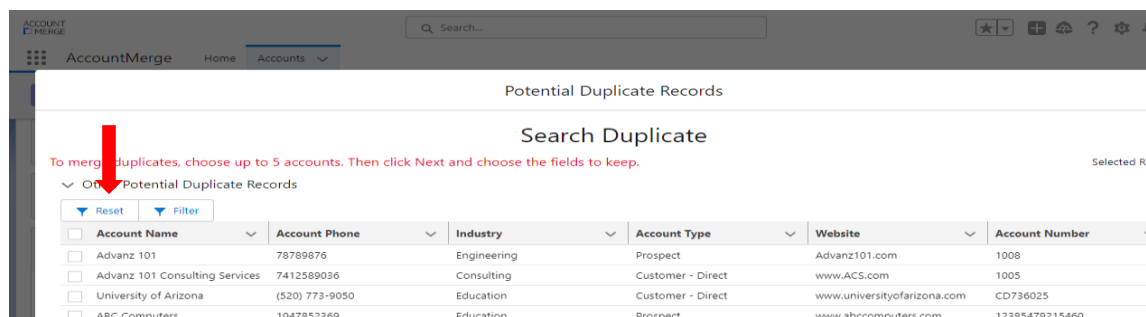
Other Potential Duplicate Records

Reset Filter

Account Name	Account Phone	Account Type	Account Number	Industry
☐ Advanz 101 Consulting Services	7854963210	Prospect	1005	Engineering
☐ Advanz 101 Consulting	9632587411	Prospect	1007	Engineering
☐ Advanz 101 Consulting Services	9632587412	Prospect	1005	Engineering
☐ University of Arizona	(520) 773-9050	Customer - Direct	CD736025	Education
☐ ABC Computers	1047852369	Prospect	12385479215460	Education
☐ test merge			1234	
☐ Test52	99800		0001	

Back Next

4. Reset the filter results by clicking the **Reset** button.



Potential Duplicate Records

Search Duplicate

To merge duplicates, choose up to 5 accounts. Then click Next and choose the fields to keep.

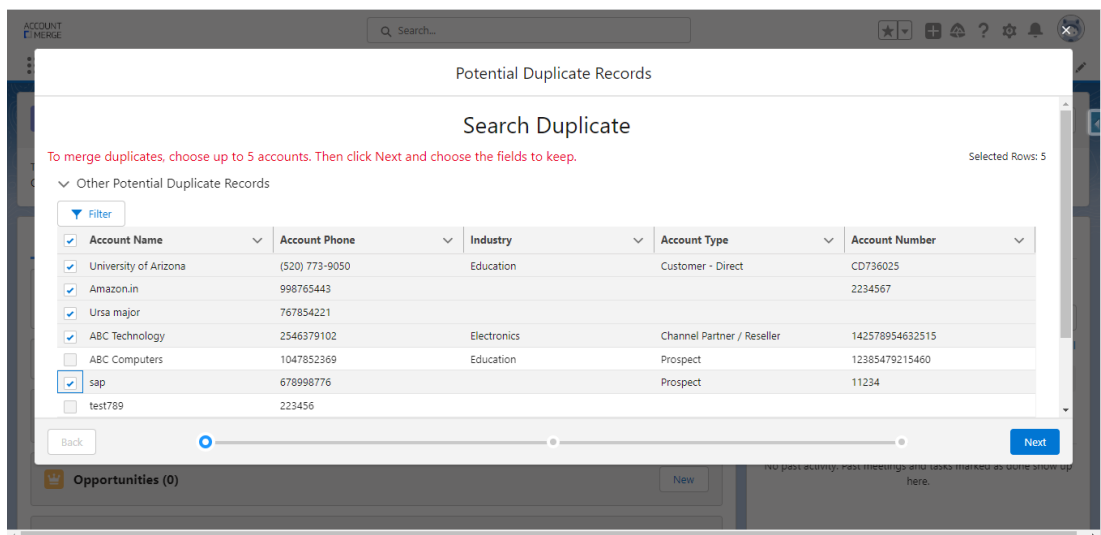
Selected Rows: 0

Other Potential Duplicate Records

Reset Filter

Account Name	Account Phone	Industry	Account Type	Website	Account Number
☐ Advanz 101	78789876	Engineering	Prospect	Advanz101.com	1008
☐ Advanz 101 Consulting Services	7412589036	Consulting	Customer - Direct	www.ACS.com	1005
☐ University of Arizona	(520) 773-9050	Education	Customer - Direct	www.universityofarizona.com	CD736025
☐ ABC Computers	1047852369	Education	Prospect	www.abccomputers.com	12385479215460

5. Select up to **five** records to be merged and click on the **Next** button.



Potential Duplicate Records

Search Duplicate

To merge duplicates, choose up to 5 accounts. Then click Next and choose the fields to keep.

Selected Rows: 5

Other Potential Duplicate Records

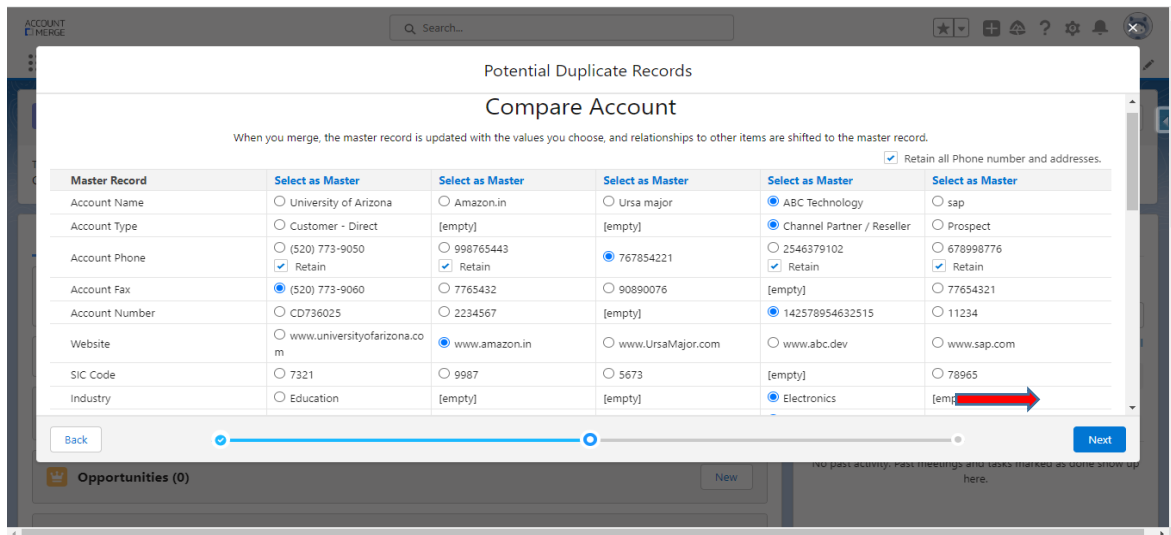
Filter

Account Name	Account Phone	Industry	Account Type	Account Number
☒ University of Arizona	(520) 773-9050	Education	Customer - Direct	CD736025
☒ Amazon.in	998765443			2234567
☒ Ursa major	767854221			
☒ ABC Technology	2546379102	Electronics	Channel Partner / Reseller	142578954632515
☐ ABC Computers	1047852369	Education	Prospect	12385479215460
☒ sap	678998776		Prospect	11234
☐ test789	223456			

Back Next

Note: - If user wants to change the column fields in the data table, then refer to [Account and Contact field configuration](#).

6. Compare the selected records and choose one record as the master record by clicking on **"Select as Master"**. For each field, information of only one Account will be retained. But for some special fields like Phone Number and Address, multiple records can be retained. To retain the addresses and phone values, click the **"Retain"** checkbox and click on **Next** to navigate to the next screen. This will save extra information that is needed which otherwise would be lost in a simple merge process.



Potential Duplicate Records

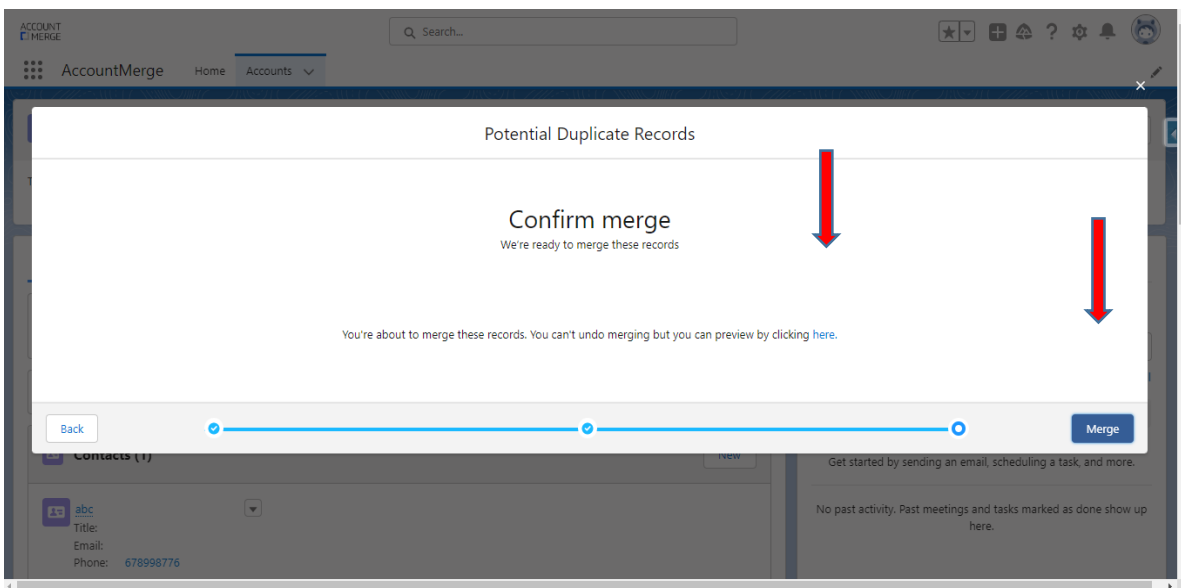
Compare Account

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record. ☒ Retain all Phone number and addresses.

Master Record	Select as Master	Select as Master	Select as Master	Select as Master	Select as Master
Account Name	☐ University of Arizona	☐ Amazon.in	☐ Ursa major	☒ ABC Technology	☐ sap
Account Type	☐ Customer - Direct	[empty]	[empty]	☒ Channel Partner / Reseller	☐ Prospect
Account Phone	☐ (520) 773-9050	☐ 998765443	☒ 767854221	☐ 2546379102	☐ 678998776
	☒ Retain	☒ Retain		☒ Retain	☒ Retain
Account Fax	☒ (520) 773-9060	☐ 7765432	☐ 90890076	[empty]	☐ 77654321
Account Number	☐ CD736025	☐ 2234567	[empty]	☒ 142578954632515	☐ 11234
Website	☐ www.universityofarizona.com	☒ www.amazon.in	☐ www.UrsaMajor.com	☐ www.abc.dev	☐ www.sap.com
SIC Code	☐ 7321	☐ 9987	☐ 5673	[empty]	☐ 78965
Industry	☐ Education	[empty]	[empty]	☒ Electronics	[empty]

Back Next

7. Records can now be merged by clicking the **Merge** Button. As merging cannot be reversed we have provided the Preview view so that user can confirm the outcome before actual merge commences. Preview by clicking the link **"here"**.



Potential Duplicate Records

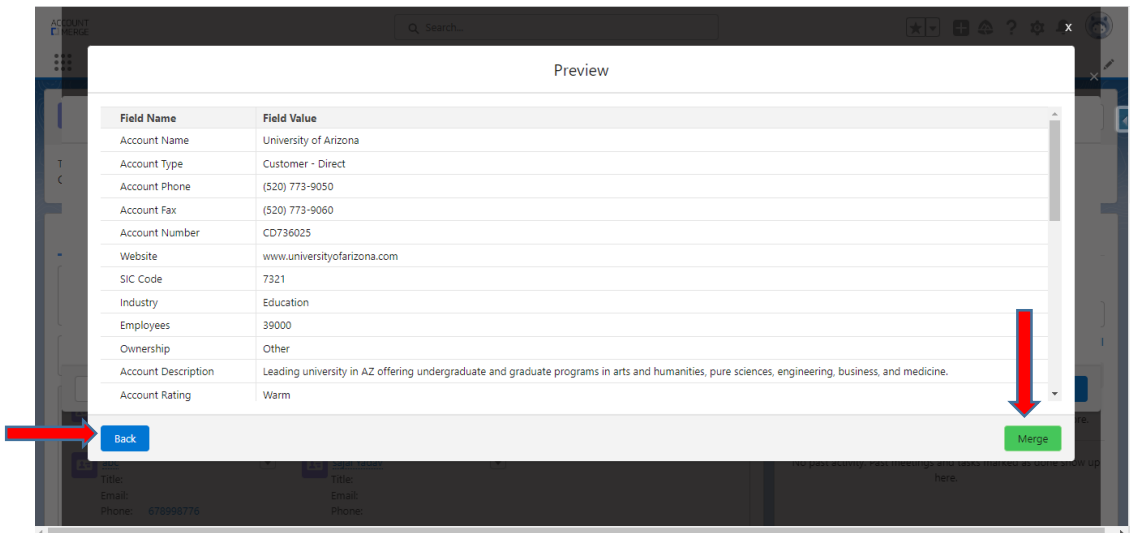
Confirm merge

We're ready to merge these records

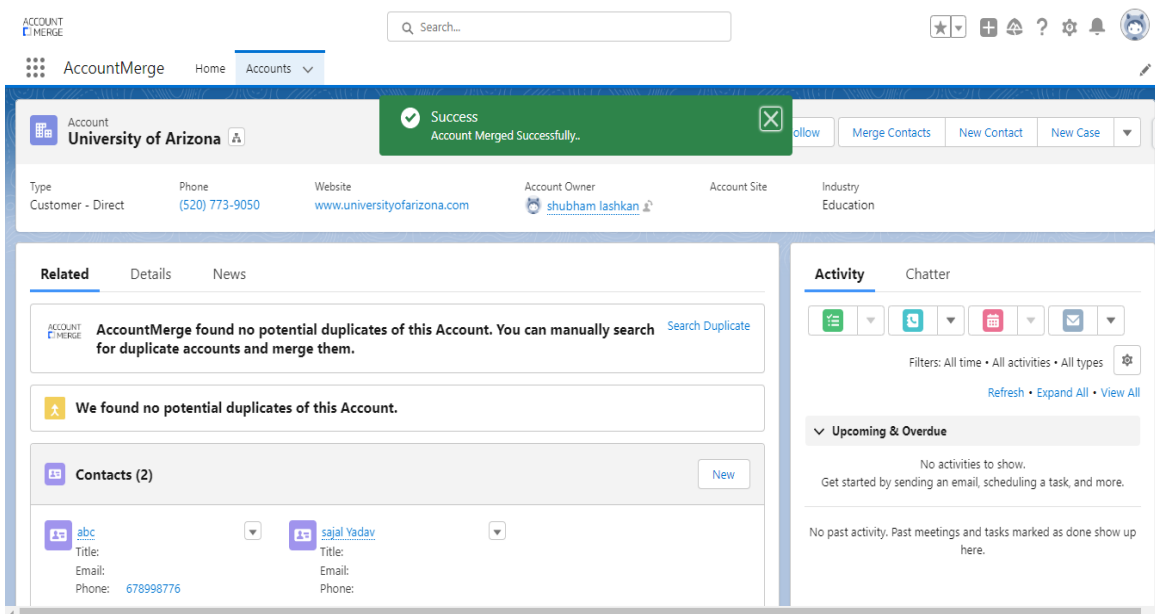
You're about to merge these records. You can't undo merging but you can preview by clicking [here](#).

Back Merge

8. On the Preview Screen, retained fields that will be saved on selected Master record will be visible and can be merged by clicking the Merge Button. In case any correction is needed, you can click the back button and do the changes needed in the previous screen.



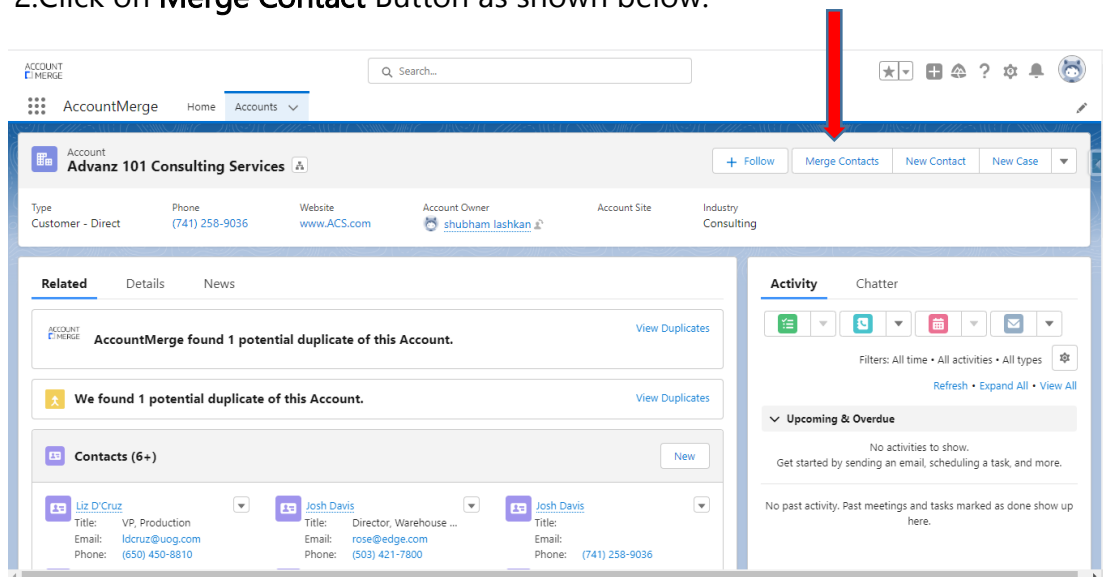
9. After clicking the **Merge** button, the records will be **merged**, and the user will be redirected to the Account selected as Master Record. A notification will also appear indicating that the account has been merged successfully.



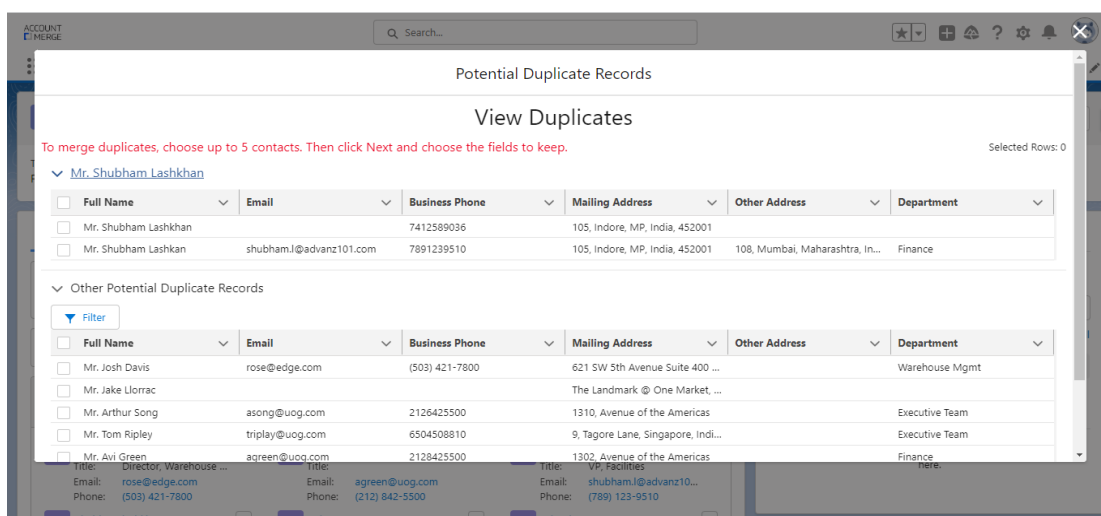
How to Merge Contacts

As we have discussed the merging process of accounts, there can be scenarios where a single account is having multiple contacts, which are similar. This scenario will increase further after account merging. Hence, merging of contacts will be very useful and your AccountMerge application covers this feature as well.

1. Navigate to Account record page.
2. Click on **Merge Contact** Button as shown below.

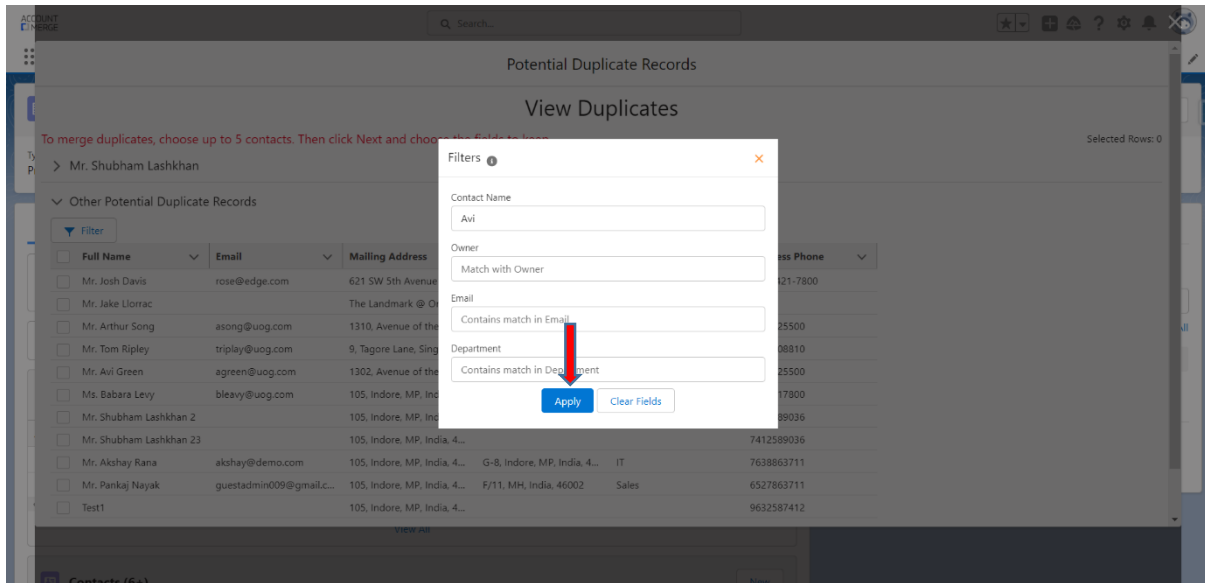


3. All Contact records related to that specific account will be visible now.

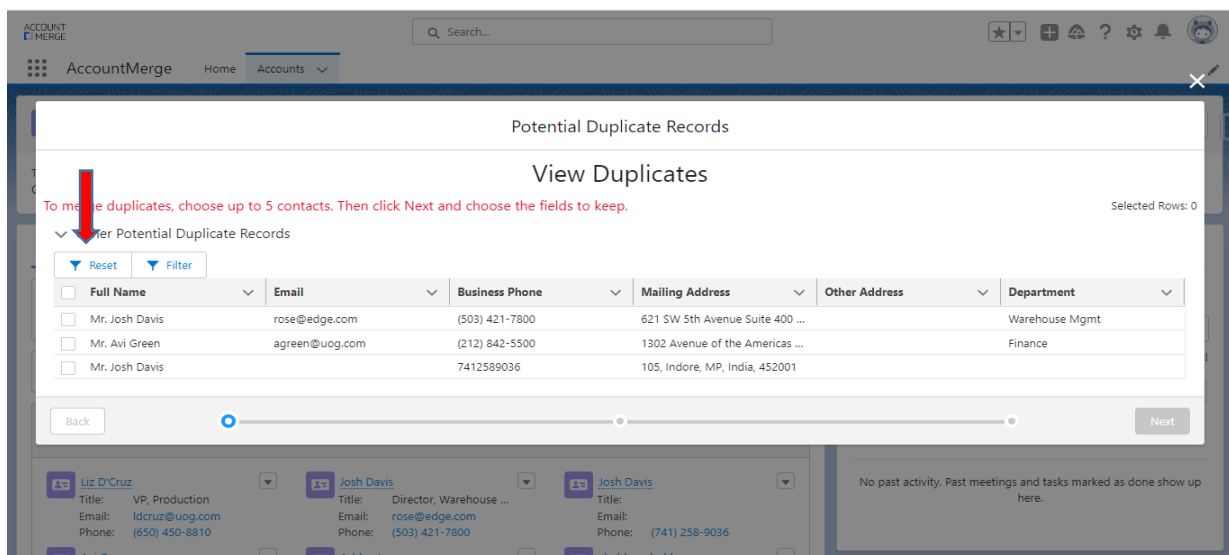


Note:-If user wants to change the column fields in the data table, then refer to [Account and Contact field configuration](#).

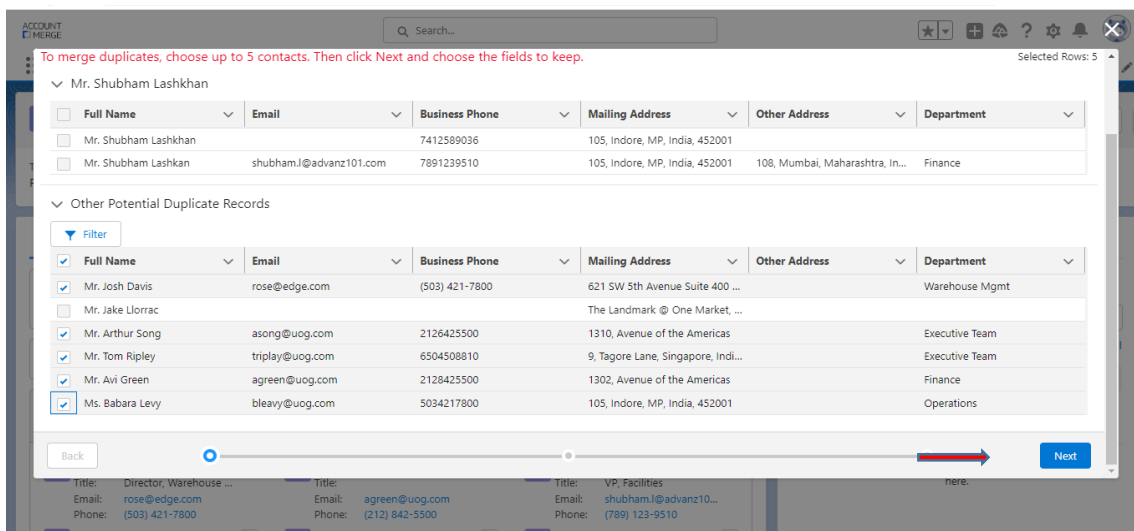
4. To facilitate searching and selection of contacts manually we can use different available filters to zero in on the required contacts. To apply filter click on **Filter** button. It filters Contacts based on Contact Name, Owner, Email, and Department. Click Apply to set filter.



5. Reset the filter results by clicking the **Reset** button



6. Select **Maximum five** contacts which are needed to be merged at one time and click **Next** Button. In case where more than 5 contacts are required to be merged then the same can be accomplished by repeating the contact merge steps.



To merge duplicates, choose up to 5 contacts. Then click Next and choose the fields to keep.

Selected Rows: 5

Mr. Shubham Lashkhan

☐	Full Name	Email	Business Phone	Mailing Address	Other Address	Department
☐	Mr. Shubham Lashkhan		7412589036	105, Indore, MP, India, 452001		
☐	Mr. Shubham Lashkhan	shubham.l@advanz101.com	7891239510	105, Indore, MP, India, 452001	108, Mumbai, Maharashtra, In...	Finance

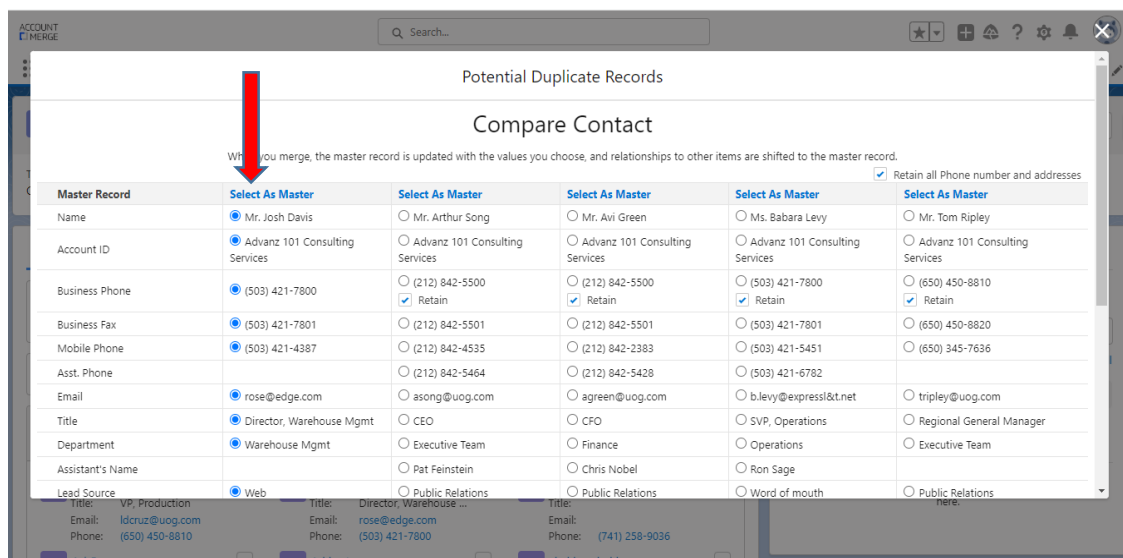
Other Potential Duplicate Records

Filter

☒	Full Name	Email	Business Phone	Mailing Address	Other Address	Department
☒	Mr. Josh Davis	rose@edge.com	(503) 421-7800	621 SW 5th Avenue Suite 400 ...		Warehouse Mgmt
☐	Mr. Jake Llorrac			The Landmark @ One Market, ...		
☒	Mr. Arthur Song	asong@uog.com	2126425500	1310, Avenue of the Americas		Executive Team
☒	Mr. Tom Ripley	tripleplay@uog.com	6504508810	9, Tagore Lane, Singapore, Indi...		Executive Team
☒	Mr. Avi Green	agreen@uog.com	2128425500	1302, Avenue of the Americas		Finance
☒	Ms. Babara Levy	bleavy@uog.com	5034217800	105, Indore, MP, India, 452001		Operations

Back Next

7. The duplicate accounts can now be compared, and a master record can be selected by clicking on "**Select as Master**". The record chosen as the master will become the primary record.



Potential Duplicate Records

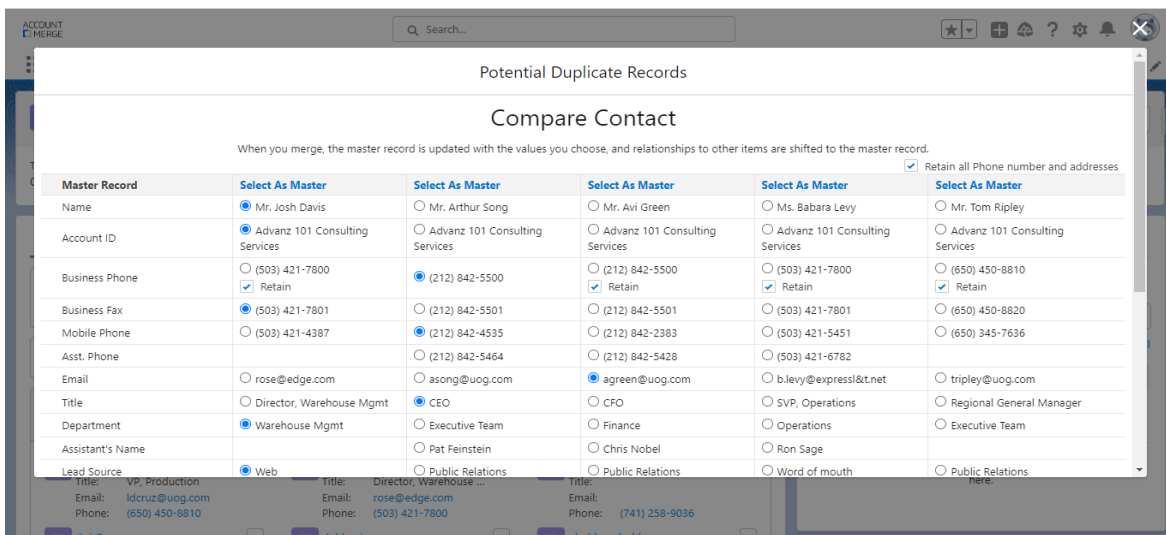
Compare Contact

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

☒ Retain all Phone number and addresses

Master Record	Select As Master	Select As Master	Select As Master	Select As Master	Select As Master
Name	☒ Mr. Josh Davis	☐ Mr. Arthur Song	☐ Mr. Avi Green	☐ Ms. Babara Levy	☐ Mr. Tom Ripley
Account ID	☒ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services
Business Phone	☒ (503) 421-7800	☐ (212) 842-5500 ☒ Retain	☐ (212) 842-5500 ☒ Retain	☐ (503) 421-7800 ☒ Retain	☐ (650) 450-8810 ☒ Retain
Business Fax	☒ (503) 421-7801	☐ (212) 842-5501	☐ (212) 842-5501	☐ (503) 421-7801	☐ (650) 450-8820
Mobile Phone	☒ (503) 421-4387	☐ (212) 842-4535	☐ (212) 842-2383	☐ (503) 421-5451	☐ (650) 345-7636
Asst. Phone		☐ (212) 842-5464	☐ (212) 842-5428	☐ (503) 421-6782	
Email	☒ rose@edge.com	☐ asong@uog.com	☐ agreen@uog.com	☐ b.levy@expressl&t.net	☐ tripleplay@uog.com
Title	☒ Director, Warehouse Mgmt	☐ CEO	☐ CFO	☐ SVP, Operations	☐ Regional General Manager
Department	☒ Warehouse Mgmt	☐ Executive Team	☐ Finance	☐ Operations	☐ Executive Team
Assistant's Name		☐ Pat Feinstein	☐ Chris Nobel	☐ Ron Sage	
Lead Source	☒ Web	☐ Public Relations	☐ Public Relations	☐ Word of mouth	☐ Public Relations

8. Preserving the values is also possible by clicking on the **radio** buttons, which allows for flexibility in selecting fields from records other than the master record.



Potential Duplicate Records

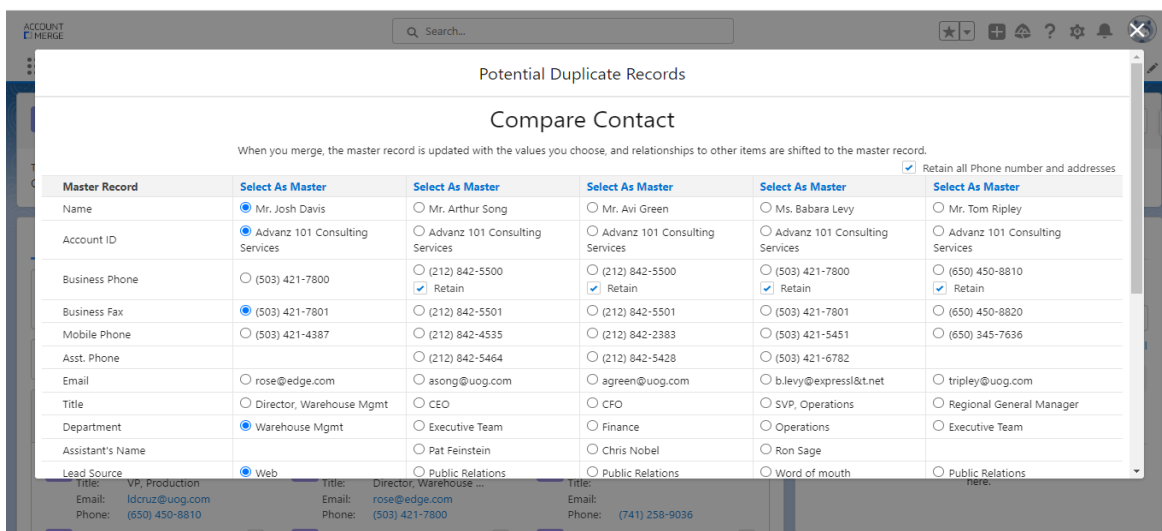
Compare Contact

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

☒ Retain all Phone number and addresses

Master Record	Select As Master	Select As Master	Select As Master	Select As Master	Select As Master
Name	☒ Mr. Josh Davis	☐ Mr. Arthur Song	☐ Mr. Avi Green	☐ Ms. Babara Levy	☐ Mr. Tom Ripley
Account ID	☒ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services
Business Phone	☐ (503) 421-7800 ☒ Retain	☒ (212) 842-5500	☐ (212) 842-5500 ☒ Retain	☐ (503) 421-7800 ☒ Retain	☐ (650) 450-8810 ☒ Retain
Business Fax	☒ (503) 421-7801	☐ (212) 842-5501	☐ (212) 842-5501	☐ (503) 421-7801	☐ (650) 450-8820
Mobile Phone	☐ (503) 421-4387	☒ (212) 842-4535	☐ (212) 842-2383	☐ (503) 421-5451	☐ (650) 345-7636
Asst. Phone	☐	☐ (212) 842-5464	☐ (212) 842-5428	☐ (503) 421-6782	☐
Email	☐ rose@edge.com	☐ asong@uog.com	☒ agreen@uog.com	☐ b.levy@expressl&t.net	☐ tripley@uog.com
Title	☐ Director, Warehouse Mgmt	☒ CEO	☐ CFO	☐ SVP, Operations	☐ Regional General Manager
Department	☒ Warehouse Mgmt	☐ Executive Team	☐ Finance	☐ Operations	☐ Executive Team
Assistant's Name	☐	☐ Pat Feinstein	☐ Chris Nobel	☐ Ron Sage	☐
Lead Source	☒ Web	☐ Public Relations	☐ Public Relations	☐ Word of mouth	☐ Public Relations

9. Suppose we need to retain Address/Phone numbers of more than one contact. In such case one can retain the addresses and phone values by checking the **"Retain"** checkbox and click on **Next** to navigate to the next screen. This will save extra information that is needed which otherwise would be lost in the merge process.



Potential Duplicate Records

Compare Contact

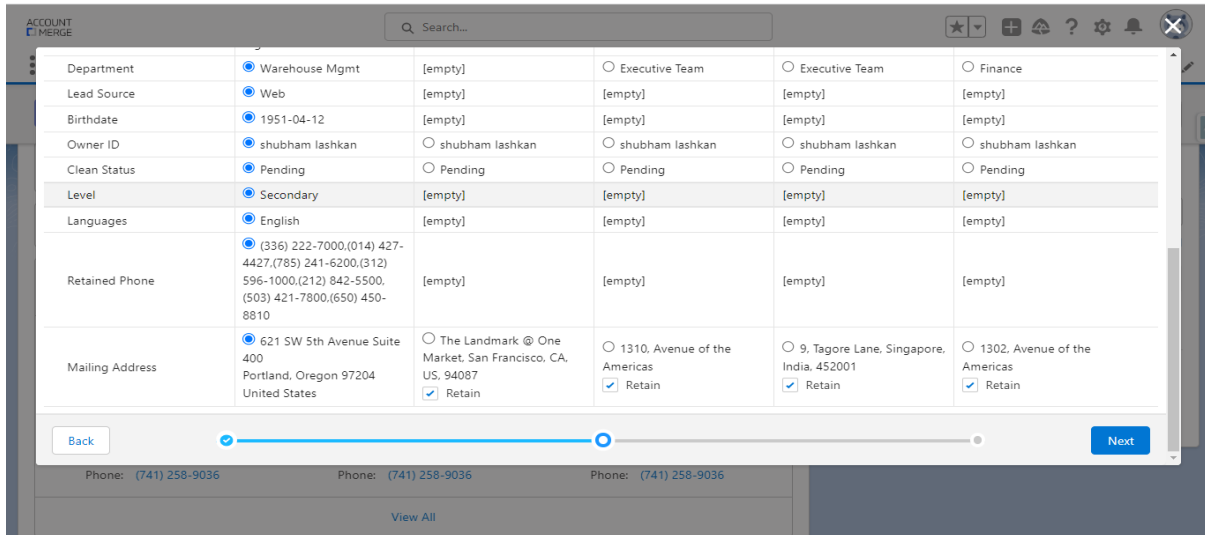
When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

☒ Retain all Phone number and addresses

Master Record	Select As Master	Select As Master	Select As Master	Select As Master	Select As Master
Name	☒ Mr. Josh Davis	☐ Mr. Arthur Song	☐ Mr. Avi Green	☐ Ms. Babara Levy	☐ Mr. Tom Ripley
Account ID	☒ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services	☐ Advanz 101 Consulting Services
Business Phone	☐ (503) 421-7800 ☒ Retain	☐ (212) 842-5500 ☒ Retain	☐ (212) 842-5500 ☒ Retain	☐ (503) 421-7800 ☒ Retain	☐ (650) 450-8810 ☒ Retain
Business Fax	☒ (503) 421-7801	☐ (212) 842-5501	☐ (212) 842-5501	☐ (503) 421-7801	☐ (650) 450-8820
Mobile Phone	☐ (503) 421-4387	☐ (212) 842-4535	☐ (212) 842-2383	☐ (503) 421-5451	☐ (650) 345-7636
Asst. Phone	☐	☐ (212) 842-5464	☐ (212) 842-5428	☐ (503) 421-6782	☐
Email	☐ rose@edge.com	☐ asong@uog.com	☐ agreen@uog.com	☐ b.levy@expressl&t.net	☐ tripley@uog.com
Title	☐ Director, Warehouse Mgmt	☐ CEO	☐ CFO	☐ SVP, Operations	☐ Regional General Manager
Department	☒ Warehouse Mgmt	☐ Executive Team	☐ Finance	☐ Operations	☐ Executive Team
Assistant's Name	☐	☐ Pat Feinstein	☐ Chris Nobel	☐ Ron Sage	☐
Lead Source	☒ Web	☐ Public Relations	☐ Public Relations	☐ Word of mouth	☐ Public Relations

10.If multiple **mailing addresses** or **other addresses** are being retained, then a **pop-up** screen can be seen.

Click **Yes** to navigate to next screen or click **No** to remain on same screen.



ACCOUNT MERGE

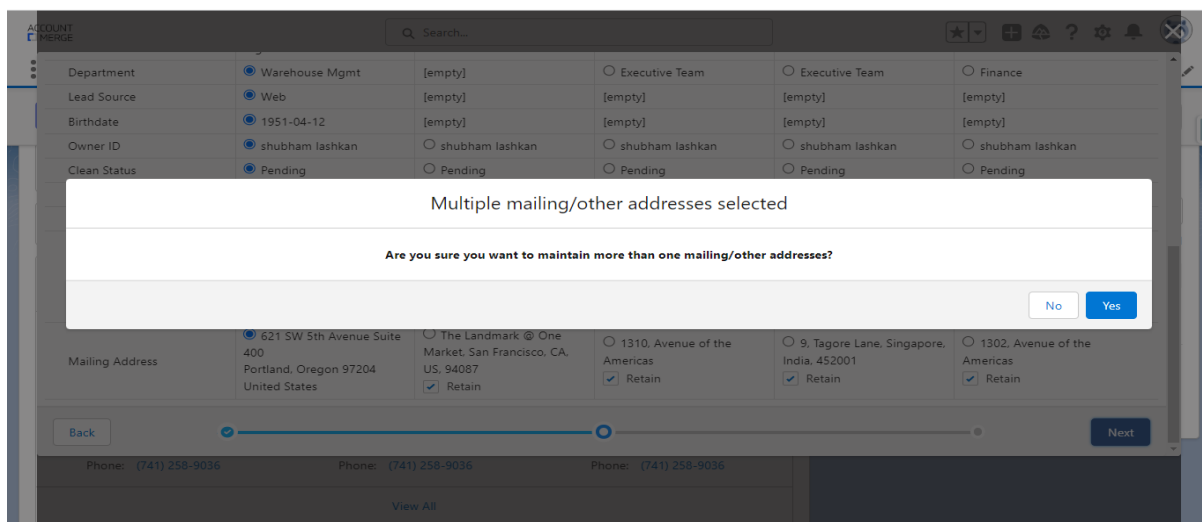
Search...

Department	☒ Warehouse Mgmt	[empty]	☐ Executive Team	☐ Executive Team	☐ Finance
Lead Source	☒ Web	[empty]	[empty]	[empty]	[empty]
Birthdate	☒ 1951-04-12	[empty]	[empty]	[empty]	[empty]
Owner ID	☒ shubham lashkan	☐ shubham lashkan	☐ shubham lashkan	☐ shubham lashkan	☐ shubham lashkan
Clean Status	☒ Pending	☐ Pending	☐ Pending	☐ Pending	☐ Pending
Level	☒ Secondary	[empty]	[empty]	[empty]	[empty]
Languages	☒ English	[empty]	[empty]	[empty]	[empty]
Retained Phone	☒ (336) 222-7000,(014) 427-4427,(785) 241-6200,(312) 596-1000,(212) 842-5500,(503) 421-7800,(650) 450-8810	[empty]	[empty]	[empty]	[empty]
Mailing Address	☒ 621 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	☐ The Landmark @ One Market, San Francisco, CA, US, 94087 ☒ Retain	☐ 1310, Avenue of the Americas ☒ Retain	☐ 9, Tagore Lane, Singapore, India, 452001 ☒ Retain	☐ 1302, Avenue of the Americas ☒ Retain

Back Next

Phone: (741) 258-9036 Phone: (741) 258-9036 Phone: (741) 258-9036

[View All](#)



ACCOUNT MERGE

Search...

Department	☒ Warehouse Mgmt	[empty]	☐ Executive Team	☐ Executive Team	☐ Finance
Lead Source	☒ Web	[empty]	[empty]	[empty]	[empty]
Birthdate	☒ 1951-04-12	[empty]	[empty]	[empty]	[empty]
Owner ID	☒ shubham lashkan	☐ shubham lashkan	☐ shubham lashkan	☐ shubham lashkan	☐ shubham lashkan
Clean Status	☒ Pending	☐ Pending	☐ Pending	☐ Pending	☐ Pending

Multiple mailing/other addresses selected

Are you sure you want to maintain more than one mailing/other addresses?

No Yes

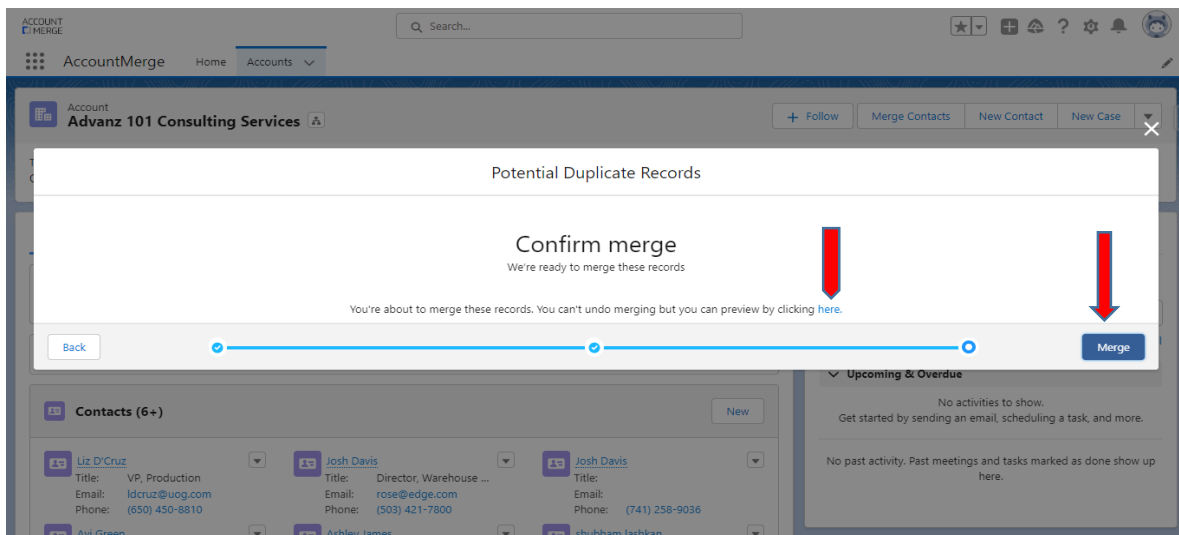
Mailing Address	☒ 621 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	☐ The Landmark @ One Market, San Francisco, CA, US, 94087 ☒ Retain	☐ 1310, Avenue of the Americas ☒ Retain	☐ 9, Tagore Lane, Singapore, India, 452001 ☒ Retain	☐ 1302, Avenue of the Americas ☒ Retain
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Back Next

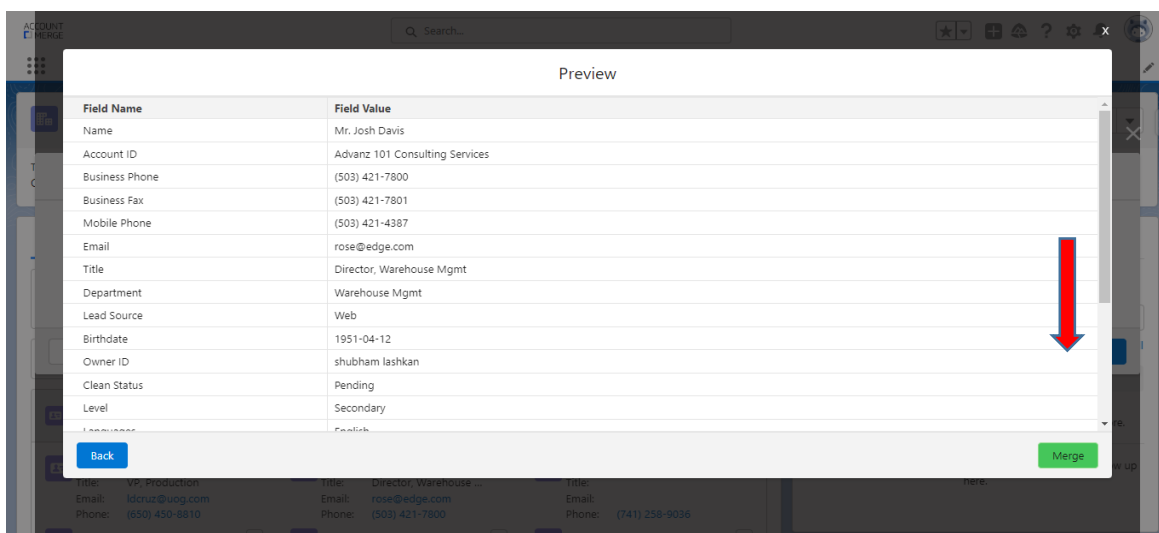
Phone: (741) 258-9036 Phone: (741) 258-9036 Phone: (741) 258-9036

[View All](#)

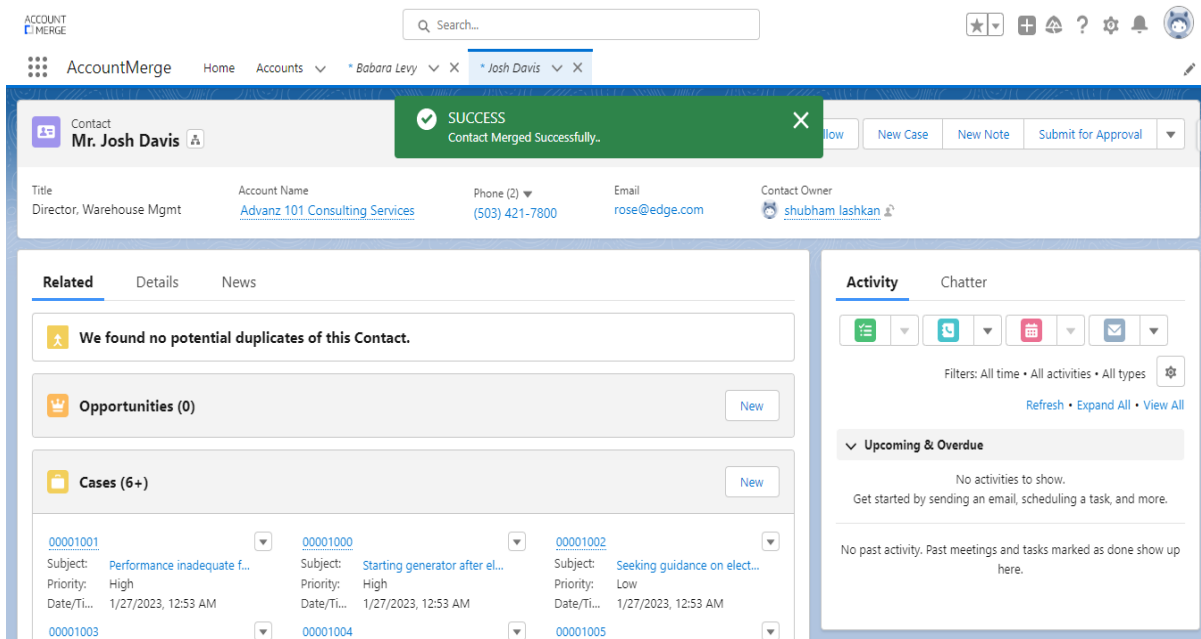
11. Records can now be merged by clicking the **Merge** Button. As merging cannot be reversed we have provided the Preview view so that user can confirm the outcome before actual merge commences. Preview by clicking the link "[here](#)".



12. On the Preview Screen, retained fields that will be saved on selected Master record will be visible and can be merged by clicking the Merge Button. In case any correction is needed, you can click the back button and do the changes needed in the previous screen.



13. After **clicking** the **Merge** button, the records will be **merged**, and the user will be redirected to the Contact Record selected as Master. A notification will also appear indicating that the contact's have been merged successfully. To access the retained values user can navigate to the **Related** tab of the Contact record.



AccountMerge

Search...

Home Accounts ▾ * Barbara Levy ▾ X * Josh Davis ▾ X

CONTACT Mr. Josh Davis

SUCCESS Contact Merged Successfully..

Title Director, Warehouse Mgmt Account Name Advanz 101 Consulting Services Phone (2) (503) 421-7800 Email rose@edge.com Contact Owner shubham lashkan

Related Details News

We found no potential duplicates of this Contact.

Opportunities (0) New

Cases (6+) New

00001001 Subject: Performance inadequate f... Priority: High Date/Ti... 1/27/2023, 12:53 AM

00001000 Subject: Starting generator after el... Priority: High Date/Ti... 1/27/2023, 12:53 AM

00001002 Subject: Seeking guidance on elect... Priority: Low Date/Ti... 1/27/2023, 12:53 AM

00001003 Subject: ... Priority: ... Date/Ti... 1/27/2023, 12:53 AM

00001004 Subject: ... Priority: ... Date/Ti... 1/27/2023, 12:53 AM

00001005 Subject: ... Priority: ... Date/Ti... 1/27/2023, 12:53 AM

Activity Chatter

Filters: All time • All activities • All types

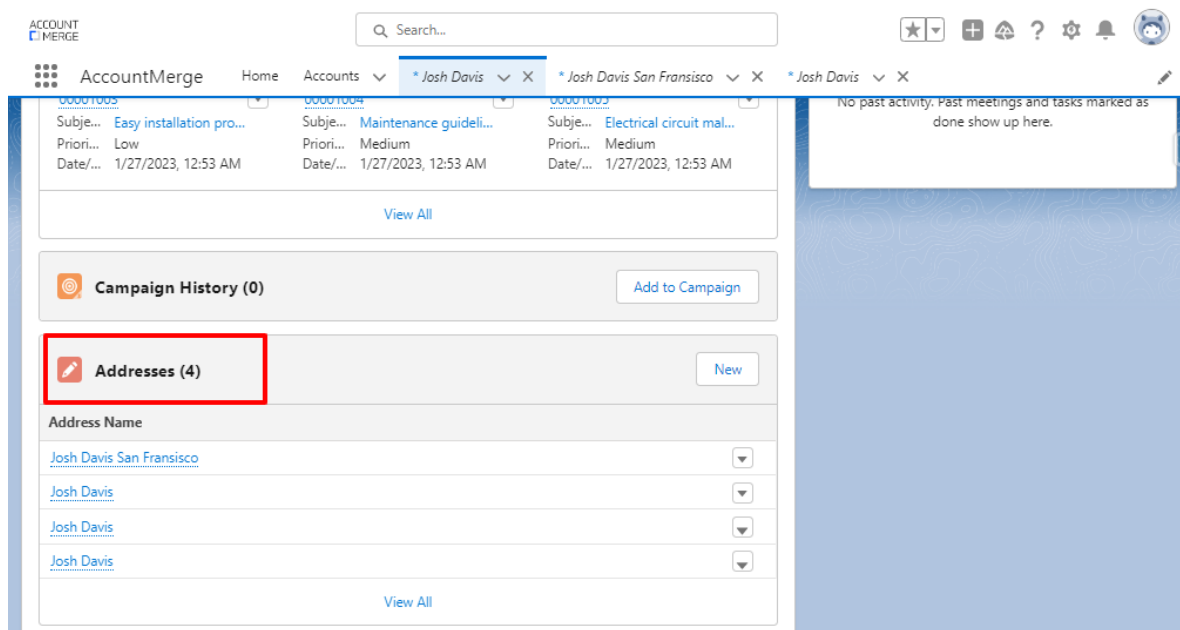
Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

14. To access the retained addresses, navigate to the Addresses list visible under the related tab of the Contact record page.



AccountMerge

Search...

Home Accounts ▾ * Josh Davis ▾ X * Josh Davis San Francisco ▾ X * Josh Davis ▾ X

00001005 Subject: Easy installation pro... Priority: Low Date/Ti... 1/27/2023, 12:53 AM

00001004 Subject: Maintenance guideli... Priority: Medium Date/Ti... 1/27/2023, 12:53 AM

00001003 Subject: Electrical circuit mal... Priority: Medium Date/Ti... 1/27/2023, 12:53 AM

View All

Campaign History (0) Add to Campaign

Addresses (4) New

Address Name

Josh Davis San Francisco

Josh Davis

Josh Davis

Josh Davis

View All

No past activity. Past meetings and tasks marked as done show up here.

Other Apps by Advanz101

- **MergeEase**
Merge multiple service contracts.
- **PartEase**
User can select Contract Line Items available in Service Contract and Renew only selected Contract Line Items
- **MoveEase**
Transfer asset from one account to another
- **AutoSplit**
Split Service Contract into multiple contracts
- **CaseAutoMail**
Transform Case Communication with CaseAutomail
- **EaseQuotePdf**
Automate Quote PDF Generation on Status
- **Split Ease**
Split Service Contract into multiple contracts manually to avoid large cart errors.

Hope you find our AccountMerge App useful. We would love to hear about our app from you. In case of any query or further clarification please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVANZ101 Business Systems Inc. is a registered Salesforce partner providing best-in class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us at info@advanz101.com

Checklist for post App setup.

The app will work as per design only if it is configured in right way. Please refer below checklist to see the one time initial configuration is done properly or not

Step Heading	Changes will be visible
How to add DuplicateMsg Component to record page.	After performing this step Duplicate message component will be visible in the related tab of account record which help you know if duplicate account exists in you org or not.
How to add Merge Contacts Button	After performing this step Merge Contacts button will be visible on quick action list on account record page.
How to add Address into related list	After performing this step Addresses related list will be visible on accounts related tab as well as contact related tab.
How to add retained phone field into record detail page	After performing this step Retained Phone field will be visible on accounts and contacts record detail page.
Account and Contact Field Configuration	By default data of 4 fields will be visible when you click on view duplicate/search duplicate button from DuplicateMsg component which you added by following How to add DuplicateMsg Component to record page. Also when you click on Merge Contacts button 4 fields will be visible. But if you have done the changes by following Account and Contact Field Configuration then field count will change based on changes you have done.