

OneMerge | Home Page

Demo | Coffee Break Test

OneMerge extends Salesforce's native duplicate detection with automated resolution capabilities that pass the "Coffee Break Test"—handling routine duplicate management in minutes instead of hours. The walkthrough demonstrates how merge rules automate repetitive decisions while routing only exceptional cases requiring human judgment to a review queue. Admins gain transparent audit trails of all resolutions, significantly reducing manual work and keeping Salesforce data clean with minimal effort.

Total chapters: 4

Chapter 1: From Detection to Resolution

Total steps: 4

1. Does your Duplicate Management process pass the Coffee Break Test?

The Coffee Break Test is simple: routine duplicate management should take minutes, not hours.

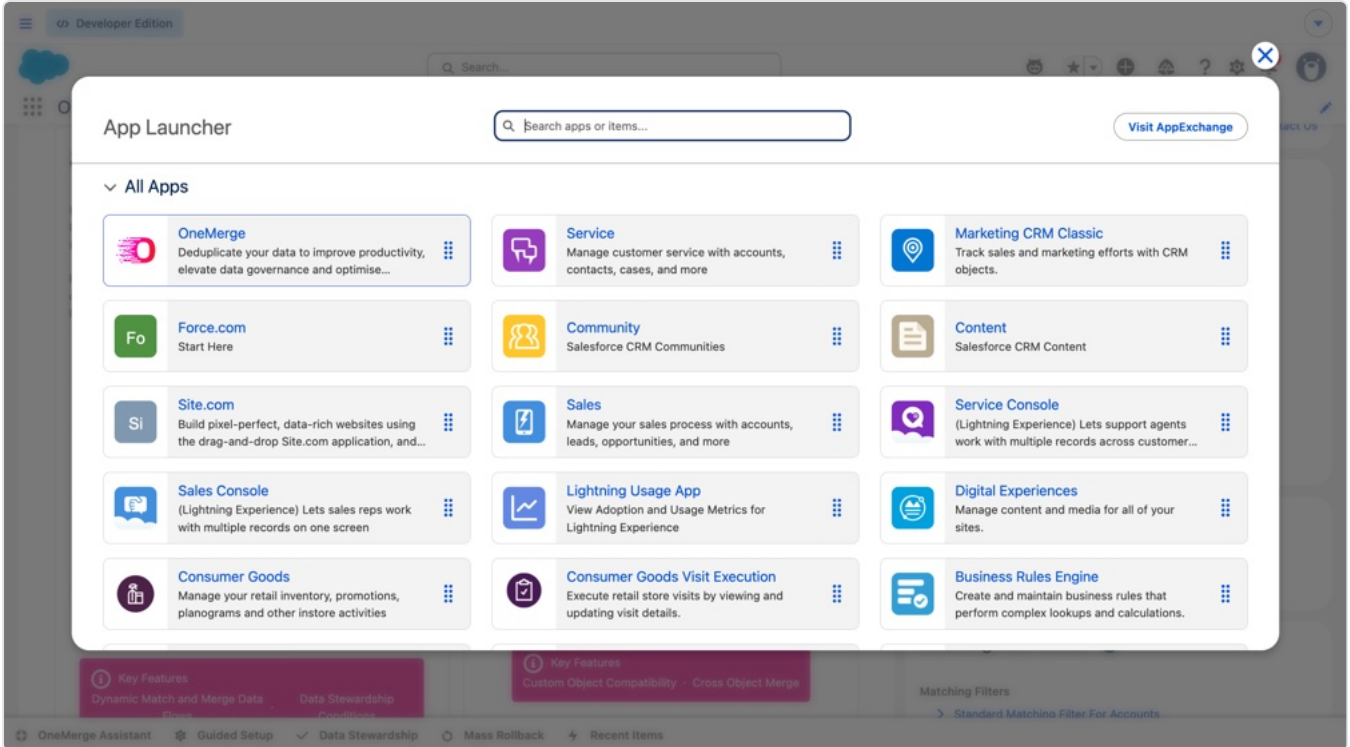
See how **OneMerge** extends Salesforce Duplicate Management into efficient duplicate resolution.

Setup the Rules

Automate Resolution

Review Exceptions Only

[Learn more about the Coffee Break Test](#)



2. Native to Salesforce

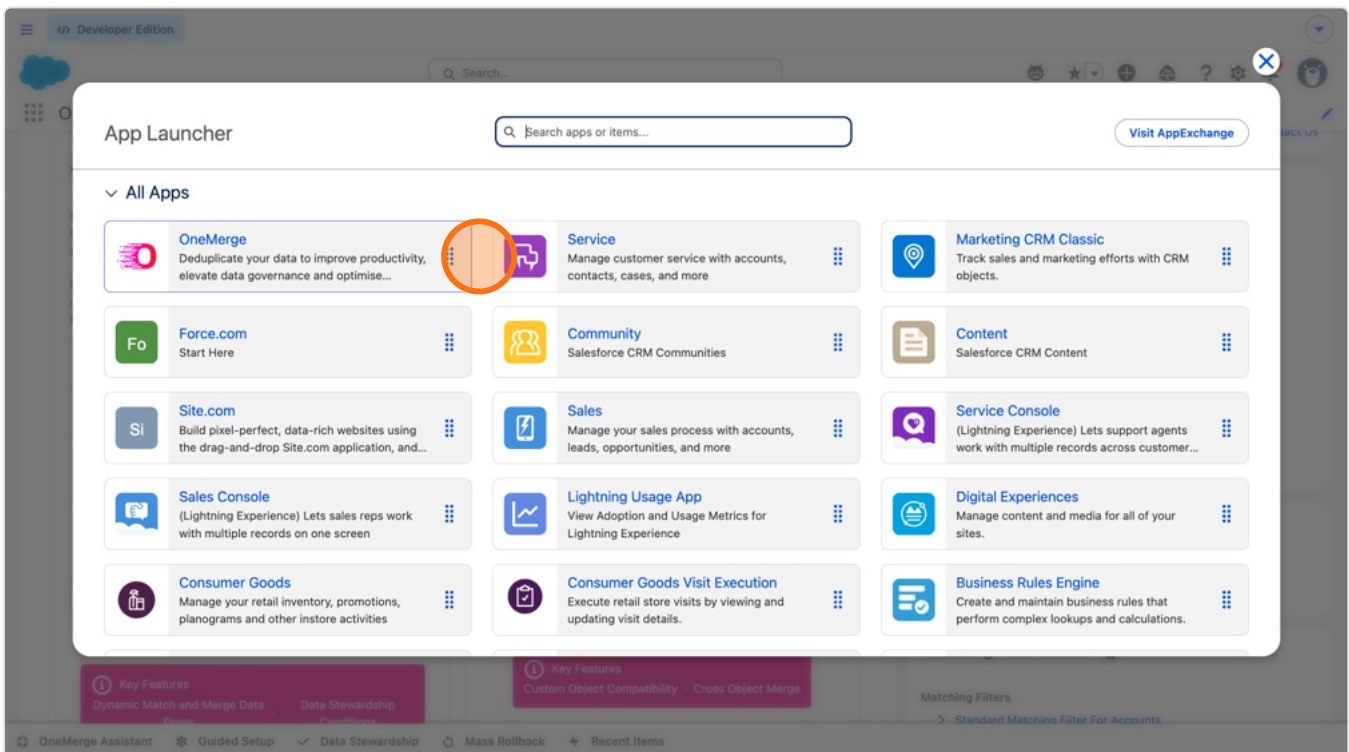
OneMerge runs inside Salesforce, so your CRM data never leaves the platform.

Duplicate resolution, review and governance all happen within the Salesforce experience.

Audio transcript: OneMerge is a native Salesforce application, so your CRM data stays securely within Salesforce.

There's no need to move data to an external platform for duplicate resolution.

Let's open OneMerge and see how the process works.



3. Salesforce finds the duplicates. But who resolves them?

OneMerge builds on Salesforce Duplicate Management.

Here you can see the Matching Rules and Duplicate Rules already active in Salesforce — the foundation for identifying potential duplicates.

Salesforce does the detection. The challenge is what happens next.

Without automation, admins are left reviewing, comparing and manually merging records — repetitive work that is error prone, time-consuming and easy to postpone.

Audio transcript: OneMerge starts with the duplicate management capability already built into Salesforce.

Here we can see the active Matching Rules and Duplicate Rules used to identify potential duplicates.

Salesforce is already doing the important work of finding them.

The challenge is resolution. Without automation, admins still need to review records, compare values and complete merges manually — repetitive work that is time-consuming and very easy to postpone.

Permissions for System Admin

0 Duplicate Record Sets (Duplicate Jobs)
Duplicate Record Sets are generated by Salesforce and merged by OneMerge.

Last Duplicate Record Set: 2026-08-07

 Key Features

Dynamic Match and Merge Data Flow

Data Stewardship
Conditions

2 Please review the Permissions assignments and related configuration pre-requisites noted below.

OneMerge User Permission Set Assignment

Please assign the Permission Set [OneMerge User] to all users who interact with OneMerge.

 Duplicate Record Set Object Access Permissions

Create • Read • Update • Delete

[Contact Object Access Permissions](#)

Create · Read · Update · Delete

Duplicate Record Set Layout Assignment

Please ensure that the OneMerge Duplicate Record Set Layout is assigned to all relevant profiles.

 Duplicate Record Item Layout Assignment

Please ensure that the OneMerge Duplicate Record Item Layout is assigned to all relevant profiles.

OneMerge Fields for Contact

Please ensure that the OneMerge Fields (e.g. Is Merge Master? and Last Merged Date) are added to the relevant Page Layouts for the Salesforce Object.

Key Features

Custom Object Compatibility · Cross Object Merge

Merge Ruleset Status - Enterprise Edition

Merge Rulesets

Custom Merge Ruleset for ERP Company
Status: OK

Standard Merge Ruleset for Accounts
Status: OK

Standard Merge Ruleset for Contacts
Status: OK

Standard Merge Ruleset for Leads
Status: OK

Standard Ruleset For PersonAccount
Status: OK

Job Status ⓘ

No Active Jobs

Matching Filter Status

Matching Filters

Standard Matching Filter For Accounts

4. Stop managing duplicates. Start resolving them.

Merge Rules define how duplicates should be resolved.

Merge Automation then applies those rules automatically to routine cases.

Configure the logic once, automate the repeatable decisions and leave only the exceptions for human review.

Audio transcript: This is where OneMerge turns duplicate management into duplicate resolution.

Merge Rules define how records should be resolved, including which record should survive and which values should be retained.

Merge Automation then applies those rules to routine cases automatically.

So instead of asking an admin to make the same decision again and again, we configure the logic once, automate the repeatable work and leave only the exceptions for review.

The screenshot displays the OneMerge application interface, which is designed for managing duplicate records in Salesforce. The interface is organized into three main columns:

- Merge Rules:** This section allows users to define rules for resolving duplicates. It includes a "Contact to Lead" rule and a "Standard Merge Ruleset for Contacts" which includes rules for Email, Mailing Address, Mobile, Name, and Other Address. A pink box highlights "Key Features: Flexible Configuration · Multiple Rulesets per Object".
- Merge Jobs:** This section shows scheduled merge jobs. It includes a "Realtime Merge" job (highlighted with an orange circle) and a "Scheduled Merge Job" for "OneMerge ContactMergeJob [07082026-100442]".
- Merge Logs:** This section displays a list of merge jobs. The "All" filter is selected, showing a list of jobs with details such as "Object Type: Contact", "Job Type: Merge", "Merge Job Stat...: Completed", and "Created Date: 07/08/2026, 10:05".

The interface also features a top navigation bar with various tabs and a search bar, and a bottom navigation bar with icons for "OneMerge Assistant", "Guided Setup", "Data Stewardship", "Mass Rollback", and "Recent Items".

Chapter 2: Merge Activity

Total steps: 3

1. See the work already completed

Merge Activity gives admins a clear view of duplicate resolution across Salesforce.

See how many duplicates have been resolved, how much was automated, how often human review was required and the administrative time saved.

The focus shifts from managing a queue to understanding outcomes.

Audio transcript: Now we can see the impact of that automation.

Merge Activity shows the duplicate resolution work OneMerge has already completed across Salesforce.

At a glance, we can see how many duplicates have been resolved, the automation rate, how often human review was actually required and the estimated time saved.

So instead of an admin arriving to a backlog of duplicate records, they arrive to a view of outcomes — with visibility into what OneMerge has already taken care of.

Developer Edition

OneMerge

Home

Merge Activity

Merge Decisions

Merge Rule Setup

Find Duplicates

Duplicate Record Sets

Merge Requests

Merge Jobs

More

Search...

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Merge Activity

Today

Refresh

Review duplicate resolution outcomes and see the work completed by OneMerge.

DUPLICATES RESOLVED

40

Successful outcomes

AUTOMATION RATE

70%

Resolved without human review

HUMAN REVIEW RATE

30%

Requires human judgement

ESTIMATED TIME SAVED

56 min

Estimated administrative time saved

Resolution Breakdown

Records resolved automatically without user intervention.
43% of total

Records resolved with assistance from an agent.
28% of total

Records reviewed and merged by a user.
30% of total

Records reviewed and marked as not duplicates.
0% of total

Records that could not be resolved because processing failed or was blocked.
0% of total

Records whose resolution changes were rolled back.
0% of total

Search Merge Activity

Search by record name, ID, merge rule...

Salesforce Object

Resolution Type

Sort By

Direction

Clear Filters

Merge Activity (41)

Frankie Davis

Human Review 07/08/2026, 10:05:03

OneMerge Assistant

Guided Setup

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2. Reviewed by a User

Filter Merge Activity to see resolutions completed through human review.

The screenshot displays the OneMerge Merge Activity dashboard. At the top, there's a navigation bar with the OneMerge logo and a search bar. Below the navigation bar, the 'Merge Activity' section is active, showing a summary of duplicate resolution outcomes. The summary includes four key metrics: Duplicates Resolved (40), Automation Rate (70%), Human Review Rate (30%), and Estimated Time Saved (56 min). Below these metrics is a 'Resolution Breakdown' section with six categories: Records resolved automatically without user intervention (17, 43% of total), Records resolved with assistance from an agent (11, 28% of total), Records reviewed and merged by a user (12, 30% of total), Records reviewed and marked as duplicates (0, 0% of total), Records that could not be resolved because processing failed or was blocked (0, 0% of total), and Records whose resolution changes were rolled back (0, 0% of total). The 'Records reviewed and merged by a user' category is highlighted with a blue border, and the 'Records reviewed and marked as duplicates' category is highlighted with an orange circle. Below the breakdown is a 'Search Merge Activity' section with a search bar and filters for Salesforce Object, Resolution Type, Sort By, and Direction. At the bottom, there's a 'Merge Activity' table with a 'Show' dropdown set to 25. A sidebar on the right shows the user 'Frankie Davis' and a 'Human Review' log entry for 07/08/2026, 10:05:03.

Developer Edition

Search...

OneMerge Home Merge Activity Merge Decisions Merge Rule Setup Find Duplicates Duplicate Record Sets Merge Requests Merge Jobs More

Merge Activity

Today Refresh

Review duplicate resolution outcomes and see the work completed by OneMerge.

DUPLICATES RESOLVED
40
Successful outcomes

AUTOMATION RATE
70%
Resolved without human review

HUMAN REVIEW RATE
30%
Required human judgement

ESTIMATED TIME SAVED
56 min
Estimated administrative time saved

Resolution Breakdown

Records resolved automatically without user intervention. 17 43% of total

Records resolved with assistance from an agent. 11 28% of total

Records reviewed and merged by a user. 12 30% of total

Records reviewed and marked as duplicates. 0 0% of total

Records that could not be resolved because processing failed or was blocked. 0 0% of total

Records whose resolution changes were rolled back. 0 0% of total

Search Merge Activity

Search by record name, ID, merge rule...

Salesforce Object Resolution Type Sort By Direction

All All Select an Option Desc Clear Filters

Merge Activity (41)

Show 25

Frankie Davis

Human Review 07/08/2026, 10:05:03

Close

OneMerge Assistant Guided Setup Data Stewardship Mass Rollback Recent Items

3. Understand every decision

Open any Merge Activity record to see the records involved, the surviving master, the Merge Rule applied and how the resolution was reached.

Every outcome is transparent, auditable and, where appropriate, reversible with Easy Undo.

Audio transcript: From Merge Activity, we can open any resolution and understand exactly what happened.

Here we can see the records involved, the surviving master record, the Merge Rule that was applied and the resulting decision.

That gives the admin a clear audit trail behind every resolution.

And when needed, Easy Undo provides a controlled route back.

The screenshot displays the OneMerge Developer Edition interface. The top navigation bar includes a search bar and various icons. The main content area is divided into two panels. The left panel, titled 'Merge Activity (13)', lists several merge activities with details like the name (e.g., Frankie Davis), resolution type (Human Review), and timestamp. The right panel, titled 'Frankie Davis', provides a detailed view of a specific merge activity. It includes a 'RESOLUTION SUMMARY' section with fields for Activity ID, Resolution Type, Merge Ruleset, and Records Processed. Below this is a 'RECORDS INVOLVED' section showing the Master Record (Francesca Davis) and the Merged Record (Frankie Davis). A 'WHY THIS DECISION WAS MADE' section contains a text box explaining the decision. At the bottom of the right panel are three buttons: 'Open Master Record', 'Undo Merge', and 'Copy Activity ID'. An orange circle highlights the 'Undo Merge' button.

Developer Edition

Search...

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Merge Activity (13)

Show 25

Frankie Davis
Human Review
07/08/2026, 10:05:03 • Standard Merge Ruleset for Cont...

Dani Phillips
Human Review
07/08/2026, 09:51:54 • Standard Merge Ruleset for Cont...

Nat Scott
Human Review
07/08/2026, 09:51:54 • Standard Merge Ruleset for Cont...

Steph Harrison
Human Review
07/08/2026, 09:51:52 • Standard Merge Ruleset for Cont...

Pat King
Human Review
07/08/2026, 09:51:51 • Standard Merge Ruleset for Cont...

Maggie Lee
Human Review
07/08/2026, 09:51:50 • Standard Merge Ruleset for Cont...

Frankie Davis
Human Review 07/08/2026, 10:05:03

RESOLUTION SUMMARY

Activity ID MRES000000957
Resolution Type Human Review
Merge Ruleset Standard Merge Ruleset for Contacts
Records Processed 2 records

RECORDS INVOLVED

Francesca Davis Master Record X Frankie Davis Merged Record

WHY THIS DECISION WAS MADE

A user approved the recommended merge after reviewing the duplicate candidates.

Open Master Record Undo Merge Copy Activity ID

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Chapter 3: Merge Decisions

Total steps: 8

1. Only the exceptions need attention

When a duplicate cannot be resolved safely through automation, it is routed to **Merge Decisions**.

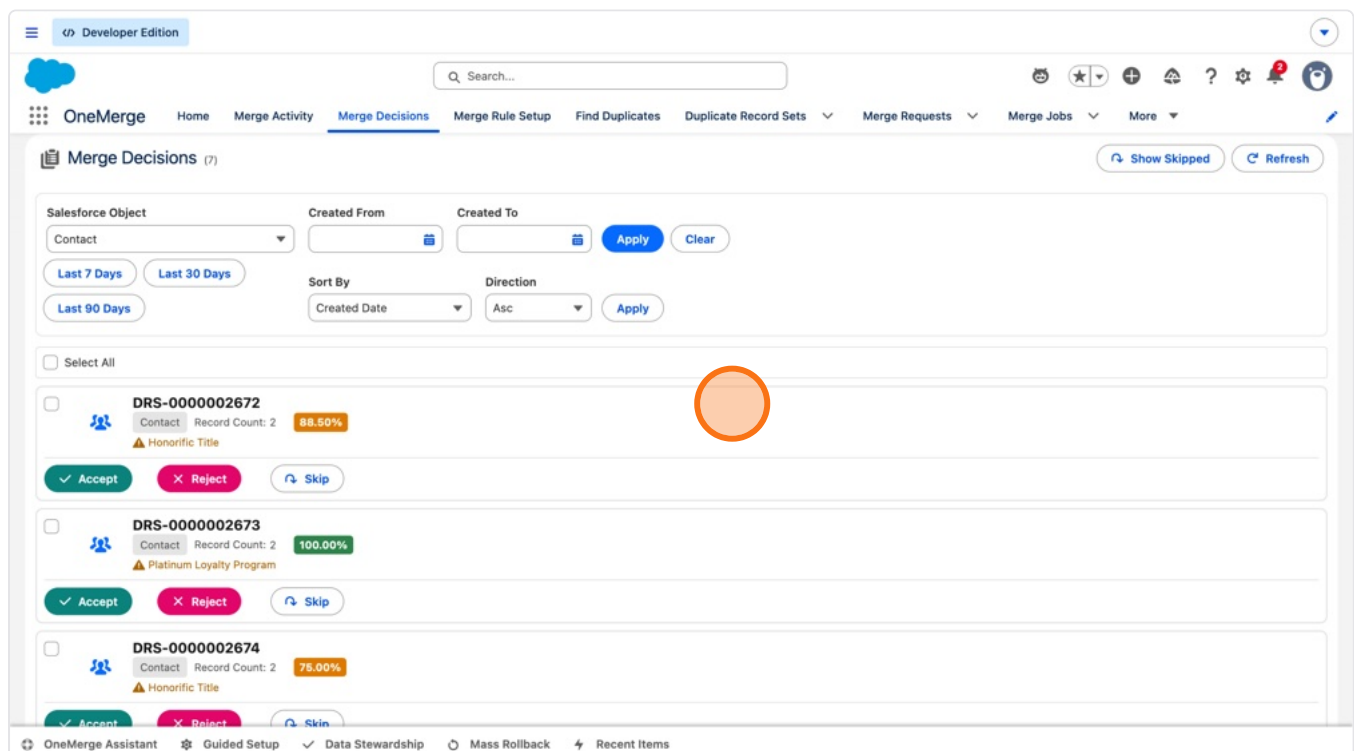
Instead of asking admins to review every potential duplicate, **OneMerge** focuses human attention on the smaller number of cases where judgement genuinely adds value.

Audio transcript: Not every duplicate should be resolved automatically.

When OneMerge cannot safely make the decision, the case is routed to Merge Decisions.

The important difference is that admins are not reviewing every potential duplicate. They are focusing only on the exceptions where human judgement is genuinely needed.

Let's open one of those decisions.



2. Step 2

Developer Edition

Search...



OneMerge Home Merge Activity Merge Decisions Merge Rule Setup Find Duplicates Duplicate Record Sets Merge Requests Merge Jobs More

Merge Decisions (7)

Show Skipped Refresh

Salesforce Object

Contact

Created From

Created To

Apply

Clear

Last 7 Days

Last 30 Days

Last 90 Days

Sort By

Created Date

Direction

Asc

Apply

Select All

DRS-0000002672

Contact Record Count: 2 88.50%

Honorable Title

Accept Reject Skip

DRS-0000002673

Contact Record Count: 2 100.00%

Platinum Loyalty Program

Accept Reject Skip

DRS-0000002674

Contact Record Count: 2 75.00%

Honorable Title

Accept Reject Skip

OneMerge Assistant

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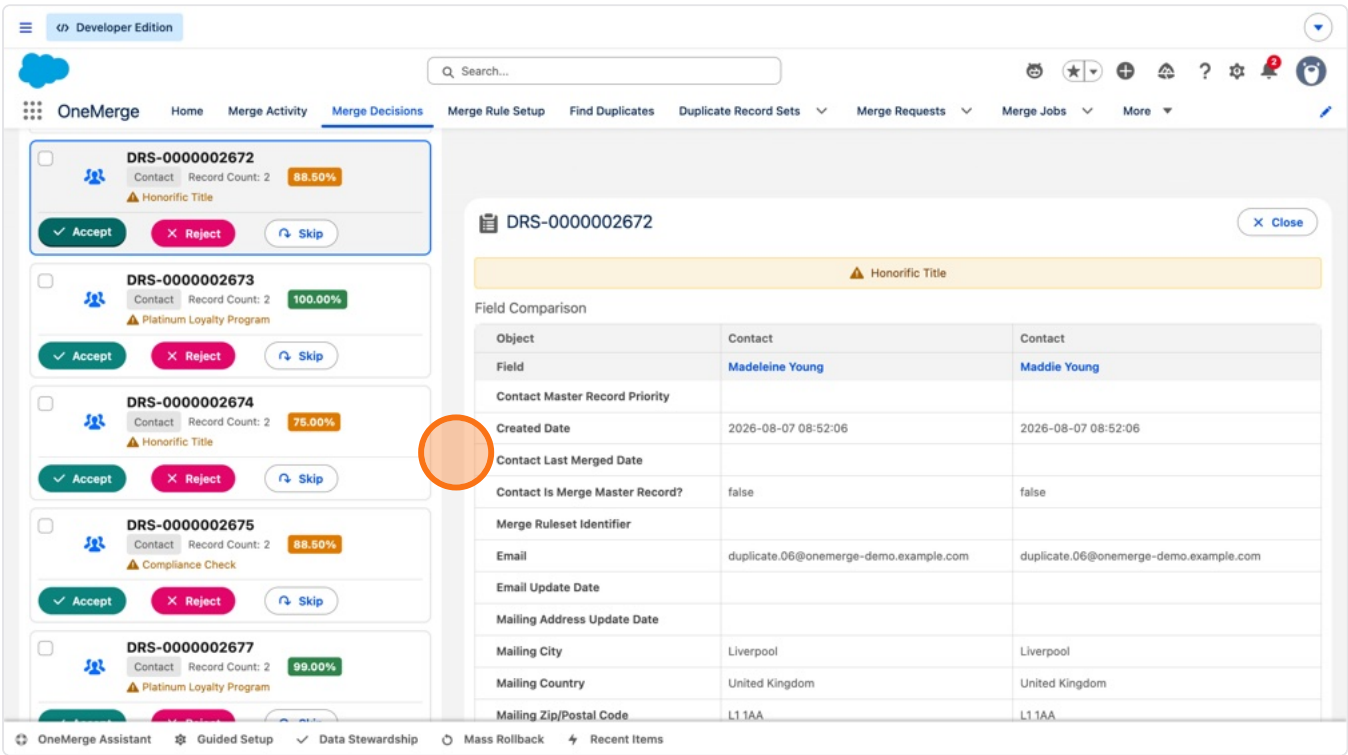
3. Clear context. Simple decision.

OneMerge presents the key information needed to make a fast, confident decision.

Each Merge Decision shows match confidence, the data stewardship reason, record count and Salesforce object at a glance. Plus a detailed field-by-field-comparison table.

Audio transcript: OneMerge is designed to make human review fast and focused.

The most important context is visible immediately, and the detailed field-by-field comparison is available when needed.



4. Step 4

Developer Edition

OneMerge

HomeMerge ActivityMerge DecisionsMerge Jobs

Success! Accepted:

DRS-0000002673

Contact Record Count: 2100.00%

Platinum Loyalty Program

AcceptRejectSkip

DRS-0000002674

Contact Record Count: 275.00%

Honorable Title

AcceptRejectSkip

DRS-0000002675

Contact Record Count: 288.50%

Compliance Check

AcceptRejectSkip

DRS-0000002677

Contact Record Count: 299.00%

Platinum Loyalty Program

AcceptRejectSkip

DRS-0000002678

Contact Record Count: 275.00%

Compliance Check

AcceptRejectSkip

DRS-0000002673

Close

Platinum Loyalty Program

Field Comparison

Object	Contact	Contact
Field	Penelope Griffiths	Penny Griffiths
Contact Master Record Priority		
Created Date	2026-08-07 08:52:06	2026-08-07 08:52:06
Contact Last Merged Date		
Contact Is Merge Master Record?	false	false
Merge Ruleset Identifier		
Email	duplicate.07@onemerge-demo.example.com	duplicate.07@onemerge-demo.example.com
Email Update Date		
Mailing Address Update Date		
Mailing City	Sheffield	Sheffield
Mailing Country	United Kingdom	United Kingdom
Mailing Zip/Postal Code	S1 1AA	S1 1AA

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5. Step 5

Developer Edition

OneMerge

HomeMerge ActivityMerge DecisionsMe

Success! Accepted:

DRS-0000002674

ContactRecord Count: 275.00%

Honorific Title

AcceptRejectSkip

DRS-0000002675

ContactRecord Count: 288.50%

Compliance Check

AcceptRejectSkip

DRS-0000002677

ContactRecord Count: 299.00%

Platinum Loyalty Program

AcceptRejectSkip

DRS-0000002678

ContactRecord Count: 275.00%

Compliance Check

AcceptRejectSkip

DRS-0000002679

ContactRecord Count: 299.00%

Platinum Loyalty Program

AcceptRejectSkip

DRS-0000002674

Honorific Title

Field Comparison

Object	Contact	Contact
Field	Pippa Mitchell	Philippa Mitchell
Contact Master Record Priority		
Created Date	2026-08-07 08:52:06	2026-08-07 08:52:06
Contact Last Merged Date		
Contact Is Merge Master Record?	false	false
Merge Ruleset Identifier		
Email	duplicate.08@onemerge-demo.example.com	duplicate.08@onemerge-demo.example.com
Email Update Date		
Mailing Address Update Date		
Mailing City	Nottingham	Nottingham
Mailing Country	United Kingdom	United Kingdom
Mailing Zip/Postal Code	NG1 1AA	NG1 1AA

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6. Step 6

Developer Edition

Search...

OneMerge

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DRS-0000002675

Contact Record Count: 2 88.50%

Compliance Check

Accept

Reject

Skip

DRS-0000002677

Contact Record Count: 2 99.00%

Platinum Loyalty Program

Accept

Reject

Skip

DRS-0000002678

Contact Record Count: 2 75.00%

Compliance Check

Accept

Reject

Skip

DRS-0000002679

Contact Record Count: 2 99.00%

Platinum Loyalty Program

Accept

Reject

Skip

Error. Show details.

Previous

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DRS-0000002679

Close

Platinum Loyalty Program

Field Comparison

Object	Contact	Contact
Field	Louise Bennett	Lou Bennett
Contact Master Record Priority		
Created Date	2026-08-07 08:52:06	2026-08-07 08:52:06
Contact Last Merged Date		
Contact Is Merge Master Record?	false	false
Merge Ruleset Identifier		
Email	duplicate.05@onemerge-demo.example.com	duplicate.05@onemerge-demo.example.com
Email Update Date		
Mailing Address Update Date		
Mailing City	Bristol	Bristol
Mailing Country	United Kingdom	United Kingdom
Mailing Zip/Postal Code	BS1 1AD	BS1 1AD

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7. Step 7

Developer Edition

Search...

OneMerge

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Contact

Record Count: 2

88.50%

Compliance Check

Accept

Reject

Skip

DRS-0000002677

Contact

Record Count: 2

99.00%

Platinum Loyalty Program

Accept

Reject

Skip

DRS-0000002678

Contact

Record Count: 2

75.00%

Compliance Check

Accept

Reject

Skip

DRS-0000002679

Contact

Record Count: 2

99.00%

Platinum Loyalty Program

Accept

Reject

Skip

Error. Show details.

Previous

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8. Apply judgement where it matters

Here, the Platinum Loyalty Programme reason explains why this case deserves human attention.

When a decision needs human review, OneMerge gives the reviewer clear options to accept, reject, skip, merge immediately or open the full Merge UI for closer inspection.

Audio transcript: The reviewer has several ways to act depending on the situation.

They can accept the recommendation, reject it, skip the decision, merge immediately, or open the full Merge UI when a more detailed review is needed.

That keeps simple decisions fast, while still giving full control when the case is more complex.

The screenshot displays the OneMerge Developer Edition interface. On the left, a list of merge decisions is shown, each with a checkbox, a record ID, a contact name, a record count, and a percentage. The fourth decision, DRS-0000002679, is highlighted with a blue border and a 'Platinum Loyalty Program' tag. On the right, a detailed comparison of two records is shown. The records are DRI-0000005906 (Louise Bennett) and DRI-0000005907 (Lou Bennett). The comparison table shows fields like Mobile Update Date, First Name, Last Name, Contact Name Update Date, Other Address Update Date, Other City, Other Country, Other Zip/Postal Code, Other State/Province, Other Street, and Set Preferred Master. At the bottom of the comparison panel, there are buttons for 'Accept', 'Reject', 'Skip', 'Merge Now', and 'Merge UI'. An orange circle highlights the 'Merge Now' button.

Mobile Update Date		
First Name	Louise	Lou
Last Name	Bennett	Bennett
Contact Name Update Date		
Other Address Update Date		
Other City		
Other Country		
Other Zip/Postal Code		
Other State/Province		
Other Street		
Set Preferred Master	☐	☐

DRI-0000005906
Louise Bennett

DRI-0000005907
Lou Bennett

Accept Reject Skip Merge Now Merge UI

Chapter 4: Resolution Outcomes

Total steps: 2

1. Less duplicate management. Better Salesforce data.

OneMerge resolves routine duplicates automatically, records every outcome in Merge Activity and keeps human review focused on the exceptions that genuinely need attention.

Setup the Rules.

Automate Resolution.

Review Exceptions Only.

Salesforce finds duplicates. **OneMerge** resolves them.

Audio transcript: And that completes the loop.

OneMerge resolves routine duplicates automatically, gives admins clear visibility through Merge Activity and keeps human review focused on the exceptions that genuinely need attention.

That means less time managing duplicates and more confidence in the quality of Salesforce data.

Setup the Rules. Automate Resolution. Review Exceptions Only.

Salesforce finds duplicates. OneMerge resolves them.

Developer Edition

OneMerge

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Search...

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Merge Activity

TodayRefresh

Review duplicate resolution outcomes and see the work completed by OneMerge.

DUPLICATES RESOLVED

42

Successful outcomes

AUTOMATION RATE

69%

Resolved without human review

HUMAN REVIEW RATE

31%

Requires human judgement

ESTIMATED TIME SAVED

58 min

Estimated administrative time saved

Resolution Breakdown

Records resolved automatically without user intervention.

18

43% of total

Records resolved with assistance from an agent.

11

26% of total

Records reviewed and merged by a user.

13

31% of total

Records reviewed and marked as not duplicates.

0

0% of total

Records that could not be resolved because processing failed or was blocked.

0

0% of total

Records whose resolution changes were rolled back.

0

0% of total

Search Merge Activity

Search by record name, ID, merge rule...

Salesforce Object

Resolution Type

Sort By

Direction

All

All

Select an Option

Desc

Clear Filters

Merge Activity (42)

Show25

👤

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An orange circle is drawn around the 'HUMAN REVIEW RATE' metric card, which shows a value of 31% and the text 'Requires human judgement'.

2. Does your Duplicate Management process pass the Coffee Break Test?

If routine duplicate management still takes hours, creates backlogs or depends on admins making the same decisions repeatedly, there is more to automate.

OneMerge reduces manual duplicate management by automating routine resolution and keeping human review focused on the exceptions.

Salesforce finds duplicates. **OneMerge** resolves them.

Audio transcript: OneMerge changes duplicate management from a recurring admin task into an efficient resolution process.

Routine decisions are automated, every outcome remains visible, and human review is focused only on the exceptions.

That's the Coffee Break Test.

Setup the Rules. Automate Resolution. Review Exceptions Only.

Salesforce finds duplicates. OneMerge resolves them.

