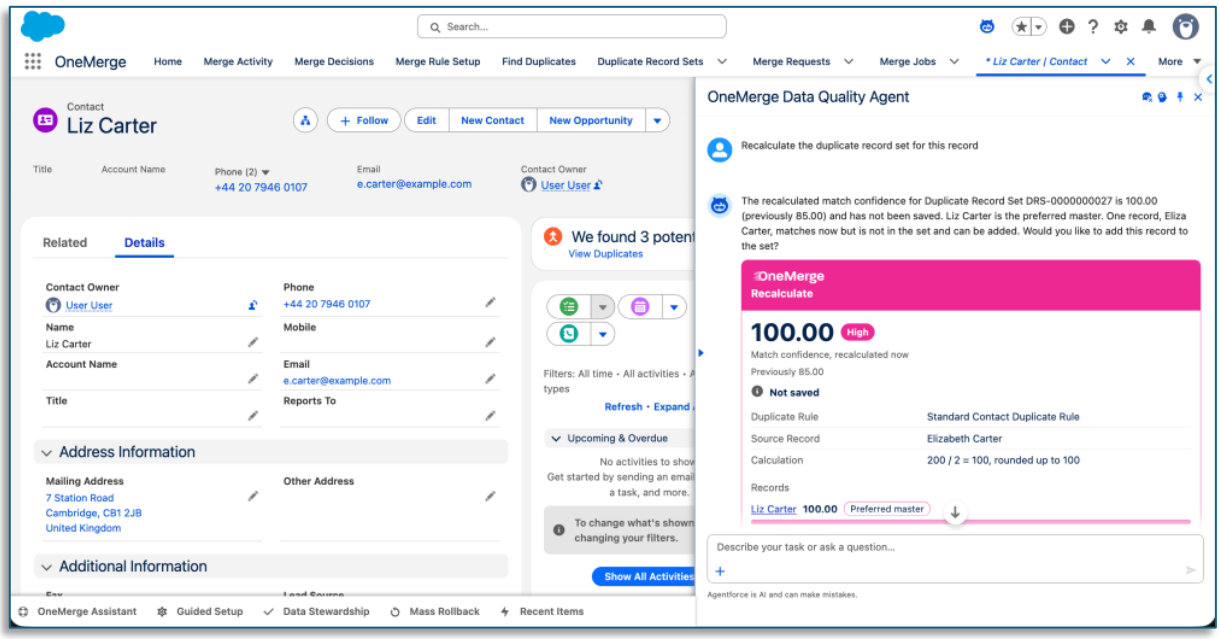
Agentforce Demo: Duplicate Management Agent for Salesforce

16 October, 2026By Mark Cane

Find, explain, decide and merge duplicate records from the Agentforce panel, with a ten-minute demo script

Duplicate records are a universal pain point: every Salesforce org has them, and every customer understands the cost. That makes duplicate management one of the clearest real-world Agentforce use cases, and an Agentforce demo customers recognise immediately. Duplicate Record Sets are where Salesforce duplicate management meets human judgement. Each set carries a match confidence score, sometimes a data stewarding flag asking for review, and eventually a decision: merge, or leave the records alone. With 1.15, the agent handles that whole lifecycle in conversation.



An Agentforce employee agent working on duplicate records, beside the record.

A ten-minute Agentforce demo script

For Salesforce customers, account executives, solution engineers and partners: this Agentforce demo shows an agent doing real work in a realistic org. Each step lists what to type and which Agentforce capability it demonstrates.

STEP	OPEN	TYPE	WHAT HAPPENS
1	Contact Liz Carter	`Find duplicates`	A card lists the duplicates, with Liz tagged preferred master and the record's Duplicate Record Set summarised underneath.
2	Liz Carter	`Recalculate the duplicate record set for this record`	Match confidence 100 (previously 85), each record's score and field comparison, and a note that Eliza Carter matches but isn't in the set.
3	Liz Carter	`Why did Beth Carter match?`	The agent explains from the comparison: same Email and Last Name, First Name likely similar.
4	Liz Carter	`Add Eliza Carter to the set`, then `yes`	Preview, one confirmation, then Eliza joins the set and the set is flagged for review.
5	Contact Chris Morgan	`Recalculate this set`	Kit Morgan is tagged Low fit. The agent says Chris and Kit may not belong in the set and offers to remove them.
6	Contact Daniel Price	`Accept this Duplicate Record Set`	The agent warns that a person rejected this set and asks before changing the decision. Nothing is merged.
7	Contact Jonathan Hughes	`Merge duplicates`	The agent won't merge, because the set is flagged for review. It merges only if you explicitly confirm.

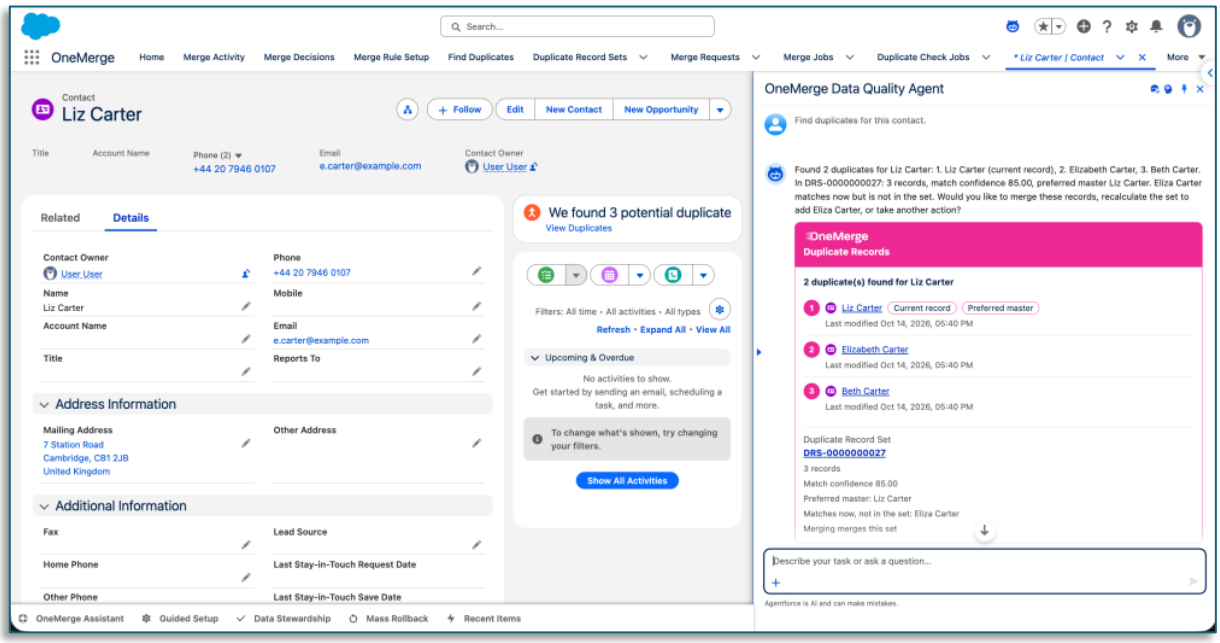
STEP	OPEN	TYPE	WHAT HAPPENS
8	Any page	`Create a merge rule for Contacts, Newest by Birthdate`	The rule is reported as submitted and deployed in the background, with Birthdate as its priority field.

Run it yourself: the record names above come from the OneMerge Agentforce demo kit, which has the setup steps, the demo data script and the Agent Script. Download the Agentforce demo kit for sandbox, Developer Edition or Scratch Orgs.

Step 1: find duplicates, aware of the set

Ask the agent to find duplicates for a record that is already in a Duplicate Record Set and it tells you about the set: how many records it holds, its match confidence, any review flag or decision, and its preferred master. If records match now that aren't in the set, it says so and offers to recalculate first.

```
Find duplicates
```



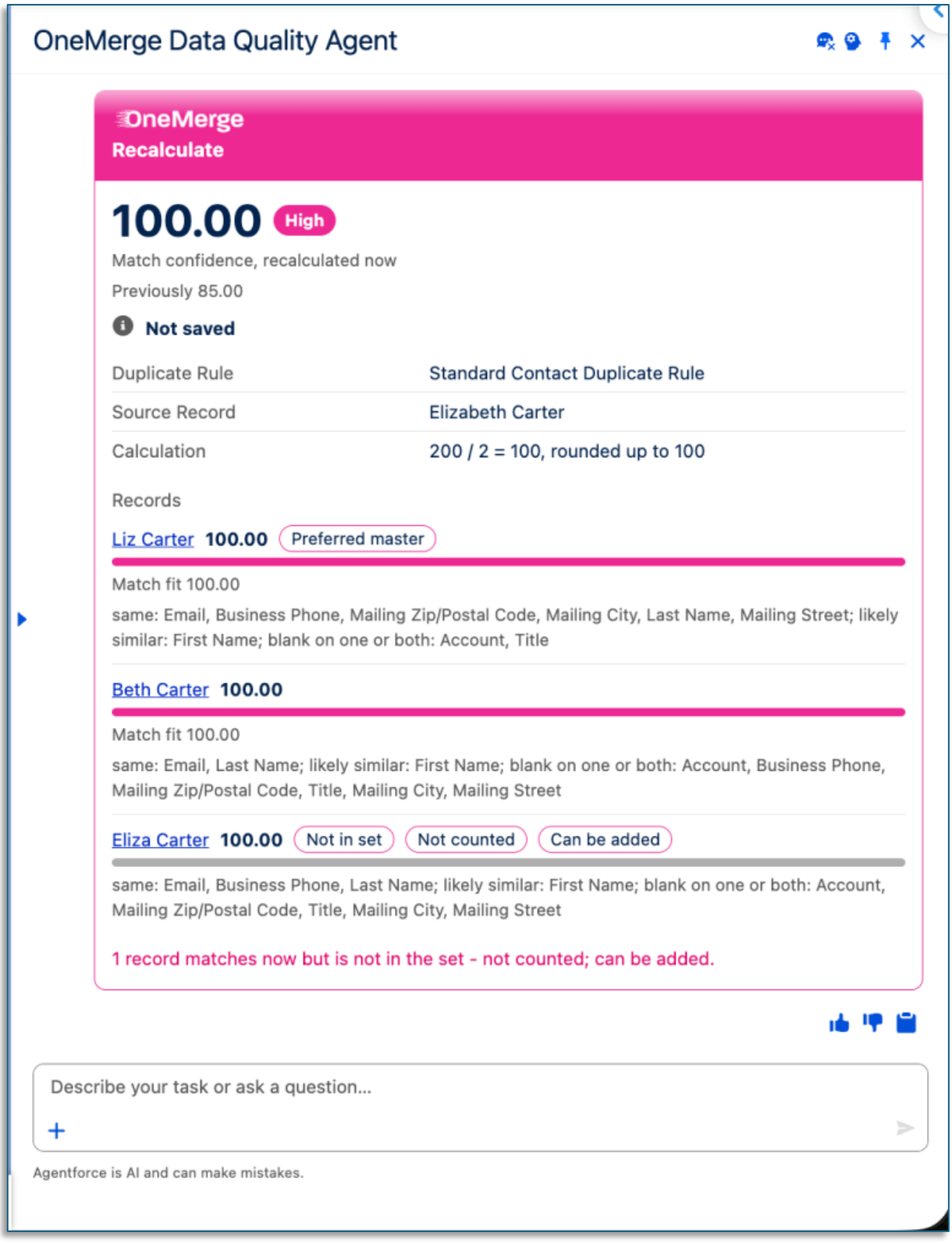
Find duplicates now shows the record's Duplicate Record Set.

Steps 2 and 3: recalculate match confidence, and see why

Match confidence goes stale. Records change, matching rules change, and records join or leave a set. Ask the agent to recalculate and it scores the set again using your Salesforce duplicate rules, counting only the records in the set.

```
Recalculate the duplicate record set for this record
```

- Preview first. You see the new score, the previous value and when it was last recalculated before anything is saved. A first score is saved straight away; replacing an existing score always asks first.
- The calculation, explained. The card shows each record's score and which fields matched: the same, similar, or different, and which were blank.
- Data stewarding, handled carefully. If low match confidence flagged the set for review and the new score clears the threshold, the agent offers to reset the flag. It never offers when a person has already accepted the set, or when the flag was raised for another reason.



Every record's score and field comparison, in one card.

Then ask why a record matched. The agent answers from that comparison rather than guessing.

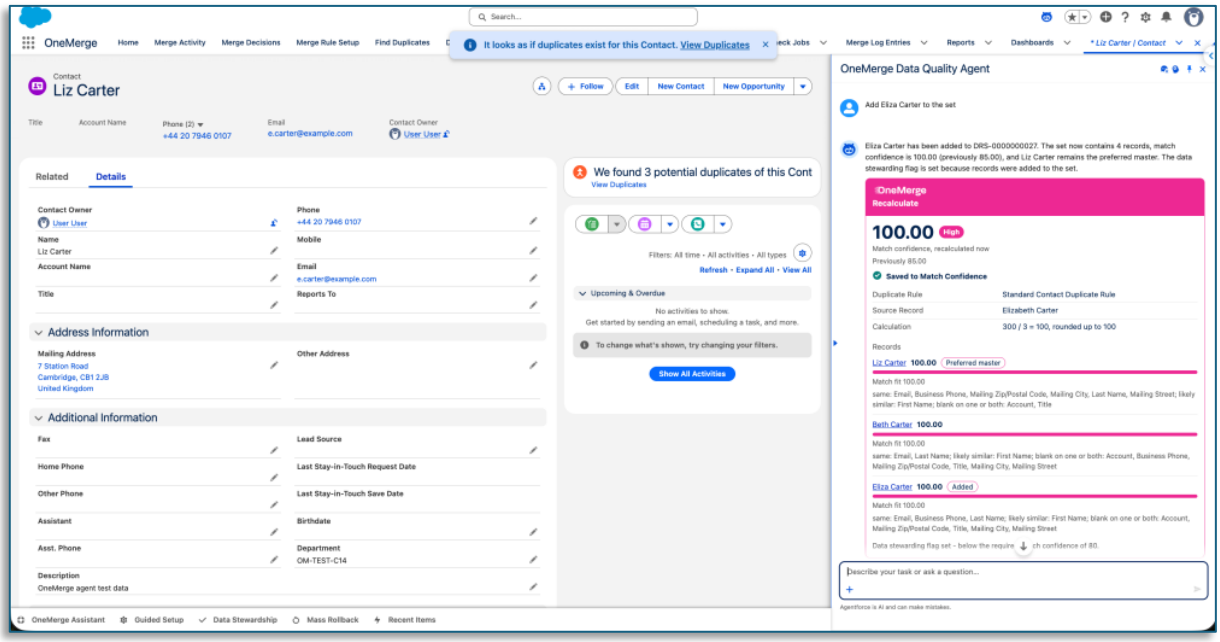
> `Why did Beth Carter match?`

Step 4: fix the set in a sentence

When the set is wrong, say so. The agent previews every change and asks before saving.

- Add records that match now but are missing from the set. Adding records flags the set for review, so a person checks it before anything is merged.
- Remove records that don’t belong. A set always keeps at least two records.
- Choose the preferred master record that a later merge should keep.

```
Add Eliza Carter to the set
```

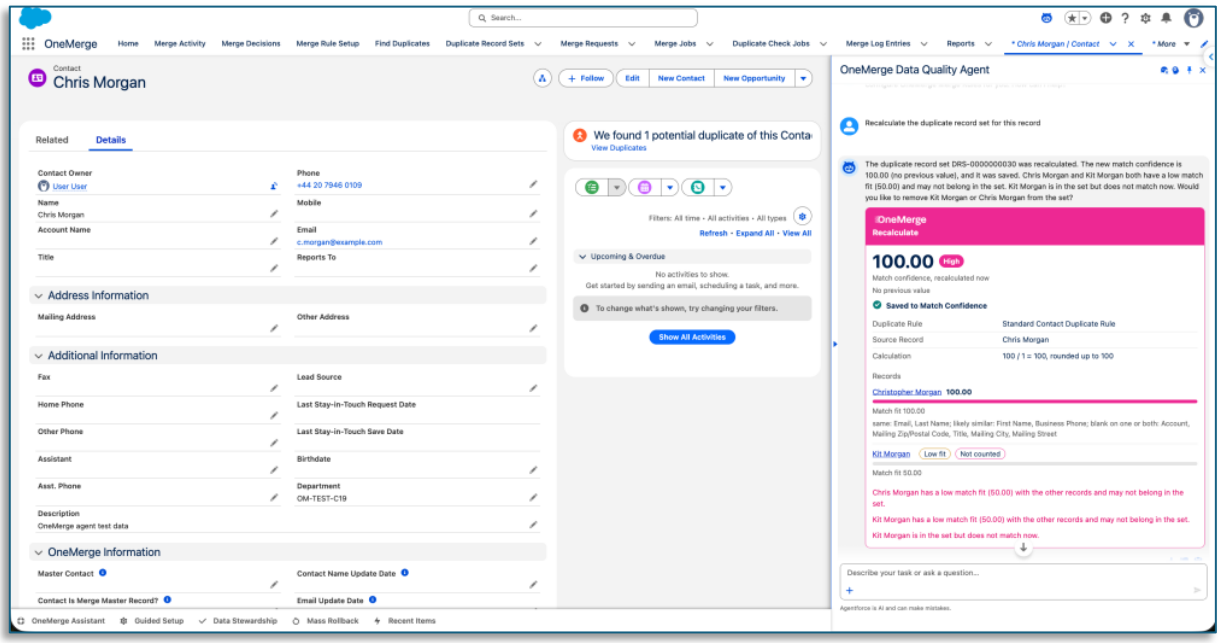


Every change is previewed and confirmed.

Step 5: spot the record that doesn’t belong

A set can look healthy while one record only matches a neighbour. Chris matches Christopher, and Christopher matches Kit, but Chris and Kit have nothing in common. The new Match Fit score shows how well each record matches all the others in the set, and the agent points out low-fit records so you can decide whether they belong.

```
Recalculate this set
```

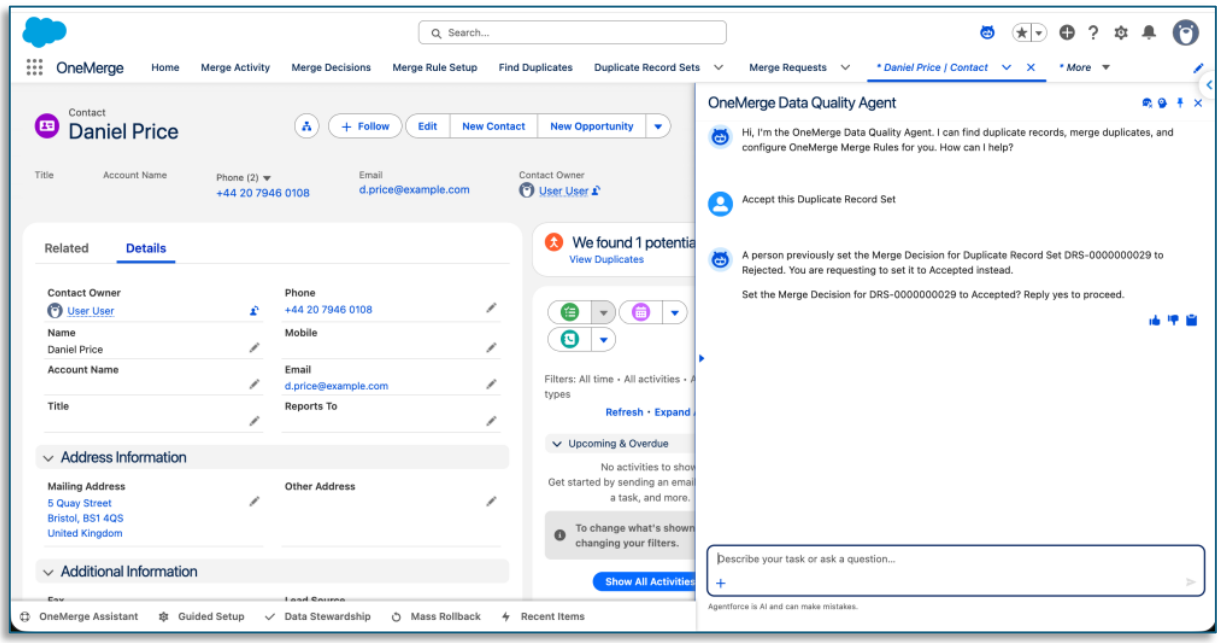


Match Fit flags records that only match part of the set.

Step 6: record a merge decision without merging

Not every review ends in a merge. Tell the agent the records are duplicates, or that they aren't, and it records the Merge Decision for the set without merging anything. Decisions made through the agent are recorded as agent-assisted, so you can always see who decided. If a person made the current decision, the agent says so before changing it.

> `Accept this Duplicate Record Set`



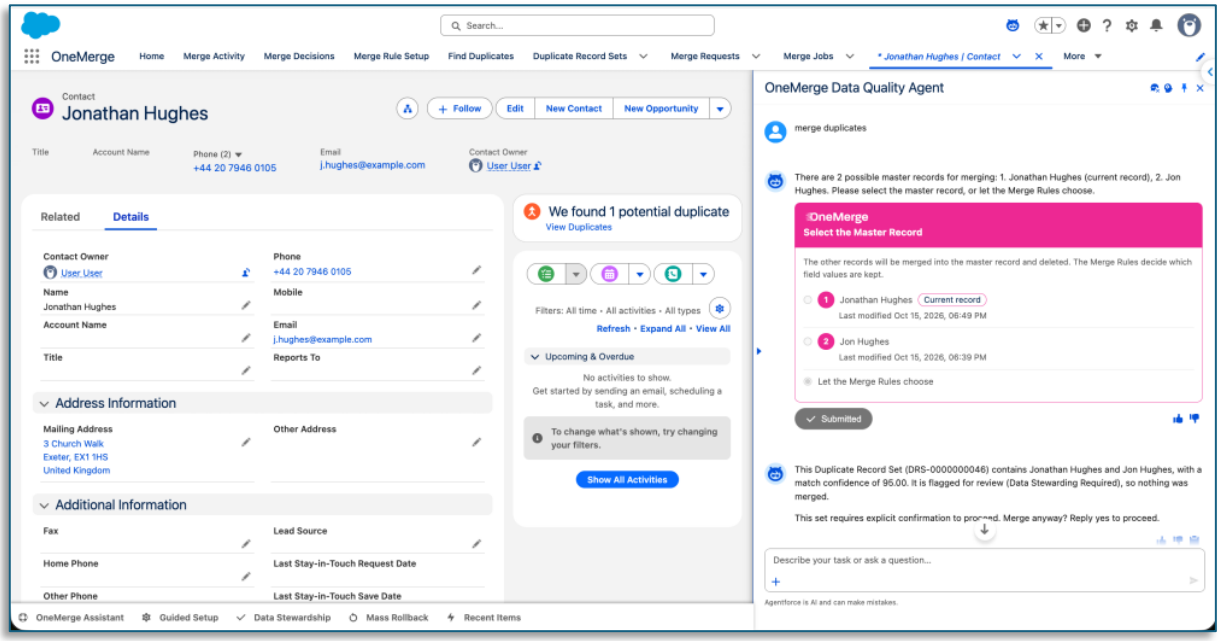
The agent tells you when it would overturn a person's decision.

Rejecting works the same way: "These records are not duplicates, reject this set".

Step 7: merge, with the guardrails on

Merging works on the set's members, with the preferred master already selected, and the set is cleaned up afterwards. A set someone rejected, or one flagged for review, is never merged quietly: the agent explains why and merges only if you explicitly confirm.

```
Merge duplicates
```



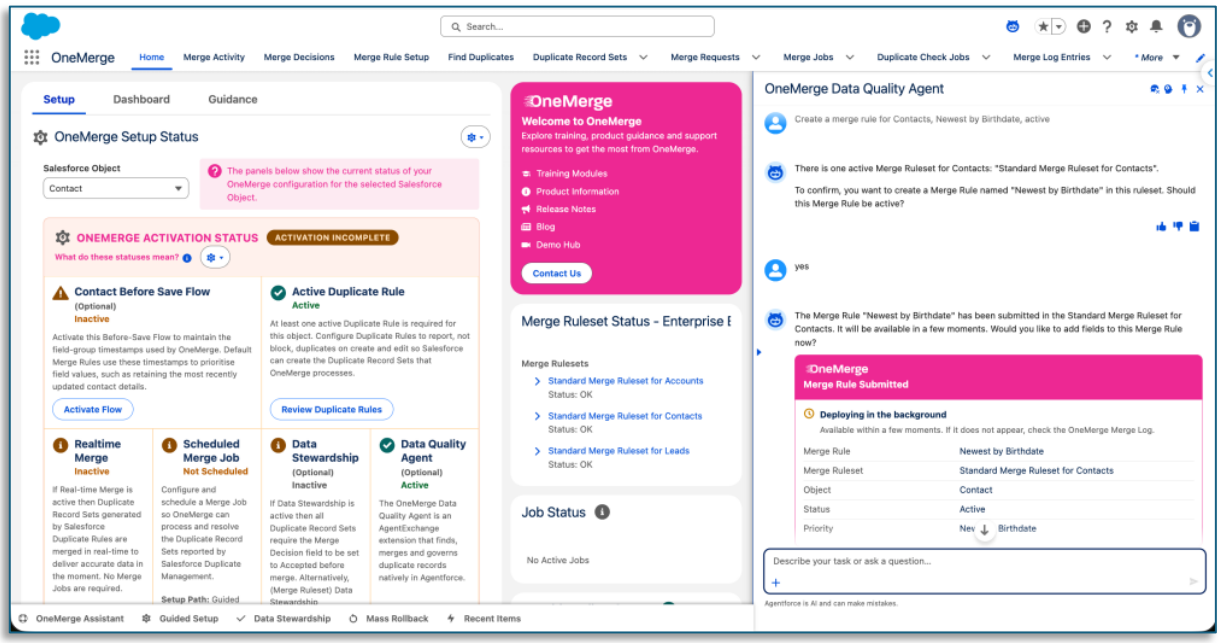
Review flags and decisions are respected, not bypassed.

Step 8: better merge rules, in natural language

Any priority field. Merge rules can now rank records on any date field for Newest and Oldest, and on any number field for Quality. The agent adds the field to the rule in the same step.

Person Accounts. Say “Person Accounts” or “Business Accounts” and the agent picks the right Account ruleset, and only offers fields that belong to it.

```
Create a merge rule for Contacts, Newest by Birthdate
```



Merge rules with any date or number priority field.

Built to tell you the truth

Throughout, the agent says exactly what happened. A preview says “not saved”. A merge rule is “submitted” while Salesforce deploys it in the background. Nothing is reported as changed, decided or merged unless it was. It never asks you for record Ids, and it shows records as links you can open.

How the Agentforce demo agent is built

For teams evaluating how to build Agentforce agents, the OneMerge Data Quality Agent is a working example of the current Agentforce toolset:

- An Agentforce employee agent created in Agent Studio from an Agent Script.
- Custom Apex agent actions that call the OneMerge package’s services, so the logic is deterministic and testable.
- Custom Lightning types that render branded result cards in the conversation.
- Human-in-the-loop confirmation for every change, and explicit overrides for governed actions.

Agentforce demo FAQ

Can Agentforce merge duplicate records in Salesforce?

Yes. The OneMerge Data Quality Agent finds duplicates with your Salesforce Duplicate and Matching Rules and merges them from the Agentforce panel, using OneMerge Merge Rules to decide which values to keep. It always asks before it merges.

Does it work with standard Salesforce duplicate rules?

Yes. It uses the Duplicate Rules and Matching Rules already in your org, including the standard rules, and works with the Duplicate Record Sets they create.

Will the agent change data without asking?

No. It previews every change and asks for confirmation before saving, merging or recording a decision. Sets flagged for review or rejected by a person are merged only after an explicit override.

How is the agent built?

It is an Agentforce employee agent created in Agent Studio from an Agent Script, using custom Apex agent actions and branded Lightning cards from the OneMerge Data Quality Agent package on AgentExchange.

Can I run this Agentforce demo in my own org?

Yes, but only sandbox, Developer Edition or Scratch Orgs. Install OneMerge and the OneMerge Data Quality Agent, create the agent from the Agent Script, and load the demo data from the Agentforce demo kit. The demo script above then works step by step.

Does it support Person Accounts?

Yes. Ask for Person Accounts or Business Accounts and the agent uses the matching OneMerge ruleset. The package also installs in orgs without Person Accounts.

Getting 1.15

- Install OneMerge 1.119.0 or later, then the OneMerge Data Quality Agent 1.15.
- Create the agent in Agent Studio from the OneMerge Agent Script on our AgentExchange listing.
- Assign the OneMerge User and OneMerge Data Quality Agent User permission sets, and give agent users access to Duplicate Record Sets through your own profile or permission set. Salesforce doesn't let packages grant access to standard objects.
- Already on 1.14? Version 1.15 is a new installation rather than an upgrade. Uninstall 1.14 first, then install 1.15 and create the agent from the Agent Script.

Partners and Salesforce teams: contact us to run this demo with your customers.