

Aress Record Merge Tool

User Manual



salesforce

PARTNER

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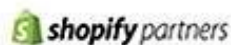
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Introduction

Navigating the Aress Record Merge tool within Salesforce offers users a seamless experience for merging records. With an intuitive interface and user-friendly design, this tool empowers users to efficiently manage and consolidate data across both standard and custom objects. From selecting the parent object, adding custom filters and confirming merging of parent & its related child records, each step is carefully designed to streamline the process.

Whether you're working with customer data, opportunity records, or any other Salesforce entity, our tool ensures a smooth journey from start to finish. Explore the interface and unlock a powerful solution for simplifying record management and enhancing data consistency in your Salesforce environment.

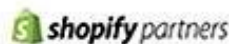
Objective

The objective of the Aress Record Merge tool is to provide Salesforce users with a streamlined and efficient solution for merging duplicate records. We aim to simplify the merging process by offering intuitive navigation, comprehensive object and field selection processes, along with robust filtering capabilities. Our tool is designed to support both standard and custom objects, ensuring flexibility and compatibility with diverse data structures. By enabling users to merge records seamlessly, our objective is to enhance data integrity, streamline workflows, and optimize record management within the Salesforce environment. Importantly, this app is for all users, ensuring that everyone can benefit from its capabilities.

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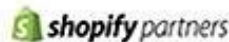
Key Features

1. **Object and Field Retrieval:** Dynamically fetches standard Salesforce objects as a Parent with their associated fields and any standard or custom related child objects, ensuring user access compatibility for provided objects and fields within your org.
2. **Querying and Filtering:** Allows you to choose specific fields and apply filter criteria on the selected object. Then, it runs SOQL queries to fetch the records you need.
3. **Record Selection and Manipulation:** Users can select individual records from queried results for merging. While merging the parent record(s), it also links the child object records.
4. **Merge and Delete Operations:** Facilitates the merging of selected records into a master record and deletes the merged record(s) from the org, ensuring seamless merging functionality across all object types present in Salesforce.
5. **Validation and Error Handling:** Validates user access and input criteria such as selected objects, fields, and filters to maintain data integrity during merge operations. Includes robust error handling mechanisms to address any issues encountered during record merging.
6. **User Interface Consistency:** Provides a consistent user interface for interacting with both standard and custom objects, ensuring a uniform experience regardless of the object type being manipulated.
7. **Cross-Object Compatibility:** Supports merging records from different object types, allowing users to seamlessly merge records across both standard and custom objects.
8. **Dynamic Field Mapping:** Dynamically maps fields from selected objects, enabling users to merge records with different field structures across various object types.

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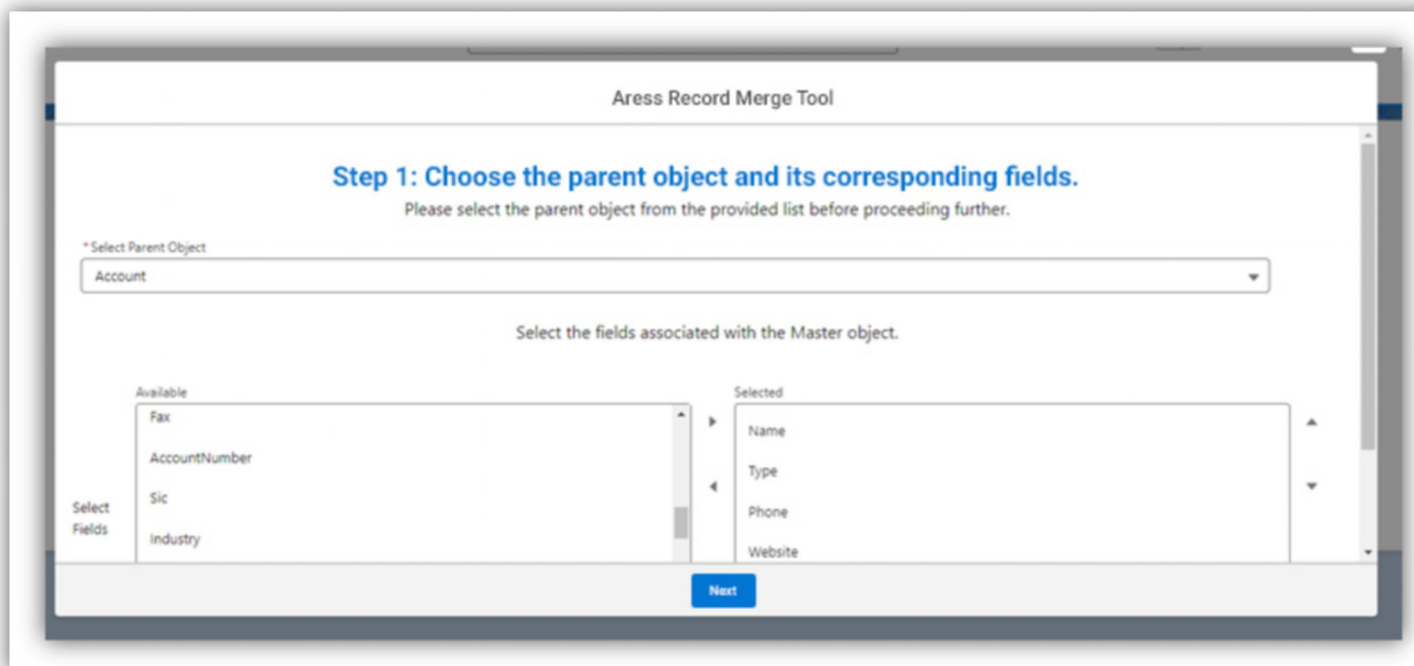
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Navigating the Interface

Page 1: Object Selection

- A dropdown menu displays all available objects for selection such as Account, Contact, Opportunity, Case, Asset, Campaign, Lead, Order, and Contract.
- Once an object type is chosen, users are taken to the Field Selection page.
- All fields related to the selected object are dynamically fetched and listed.
- Users can easily pick and choose fields for the merging process.
- The layout is intuitive, allowing for easy customization of record mergers.



Aress Record Merge Tool

Step 1: Choose the parent object and its corresponding fields.
Please select the parent object from the provided list before proceeding further.

* Select Parent Object
Account

Select the fields associated with the Master object.

Available		Selected
Fax	▶	Name
AccountNumber		Type
Sic	◀	Phone
Industry		Website

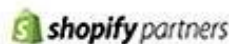
Select Fields

Next

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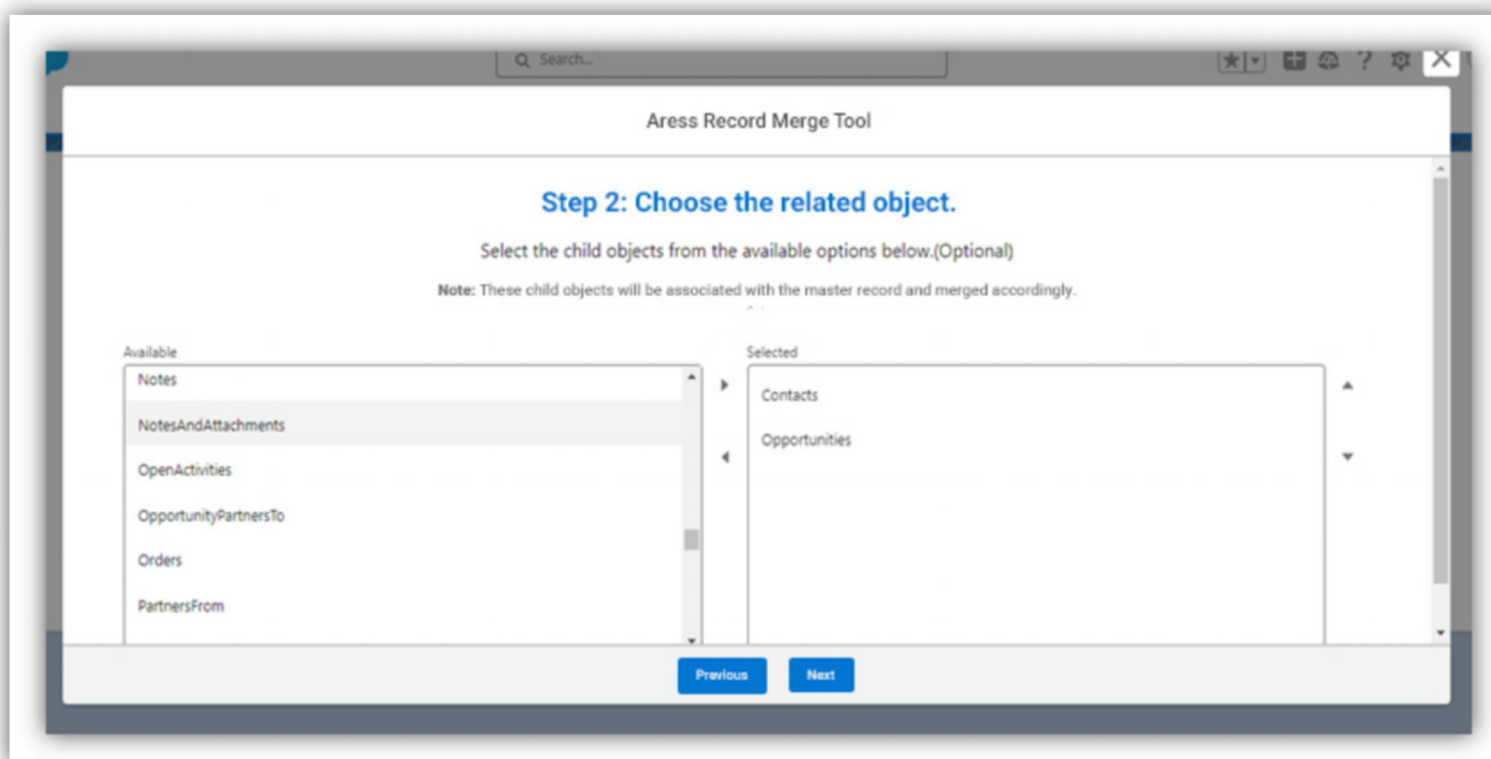


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Page 2: Child Object Selection

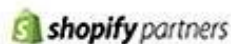
- A drop-down menu shows all available child objects (standard as well as custom) for selection.
- This step is optional.
- Users can select child objects related to the main Parent object to include in the merge process.
- This step ensures comprehensive merging of related records.
- It helps enhance data integrity.



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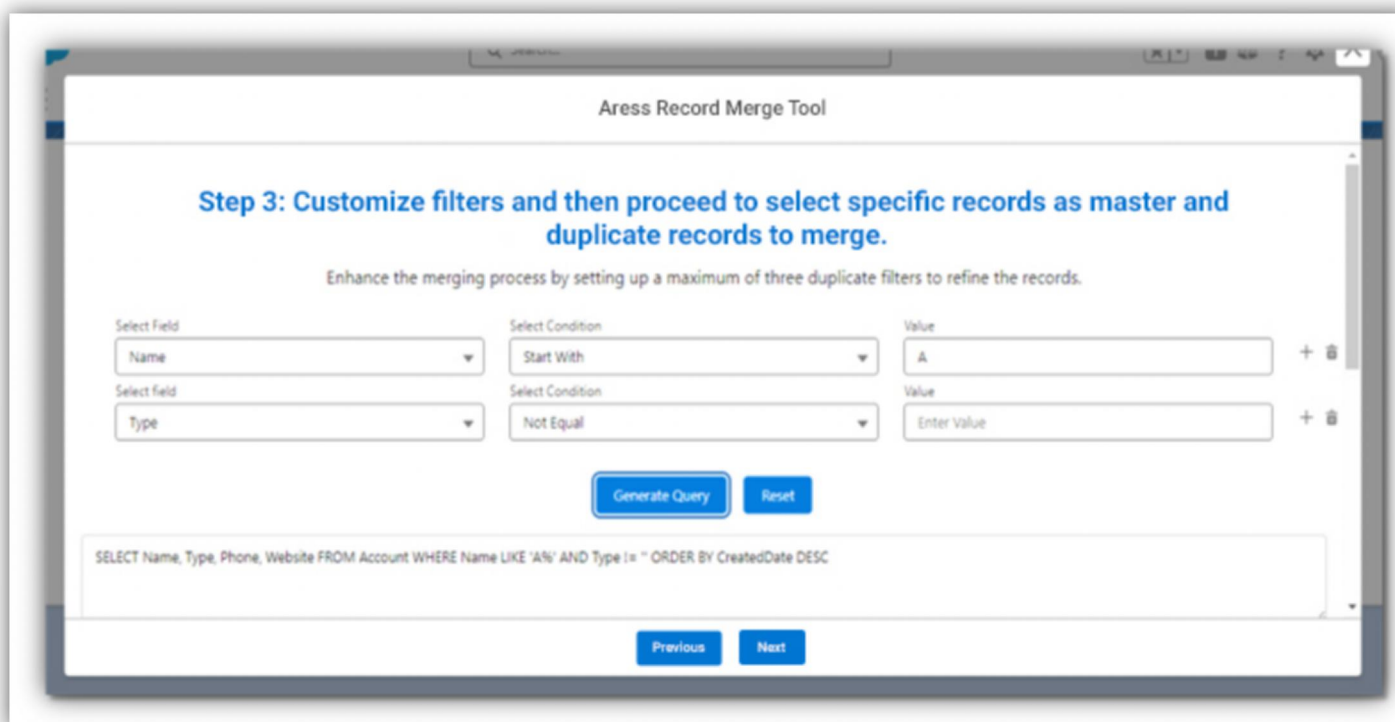


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Page 3 (a): Filter Configuration

- Users can set up filters to refine records for merging on the Filter Configuration page.
- Multiple filters can be added based on various field criteria (Start with, equal, etc.).
- Users can easily pinpoint the exact records they want to merge.
- This customization enhances merging efficiency.



Aress Record Merge Tool

Step 3: Customize filters and then proceed to select specific records as master and duplicate records to merge.

Enhance the merging process by setting up a maximum of three duplicate filters to refine the records.

Select Field	Select Condition	Value	
Name	Start With	A	+ -
Type	Not Equal	Enter Value	+ -

[Generate Query](#) [Reset](#)

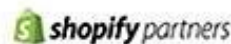
SELECT Name, Type, Phone, Website FROM Account WHERE Name LIKE 'A%' AND Type != "" ORDER BY CreatedDate DESC

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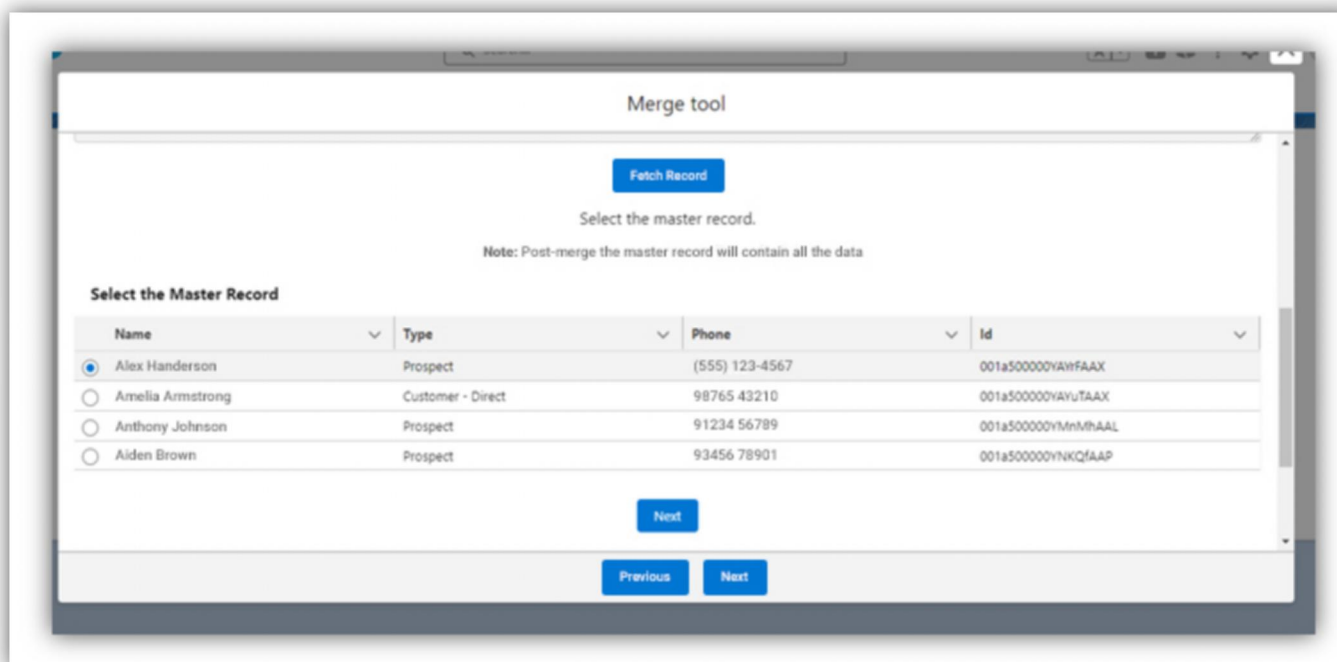


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Page 3 (b): Record Preview and Selection

- On the Record Preview and Selection page, users see a preview of records that match their criteria and filters.
- Each record has a radio button and checkboxes for easy selection of Master and duplicate record(s) respectively.
- This intuitive process gives users full control over which records to merge.
- The clear layout simplifies the review process, enhancing the overall merging experience.



Merge tool

[Fetch Record](#)

Select the master record.

Note: Post-merge the master record will contain all the data

Select the Master Record

Name	Type	Phone	Id
☒ Alex Handerson	Prospect	(555) 123-4567	001a500000YAHFAAX
☐ Amelia Armstrong	Customer - Direct	98765 43210	001a500000YAYUTAAX
☐ Anthony Johnson	Prospect	91234 56789	001a500000YMHMAAL
☐ Aiden Brown	Prospect	93456 78901	001a500000YKQFAAP

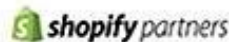
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Name	Type	Phone	Id
☒ Alex Handerson	Prospect	(555) 123-4567	001a500000YAYFAAX

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Select the duplicate records.

Note: These records will merge into the master record and subsequently be deleted.

Select Record To Merge

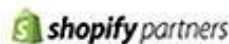
☐	Name	Type	Phone	Id
☐	Amelia Armstrong	Customer - Direct	98765 43210	001a500000YAYUTAAX
☐	Anthony Johnson	Prospect	91234 56789	001a500000YmMhAAL
☐	Aiden Brown	Prospect	93456 78901	001a500000YnKQfAAP

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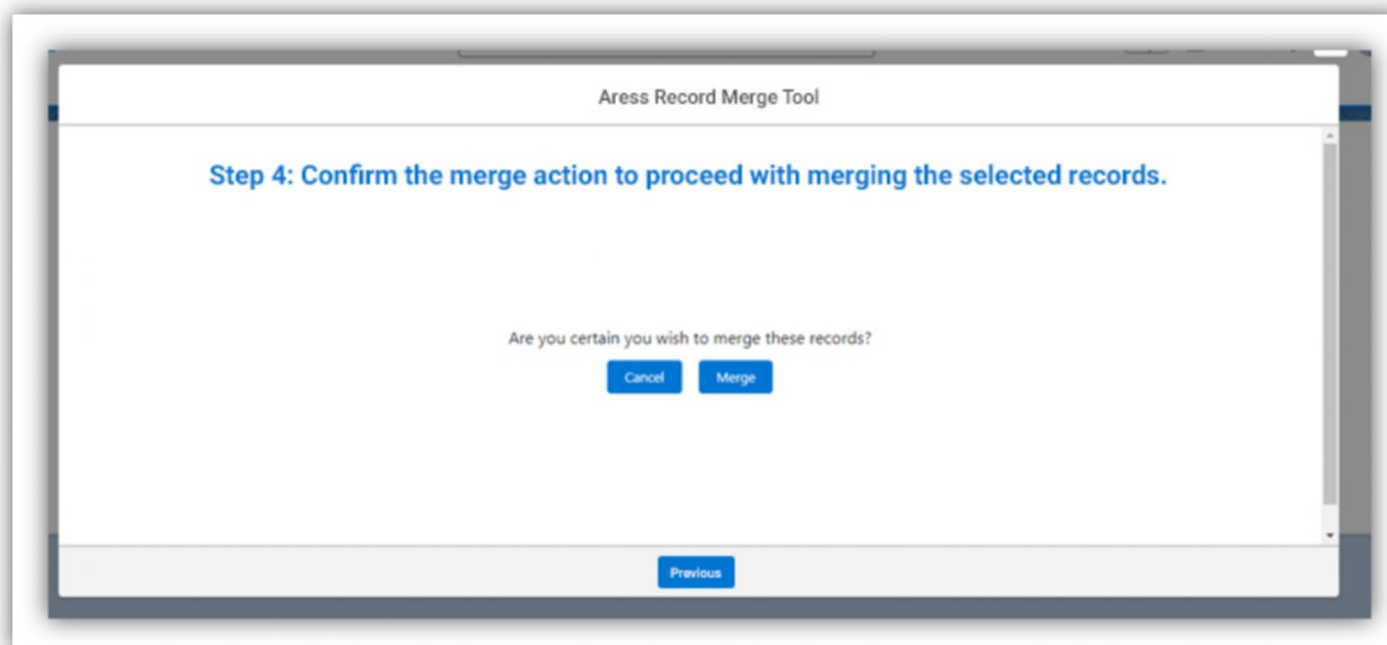


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Page 4(a): Merge Confirmation and Execution Page

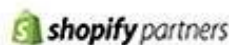
- After selecting records, users go to the Merge Confirmation page.
- This page allows a final check to ensure everything is correct before merging.
- Once confirmed, the tool consolidates the selected records into a master record based on specified criteria.
- Users receive real-time feedback on the merge progress and notifications of any errors.
- This transparency helps users monitor the merging process and stay informed throughout.



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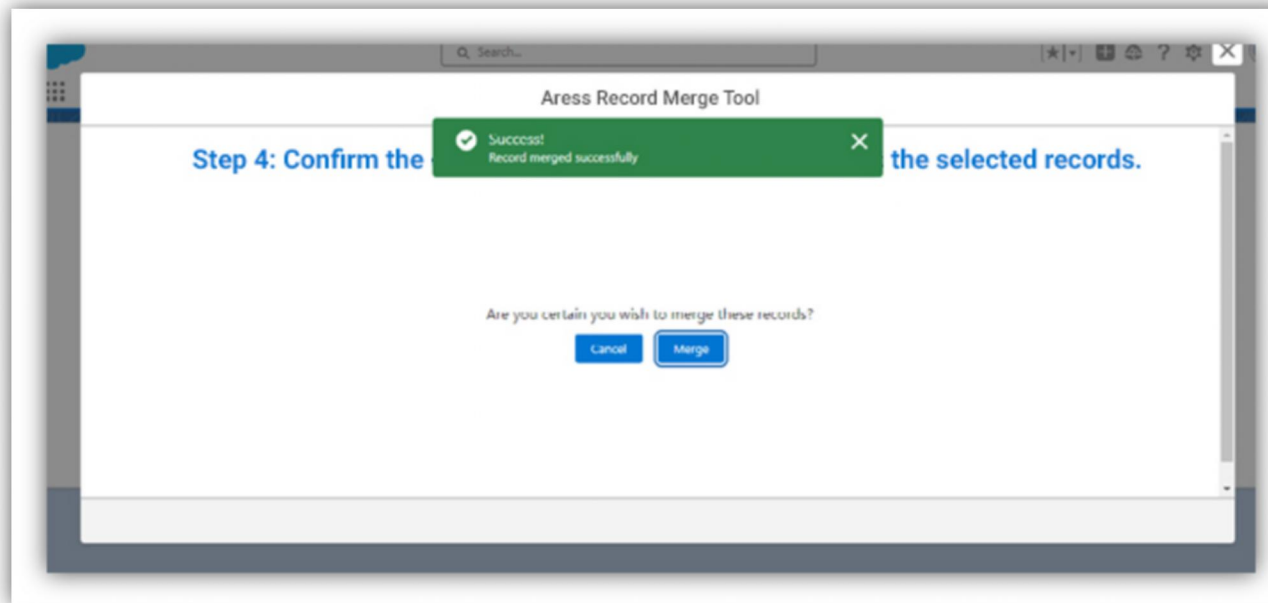


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Page 4(b): Merge Completion Summary

- Users receive a Completion Summary detailing the outcome of the merge operation.
- The summary shows notifications of successful merges and highlights any records that failed due to errors.
- Deleted records can be found in the recycle bin. This allows users to recover or permanently delete them if needed.
- Transparency allows users to take further action, like correcting errors or re-evaluating selections.
- The structured walkthrough guides users seamlessly through the record merging process, emphasizing clarity and ease of use.



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Let's Get Started



If you would like to join us and become our client, then we would be delighted to have you.

We believe that we have all the credentials to do this project with you. Our price is set at a level corresponding to the high-quality work needed for this type of project. We give you the assurance of our willingness to be an offshore partner who is committed to your success.

Thank you
for your interest in Aress Software.

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