

Auto Merge Duplicate Cases User Manual

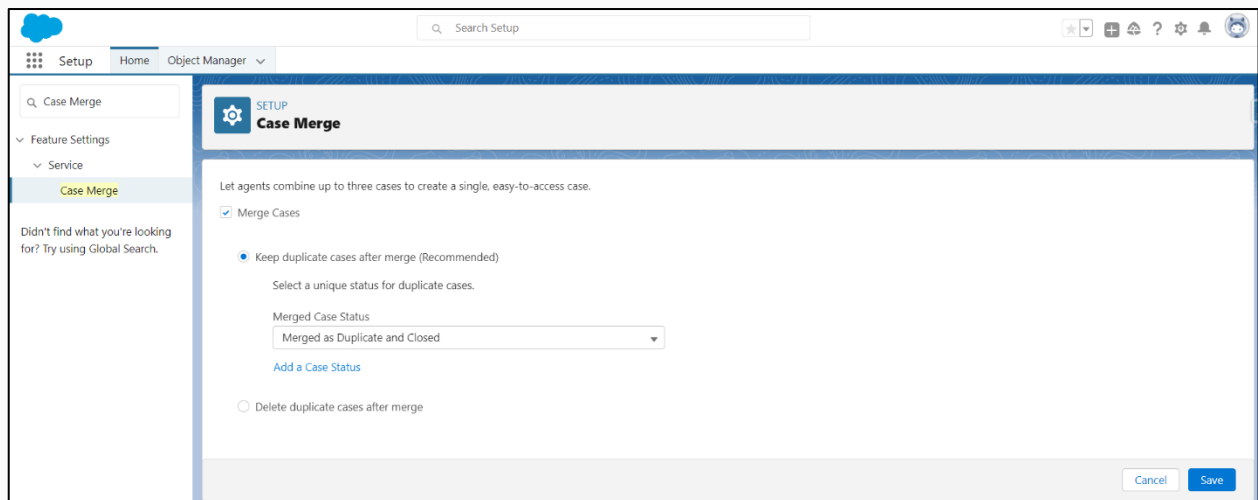
Email-to-Case enablement is required for Auto merge Duplicate Case, as duplicate cases are identified based on the email ID associated with cases.

- **Steps for setup**

1. Install the package by clicking on 'Get It Now' button.

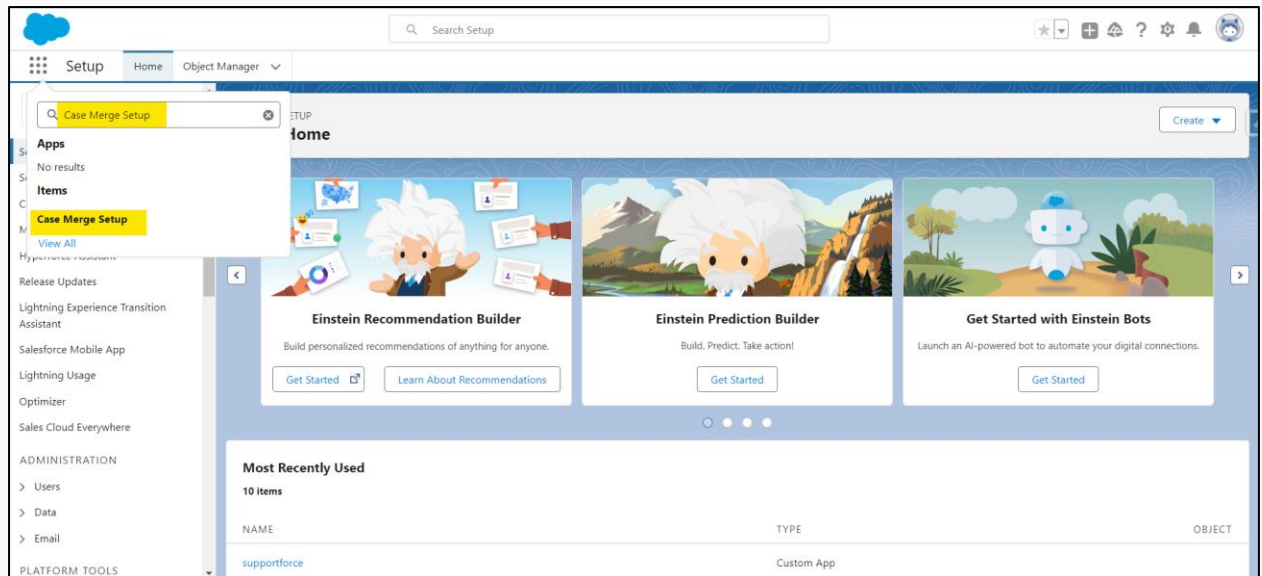
2. Enable Case Merge in your Org.

Go To Setup → Type Case Merge in quick find box → Select the Checkbox for Merge Cases. Under Keep duplicate cases after merge, click on Add a Case Status. Now Add a Case Status as 'Merged as Duplicate and Closed'.



3. From App Launcher open 'Case Merge Setup'.

****Note:-** System Admin Users must have "Manage Cases," "Customize Application," and "Assign Permission Sets" permissions to perform setup tasks.



3.1 In Case Merge Setup app. Open setting Tab to set values for Case Merge.

Auto Merge = Enter the percent value of Matching description above which cases will be auto-merged.

Indicate Duplicate = Enter the percent value of Matching description above which cases will be considered as duplicates.

Subject Duplicacy percentage = Enter the percent value of Matching subject above which cases will be considered as duplicates.

Merge cases having blank description = If checked, cases with a blank description will also be considered for automatic merge based on matching email addresses.

Merge cases having blank subject = If checked, cases with a blank subject will also be considered for automatic merge based on matching email addresses.

Case Merge Type = Select the value which is being selected in the Case Merge settings done above.

Service Home Accounts Contacts Cases Reports Dashboards Case Merge Setup

Case Merge Setup

Setting Permissions

Set Percentage for Auto Merge and Duplicate records

Description Duplacity percentage

Auto Merge 0-100 95

Indicate Duplicate 0-100 30

Subject Duplacity percentage

50-100 61

☒ Merge cases having blank description

☒ Merge cases having blank subject

Case Merge Type

☒ Keep duplicate cases after merge

☐ Delete duplicate cases after merge

Submit Edit

3.2 In Case Merge Setup app. Open Permissions Tab to assign component permission to users.(Assign this permission set to all the users who should be able to see 'permissionComp' component for duplicate cases.)

Service Home Accounts Contacts Cases Reports Dashboards Case Merge Setup

Case Merge Setup

Setting Permissions

Assign Permissions to users

Active Users

Gulzar1 Ahmad1

Assigned Users

Gulzar Ahmad

Prajwal Satewar

Save Edit

4. Add component on record detail page of case.

On the record detail page of case click on gear icon → Click on Edit Page → type permissionComp in Search box → drag and drop the component on the page.

Click on Add Filter

(i) Status - Not Equal – Closed (ii) Status – Not Equal - Merged as Duplicate and Closed.

Save

This screenshot shows the Salesforce Lightning interface for a Case Record Page. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and Calendar. A search bar is located in the top right. The main content area is divided into three sections: a header with case details (Priority: High, Status: Closed, Case Number: 00001000), a 'Feed' section with a 'Post' tab and a 'Share an update...' input field, and a 'Details' section on the right. The 'Details' section contains a list of fields with their values, such as Case Owner (Gulzar Ahmad), Case Number (00001000), Contact Name (Rose Gonzalez), and Account Name (Edge Communications). A 'Setup' menu is open in the top right corner, showing options like 'Setup for current app', 'Service Setup', 'Developer Console', 'Edit Page', and 'Edit Object'.

This screenshot shows the Lightning App Builder interface for the 'Case Record Page'. The left sidebar contains a 'Components' panel with a search bar and a list of components under 'Standard (0)' and 'Custom - Managed (1)'. The 'permissionComp' component is highlighted. The main canvas displays a preview of the Case Record Page layout, including the header, feed, and details sections. A yellow arrow points from the 'permissionComp' component in the sidebar to its position in the layout. The right sidebar shows the 'Page > permissionComp' configuration panel, which includes a 'Set Component Visibility' section with a 'Filters' list containing a single filter: 'Record > Status Not Equal Closed'.

This screenshot shows the Lightning App Builder interface for the 'Case Record Page'. The left sidebar contains a 'Components' panel with a search bar and a list of components under 'Standard (39)'. The 'permissionComp' component is highlighted. The main canvas displays a preview of the Case Record Page layout, including the header, feed, and details sections. The right sidebar shows the 'Page > permissionComp' configuration panel, which includes a 'Set Component Visibility' section with a 'Filters' list containing two filters: 'Record > Status Not Equal Closed' and 'Record > Status Not Equal Merged as Duplicate and Closed'. A yellow box highlights these two filters. Below the filters, the 'Show component when:' section is visible, with radio buttons for 'All filters are true', 'Any filters are true', and 'The filter logic is met'.

5. The duplicate cases with matching percent will be shown in the component.

The screenshot displays a CRM interface with a top navigation bar containing various modules like Sales, Home, Leads, Opportunities, Accounts, Contacts, Quotes, Orders, Contracts, Invoices, Tasks, Files, Campaigns, and Cases. The main content area is divided into two sections. The left section, titled 'Case: Subject testing for fresh case', shows a feed with tabs for Post, Email, and Poll. It includes a 'Share an update...' input field and a 'Share' button. Below the feed, there's a 'Most Recent Activity' section with a search bar and a list of updates. The right section, titled 'Duplicate Cases List', shows a table with columns for Case Number, Subject, and Match %. It lists four cases with their respective match percentages: 20%, 20%, 23%, and 59%. At the bottom of the table, there are buttons for Merge, Review, and Remove.

Case: Subject testing for fresh case

Priority: Medium, Status: New, Case Number: 00001050

Feed | Related | Details

Post | Email | Poll

Share an update... **Share**

Most Recent Activity ▼

All Updates | Emails | Call Logs | Text Posts | Status Changes

Mona Sharma Case created 2m ago

Duplicate Cases List

Page 1 of 1 | Display Records Per Page: 10

☐	Case Number	Subject	Match %
☐	00001042	Subject testing for new case	20%
☐	00001044	Subject testing for new case	20%
☐	00001045	Subject testing for new case	23%
☐	00001048	Subject testing in fresh case	59%

Merge **Review** **Remove**

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