

User Manual

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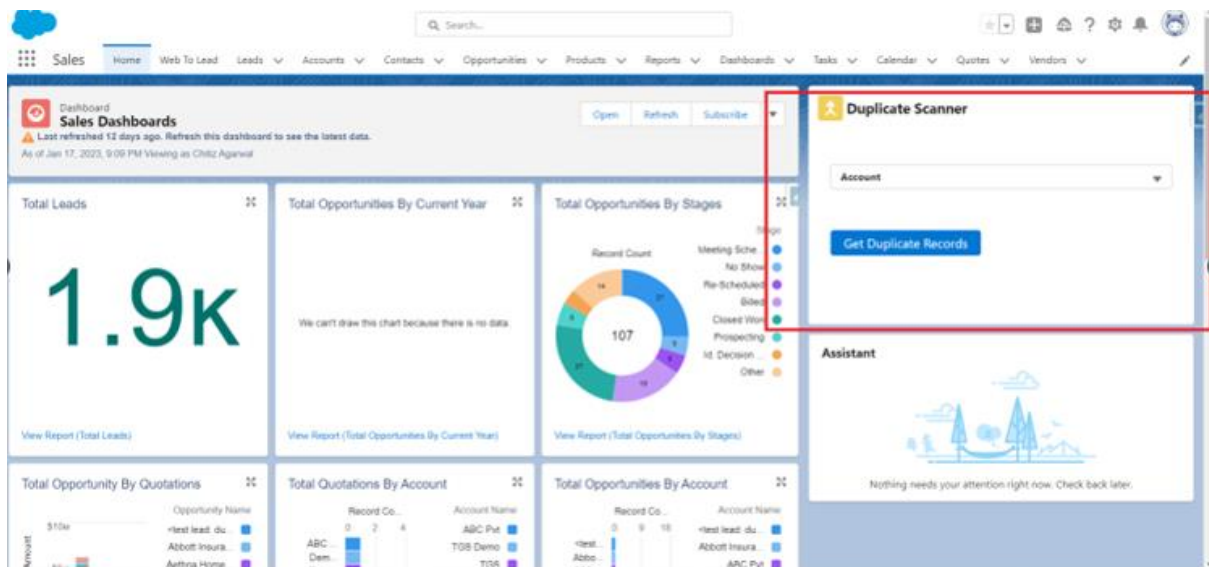
Home Page Component

Step 1:

Once the **deduper** component has been placed on the Home page of Salesforce App.

A **Searchbox** with a button would be shown in the component.

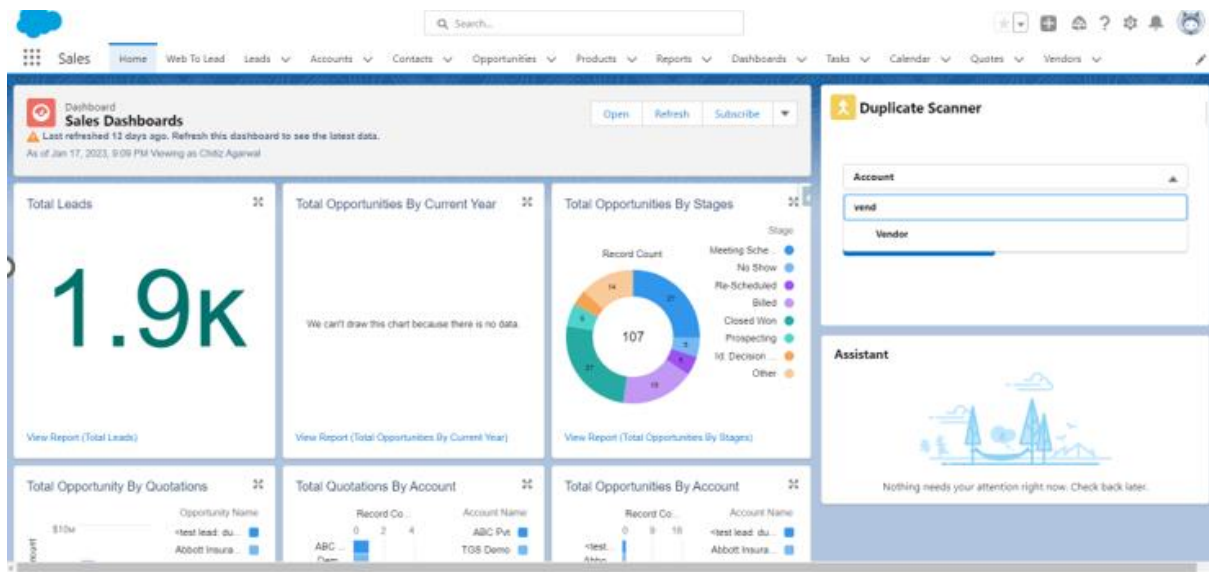
Account, Lead, Contact and all the custom objects of that Salesforce org would be listed as the dropdown list.



Step 2:

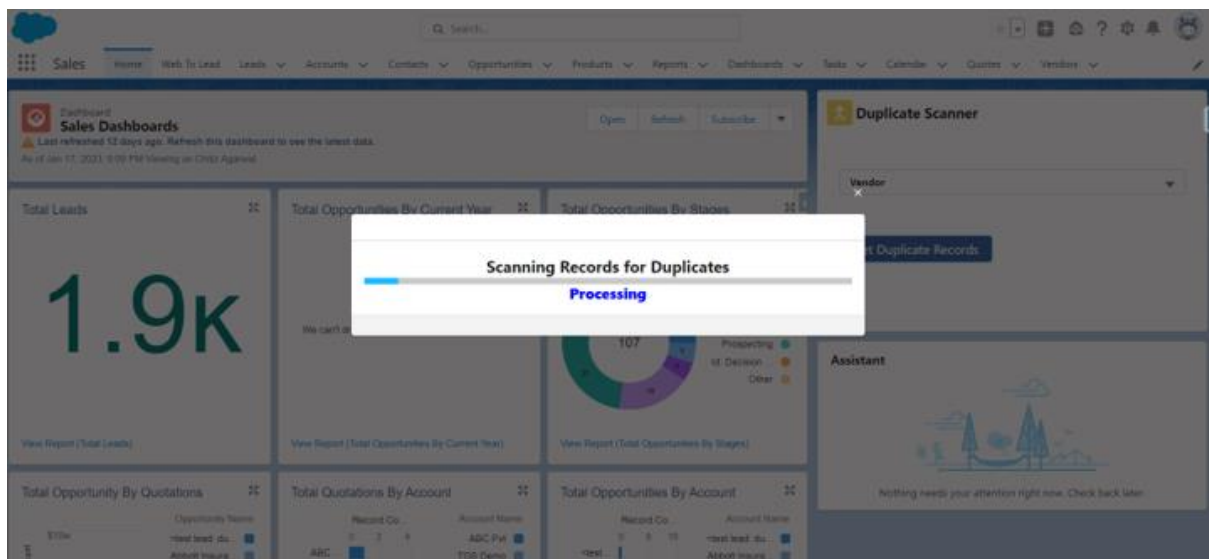
We can either type the initial letters of the desired object and select that object as its name appears, or we can also scroll the dropdown list to choose the object.

Select the desired object and click on the GET **DUPLICATE RECORDS** button.

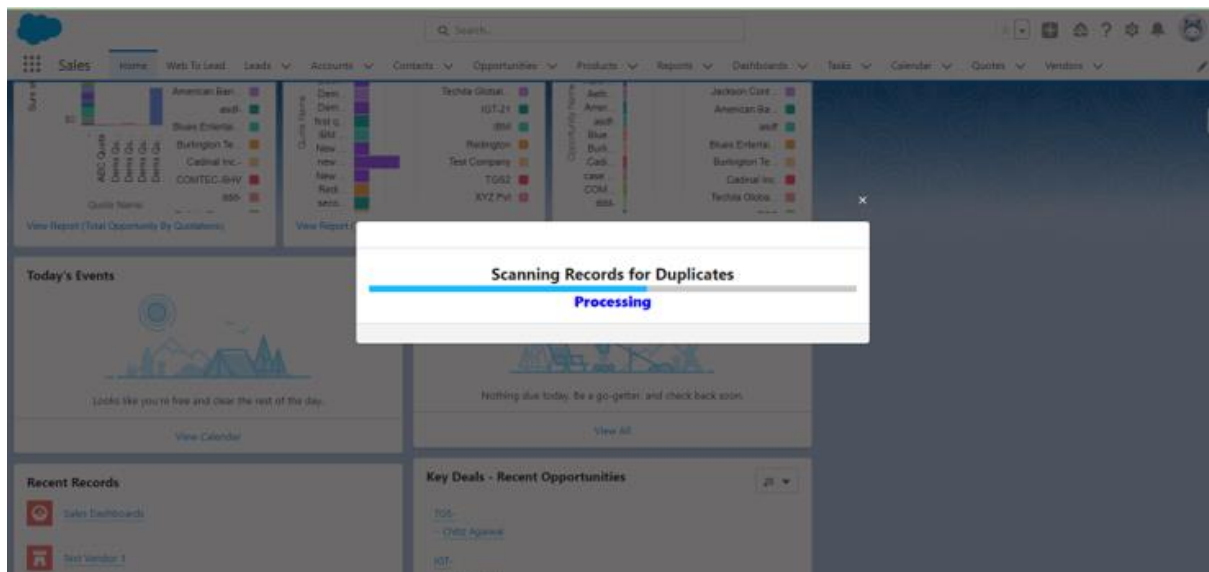


Step 3:

After clicking the “Get Duplicate Records” button. A small popup window would be displayed on screen.

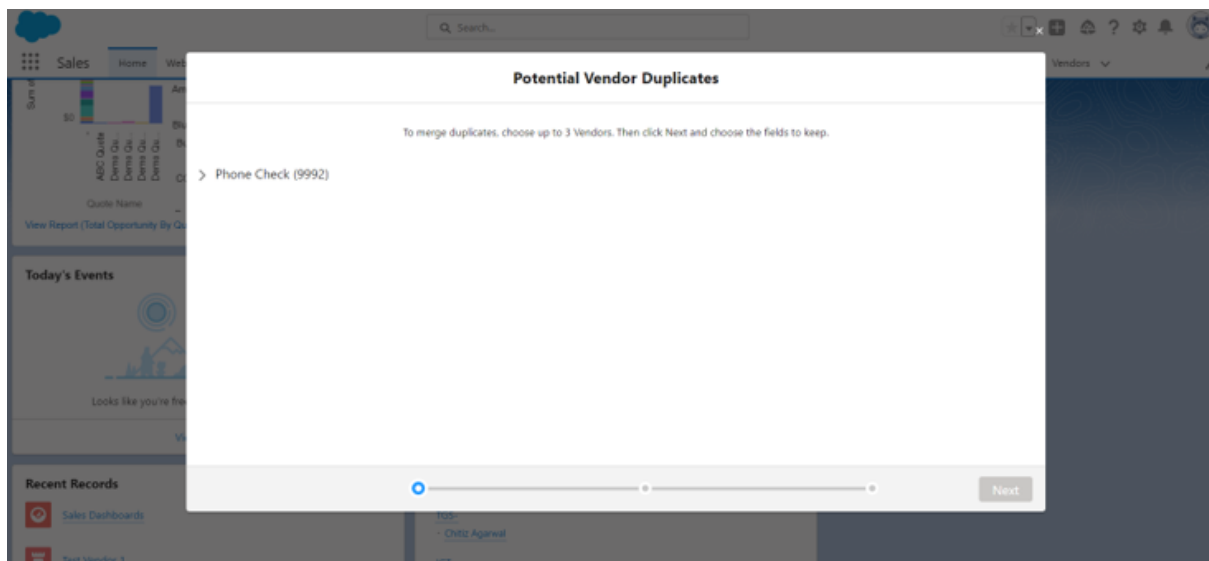


This progress bar will be updated according to running status of Batch Job in the backend, which filters out the duplicate Records from



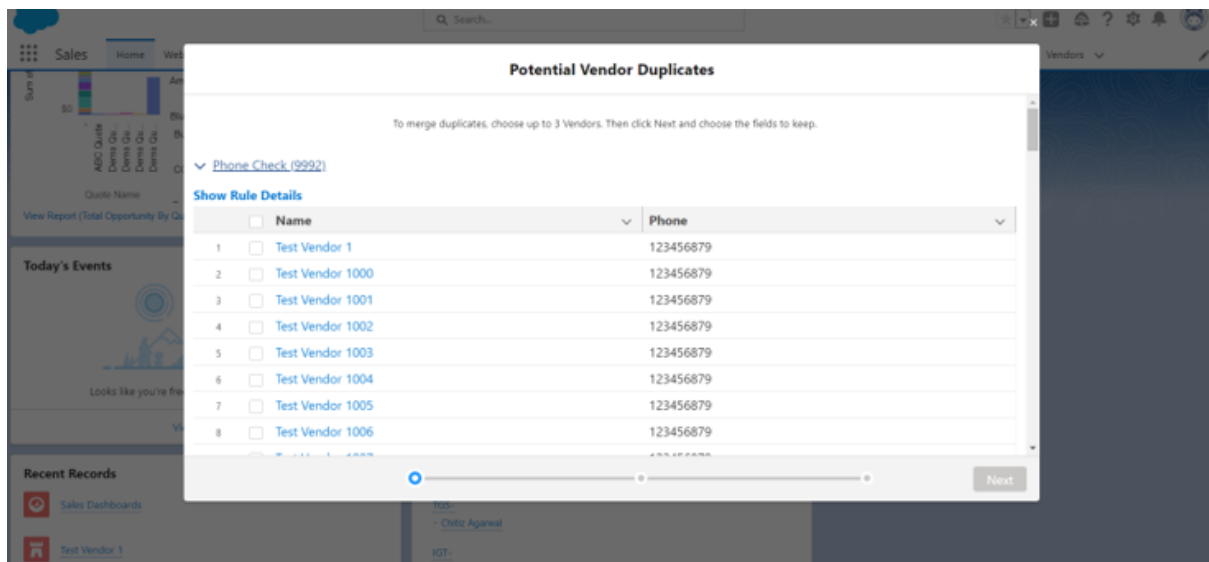
Once the scanning gets completed

Below screen would be visible, which shows the active duplicate rule for that selected Object and all the duplicate records according to that rule

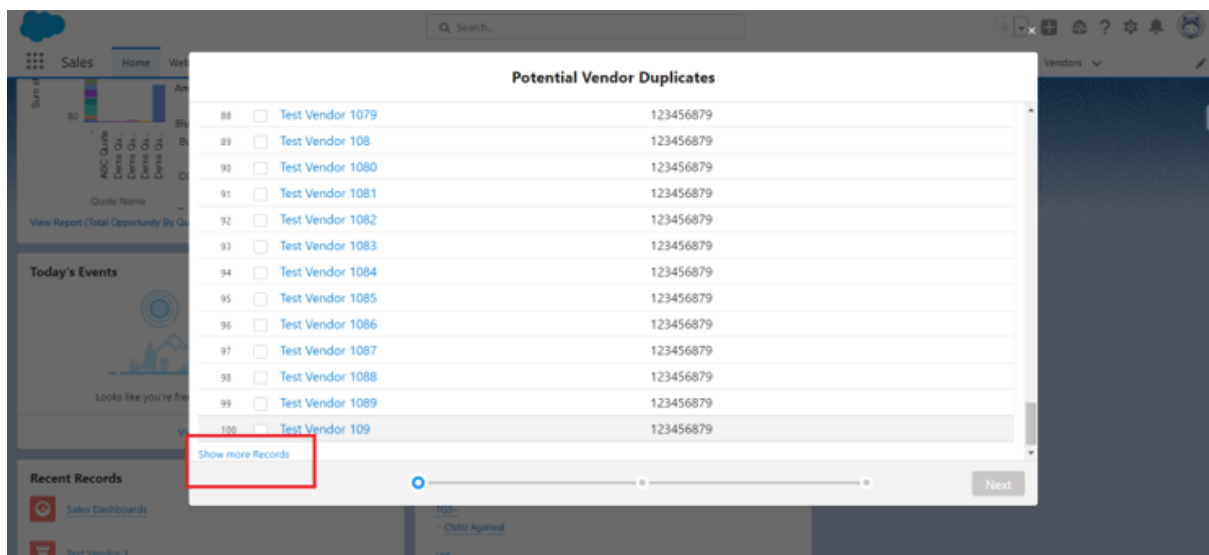


Step 4:

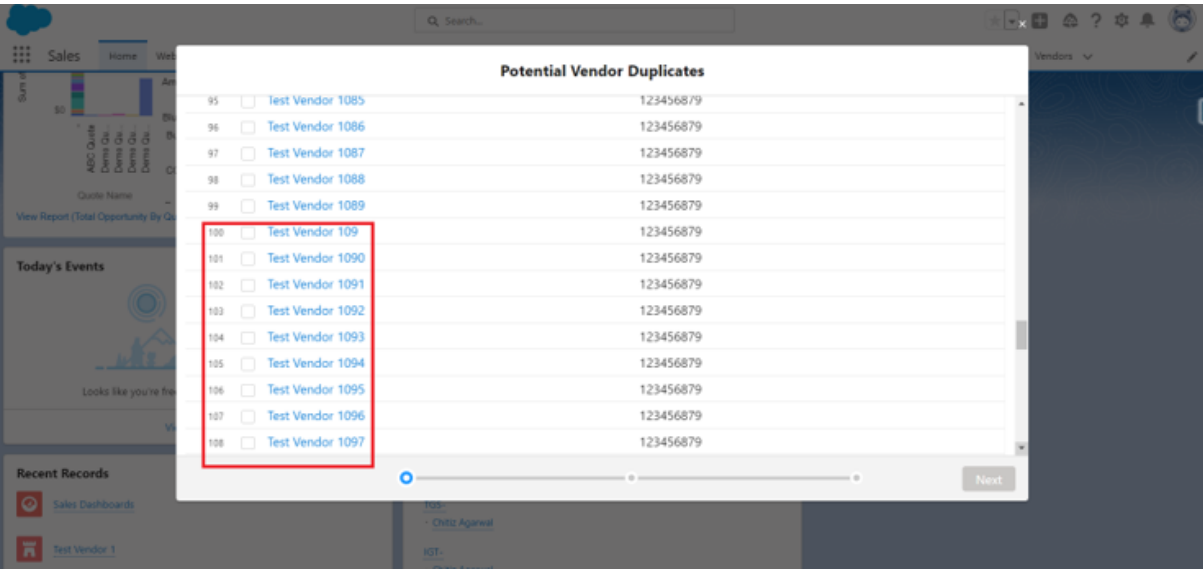
When we click on the Expand arrow we get the list of all duplicate records and the count of records is mentioned in brackets, with the name of the Duplicate Rule.



When we reach towards the end of the screen we get a Show **more Records** link.

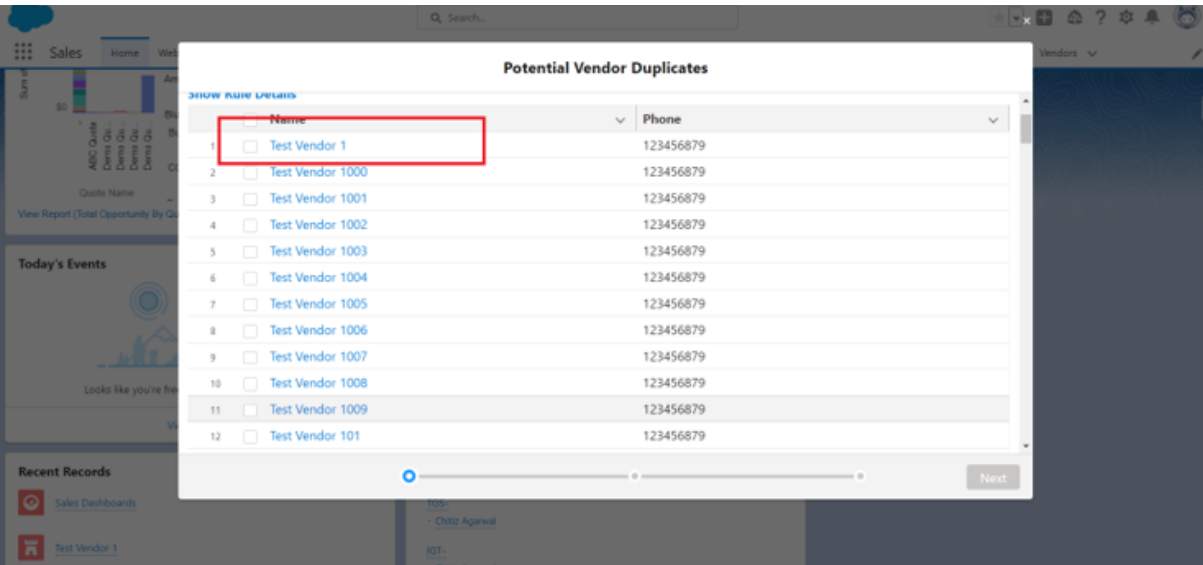


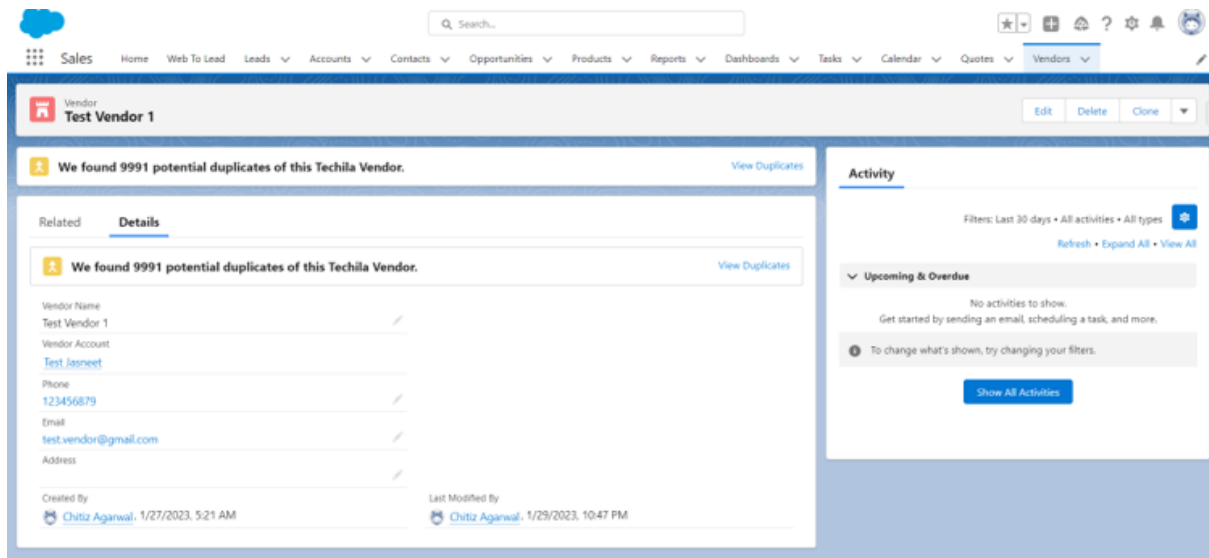
and on click of this link we will get records for the same Duplicate Rule, if it exists.



Step 5:

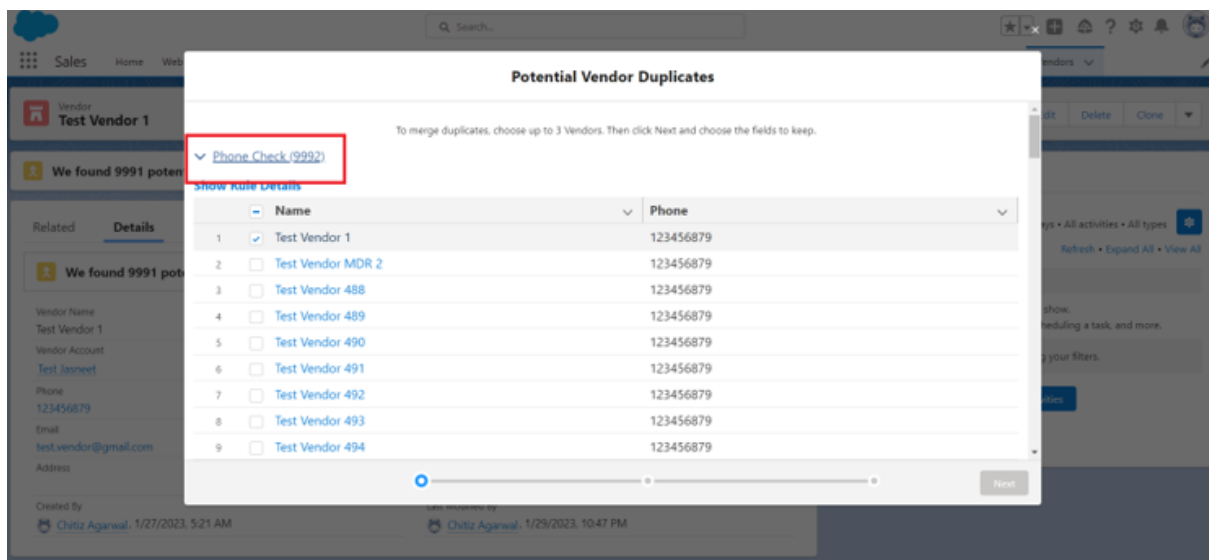
If we want to see the details of any record which are shown in the popup, we click on its Name which will open the record's detail page.





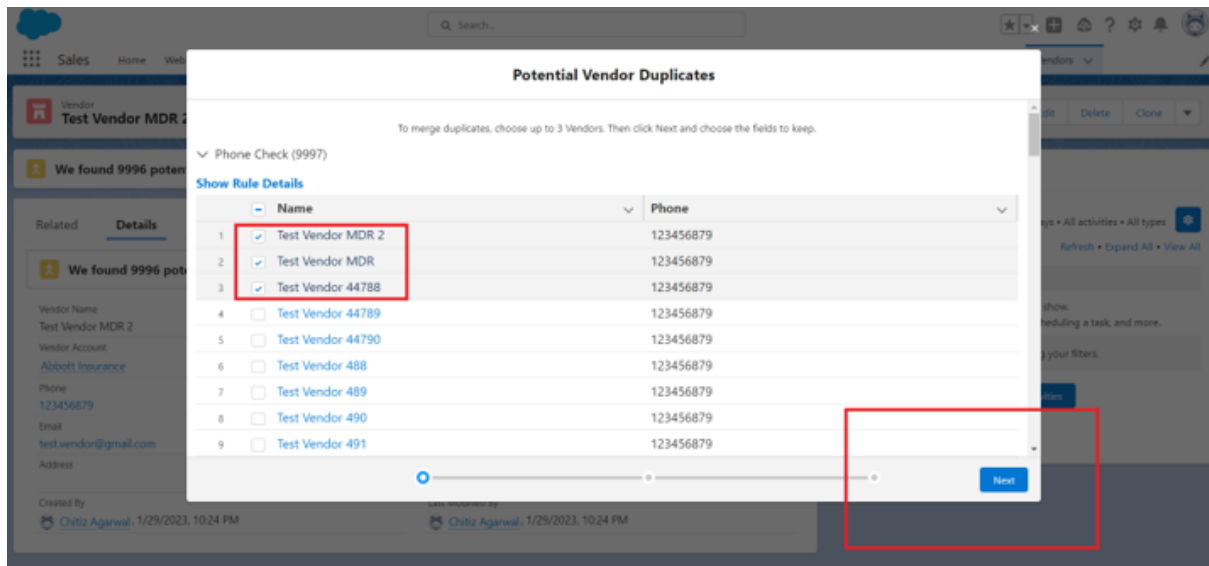
Step 6:

We can expand or collapse the duplicate rules name and duplicate records which are found for the expanded duplicate rule/matching criteria would be displayed under it.

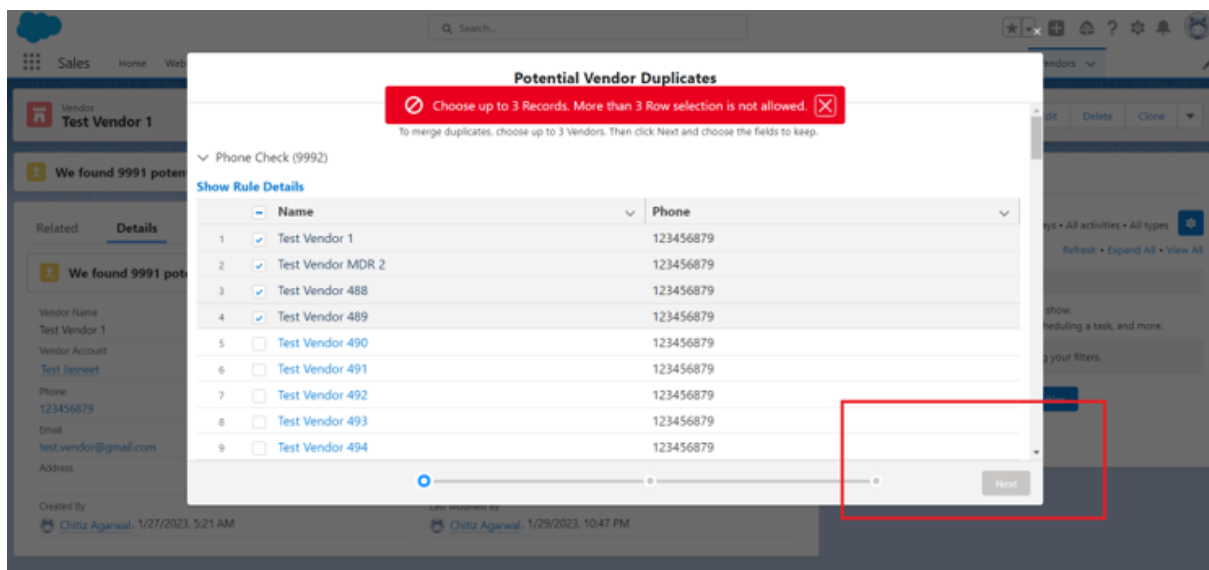


Step 7:

We can select up to 3 records of any rule to start the merging process. After selection, the NEXT button would be enabled to click.



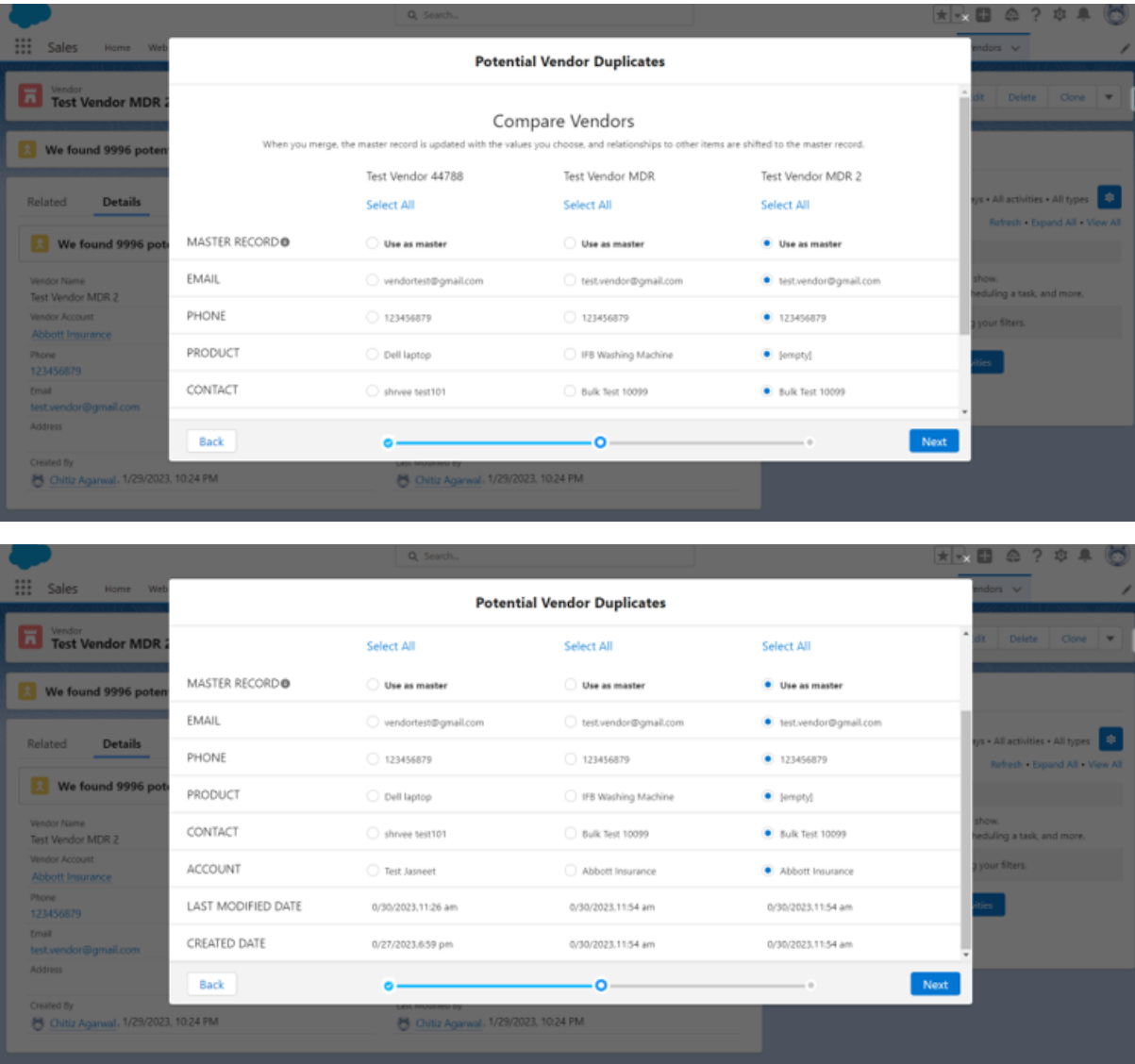
If we select more than three records below Error Message will be displayed and the Next button would be greyed out.



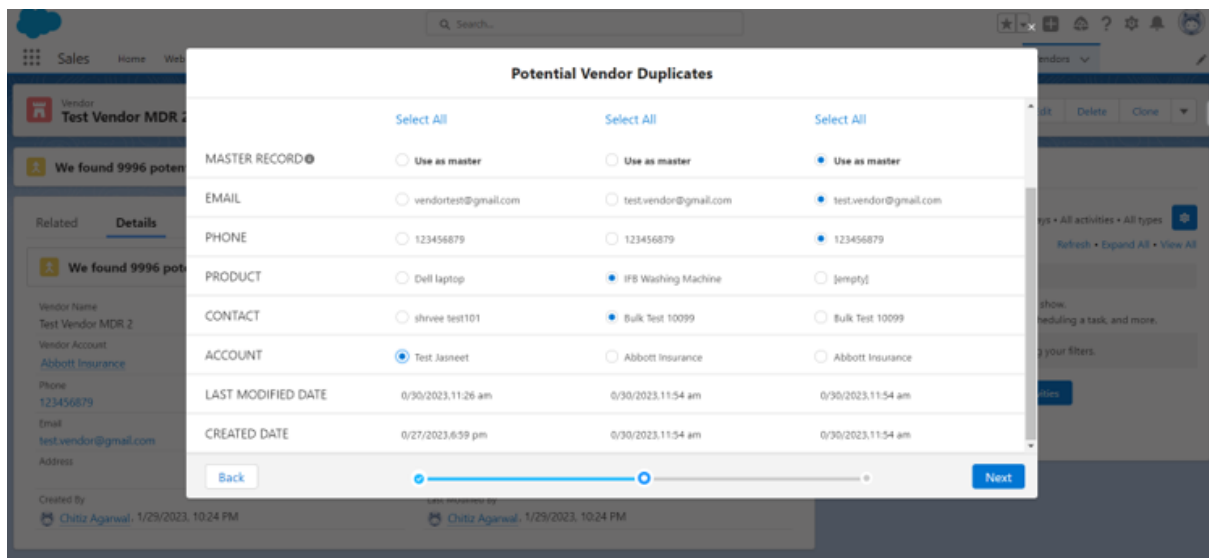
Step 8:

After selection, the Compare Records Screen would be displayed.

Here Last record would be auto selected as Master Record. We can change this auto selection and can select any of three records as Master.



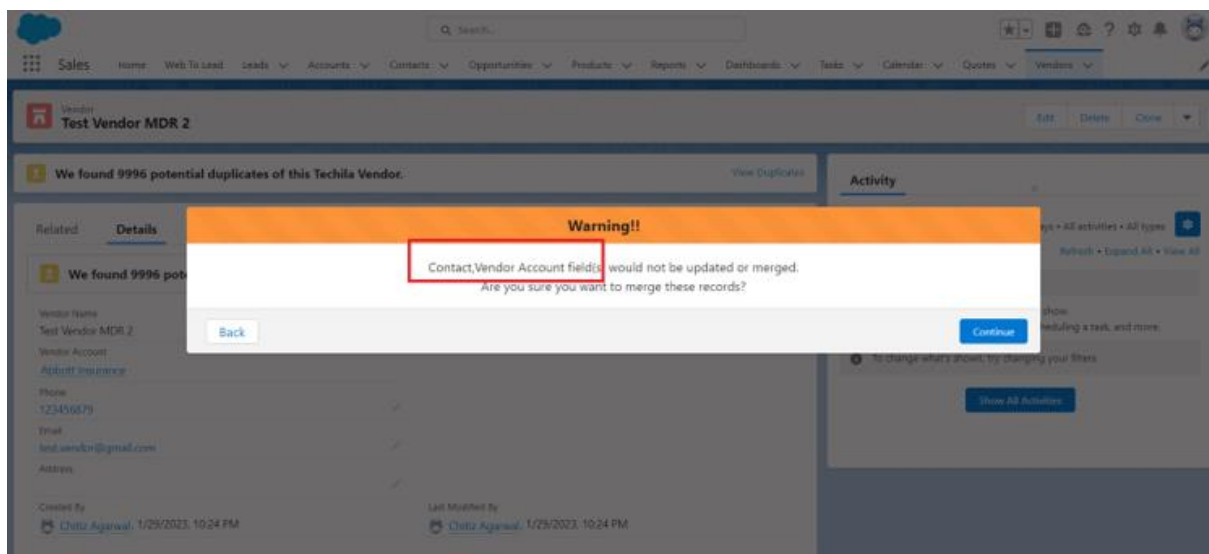
In parallel, we can select other displayed fields as Master. The value of these selected fields would be overwritten into the selected Master record.



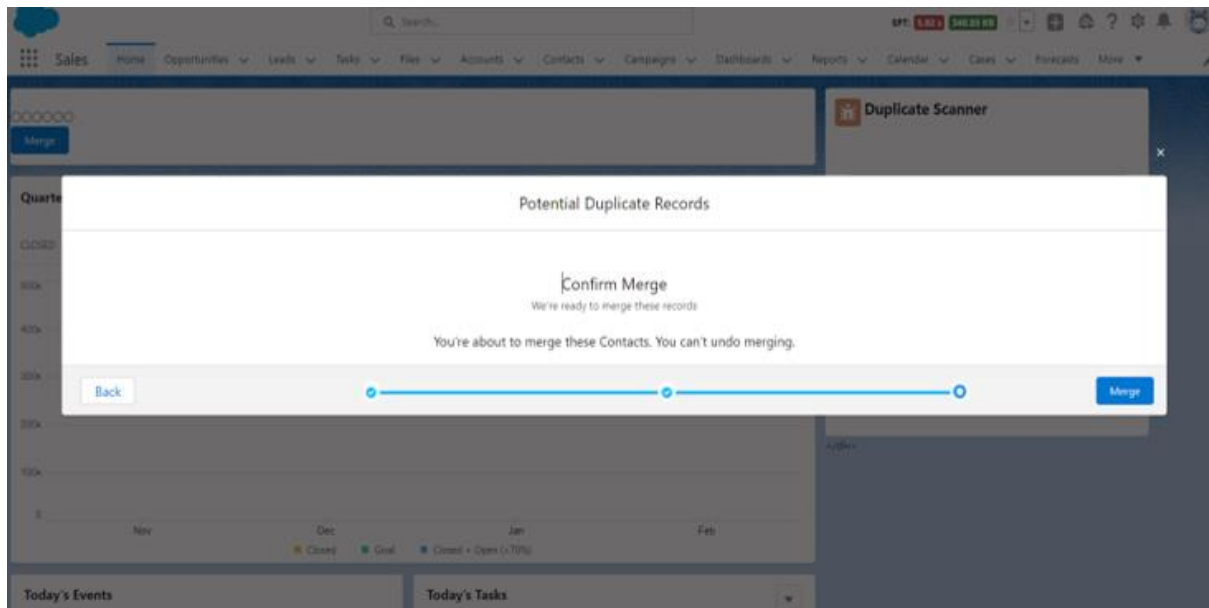
Step 9:

After Record and field selection, click on Next Button. Here 2 types of screens would be shown based upon the field's selection and their types. If our selected field is having Master Detail relationship, in that case we can select the required field of any of the three records but its value would remain as of selected Master Record i.e. its value would not be changed. The name of the Master Detail Fields would also be displayed in the message.

The warning message would be shown as below:-



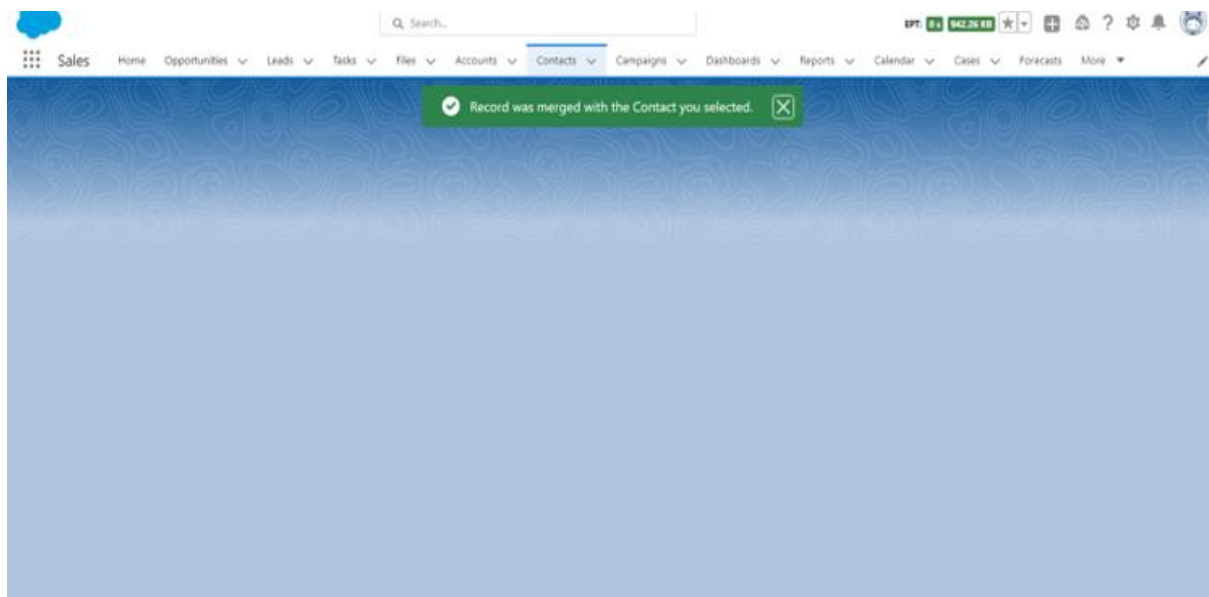
After clicking on Continue Button, Confirmation Popup would be displayed on screen.

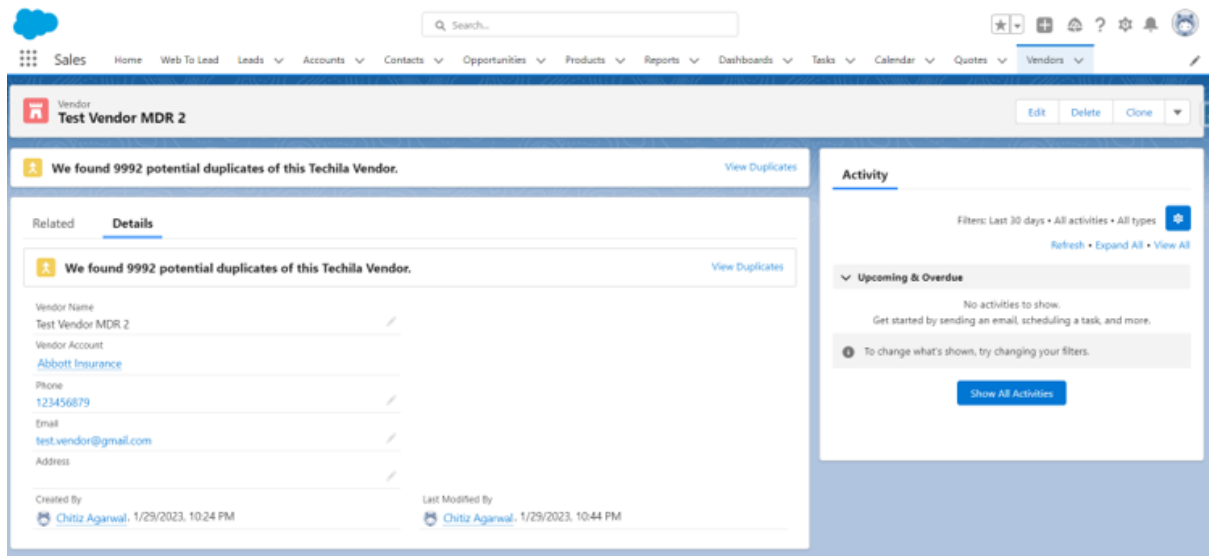


Step 10:

After clicking on Merge Button all the unselected records and unselected fields would be merged with the selected Master record and selected fields. A message would be displayed on the screen.

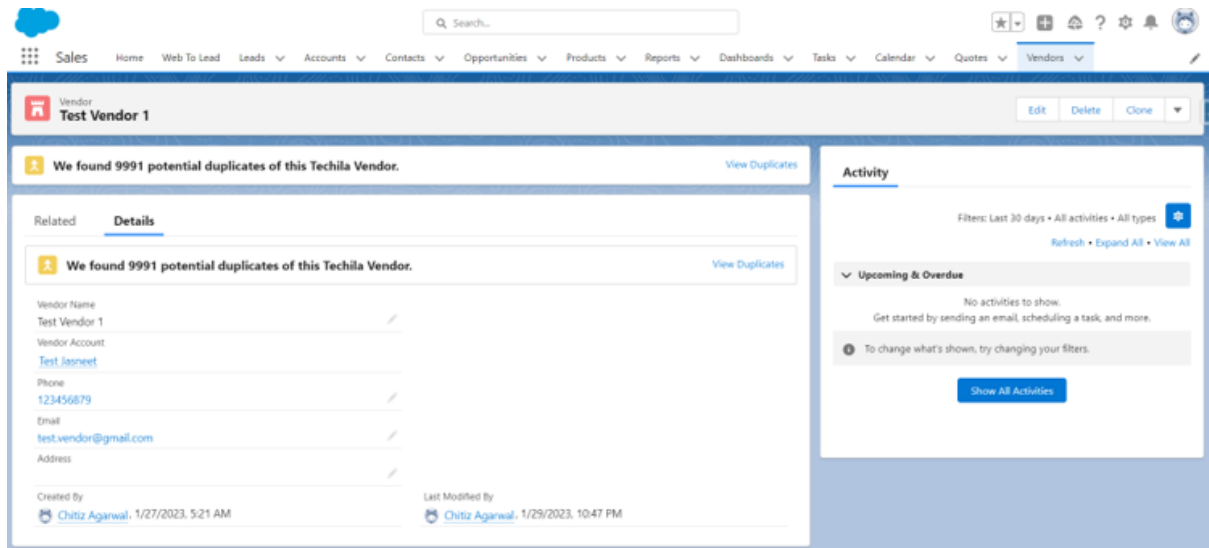
After it, the Detail page of Master record would be opened by default.





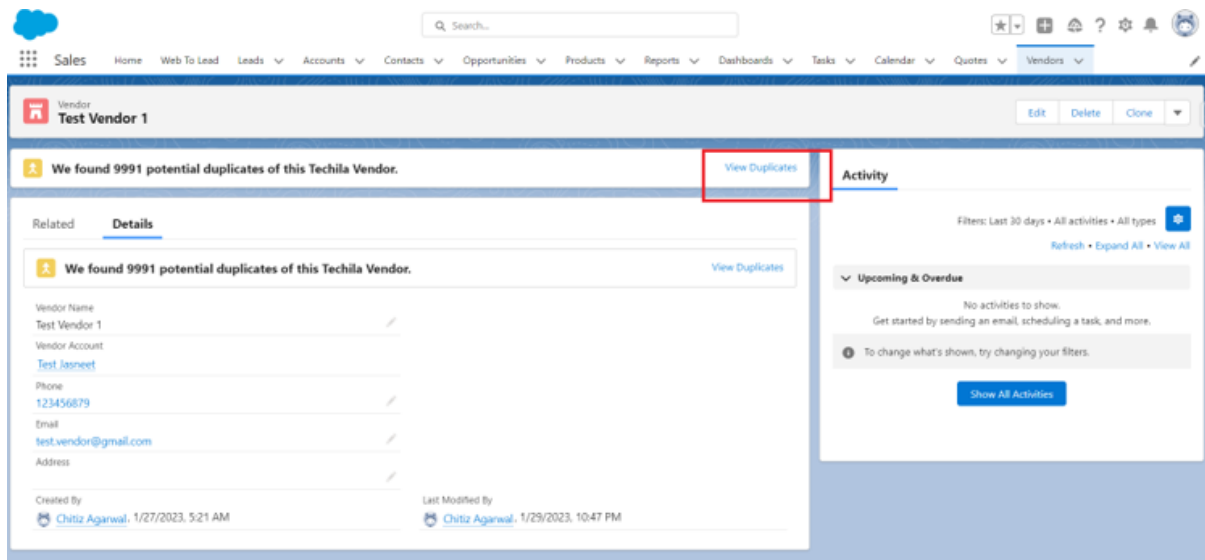
Record Page Component

When we open the Record Detail page of any Object, if that object has duplicates available in that org. This component would show the count of other duplicate records on the Detail Page Screen.



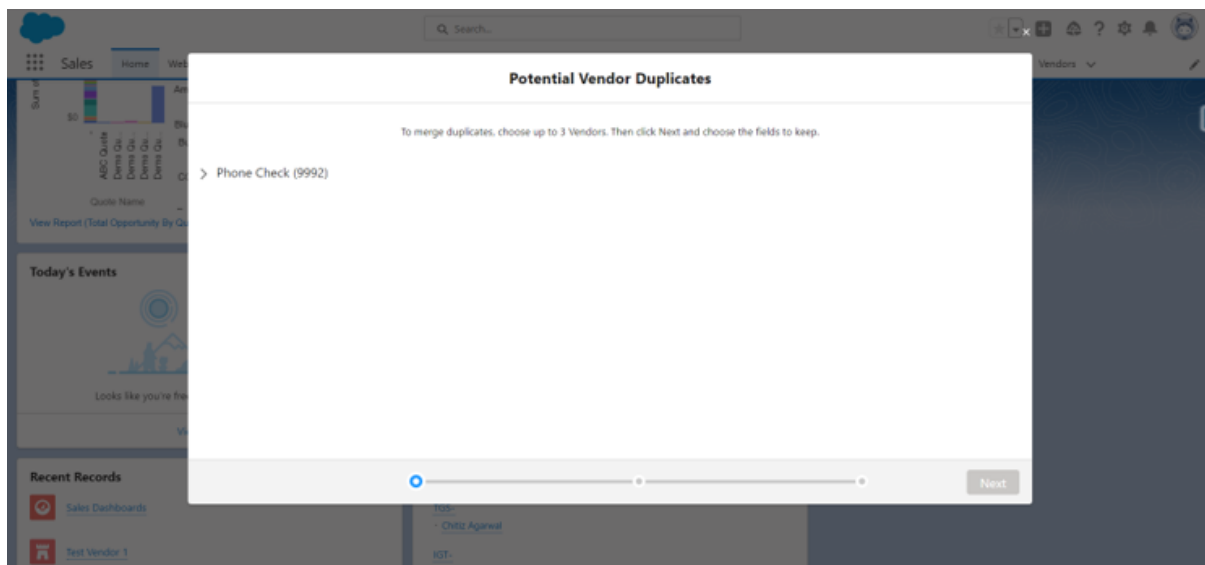
Step 1:

Here **View Duplicates** link would also be there to show the duplicate Records.



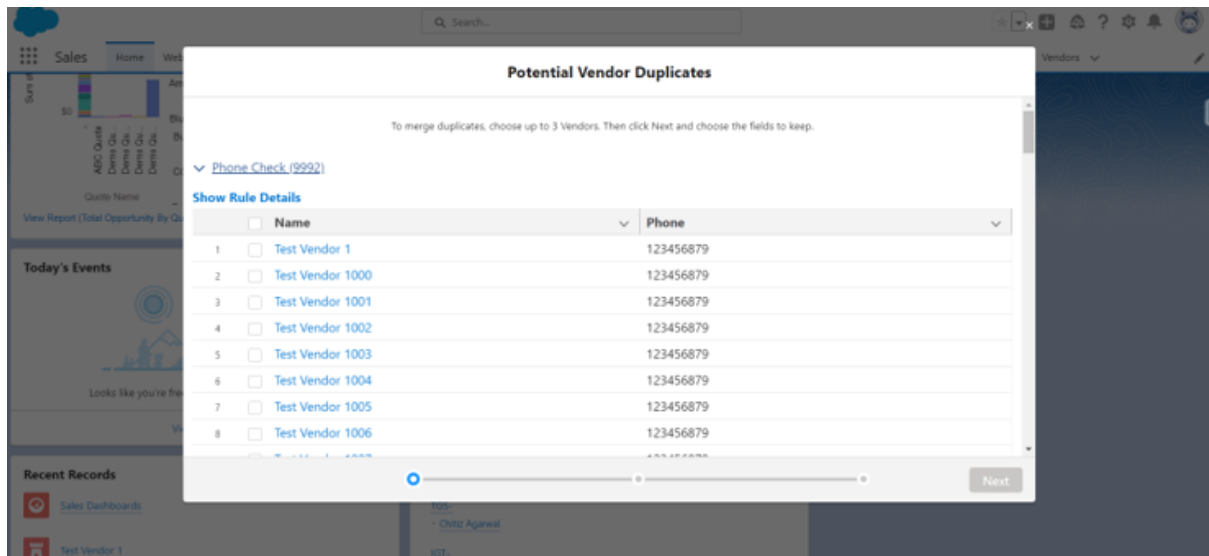
Step 2:

On click of **View Duplicates** link the popup would display all the other available duplicate records according to the active Duplicate Rule for that Object.

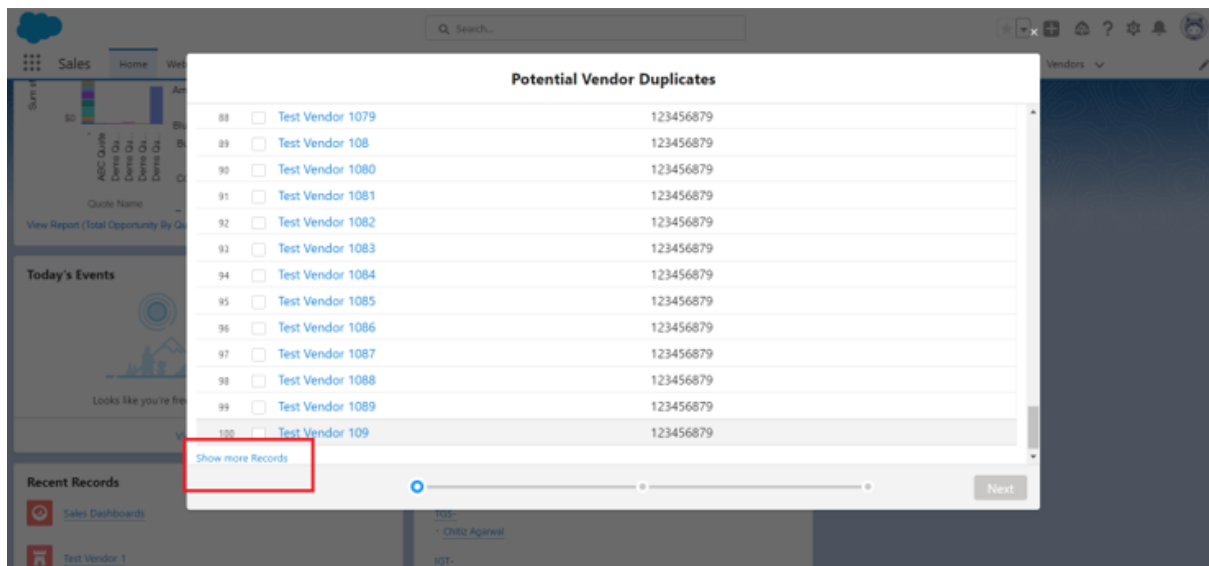


Step 4:

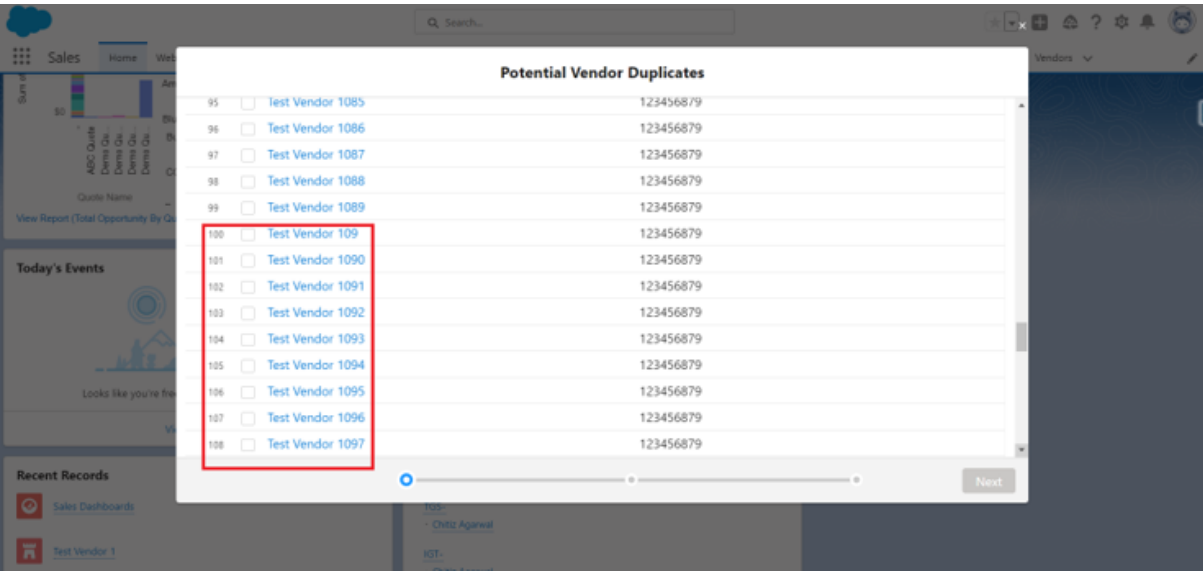
When we click on the Expand arrow we get the list of all duplicate records and the count of records is mentioned in brackets, with the name of the Duplicate Rule.



When we reach towards the end of the screen we get a **Show more Records** link.

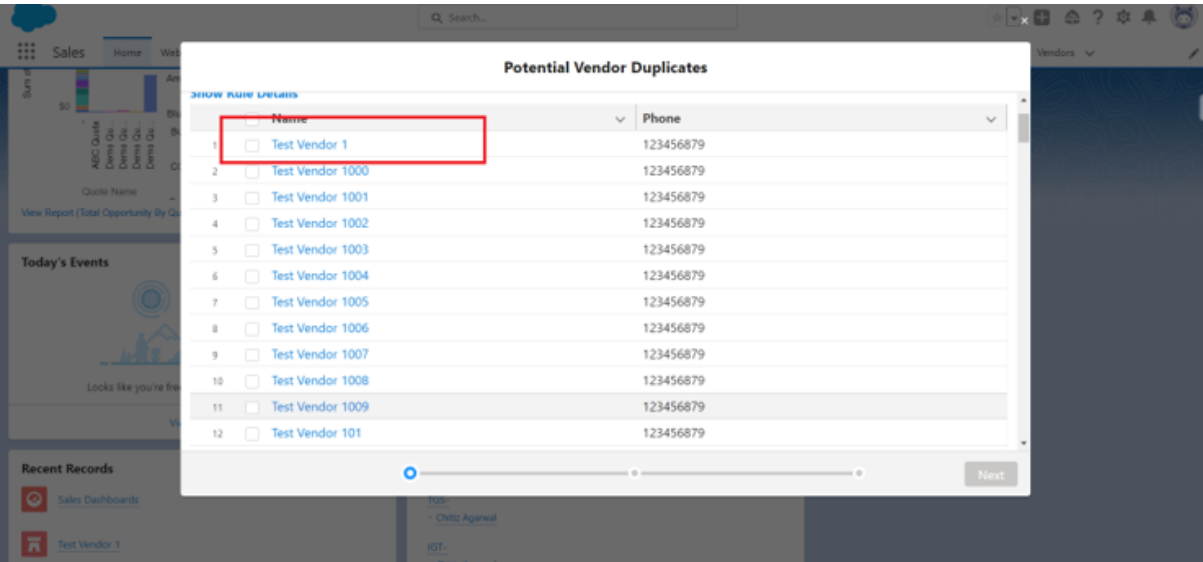


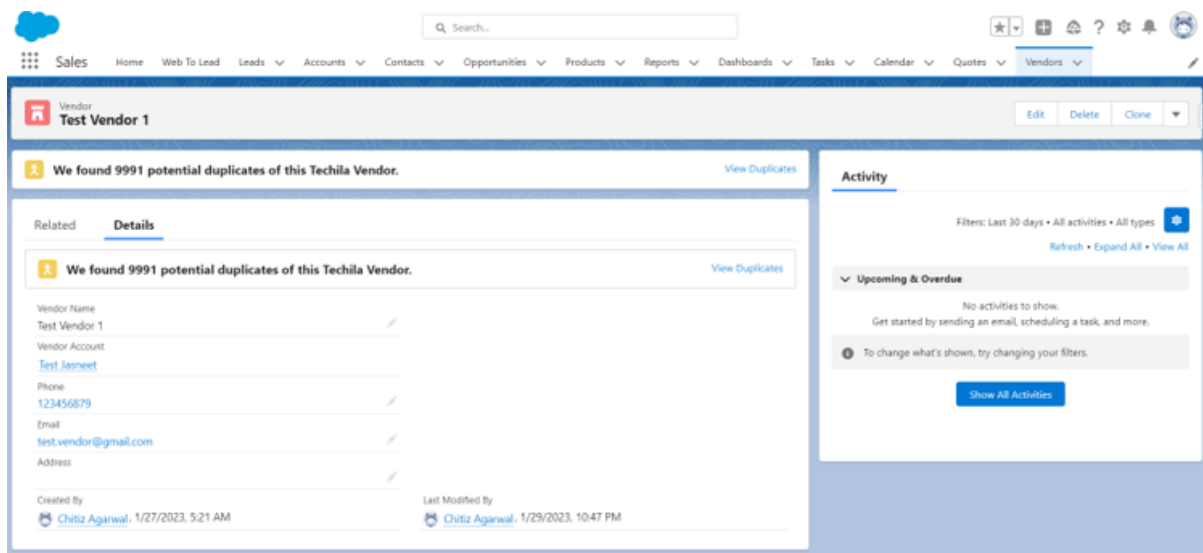
and on click of this link we will get records for the same Duplicate Rule, if it exists.



Step 5:

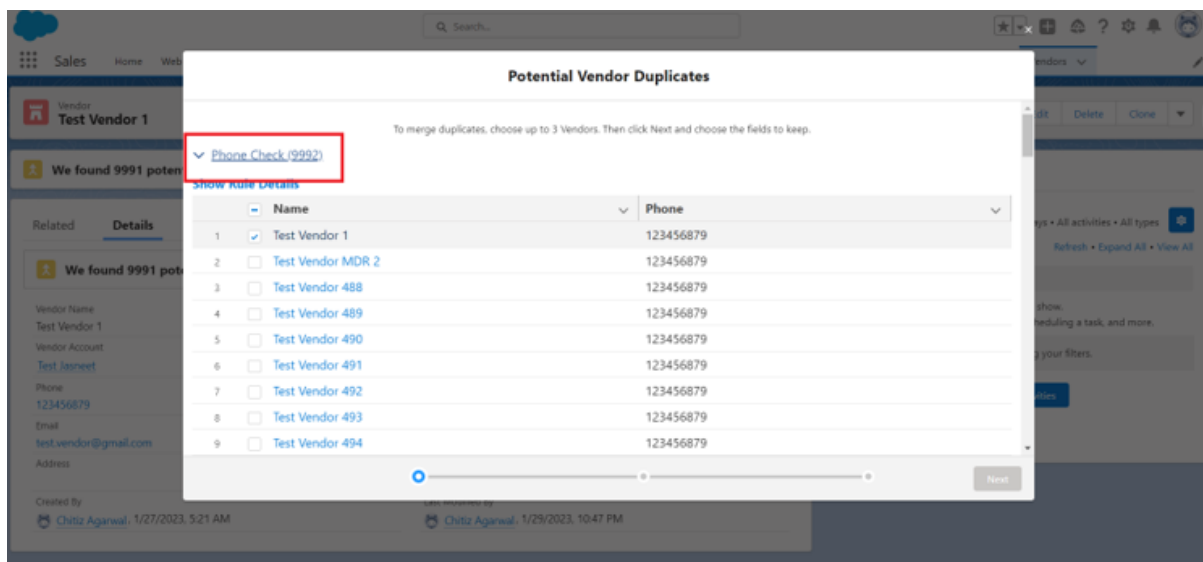
If we want to see the details of any record which are shown in the popup, we click on its Name which will open the record's detail page.





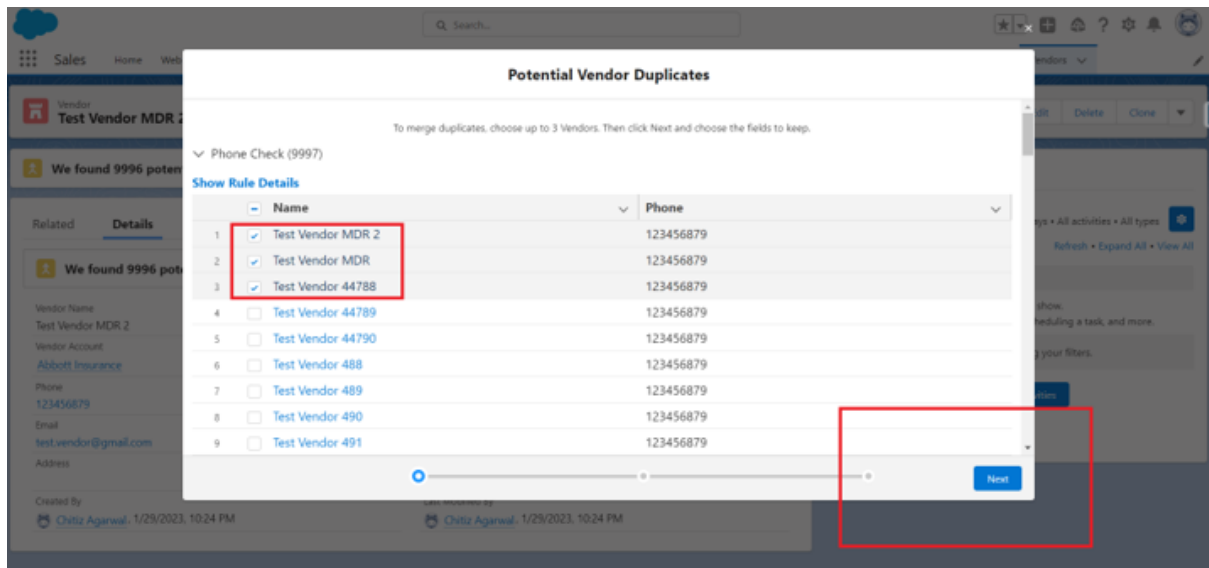
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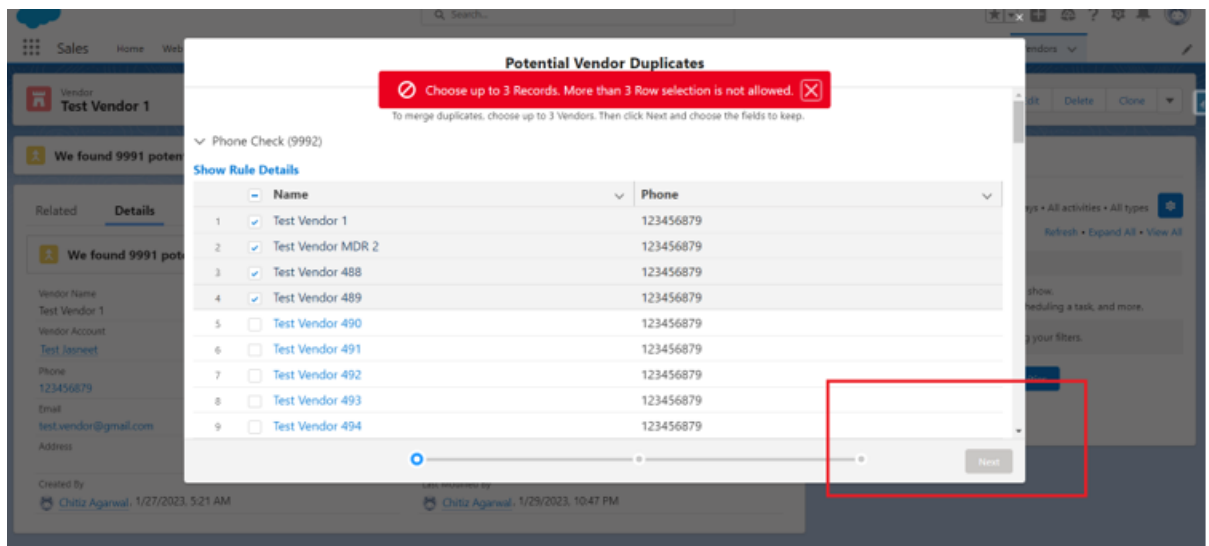


Step 7:

We can select up to 3 records of any rule to start the merging process. After selection, the NEXT button would be enabled to click.



If we select more than three records below Error Message will be displayed and the Next button

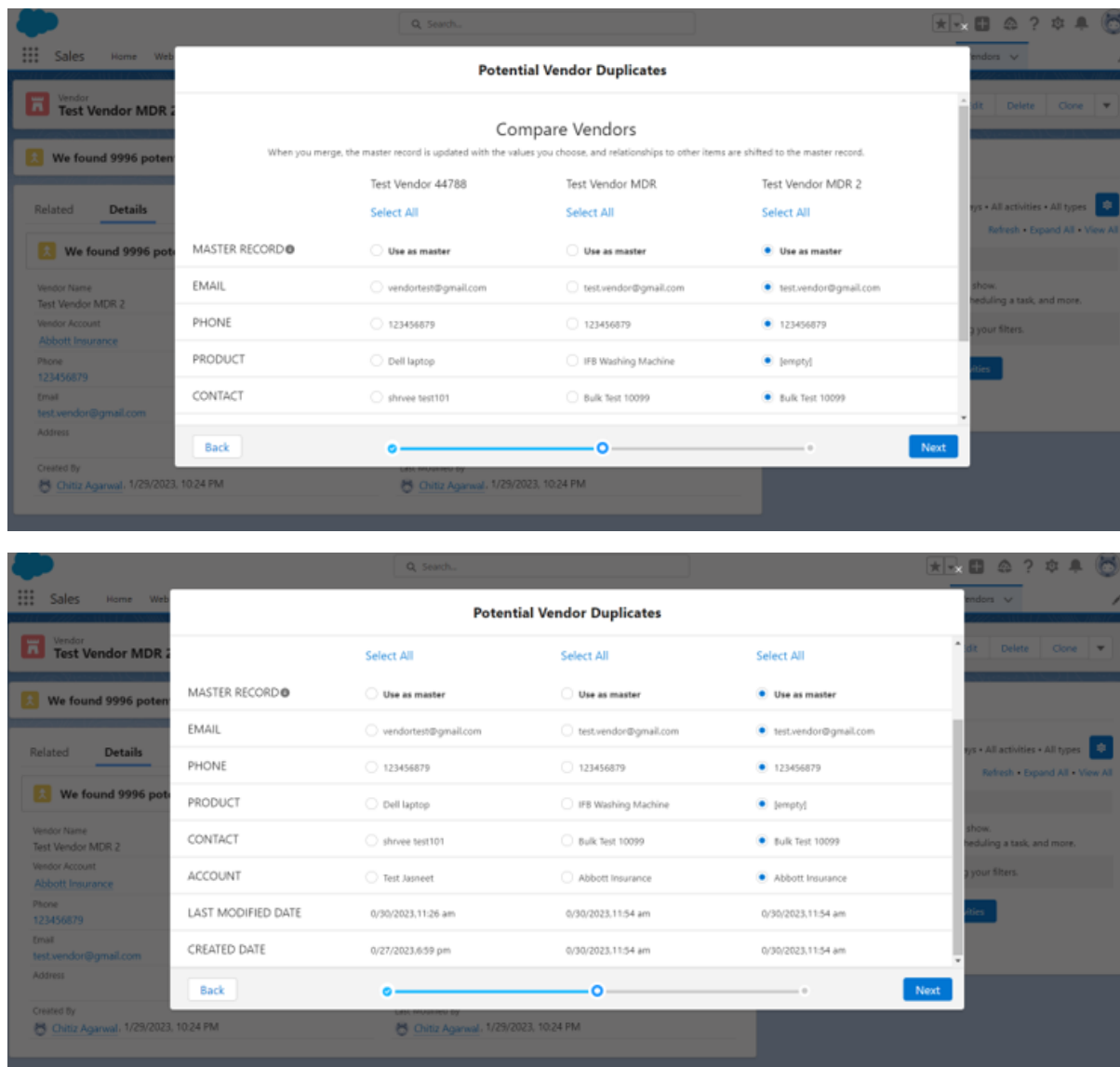


would be greyed out.

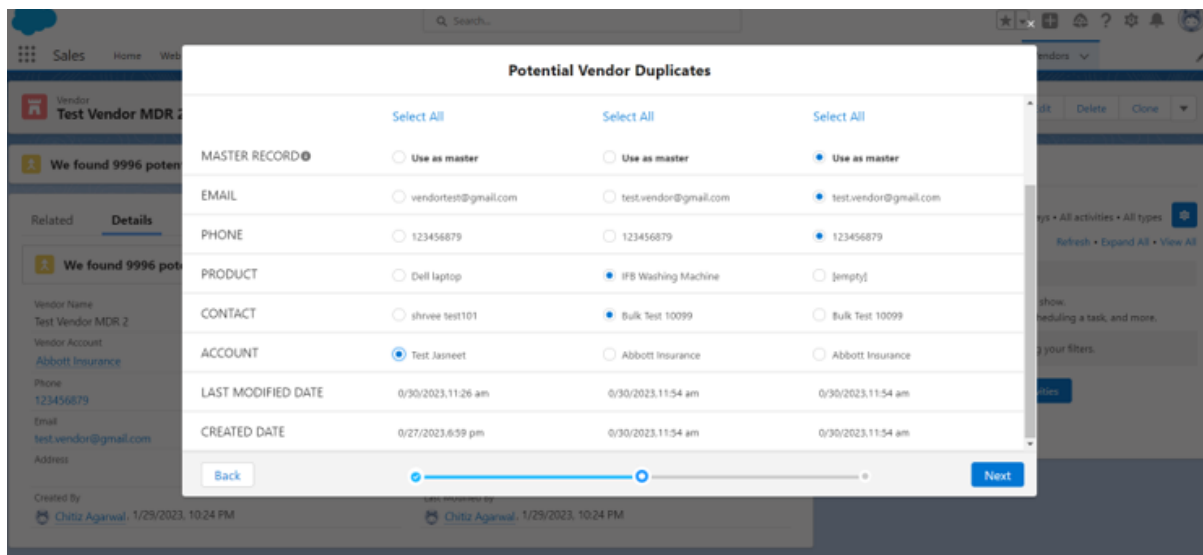
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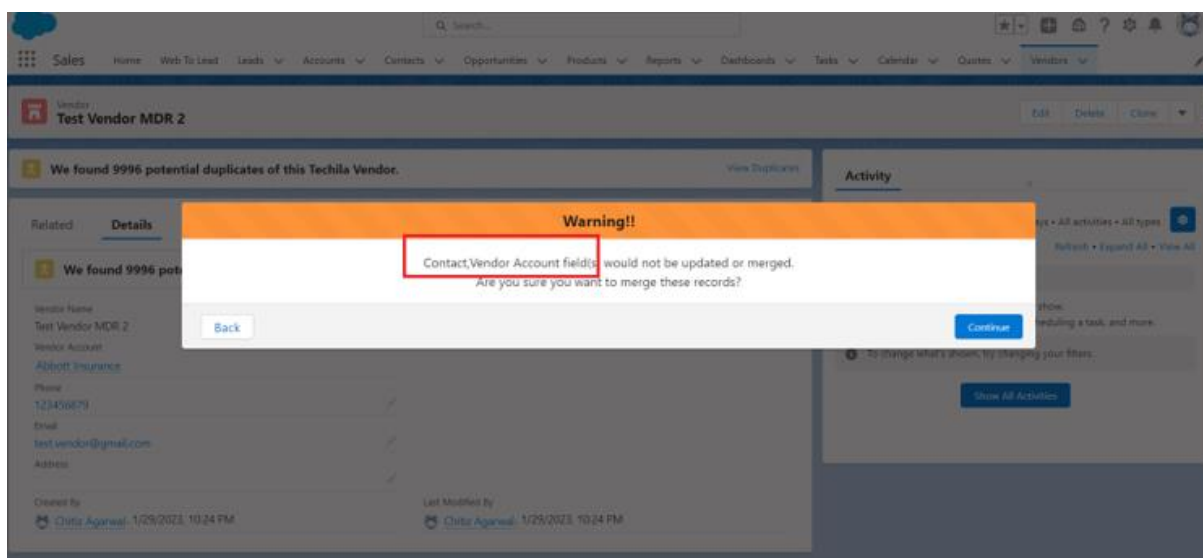
In parallel, we can select other displayed fields as Master. The value of these selected fields would be overwritten into the selected Master record.



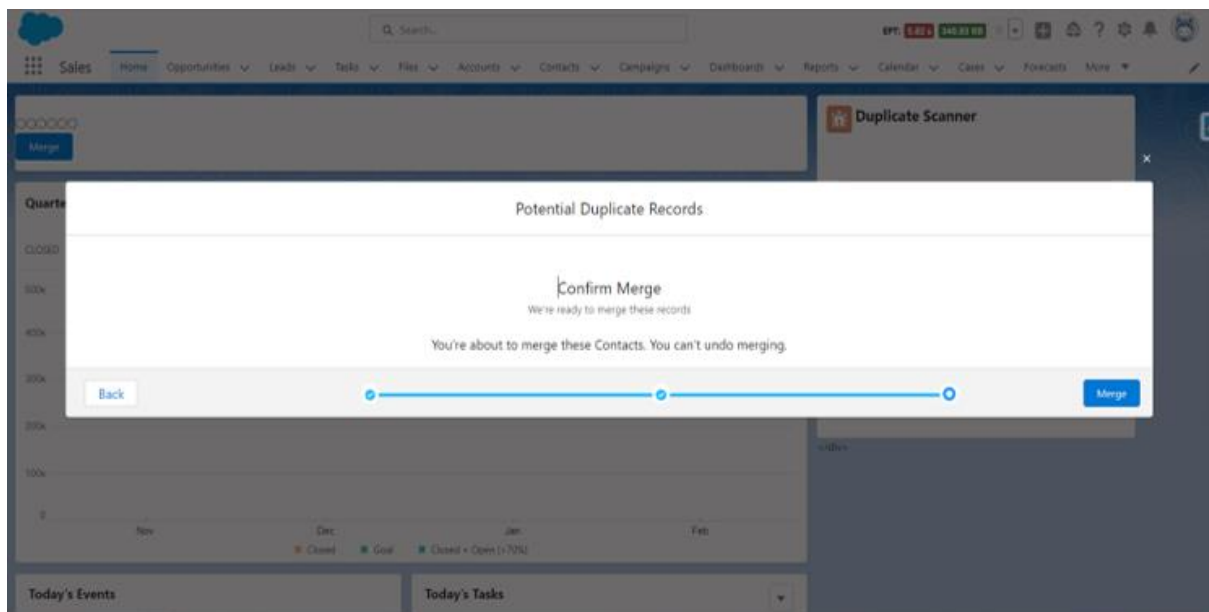
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The warning message would be shown as below:-



After clicking on Continue Button, Confirmation Popup would be displayed on screen.



Step 10:

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After it, the Detail page of Master record would be opened by default.

