



MergeEase

Contract merge made Easy!

User Manual to install MergeEase app for Salesforce CRM users to merge multiple Service Contracts of same account into single Master Service Contract.

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About MergeEase

MergeEase App provides functionality to users who want to Merge different Service Contract available in same Account into one Master Service Contract.

Users may come across situation where they have multiple service contracts within a same account that require Amend/Renew operation to be performed. Performing Amendment or Renewal on large number of service contracts individually becomes a tedious task. By using MergeEase App user can merge all the service contracts in one service contract. Post merge, the user can perform Amend or Renew operation in one go.

Pre-requisites

You must have **Salesforce CPQ & Service Cloud** for Salesforce CPQ Packages pre-installed in your salesforce org.

How to Download the App

Installation of MergeEase App from Salesforce App Exchange.

Connect Your Salesforce Account to Your Trailblazer.me Profile

1. In a new browser tab, open **AppExchange**.
2. Click your avatar to open your Trailblazer.me account menu, then click **Settings**.
3. Under the Salesforce Accounts header in the Connected Accounts section, click **Connect**.
4. If you see the Choose a Username page, click **Log in with a Different Username**. If you see a login page, skip to the next step.
5. Enter your Salesforce username and password, then click **Log In**.
6. Click **Link Account**.

Steps to Install Application to Salesforce Org-

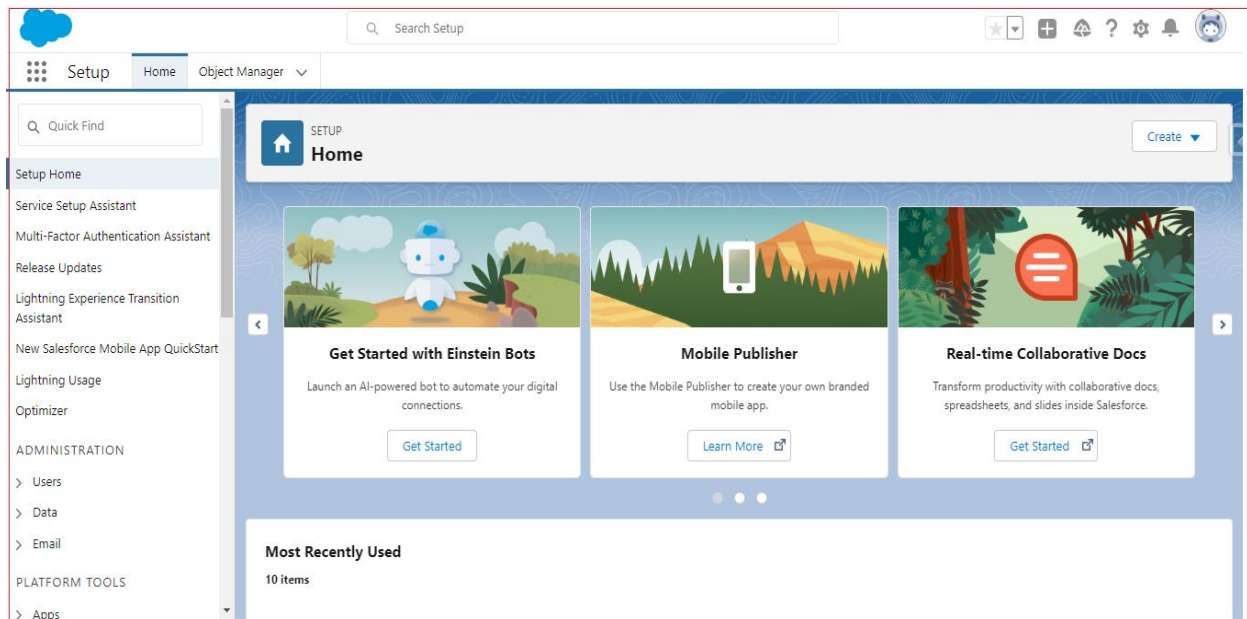
1. In a new browser tab, open **AppExchange**.
2. Search for **MergeEase**.
3. Click on **Apply Filters** button and choose Solution type as **Apps** to narrow down search result.
4. Click on the **MergeEase** App Name.
5. Now click on **Get it Now** button.
6. You will see 2 options **Install in Production** and **Install in Sandbox**.
7. In Install in Production you will see all the connected salesforce accounts.

8. If you can't find the username for the account in which you want to install then check Connect Your Salesforce Account to Your Trailblazer.me Profile above.
9. Choose the username and click **Install in Production**.
10. You will see a page where you can confirm your details.
11. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to terms and conditions.
12. Click on **Confirm and Install**, it will take you to the login screen.
13. If you want to Install in Sandbox then click on **Install in Sandbox** button.
14. You will see a page where you can confirm your details.
15. Select the checkbox **I have read and agree to the terms and conditions** only if you have read and agree to terms and conditions.
16. Click on **Confirm and Install** it will take you to the login screen.
17. Provide your login credentials and select for which users you want to install the application.
18. After that application installation will start.

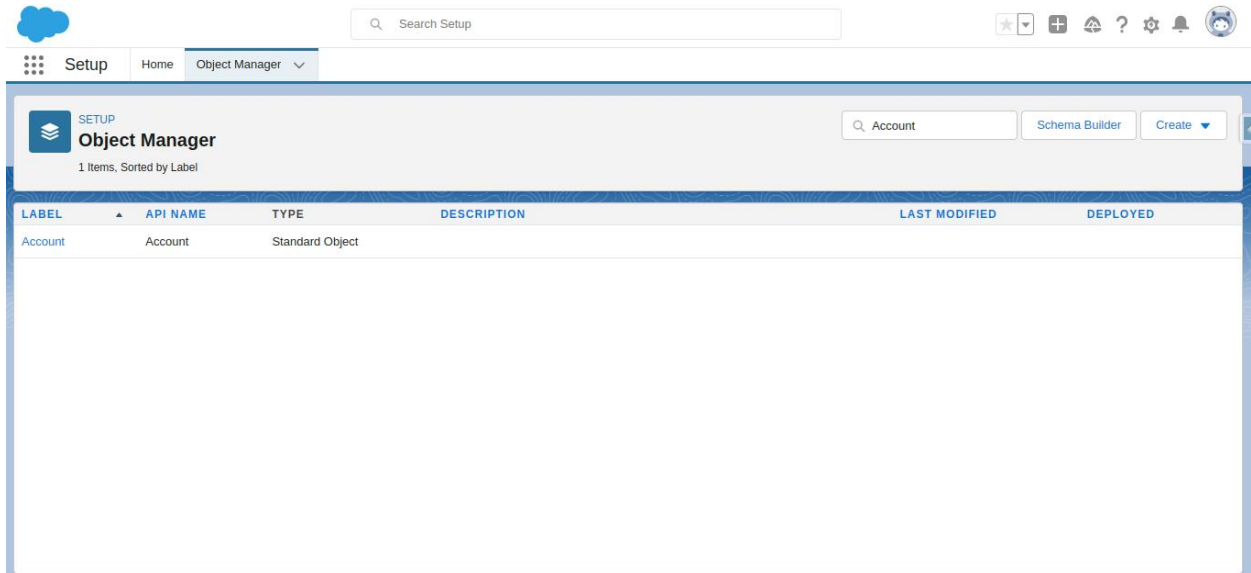
***We strongly recommend not to use any file that you receive from any unauthorized source or any source not mentioned above.**

How to add Merge Ease button

1. Click , and select Setup.



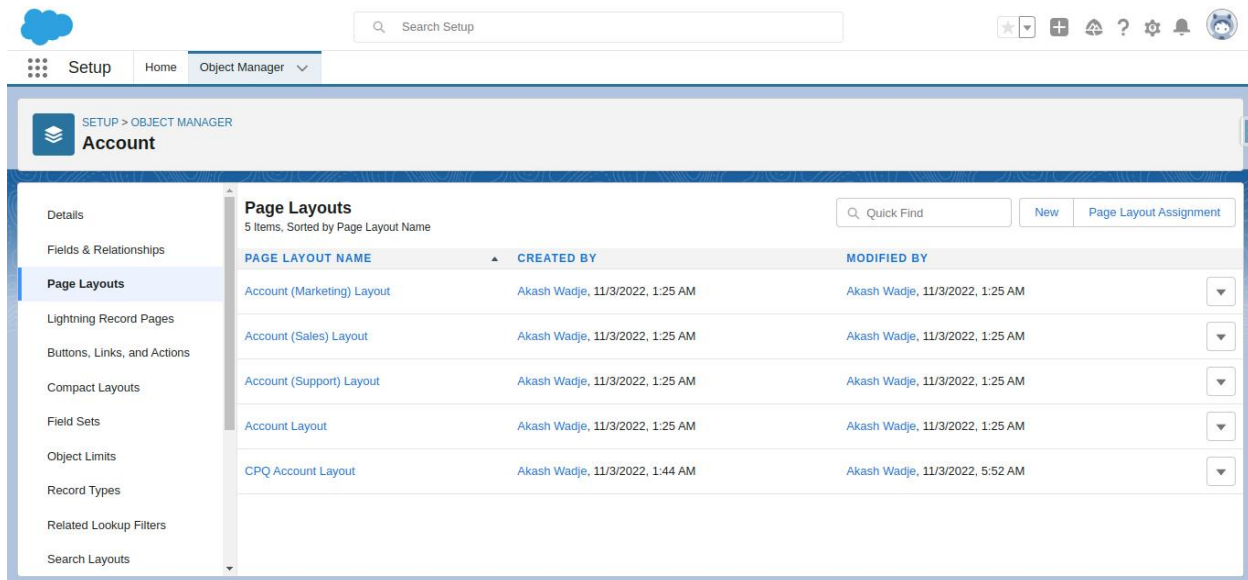
2. Select Object Manager and Enter “**Account**” in the Quick Find box, and select “**Account**” Object.



The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with a search box labeled "Search Setup" and several utility icons. Below the navigation bar, the "Object Manager" tab is selected. The main content area displays the "Object Manager" page for the "Account" object. The page includes a search box with "Account" entered, a "Schema Builder" button, and a "Create" dropdown menu. Below this, a table lists the object details:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			

3. Click **Page Layouts** and open CPQ Account Page Layout if you are using the default page layout for your Profiles. If you have created different page layout for your user then choose that one.



The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Account' object is selected. The left sidebar contains a list of setup options, with 'Page Layouts' highlighted. The main content area displays the 'Page Layouts' for the 'Account' object, showing 5 items sorted by name. The table lists the layout names, the user who created them, and the creation/modification dates. The 'CPQ Account Layout' is the most recent.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Akash Wadje, 11/3/2022, 1:25 AM	Akash Wadje, 11/3/2022, 1:25 AM
Account (Sales) Layout	Akash Wadje, 11/3/2022, 1:25 AM	Akash Wadje, 11/3/2022, 1:25 AM
Account (Support) Layout	Akash Wadje, 11/3/2022, 1:25 AM	Akash Wadje, 11/3/2022, 1:25 AM
Account Layout	Akash Wadje, 11/3/2022, 1:25 AM	Akash Wadje, 11/3/2022, 1:25 AM
CPQ Account Layout	Akash Wadje, 11/3/2022, 1:44 AM	Akash Wadje, 11/3/2022, 5:52 AM

4. Click on **"Related List"**, go to Service Contract click on , if Service contract is not added on present page, First add service contract.

Setup Home Object Manager

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Contacts	Contracts	Distributor Quotes	Invoices	Order Products	Price Schedules	Quotes	Subscriptions
Content Deliveries	Credit Memos	Entitlements	Notes & Attachments	Orders	Provided Assets	Related Content	Tax Exemption Cer...
Contracted Prices	Data Integration ...	Files	Open Activities	Partner Quotes	Quote Line Groups	Service Contracts	Work Orders
Contract Line Items	Discount Schedules	Groups	Opportunities	Partners	Quotes	Serviced Assets	

Expanded Lookups

Related Lists

Related Lists

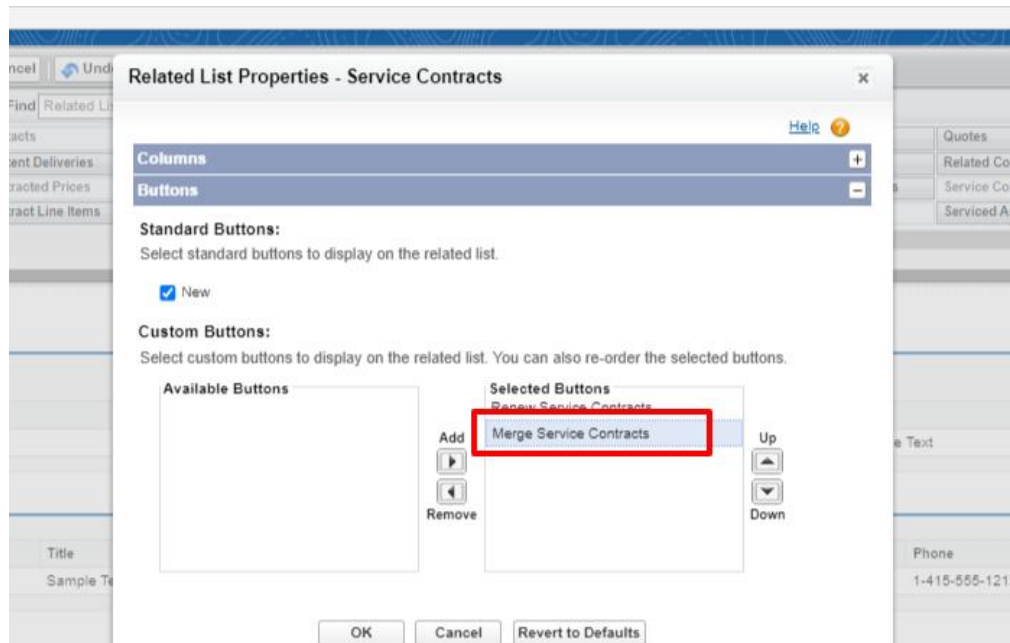
Service Contracts

New

Renew Service Contracts

Contract Name	Start Date	End Date	Status
Sample Text	1/11/2023	1/11/2023	Sample Text

5. Click on  icon, add Select **Merge Service Contract**.



6. Now User can see **"Merge Service Contract"** button on **Service Contracts** related list on **Account Record**.

The screenshot displays the Salesforce CPQ interface for the 'A101 Coffee' account. The top navigation bar includes 'Salesforce CPQ', 'Home', 'Accounts', 'Opportunities', 'Quotes', 'Solution Groups', 'Discount Schedules', and 'More'. The 'Accounts' menu is highlighted with a red box. The account details section shows 'A101 Coffee' with fields for Type, Phone, Website, Account Owner, Account Site, and Industry. The 'Related' tab is selected and highlighted with a red box. Below the 'Related' tab, a message states: 'We found no potential duplicates of this Account. No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.' The 'Service Contracts (2)' list is shown, with the list name highlighted by a red box. The list contains two entries, both 'Service Contract' with a start date of 3/20/2023 and an end date of 3/19/2024, both in 'Active' status. A 'Merge Service Contracts' button is visible next to the list name, also highlighted with a red box. The right sidebar shows the 'Activity' and 'Chatter' sections, with filters set to 'All time', 'All activities', and 'All types'.

Search...

Salesforce CPQ Home Accounts Opportunities Quotes Solution Groups Discount Schedules More

Account A101 Coffee

Follow Edit New Contact New Opportunity

Type: Other Phone: (147) 852-3690 Website: www.a101coffee.com Account Owner: Akash Wadje Account Site: Industry:

Related Details News

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Service Contracts (2) New Merge Service Contracts

Contract Name	Start Date	End Date	Status
Service Contract	3/20/2023	3/19/2024	Active
Service Contract	3/20/2023	3/19/2024	Active

[View All](#)

Activity Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

How Merge Ease works

1. Go to the required **Account** object and Click on **View all** button below the service contract from Account record Related list.

The screenshot displays the Salesforce CPQ interface for the 'A101 Coffee' account. The top navigation bar includes 'Salesforce CPQ', 'Home', 'Accounts', 'Opportunities', 'Quotes', 'Solution Groups', 'Discount Schedules', and 'More'. The 'Accounts' tab is highlighted. The account details section shows the account name 'A101 Coffee', type 'Other', phone '(147) 852-3690', website 'www.a101coffee.com', account owner 'Akash Wadje', and account site 'Industry'. The 'Related' section shows a message about no potential duplicates and a list of 'Service Contracts (2)'. The 'View All' button at the bottom of the service contract list is highlighted with a red box and a red arrow. The 'Activity' section on the right shows no upcoming or overdue activities.

Contract Name	Start Date	End Date	Status
Service Contract	3/20/2023	3/19/2024	Active
Service Contract	3/20/2023	3/19/2024	Active

[View All](#)

2. Select all the **Service Contracts** from that Account that User want to merge, then click on **Merge Service Contracts** button.

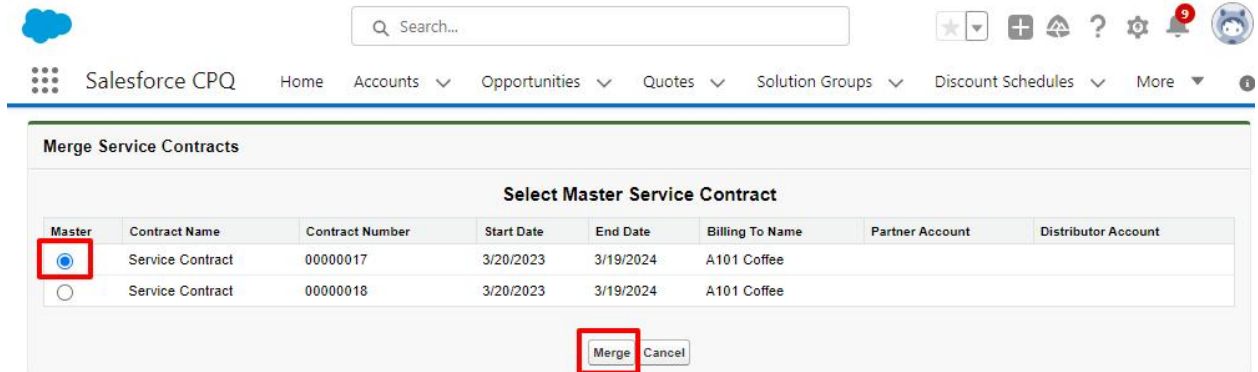
The screenshot shows the Salesforce CPQ interface. At the top, there's a navigation bar with 'Salesforce CPQ' and various tabs like 'Home', 'Accounts', 'Opportunities', 'Quotes', 'Solution Groups', 'Discount Schedules', and 'More'. A search bar is also present. Below the navigation bar, the 'Accounts' tab is selected, and the 'Service Contracts' list is displayed for the account 'A101 Coffee'. The list shows 2 items selected. The 'Merge Service Contracts' button is highlighted with a red box and an arrow pointing to it. The 'Contract Name' column is also highlighted with a red box and an arrow pointing to it. The table below shows the details of the selected contracts.

	☒	Contract Name ↑	Start Date	End Date	Status	
1	☒	Service Contract	3/20/2023	3/19/2024	Active	▼
2	☒	Service Contract	3/20/2023	3/19/2024	Active	▼

1. Select Service Contracts

2. Click on Merge Service Contracts

3. Select one Service Contract as Master Service Contract and click on **Merge** button.



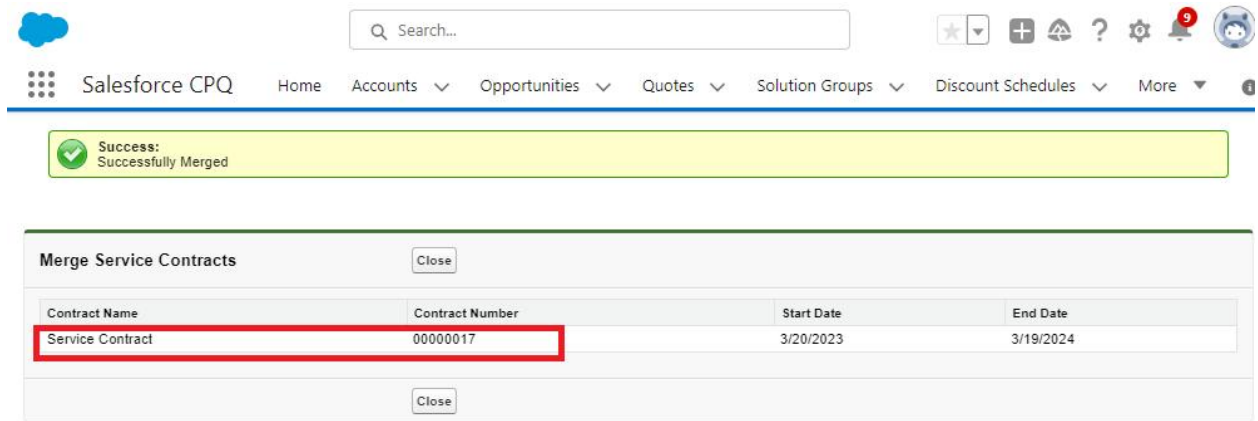
Merge Service Contracts

Select Master Service Contract

Master	Contract Name	Contract Number	Start Date	End Date	Billing To Name	Partner Account	Distributor Account
☒	Service Contract	00000017	3/20/2023	3/19/2024	A101 Coffee		
☐	Service Contract	00000018	3/20/2023	3/19/2024	A101 Coffee		

Merge Cancel

4. Merge operation is completed successfully and the result screen will appear showing the Master Service Contract.



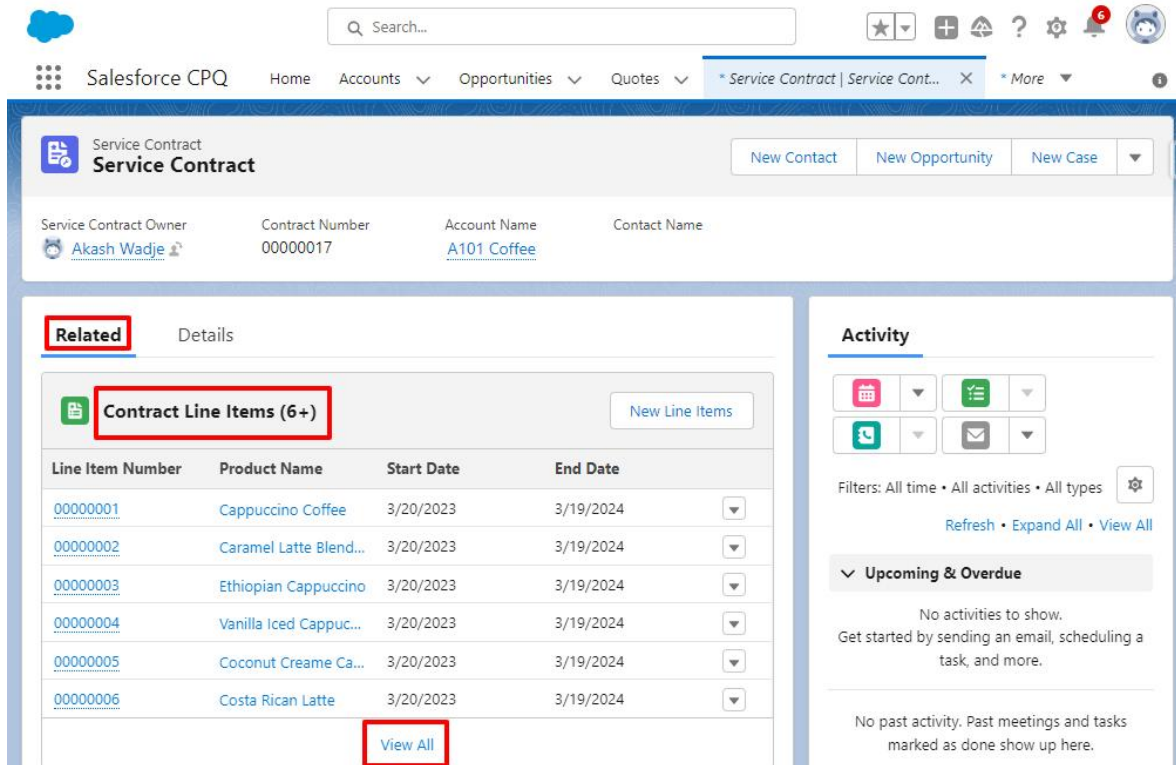
Success:
Successfully Merged

Merge Service Contracts Close

Contract Name	Contract Number	Start Date	End Date
Service Contract	00000017	3/20/2023	3/19/2024

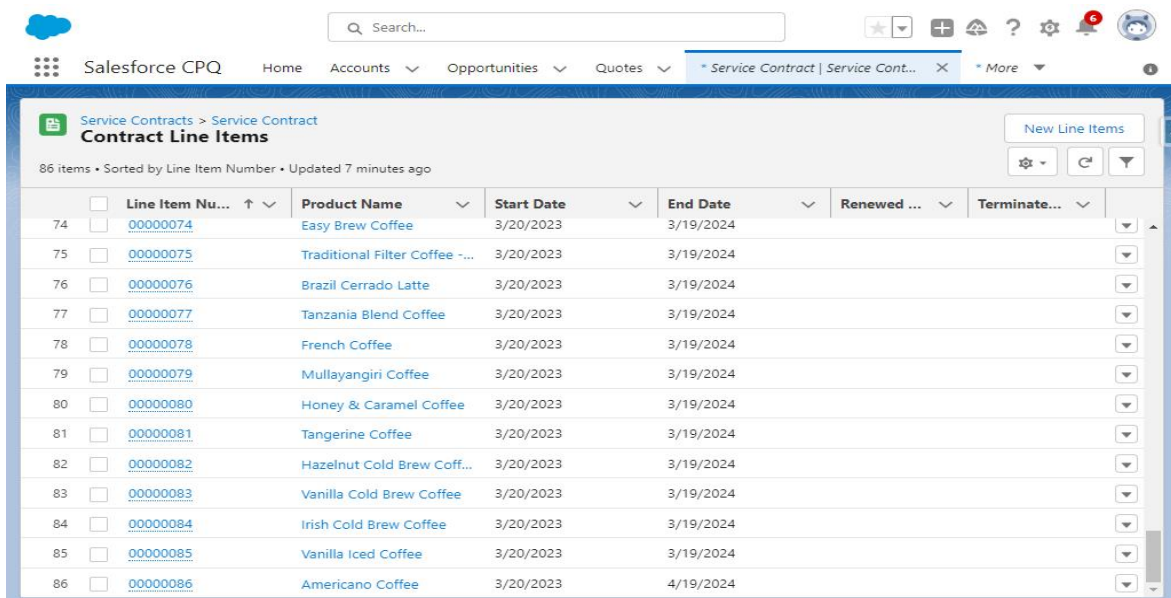
Close

5. Click on the service contract row visible in step 4 to open the Master Service contract. Navigate to related list and then click view all under contract line items.



The screenshot shows the Salesforce CPQ interface for a Service Contract. The top navigation bar includes 'Salesforce CPQ', 'Home', 'Accounts', 'Opportunities', 'Quotes', and 'Service Contract | Service Cont...'. The main header displays 'Service Contract' with buttons for 'New Contract', 'New Opportunity', and 'New Case'. Below this, the contract details are shown: 'Service Contract Owner: Akash Wadje', 'Contract Number: 00000017', 'Account Name: A101 Coffee', and 'Contact Name'. The 'Related' tab is active, showing a list of 'Contract Line Items (6+)'. The list includes columns for 'Line Item Number', 'Product Name', 'Start Date', and 'End Date'. The items are: 00000001 (Cappuccino Coffee), 00000002 (Caramel Latte Blend...), 00000003 (Ethiopian Cappuccino), 00000004 (Vanilla Iced Cappuc...), 00000005 (Coconut Creame Ca...), and 00000006 (Costa Rican Latte). A 'View All' button is highlighted at the bottom of the list. The 'Activity' panel on the right shows filters for 'All time', 'All activities', and 'All types', with a 'Refresh' button and a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.'

6. Here you will find the contract line items of all the merged service contracts.



The screenshot shows the Salesforce CPQ interface for 'Service Contracts > Service Contract Contract Line Items'. The top navigation bar includes 'Salesforce CPQ', 'Home', 'Accounts', 'Opportunities', 'Quotes', and 'Service Contract | Service Cont...'. The main header displays 'Service Contracts > Service Contract Contract Line Items' with buttons for 'New Line Items', 'Settings', 'Refresh', and 'Filter'. Below this, the list of contract line items is shown, sorted by 'Line Item Number'. The list includes columns for 'Line Item Number', 'Product Name', 'Start Date', 'End Date', 'Renewed ...', and 'Terminate...'. The items are: 74 (Easy Brew Coffee), 75 (Traditional Filter Coffee -...), 76 (Brazil Cerrado Latte), 77 (Tanzania Blend Coffee), 78 (French Coffee), 79 (Mullayangiri Coffee), 80 (Honey & Caramel Coffee), 81 (Tangerine Coffee), 82 (Hazelut Cold Brew Coff...), 83 (Vanilla Cold Brew Coffee), 84 (Irish Cold Brew Coffee), 85 (Vanilla Iced Coffee), and 86 (Americano Coffee). The list is titled '86 items • Sorted by Line Item Number • Updated 7 minutes ago'.

7. Here we have clicked on a Contract Line that has been merged from some other service contract. To understand whether a contract line has come from some other service contract check the description field. It will show text "Original Service Contract Number: XXXXXXXX " if it is merged from other service contract.

The screenshot displays the Salesforce CPQ interface for a Contract Line Item. The top navigation bar includes a search bar and tabs for Home, Accounts, Opportunities, Quotes, and the current view: "00000086 | Contract Line Item". The main header shows the Contract Line Item ID "00000086" and buttons for "New Contact", "New Opportunity", and "New Case".

Service Contract	Asset Name	Quantity	Total Price
Service Contract		1.00	\$89.00

The "Details" tab is active, showing the following information:

- Line Item Number: 00000086
- Start Date: 3/20/2023
- Product: [Americano Coffee](#)
- End Date: 4/19/2024
- Service Contract: [Service Contract](#)
- Description: "Original Service Contract Number: 00000018" (highlighted with a red box)

The "Pricing" section shows:

List Price	Subtotal
\$89.00	\$89.00

The "Activity" panel on the right shows filters (All time, All activities, All types) and a section for "Upcoming & Overdue" activities, which currently displays "No activities to show."

Conditions when MergeEase cannot be used

1. If you select service contracts having products from different price books then you will see validation message.

Also, if you select a list of service contracts having multiple currency entry and if you try to merge them with service contract that does not belong to that currency then you will see a validation message.

Validation Message: "Error: Price Book Entry: The selected Service Contracts have different pricebook or different Currency Code hence they cannot be Merged."

 **Error:**
Price Book Entry: The selected Service Contracts have different pricebook or different Currency Code hence they cannot be Merged.

Merge Service Contracts

Select Master Service Contract

Master	Contract Name	Contract Number	Start Date	End Date	Billing To Name	Partner Account	Distributor Account
☐	Service Contract	00001660	1/11/2023	1/10/2024	Test Diff PB		
☐	Service Contract	00001661	1/11/2023	1/10/2024	Test Diff PB		

2. If any of your service contracts are fully renewed, then before merging that service contract with other, you have to click contracted checkbox on that new renewal opportunity to make it contracted in order to merge main service contract otherwise you will see a validation message.

Validation Message: *"Error: Please create contract for the renewal opportunity before merging."*

NOTE: But if your renewed service contract Partially (Only selected Contract Line Item being renewed) then Renewed contract lines cannot be used in merged functionality but CLI which are not renewed can be used in merge functionality.

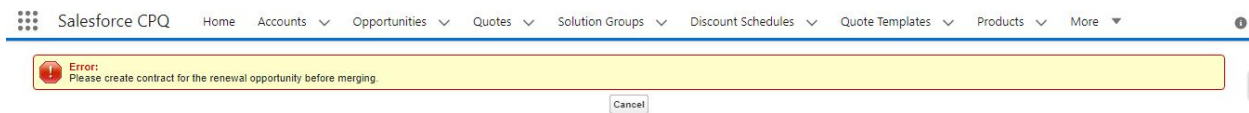
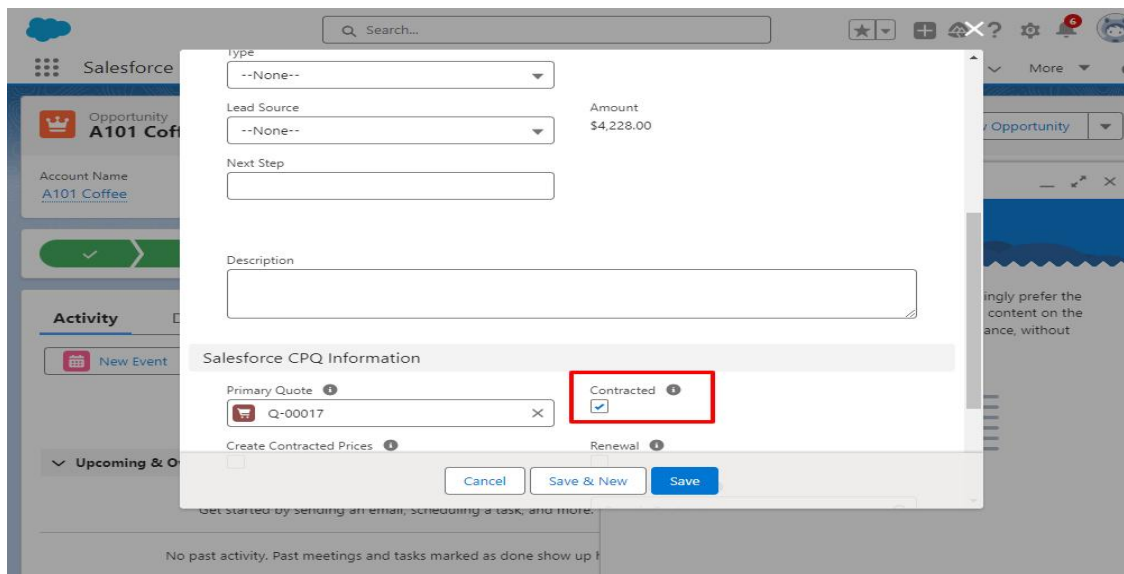


Figure- Contracted checkbox visible on Opportunity.



Other Apps by Advanz101

- **SplitEase**
Split Service Contract into multiple contracts manually to avoid large cart errors.
- **AutoSplit**
Split Service Contract into multiple contracts to avoid large cart errors.
- **PartEase**
User can select Contract Line Items available in Service Contract and Renew only selected Contract Line Items.
- **MoveEase**
Transfer asset from one account to another.
- **EaseQuotePDF**
Automate quote PDF generation on status change.
- **CaseAutoMail**
Transform case communication with CaseAutoMail.
- **AccountMerge**
Merge accounts and contacts with added functionality like smart filtering, previewing before merging and retaining critical data on merge.

Hope you find our MergeEase App useful. We would love to hear about our app from you. In case of any query or further clarification, please feel free to reach us at info@advanz101.com

Please keep following us as many new apps are under development. Follow us at www.advanz101.com

About Advanz101

ADVANZ101 Business Systems Inc. is a registered Salesforce partner providing best-in-class solutions for global business houses and brands. Our team is equipped to meet the SaaS demands of modern enterprises with due diligence in today's business landscape of hybrid IT.

For additional information, please feel free to connect with us at info@advanz101.com