

Astrea Opportunity Merge Lightning Component

Overview

Opportunity Merge is a Lightning Component which provides functionality to merge duplicate Opportunities for an account. The user can select Master Opportunity which provides the default values for fields. Also user has control to select which opportunity value should be used for all fields, It also merges the related list of the Losing opportunity into Winning Opportunity. The behavior is similar to standard Account Merge feature of Salesforce Classic

Key Features

- Merge duplicate opportunities for an account.
- Select winning Opportunity amongst two Opportunities of an Account.
- Merge Opportunities on the basis of the selected fields values into the winning Opportunity.
- It merges the related list of the Opportunity.

Advantages of Merging Opportunities

- Manage duplicate Opportunities.
- User can select the fields data of the losing opportunity for the master opportunity.
- Reduces data storage capacity by removing redundant data.
- Simple graphical user interface.

Steps to Merge Two Opportunities

***Note** - A custom domain name is required in Salesforce Org for a Lightning Component to work.

Steps to generate My Domain Manually-

From Setup → Administer → Domain Management → (Select)My Domain

Url to generate My Domain Directly-

1. URL for Production / Dev Org -
<https://login.salesforce.com/domainname/DomainName.apexp?retURL=%2Fui%2Fsetup%2FSetup%3Fsetupid%3DDomains&setupid=OrgDomain>
2. URL for Sandbox Org -
<https://test.salesforce.com/domainname/DomainName.apexp?retURL=%2Fui%2Fsetup%2FSetup%3Fsetupid%3DDomains&setupid=OrgDomain>

Step 1 - In Salesforce Lightning, on an Account's Detail Page, Click on Merge Opportunities Button.

Account: Radison Blu

+ Follow Merge Opportunities New Contact New Case

Type: Customer - Direct Phone Website Account Owner: Anshika Ahuja Account Site Industry: Food & Beverage

RELATED DETAILS NEWS

We found no potential duplicates of this account.

Contacts (0) New

Opportunities (4) New

Opportunity Name	Stage	Amount	Close Date
Aquarius	Value Proposition	\$4,841,848.00	4/14/2028
Hilton	Needs Analysis	\$4,867,169.00	4/14/2018
Shivalik	Id. Decision Makers	\$87,495.00	4/25/2019
Park Regency	Value Proposition	\$784,843.00	4/25/2018

ACTIVITY CHATTER

New Task Log a Call New Event Email

Create a task... Add

Activity Timeline Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activity

Step 2 - After Clicking on the “*Merge Opportunities*” button, screen displays all the opportunities of this Account. Select any two opportunities that you will like to merge. In the figure below two opportunities “Aquarius” and “Shivalik” opportunities are being selected.

Merge Opportunities

Radison Blu

Continue Cancel

	Opportunity Name	Stage	Close Date
☒	Aquarius	Value Proposition	14, April, 2028
☐	Hilton	Needs Analysis	30, April, 2018
☒	Shivalik	Id. Decision Makers	25, April, 2019
☐	Park Regency	Value Proposition	25, April, 2018

*Select any two opportunities to merge.

Cancel

Step 3 - User can select fields values from the former or the latter opportunity which then are merged into one. In the below screen amount, type, lead source are selected from SHIVALIK opportunity and rest from Aquarius. Here the Master Opportunity is “**Aquarius**” and the losing is “**Shivalik**”.

Merge Opportunities

description	☒	☐
stagename	☒ Value Proposition	☐ Id. Decision Makers
amount	☐ 4841848.00	☒ 87495.00
probability	☒ 50	☐ 80
totalopportunityquantity	☒	☐
closedate	☒ 2028-04-14 00:00:00	☐ 2019-04-25 00:00:00
type	☐ Existing Customer - Downgrade	☒ Existing Customer - Replacement
nextstep	☒	☐
leadsource	☐	☒ Phone Inquiry
forecastcategoryname	☒ Pipeline	☐ Pipeline
campaignid	☒	☐
pricebook2id	☒	☐
ownerid	☒ 0057F00000030fU3QAI(Anshika Ahuja)	☐ 0057F00000030fU3QAI(Anshika Ahuja)
deliveryinstallationstatus__c	☒	☐

[Cancel](#)

Step 4 - Now, “**SHIVALIK**” opportunity is merged into the Master Opportunity “**Aquarius**” .

Radison Blu [+ Follow](#)

RELATED DETAILS NEWS

We found no potential duplicates of this account.

Contacts (0) [New](#)

Opportunities (3) [New](#)

Aquarius	▼	Hilton	▼
Stage: Value Proposition		Stage: Needs Analysis	
Amount: \$87,495.00		Amount: \$4,867,169.00	
Close Date: 4/14/2028		Close Date: 4/30/2018	

Park Regency	▼
Stage: Value Proposition	
Amount: \$784,843.00	
Close Date: 4/25/2018	

Aquarius

ACTIVITY CHATTER **DETAILS**

Opportunity Owner  Anshika Ahuja	Amount \$87,495.00
Private ☐	Expected Revenue \$43,747.50
Opportunity Name Aquarius	Close Date 4/14/2028
Account Name Radison Blu	Next Step
Type Existing Customer - Replacement	Stage Value Proposition
Lead Source Phone Inquiry	Probability (%) 50%
	Primary Campaign Source
Order Number	Main Competitor(s)
Current Generator(s)	Delivery/Installation Status
Tracking Number	

Step 5 - Attachment on Shivalik Opportunity will be merged into **"Aquarius"**.

 Search Salesforce

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter More

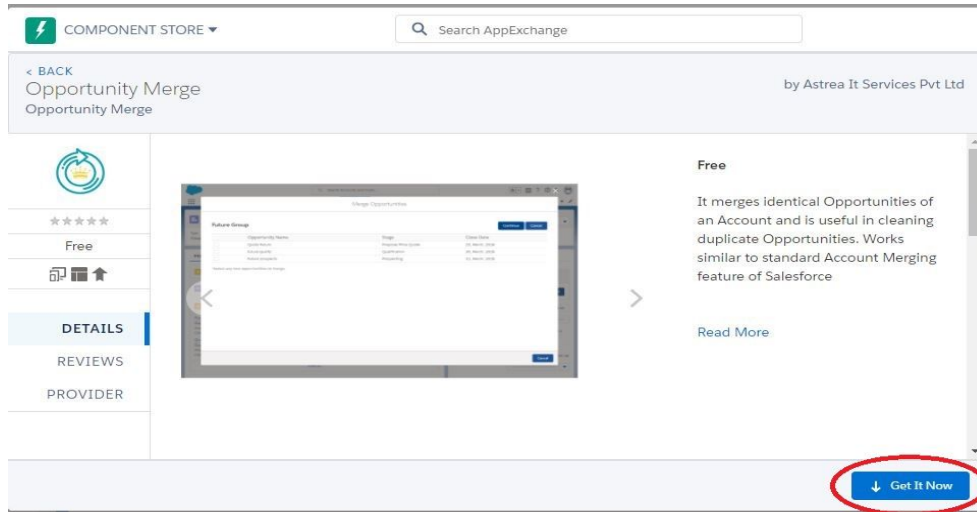
Aquarius + Follow New Case New Note Clone

ACTIVITY CHATTER DETAILS Opportunity Owner  Anshika Ahuja Private ☐ Opportunity Name Aquarius Account Name Radison Blu Type Existing Customer - Replacement Lead Source Phone Inquiry Order Number Current Generator(s) Tracking Number Created By  Anshika Ahuja, 4/23/2018 3:57 AM	Amount \$87,495.00 Expected Revenue \$43,747.50 Close Date 4/14/2028 Next Step Stage Value Proposition Probability (%) 50% Primary Campaign Source Main Competitor(s) Delivery/Installation Status Last Modified By  Anshika Ahuja, 4/23/2018 4:45 AM	Products (0) Notes & Attachments (1)  11:36 PM · 9KB · jpg View All Contact Roles (0) Stage History (2) <table> <tr> <td>Stage:</td> <td>Value Proposition</td> </tr> <tr> <td>Amount:</td> <td>\$87,495.00</td> </tr> <tr> <td>Probability (%):</td> <td>50%</td> </tr> <tr> <td>Expected Reve...:</td> <td>\$43,747.50</td> </tr> <tr> <td>Close Date:</td> <td>4/14/2028</td> </tr> <tr> <td>Last Modified By:</td> <td>Anshika Ahuja</td> </tr> </table>	Stage:	Value Proposition	Amount:	\$87,495.00	Probability (%):	50%	Expected Reve...:	\$43,747.50	Close Date:	4/14/2028	Last Modified By:	Anshika Ahuja
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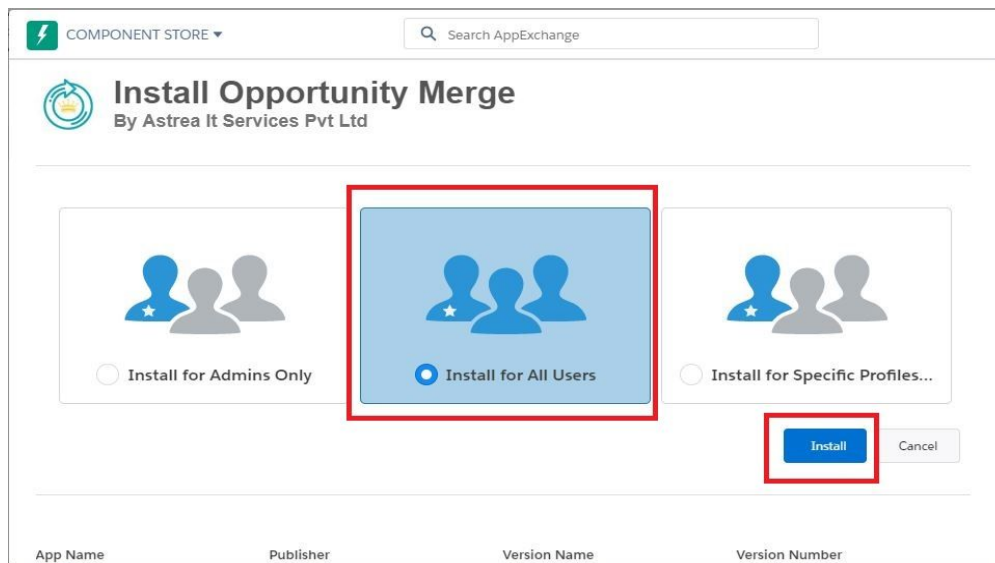
The other opportunity **"Shivalik"** will be deleted from the system.

Installation Instructions

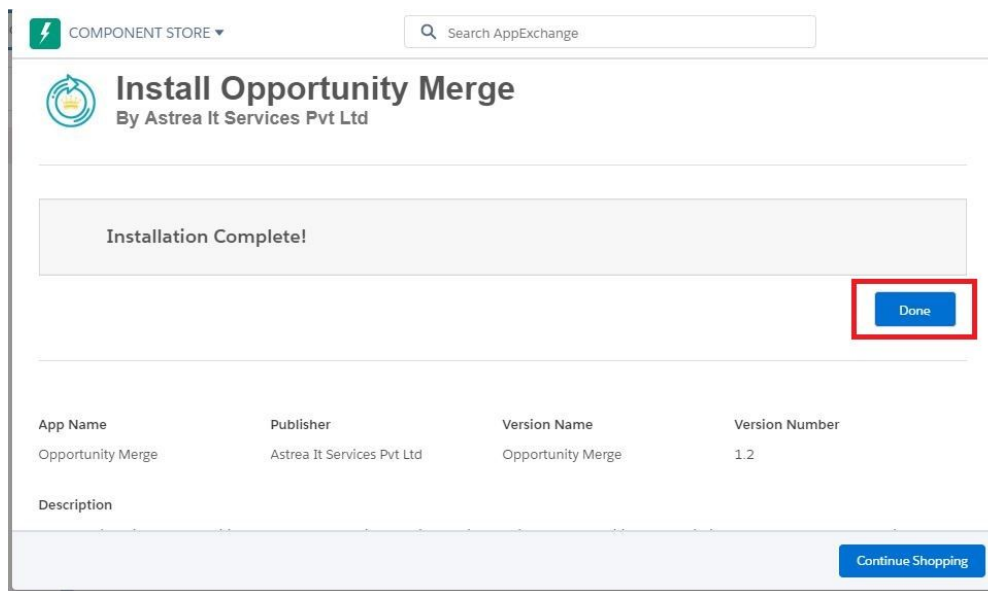
Step 1 - Install Opportunity Merge component in Salesforce Org from AppExchange by clicking on **Get It Now button on the App Page.**



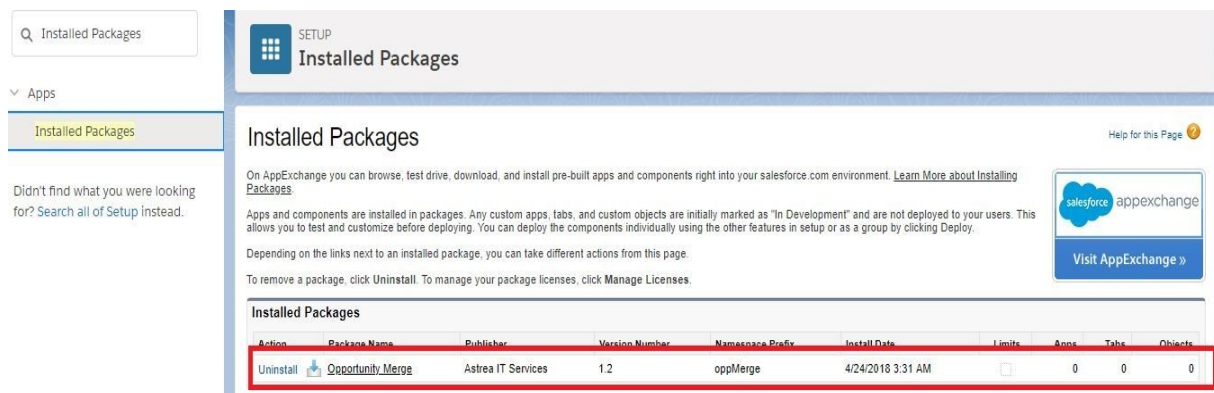
Step 2 - Opt for "Install the Component for all user" while installing "Opportunity Merge".



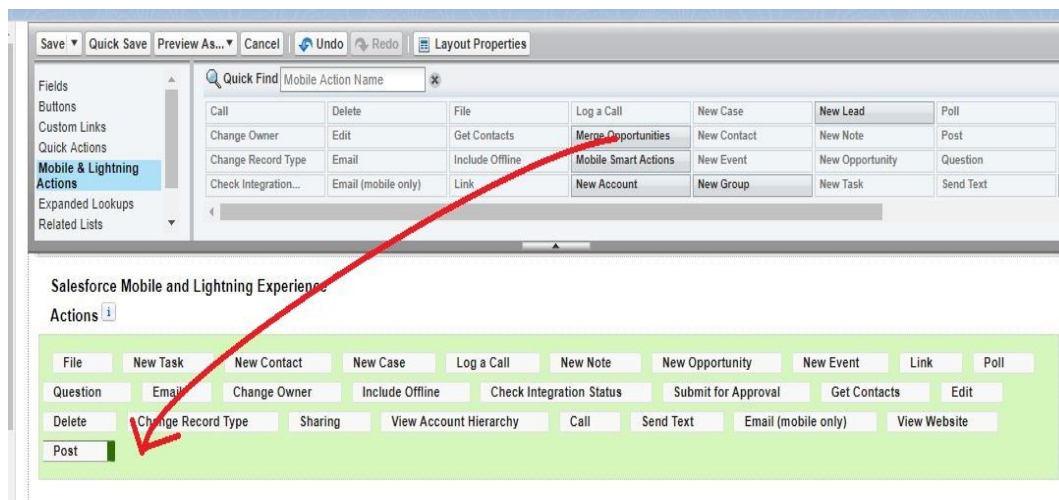
Step 3 - Click **Done** after installation is complete.



Step 4 - In the Salesforce Org, User can view the package of Opportunity Merge under “Installed Package”.



Step 5 - Drag the action “Merge Opportunities” into Salesforce Mobile & Lightning Experience Action Section of the Account Page Layout and save it.



Now component is ready to use. Please go to Account layout and follow the instructions given above to merge the Opportunities.

For additional queries please contact apps@astreait.com