



ASTREA IT SERVICES

- CONSULTING
- PRODUCTS
- TRAINING



CLOUD ALLIANCE
PARTNER

Table of Contents

Overview 3

Key Features 3

Functional Description 3

User Operations 4

 1. Steps to merge related contacts for an account4

 2. Steps to merge leads6

Overview

Astrea contact lead merge is a lightning component which enables the end users to merge related contacts of an account or any duplicate leads in the selected org. Using this app, you can narrow down your search for the duplicate contacts and/or leads by providing a set of filters options. The filter options available for contact merge are search by first name, last name, contact phone number and by email. The filter options available for duplicate leads are search by first name, last name, company name, lead status and lead rating. From the result set, a user can select any two records to be merged. After selecting records, all the editable non-null fields and all the related lists i.e., standard as well as custom related lists of the contacts or leads are displayed. A user can select any of the field's value that he/she wishes to keep in the merged record.

Key Features

- Merge duplicate contacts for an account and leads in an org.
- Search for the records on basis of filters provided on landing page.
- Select master record amongst two selected records.
- Merge records on the basis of the selected fields values and related lists into the master record.

Functional Description

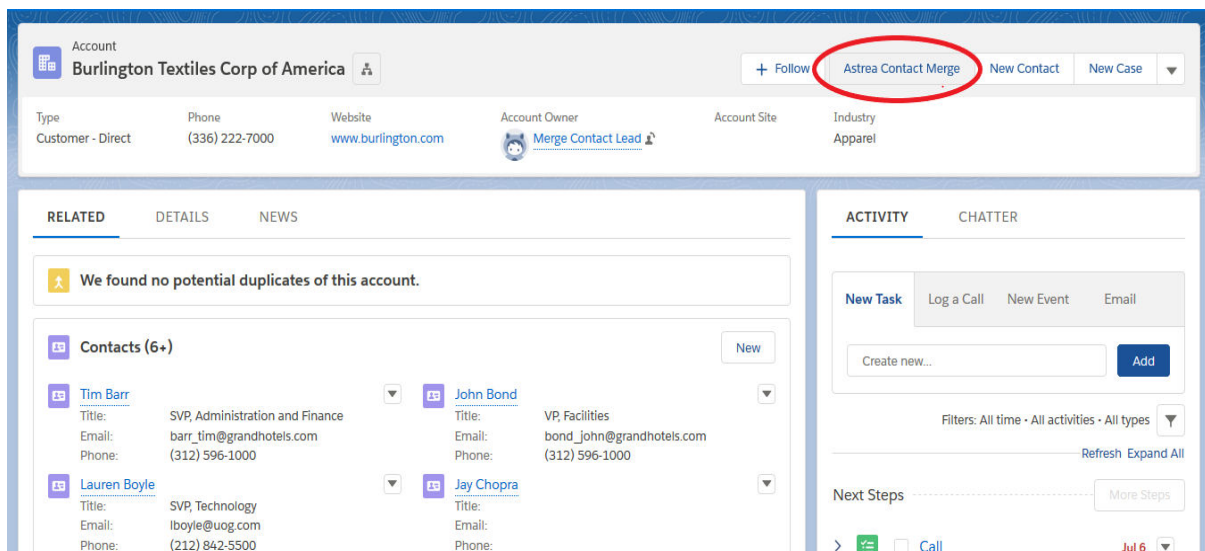
Welcome to our “Contact Lead Merge” application. Our application can be used very efficiently due to its easy to understand operations and user interface.. With a couple of clicks you can merge duplicate contacts and leads based on your choice.

The users have a quick action on account and lead record page which opens the lightning component to provide the necessary functionality.

User Operations

Steps to merge related contacts for an account:

Step 1 - In Salesforce Lightning, on an account's detail page, click on astrea contact merge button.



Step 2 - After clicking on “Astrea Contact Merge” screen displays the landing page of this lightning component. Click on “Find Duplicates” to search all available contacts related to that account or you can enter the filter options to narrow down the search result.

Astrea Contact Merge

Primary Filter Options

Search By First Name

Contains

First Name

Search By LastName

Contains

Last Name

Secondary Filter Options

Contact Phone

Contact Phone Number

Email

Contact Email

Find Duplicates

Step 3 - Select any two records that you want to merge. In the following figure, two records “Jack Rogers” and “Pat Stummuller” have been selected. Click on Add Master button to proceed to next screen.

◀ < > ▶

SELECTED	FIRST NAME	LAST NAME	PHONE	EMAIL
☐	Jack	Liorrac	(512) 757-6000	sean@edge.com
☒	Jack	Rogers	(512) 757-6000	jrogers@burlington.com
☒	Pat	Stummuller	(014) 427-4427	pat@pyramid.net
☐	Andy	Young	(785) 241-6200	a_young@dickenson.com
☐	Tim	Barr	(312) 596-1000	barr_tim@grandhotels.com
☐	John	Bond	(312) 596-1000	bond_john@grandhotels.com
☐	Stella	Pavlova	(212) 842-5500	spavlova@uog.com
☐	Lauren	Boyle	(212) 842-5500	lboyle@uog.com
☐	Babara	Levy	(503) 421-7800	b.levy@expressl&t.net
☐	Josh	Davis	(503) 421-7800	j.davis@expressl&t.net

**Select any two Contacts to merge.*

Add Master

Step 4 - You can select a master record by selecting the ID of desired record and also change the value of specific field and can also select the related list that you want to merge.

Merge Contact Records

FIELD NAME	RECORD VALUE	RECORD VALUE
ID	0036F00002WkcBjQAJ	0036F00002WkcBkQAJ
	☒	☐
AccountId	0016F00002NTQUyQAP	0016F00002NTQUyQAP
	☒	☐
LastName	Rogers	Stummuller
	☐	☒
FirstName	Jack	Pat
	☒	☐
Phone	(512) 757-6000	(014) 427-4427
	☒	☐
Email	jrogers@burlington.com	pat@pyramid.net

Merge Related Lists

Ast_CLM__Location__c	☐
Ast_CLM__Overview__c	☐
Ast_CLM__Project__c	☐
Ast_CLM__Vehicle__c	☐
Case	☒
ContentDocumentLink	☐
Event	☐
OpportunityContactRole	☐
Task	☐

Merge records

Step 5 - Now “Pat Stumuller” is merged into “Jack Rogers” and control is redirected to contact’s detail page. The other contact “Pat Stumuller” will be deleted from the system.

Contact

Mr. Jack Stumuller

+ Follow

New Case

New Note

Submit for Approval

Title

Account Name

Phone(2)

Email

Contact Owner

VP, Facilities

[Burlington Textiles Corp of America](#)

(512) 757-6000

[jrogers@burlington.com](#)

Merge Contact Lead

RELATED

DETAILS

NEWS

We found no potential duplicates of this contact.

Opportunities (0)

New

Cases (3)

New

00001000

Subject: [Starting generator after electrical failure](#)

Priority: High

Date/Time Op... 6/27/2018 2:05 AM

00001019

Subject: [Structural failure of generator base](#)

Priority: High

Date/Time Op... 6/27/2018 2:05 AM

ACTIVITY

CHATTER

New Task

Log a Call

New Event

Email

Create new...

Add

Filters: All time • All activities • All types

Refresh

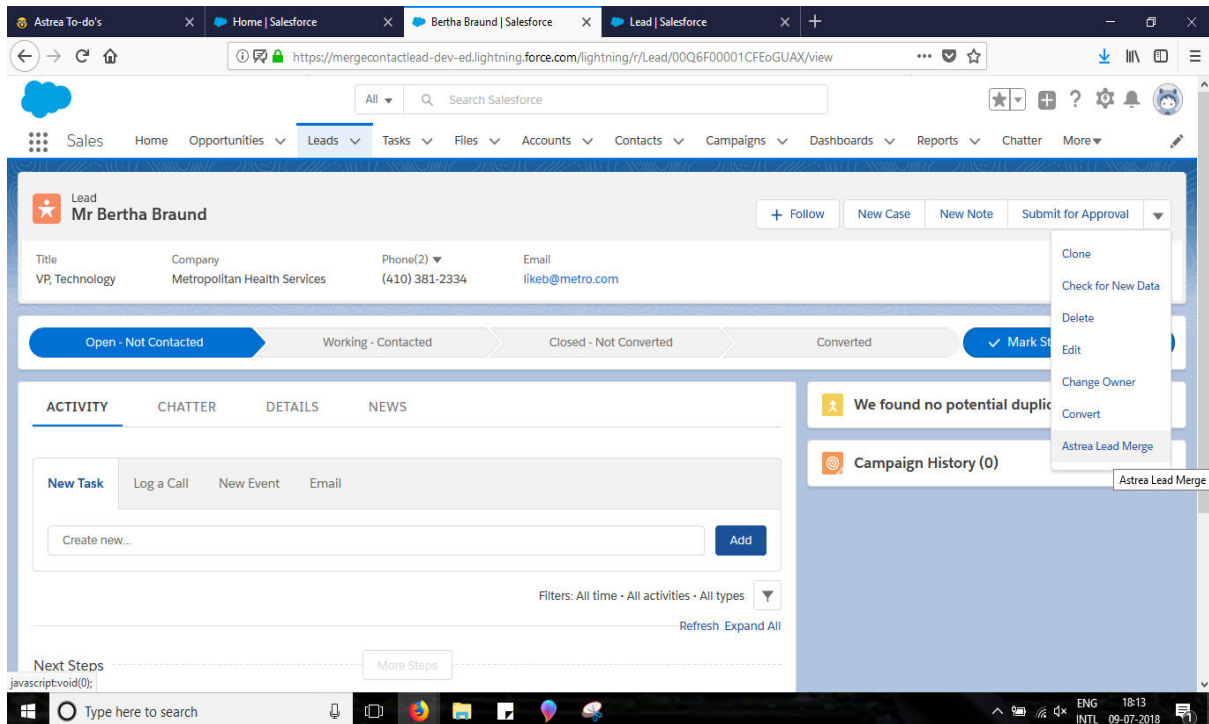
Expand All

Next Steps

More Steps

Steps to merge leads:

Step 1 - In Salesforce Lightning, on an lead's detail page, click on Astrea Lead Merge button.



Step 2 - After clicking on “Astrea Lead Merge” screen displays the landing page of this lightning component. Click on “Find Duplicates” to search all available leads or you can enter filter options to narrow down the search result.

Astrea Lead Merge

Primary Filter Options

Search By First Name:

Contains

Search By LastName:

Contains

Secondary Filter Options

Search By Company Name:

Contains

Lead Status:

--NONE--

 Lead Rating:

--NONE--

Find Duplicates

Step 3 - Select any two records that you want to merge. In the following figure, two records “Tom James” and “Andy Young” have been selected. Click on Add Master button to proceed to next screen.

◀ < > ▶

SELECTED	FIRST NAME	LAST NAME	RATING	STATUS
☐	Bertha	Braund		Open - Not Contacted
☐	Patricia	Feager		Working - Contacted
☐	Violet	Maccleod		Working - Contacted
☐	Kathy	Snyder		Working - Contacted
☒	Tom	James		Working - Contacted
☐	Shelly	Brownell		Working - Contacted
☐	Pamela	Owenby		Closed - Not Converted
☐	Norm	May		Working - Contacted
☐	Pat	Stumuller		Closed - Converted
☒	Andy	Young		Closed - Converted

*Select any two Leads to merge.

Step 4 - You can select a master record by selecting the ID of desired record and also change the value of specific field and can also select the related list that you want to merge.

FIELD NAME	RECORD VALUE	RECORD VALUE
ID	00Q6F00001CFEoLUAX	00Q6F00001CFEoQUAX
	☒	☐
LastName	James	Young
	☒	☐
FirstName	Tom	Andy
	☐	☒
Salutation	Mr	Mr
	☒	☐
Title	SVP, Production	SVP, Operations
	☒	☐
Company	Delphi Chemicals	Dickenson plc
	☐	☒
State	MN	KS
	☒	☐

Merge Related Lists

ContentDocumentLink

☐

Event

☐

Task

☐

Merge records

Step 5 - Now “Tom James” is merged into “Andy Young” and control is redirected to lead’s detail page. The other contact “Andy Young” will be deleted from the system.



Lead

Mr Andy James

+ Follow

New Case

New Note

Submit for Approval



Title

SVP, Production

Company

Dickenson plc

Phone(2) ▼

(620) 241-6200

Email

tom.james@delphi.chemicals.com



Working - Contacted

Closed - Not Converted

Converted

✓ Mark Status as Complete

ACTIVITY

CHATTER

DETAILS

NEWS

New Task

Log a Call

New Event

Email

Create new...

Add

Filters: All time • All activities • All types ▼

Refresh Expand All



We found no potential duplicates of this lead.



Campaign History (0) ▼