

Astrea Case Merge

Lightning Component

Merge your Duplicate Cases in a few clicks

USER MANUAL

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Astrea Case Merge User Manual

- **Component Overview:**

Astrea Case Merge is a Salesforce native lightning component. The component is used to merge duplicate Cases in a Salesforce instance according to dynamically selected multi-criteria. It supports point and click graphical user interface which is very simple and easy to use.

By using this lightning component, Salesforce administrators can merge Cases with the help of following criteria:

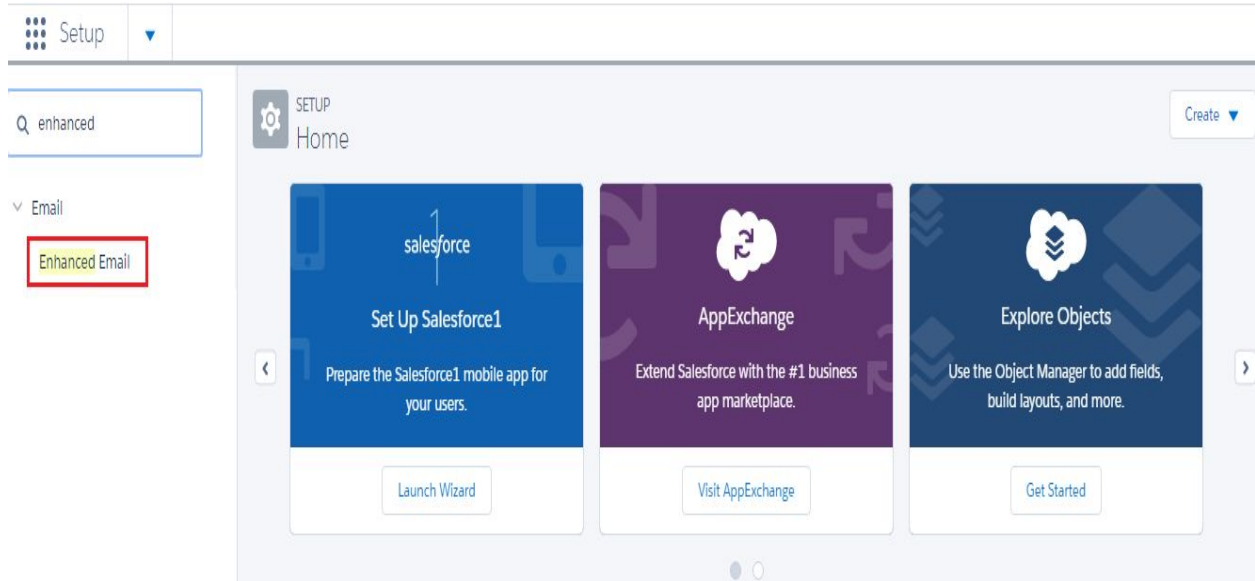
Case Numbers, Subject, Origin, Priority, Status and **Created Date** range and **Contact**. Here, subject is the primary search filter while the rest are optional.

The component merges the duplicate Case in the parent Case and also their related **Email Messages (and their related Attachments), Comments, Attachments, Files**.

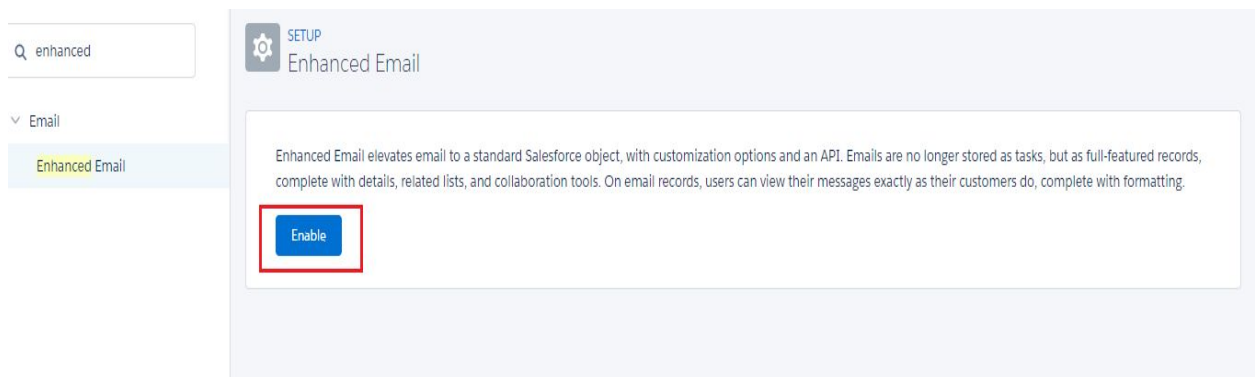
- **Steps before installation:**

- **Enhanced Email** is required for this lightning component to work seamlessly. To enable this feature, follow the below steps:

- **Go to Setup -> Email -> Enhanced Email**. Following screen will appear:



- **Click on 'Enable':**



Enhanced Email will now be enabled in your org.

➤ **Email-to-case** is also required for this lightning component to work. To enable Email-to-Case, follow the below steps:

- **Setup > Quick Find Box > Email-to-Case.** Following screen will appear:

Home Chatter +

Quick Find / Search...

Expand All | Collapse All

Introducing Email-to-Case

With Salesforce, you can efficiently resolve and correspond with customer inquiries via email. Track and view all email threads regarding a customer service issue, and let your customers send inquiries to email addresses that automatically convert customer emails to cases.

Key features and benefits

1. Customer responses regarding a case are automatically associated with the original case, including any attachments the customer sends.
2. Case reporting measures both inbound and outbound emails by case so that you can see how many emails are exchanged before an issue is resolved.
3. Routing addresses allow you to create multiple email addresses from which the contents of customer emails can be converted to case fields.
4. Assignment Rules, Escalation Rules, Workflow Rules and Auto-Response Rules all work seamlessly with Email-to-Case.

☐ Don't show me this page again

Continue

- Click on **Continue** button

Quick Find / Search...

Expand All | Collapse All

Email-to-Case Settings

Configure your Email-to-Case settings on this page. Each routing address is an email address that your customers can use to submit cases to your support team. Emails are automatically converted to cases based on the settings specified for each routing address.

After you configure your Email-to-Case settings, choose whether to set up On-Demand Email-to-Case or Email-to-Case. On-Demand Email-to-Case enables you to solely use Force.com to convert email to cases, whereas Email-to-Case enables you to use salesforce.com and your email system to convert email to cases.

For On-Demand Email-to-Case:

- Define email addresses on your email system for case submissions.
- Create email routing addresses that include the addresses defined for cases.
- Configure your email system to forward case submissions to the Email Services Address provided to you by Salesforce.
- Enable On-Demand Email-to-Case.

For Email-to-Case:

- Download the Email-to-Case agent from the [Apex Developer Network](#)
- Install the agent behind your network firewall.
- Configure email routing addresses.
- Enable Email-to-Case.

Email-to-Case Settings

Edit

To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service.

After you enable Email-to-Case, you can't disable it. You can, however, disable the On-Demand Service.

Enable Email-to-Case ☐

Notify Case Owners on New Emails ☐

Enable HTML Email ☐

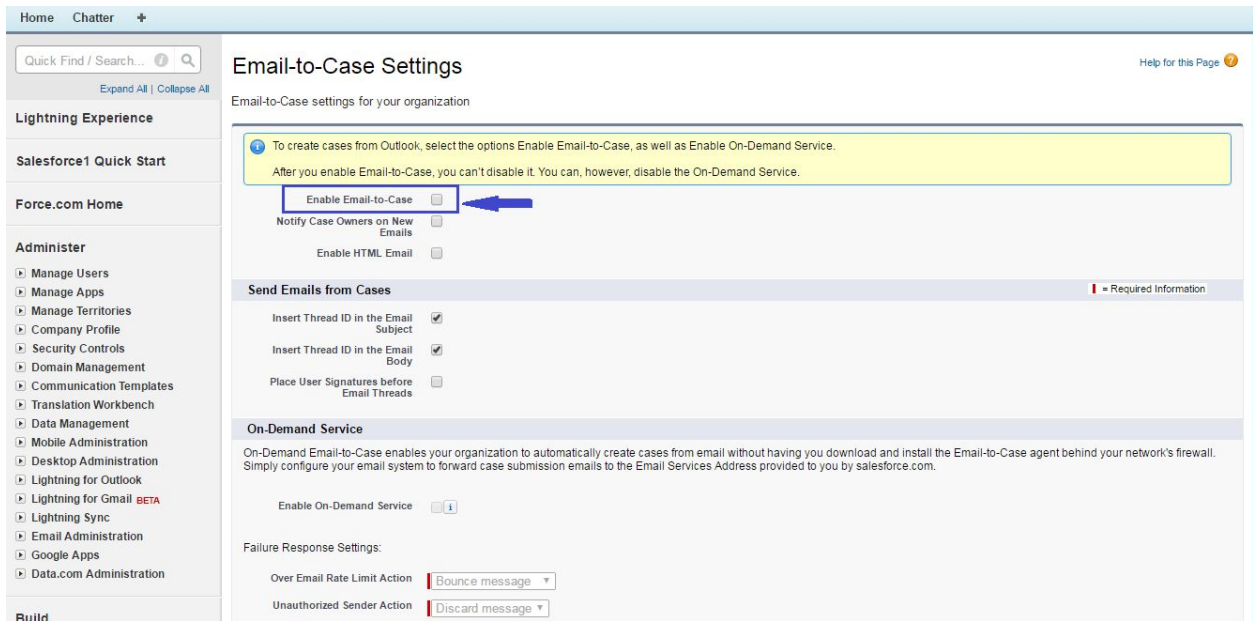
Send Emails from Cases

Insert Thread ID in the Email Subject ☒

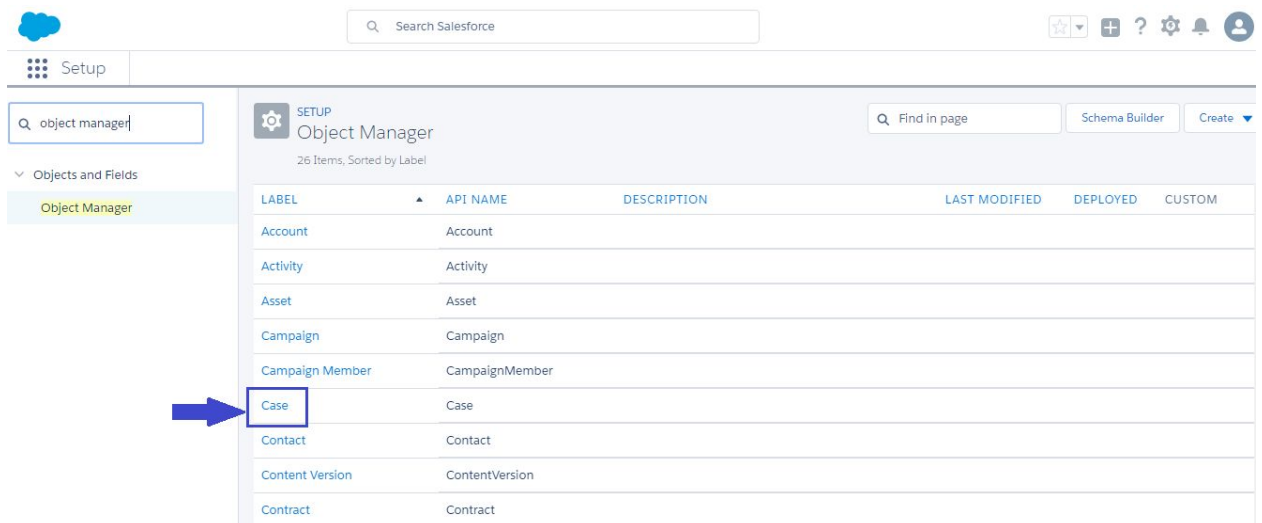
Insert Thread ID in the Email Body ☒

Place User Signatures before Email Threads ☐

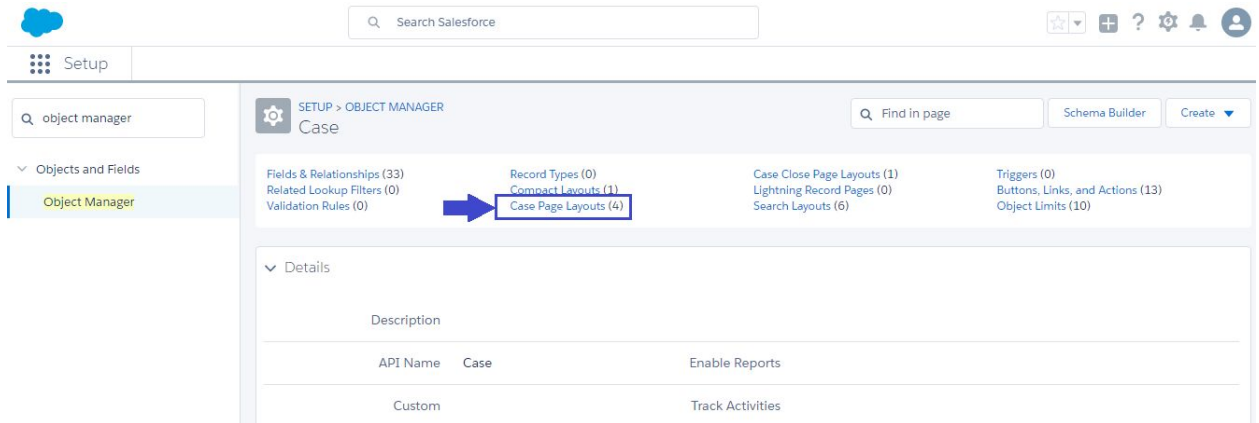
- Click on **Edit** button. After clicking on edit button the fields inside Email-to-Case Settings become editable and the following screen will appear.



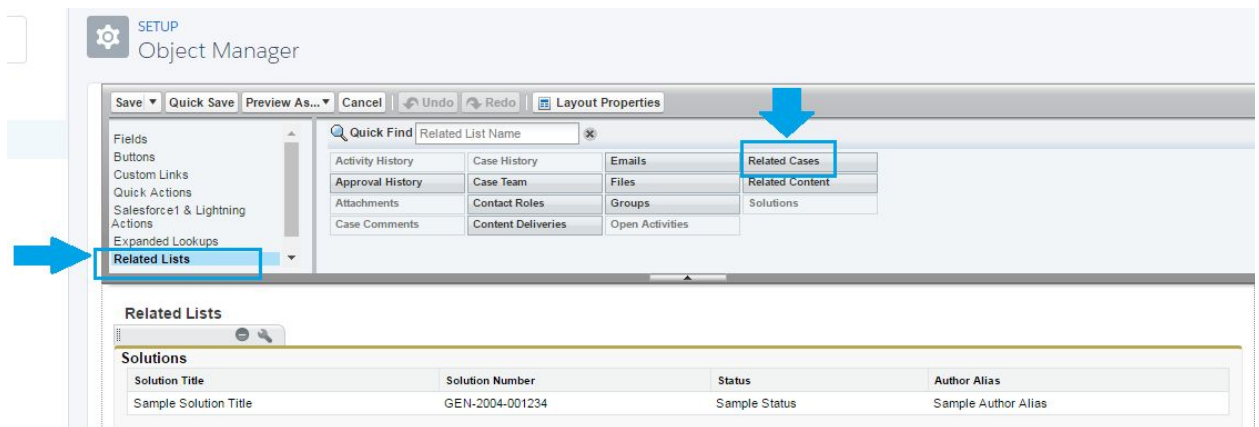
- Select the **Email-to-Case** checkbox and then click on **Save** button.
- Now follow the steps mentioned below to add '**Related Cases**' related list in Case object (if not already done in the Salesforce instance):
 - Go to **Setup > Object Manager > Case**



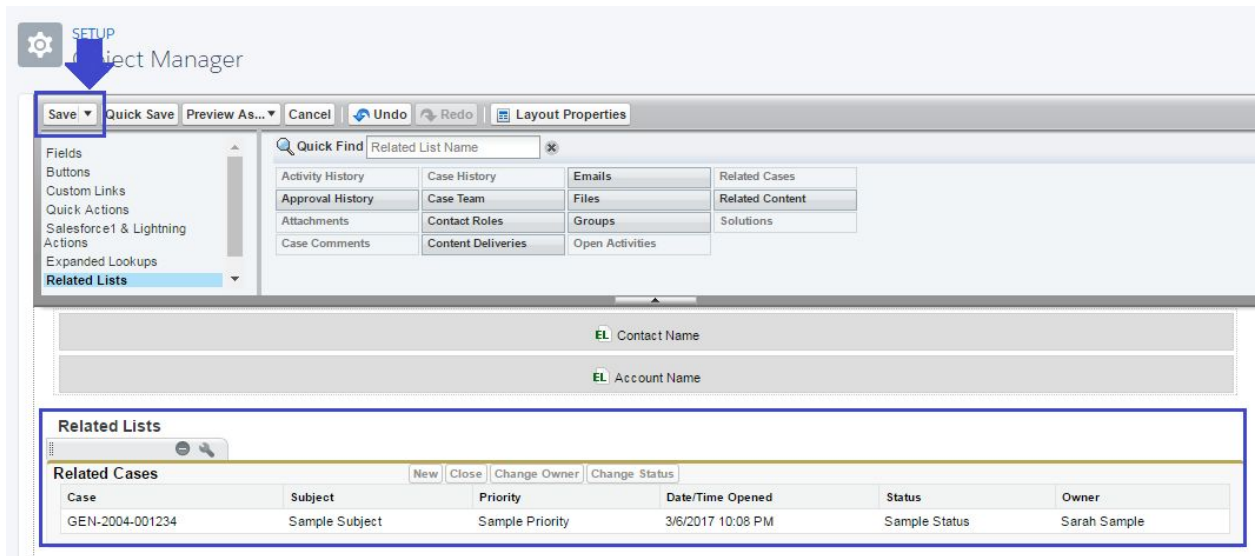
- Click on **Case Page Layouts** and then **Case Layout**



c. After selecting **Case Layout** the following screen appears:



d. Now the user needs to add **Related Cases** tab in **Related Lists** by dragging the Related Cases button to Related Lists Properties icon  .



e. After adding Related Cases, save the changes made by clicking on **Save** button.

- Install CaseMerge package. Select **Install for All Users** and then click on **Install** button.



By Astrea IT Services

☐ Install for Admins Only☐ Install for Specific Profiles...

Install

Cancer

[Additional Details](#) [View Components](#)

- After the package is installed successfully, the user gets the following screen:

Quick Find

Setup Home

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

▼ Apps

App Manager

AppExchange Marketplace

> Connected Apps

Installed Packages


[SETUP](#)
[Installed Packages](#)

Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

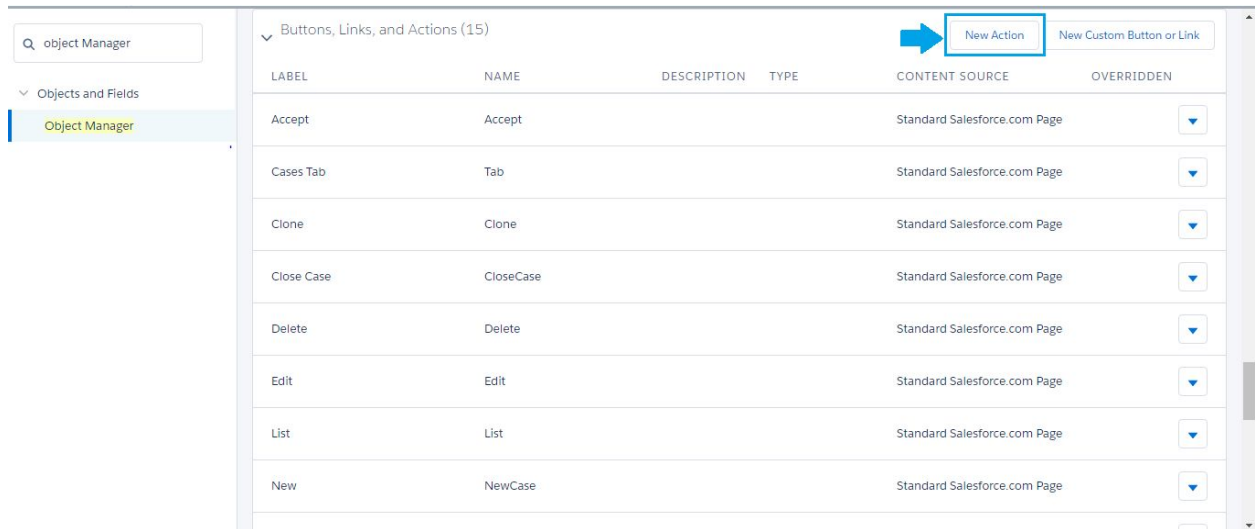
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	 CaseMerge	Astrea IT Services	1.2	AstreaCM	3/6/2017 10:33 PM	☐	0	0	0

Uninstalled Packages

No uninstalled package data archives

- ### • Steps to add the Component on the Case Detail Page
- Add the new **Lightning Quick Action** by following these steps:

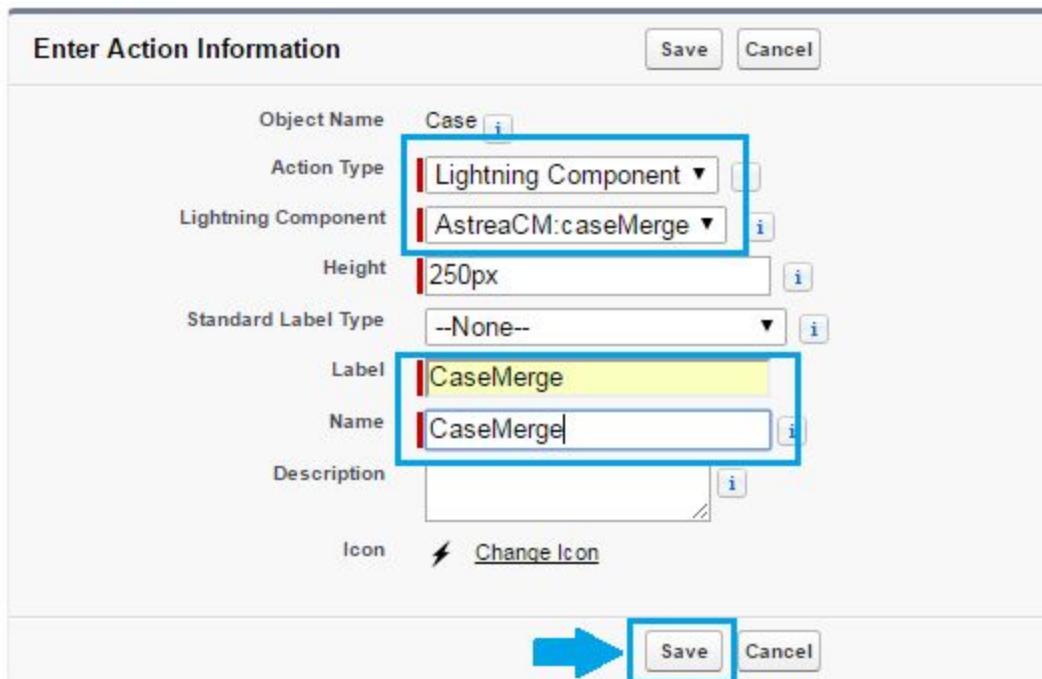
- a. Go to **Setup > Object Manager > Case > Buttons, Links, and Actions**, the following screen will appear.



Buttons, Links, and Actions (15)						
LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERIDDEN	
Accept	Accept			Standard Salesforce.com Page		▼
Cases Tab	Tab			Standard Salesforce.com Page		▼
Clone	Clone			Standard Salesforce.com Page		▼
Close Case	CloseCase			Standard Salesforce.com Page		▼
Delete	Delete			Standard Salesforce.com Page		▼
Edit	Edit			Standard Salesforce.com Page		▼
List	List			Standard Salesforce.com Page		▼
New	NewCase			Standard Salesforce.com Page		▼

- b. Click on **New Action** button.
- c. Enter the action information by selecting **Lightning Component** in **Action Type**, **AstreaCM: caseMerge** in **Lightning Component**.
- d. Enter the **Label** as **CaseMerge**.

Case Actions New Action



Enter Action Information [Save] [Cancel]

Object Name: Case [i]

Action Type: Lightning Component [i]

Lightning Component: AstreaCM:caseMerge [i]

Height: 250px [i]

Standard Label Type: --None-- [i]

Label: CaseMerge

Name: CaseMerge [i]

Description: [i]

Icon: ⚡ Change Icon

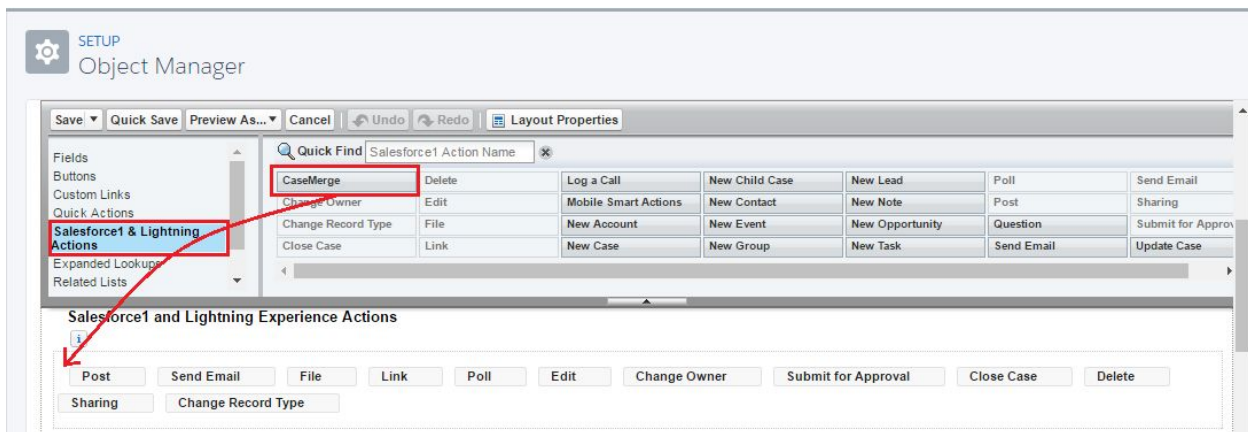
[Save] [Cancel]

e. Click on **Save** button to save the changes made.

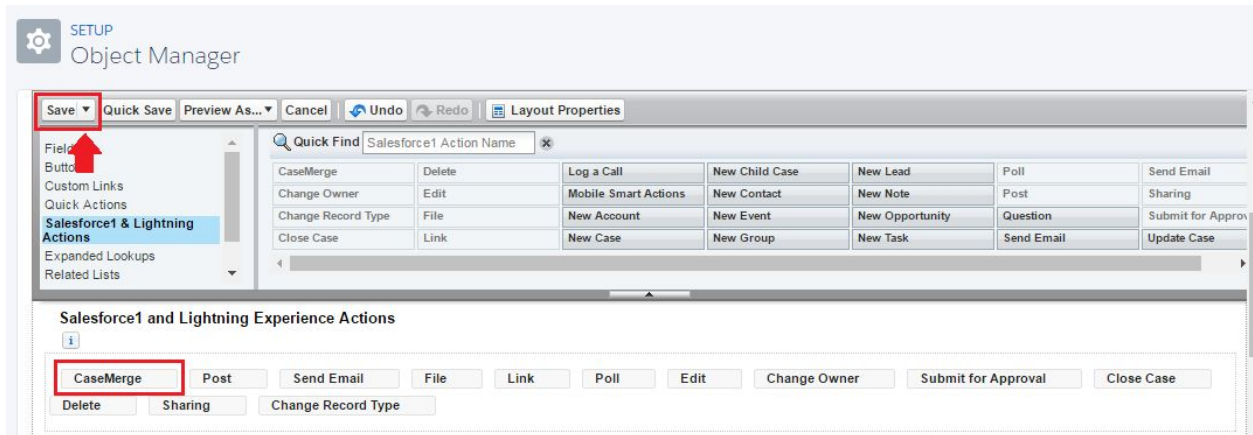
Buttons, Links, and Actions (16)						New Action	New Custom Button or Link
LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN		
Accept	Accept			Standard Salesforce.com Page			
CaseMerge	CaseMerge		Lightning Component	Lightning Component			
Cases Tab	Tab			Standard Salesforce.com Page			

Now the **CaseMerge** quick action needs to be added in the 'Button, Links, and Actions' section of Case SObject.

- Steps to add the CaseMerge quick action in Case page layout:
 - Go to **Setup > Object Manager > Case > Case Page Layouts > Case Layout**



- Drag the **CaseMerge** quick action to **Salesforce1 & Lightning Actions** section.



c. Click on **Save** Button.

- In Case object's Status Field, please add 'Closed As Duplicate' as a new Active value.
- **Astrea Case Merge Component Functionality:**

Initially the status of newly added cases is **"New"**.

Service Home Chatter Accounts Contacts **Cases** Reports Dashboards

CASES Recently Viewed

35 Items · Last updated a few seconds ago

Initially the status is "New"

CASE NUMBER	SUBJECT	STATUS	DATE/TIME OPENED	CASE OWNER ALIAS
1 00001060	Astrea Case Merge 3	New	3/20/2017 9:56 PM	SAgar
2 00001059	Astrea Case Merge 2	New	3/20/2017 9:56 PM	SAgar
3 00001058	Astrea Case Merge 1	New	3/20/2017 9:56 PM	SAgar
4 00001064	Astrea Case Merge 7	New	3/20/2017 9:56 PM	SAgar
5 00001063	Astrea Case Merge 6	New	3/20/2017 9:56 PM	SAgar
6 00001062	Astrea Case Merge 5	New	3/20/2017 9:56 PM	SAgar
7 00001061	Astrea Case Merge 4	New	3/20/2017 9:56 PM	SAgar
8 00001002	Seeking guidance on electrical wir...	New	3/6/2017 9:31 PM	SAgar
9 00001054	CaseDemoTest2	New	3/20/2017 5:29 PM	SAgar
10 00001056	CaseDemoTest4	Closed	3/20/2017 5:29 PM	SAgar

- To merge the duplicate Cases follow these steps:
 - Click on **CaseMerge** quick action in Case's detail page, the lightning component will be displayed.
 - Enter the filter criteria.

c. User can search duplicate Cases in following ways:

- if the user enters **Case numbers** then duplicate case will be fetched according to these numbers irrespective of the values present in other filters (Subject, Status, No. of Cases etc.).

The screenshot displays the Salesforce interface for a case titled "Astrea Case Merge 1". The "Feed" tab is selected, and a "CaseMerge" Lightning Quick Action is highlighted with a red box. Below this, the "Select Filter Criteria" section is also highlighted with a red box. It contains several filter fields: "Case Numbers" (with the value "00001409, 00001410, 00001411"), "Subject" (set to "Contains" and "Astrea Case Merge 1"), "Status", "Origin", "Priority", "Created Date" (with "From" and "To" date pickers), "Contact" (with a search field), and "No. Of Cases" (set to "2"). There is also a checkbox for "Delete merged Cases and related records?" and a "Find Duplicates" button. The right sidebar shows various related items, including "Emails (0)", "Files (0)", "Related Cases (0)", "Case Comments (0)", "Attachments (0)", and "Activity History (0)".

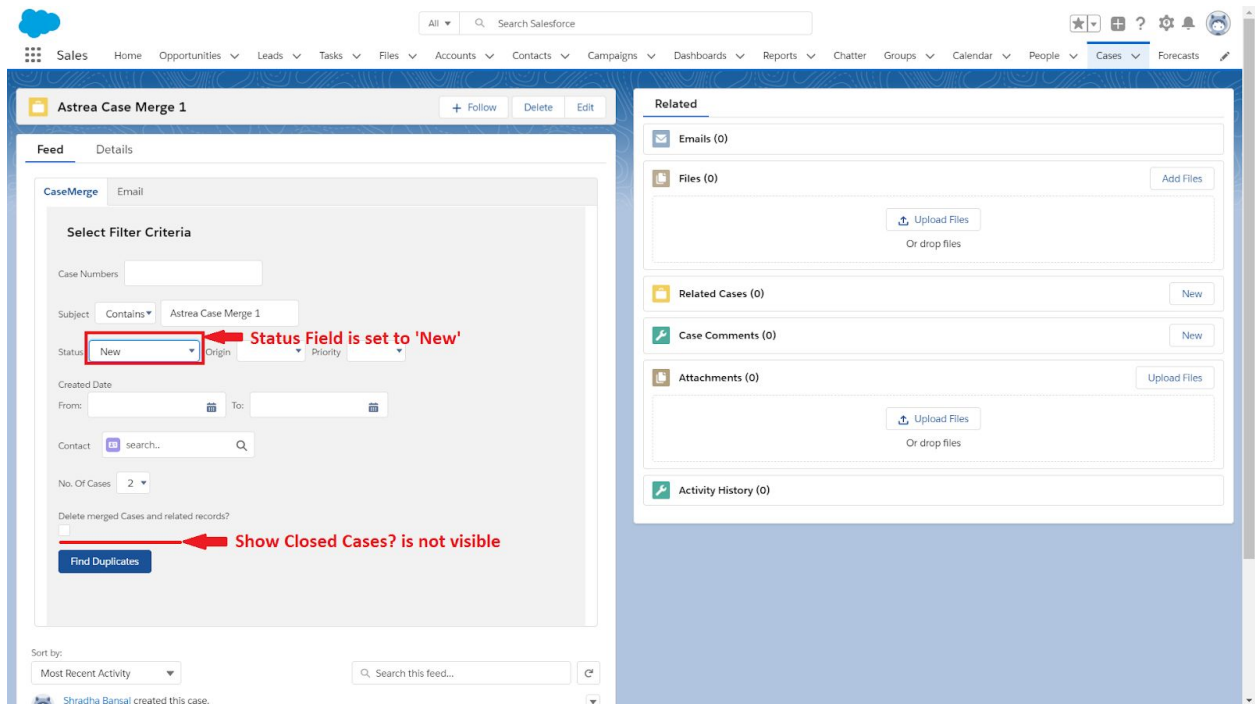
- If the user doesn't enter any case number then the duplicate cases will be fetched according to the values present in other filters. Here **Subject** is the filter criteria with two search options "**Contains**" and "**Equals**" and **Status**, **Origin**, **Priority**, **Created Date** are some other fields to filter the search. User can also select a **Contact** from the lookup to search the Cases having the selected Contact. **Delete merged Cases** is also an optional field.

Note: The format of entering the Case Number will be:

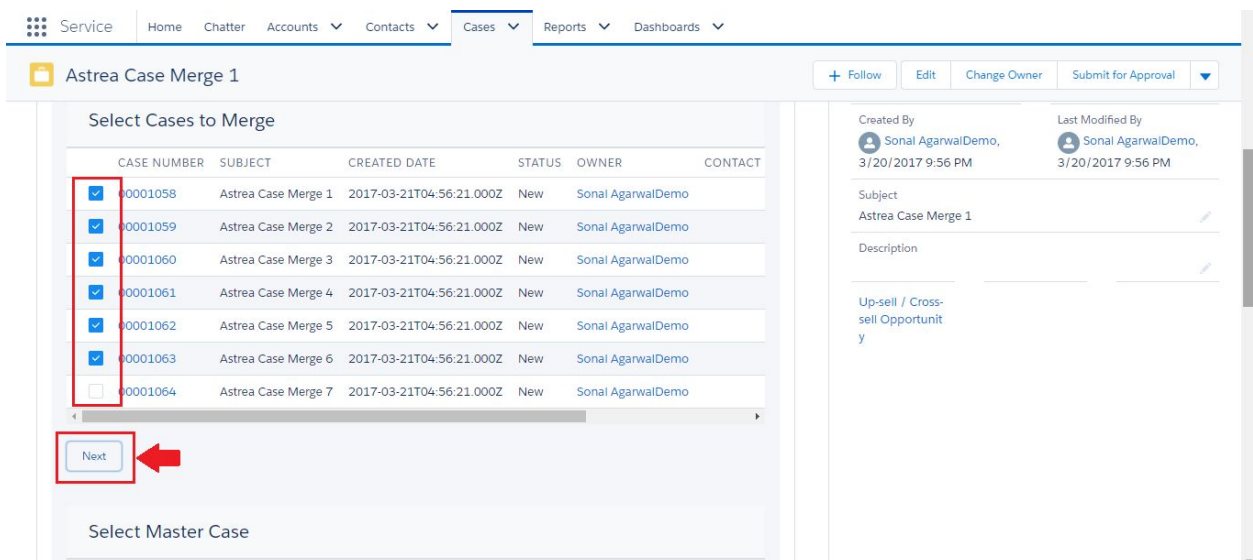
- The Case Number must be separated by a comma (,).
- There should not be any space between Case Numbers.
- The complete Case Number is acceptable only.

The screenshot displays the Salesforce interface for a case merge. The main section is titled 'Astrea Case Merge 1'. Under the 'Feed' tab, there is a 'CaseMerge' lightning quick action. Below this, the 'Select Filter Criteria' section contains several filters: 'Case Number' (empty), 'Subject' (set to 'Astrea Case Merge 1'), 'Status' (empty), 'Created Date' (empty), 'Contact' (searchable), and 'No. Of Cases' (set to 2). A checkbox labeled 'Show Closed Cases?' is checked. A 'Find Duplicates' button is located at the bottom of the filter section. The right sidebar, titled 'Related', shows various related items: 'Emails (0)', 'Files (0)', 'Related Cases (0)', 'Case Comments (0)', 'Attachments (0)', and 'Activity History (0)'. Red annotations highlight the 'CaseMerge' action, the 'Status' field, and the 'Show Closed Cases?' checkbox.

- d. User can select the number (2 to 10) of Cases to merge at a time.
- e. User can select checkbox for **Delete merged Cases and related records?** if he wants to delete duplicate (child) cases after merging them with master case.
- f. If the User wants to see Closed/Closed As Duplicate cases present in the Org then he/she can select **Show Closed Cases?** checkbox (by default, it is already selected).
- g. However, if user enters any value for Status filter then the checkbox for **Show Closed Cases?**, will automatically hide.



- h. Click on **Find Duplicates** button.
- i. According to the search criteria a list of duplicate Cases with related information will appear.
- j. User can select the Cases that he/she wants to merge by selecting the respective checkboxes.



- k. Click on **Next** button.
- l. A new list of selected Cases will be displayed with oldest Case being the default **Master Case**.

m. Master Case can be changed as per the User's choice by selecting the radio button.

Service | Home | Chatter | Accounts | Contacts | Cases | Reports | Dashboards

Astrea Case Merge 1

+ Follow Edit Change Owner Submit for Approval

Up-sell / Cross-sell Opportunity

CASE NUMBER	SUBJECT	CREATED DATE	STATUS	OWNER	CONTACT
☒ 00001062	Astrea Case Merge 5	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☒ 00001063	Astrea Case Merge 6	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☐ 00001064	Astrea Case Merge 7	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	

Next

Select Master Case ← Case in which other selected Cases are merged

CASE NUMBER	SUBJECT	CREATED DATE	STATUS	OWNER	CONTACT
☒ 00001058	Astrea Case Merge 1	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☐ 00001059	Astrea Case Merge 2	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☐ 00001060	Astrea Case Merge 3	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☐ 00001061	Astrea Case Merge 4	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☐ 00001062	Astrea Case Merge 5	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	
☐ 00001063	Astrea Case Merge 6	2017-03-21T04:56:21.000Z	New	Sonal AgarwalDemo	

Merge

n. Click on **Merge** button.

o. After clicking on **Merge**, all the selected Cases get merged in the **Master Case** along with their related **Emails, Comments and Attachments**.

Service | Home | Chatter | Accounts | Contacts | Cases | Reports | Dashboards

Astrea Case Merge 1

+ Follow Edit Change Owner Submit for Approval

Success! Cases Merged

All the cases have been merged

Sonal AgarwalDemo created this case. 27m ago

00001058

View more details

Like Comment

Write a comment...

Date/Time Opened: 3/20/2017 9:56 PM

Date/Time Closed

Product

Engineering Req Number

Potential Liability

SLA Violation

Created By: Sonal AgarwalDemo, 3/20/2017 9:56 PM

Last Modified By: Sonal AgarwalDemo, 3/20/2017 9:56 PM

Subject: Astrea Case Merge 1

Description

Up-sell / Cross-sell Opportunity

The top screenshot displays the 'Astrea Case Merge 6' master case. The 'RELATED' tab shows a list of merged cases (00001058 to 00001062) with details like Subject, Priority, and Date/Time Opened. A red box highlights the 'Related Cases (5)' section, and a red arrow points to the 'Merged Cases' label. The right sidebar shows case details like Case Owner (Sonal AgarwalDemo), Case Number (00001063), and Status (New).

The bottom screenshot shows the same case with 'Merged Comments and Attachments'. The 'Case Comments (1)' section shows a comment from Sonal AgarwalDemo. The 'Attachments (2)' section shows two attachments: banner.png and a+.png. The right sidebar shows additional details like Web Name, Web Phone, Date/Time Opened, and Date/Time Closed.

- p. After getting merged the Status of the merged Cases changes to **Closed** or **Closed As Duplicate** depending upon the value present in Org's Case object Status field.
- q. While merging the Case if user check the "Deleted merged Cases and related records?", then all the merged child records will be deleted and their Attachments and Comments will be related to the Parent Case.

CASES
Recently Viewed

35 items • Last updated a few seconds ago

New



	CASE NUMBER	SUBJECT	STATUS	DATE/TIME OPENED	CASE OWNER ALIAS	
1	00001063	Astrea Case Merge 6	New	3/20/2017 9:56 PM	SAgar	
2	00001062	Astrea Case Merge 5	Closed	3/20/2017 9:56 PM	SAgar	
3	00001061	Astrea Case Merge 4	Closed	3/20/2017 9:56 PM	SAgar	
4	00001060	Astrea Case Merge 3	Closed	3/20/2017 9:56 PM	SAgar	
5	00001059	Astrea Case Merge 2	Closed	3/20/2017 9:56 PM	SAgar	
6	00001058	Astrea Case Merge 1	Closed	3/20/2017 9:56 PM	SAgar	
7	00001064	Astrea Case Merge 7	New	3/20/2017 9:56 PM	SAgar	
8	00001002	Seeking guidance on electrical wir...	New	3/6/2017 9:31 PM	SAgar	
9	00001054	CaseDemoTest2	New	3/20/2017 5:29 PM	SAgar	
10	00001056	CaseDemoTest4	Closed	3/20/2017 5:29 PM	SAgar	

Status of the merged cases changes to "Closed"