



Cyber Group

Case Merge

Case Merge by Cyber Group is a case merge application built natively on the Salesforce platform.

- Allows up to 5 cases to be merged at once.
- Intuitive interface allows master case and requested fields to be selected and merged.
- Concatenation feature allows each case record subject field to be combined in the master case record.
- SOSL query functionality searches with-in every text field on the case record for possible match.
- Merged case records are not deleted with this application. The merged cases are assigned as child records to the master case record.
- Child cases contain an indicator that the case has been merged.
- Related records remain associated with original case records.
- Does not require “Modify All” permission on profile.
- Case Merge application respects native field level security when displaying fields to merge.
- Admin needs to configure the page layout to display/view the child cases for all the merge records.
- Field set determines which custom fields are considered for merging. Administrators can add/remove custom fields from field set as needed.
- Custom Permission Set controls access to Case Merge application