



App Benefits:

- Cleaner case records
- Save time and money
- More accurate analytics
- Case Merge App is **FREE!**



“Cyber Group’s Case Merge app is easy-to-use, functional, and saves us a lot of time.”

- Salesforce Client



Key App Features:

- Built natively in Salesforce
- Custom permission set
- Search for cases by text string or case number
- Merge up to 5 cases at one time across multiple channels

SALESFORCE CASE MERGE APP



Duplicate case records create problems for a Salesforce org. The impact is felt across the org especially considering how easy it is to create redundant cases and the lack of an effective case merge solution. Left unmanaged, duplicate records can skew analytics, waste time due to double work, and frustrate users.

Impact

A customer e-mails your customer service team to report an issue. The same customer also reports this issue to customer service through the web, by text and in a community. You now have a situation where multiple cases have been created as a result of one customer reporting the same issue through multiple channels. There’s a good chance multiple service agents are working the same case, wasting valuable time that otherwise could be spent resolving another customer case. And when a service agent “replies all” to the original customer e-mail, the case duplication problem becomes systematic since each e-mail creates a new redundant case. The overall impact is the same regardless of what scenario you can think of: wasted time, frustrated service agents, unsatisfied customers, and skewed KPIs based on duplicate data.

Solution

Cyber Group’s Case Merge is a custom developed app built natively in Salesforce. Permission to access the app and functionality is provided by a custom permission set installed with the application. Users can search for cases by case number or by text string (*SOSL query searches all text fields*). An improvement upon the Salesforce native merge features, this app can merge up to 5 cases at one time across omni-channels and without special administrative permissions. Cases that merge into the master case become child cases with a lookup to the parent case (*the master case becomes parent case*). If a user merges cases by mistake, rollback is extremely easy because merged cases are never deleted. Users can generate a standard case report filtered by “Merged Case” checkbox that displays merged cases.

Result

Problems created by duplicate case records are now over. Cyber Group’s Case Merge app extends functionality where existing solutions fall short. Users can merge duplicate cases easily and without fear of losing data. The best part is that the app is **FREE!** Download it today on the Salesforce AppExchange: [Case Merge by Cyber Group](#).