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Duplicate Search & Merge

USER MANUAL

Set Up Duplicate Search & Merge

Welcome, Salesforce Administrators & Users

This manual contains the details you need to setup & maintain DSM in your Salesforce Organization. This guide does not include any technical design details about the product.

We hope this guide provides you with the complete content you need to get Duplicate Search & Merge up and running with Salesforce. If you need any further assistance, feel free to contact the support team at Mirketa.

Understanding how Duplicate Search & Merge Works

DSM is a duplicate management application that searches and eliminates duplicate records based on the search criteria defined by the user.

DSM gives the user a flexible experience by letting him select the object as well as the fields on which he wants to search the duplicates on. The user gets to select up to 7 fields which gives the user ability to search over a large number of criteria. It also lets the user decide how the master records will be chosen. Users can perform a blanket merge using the merge all feature or select individual records per their need. Also, the user doesn't have to worry about not knowing what impacts the merge will have on the master record, we have got all your worries covered. DSM lets the user have a preview of the record to be retained before performing the actual merge. Moreover, the user can export all the records in a .csv or .xls format as a backup. DSM has smart notifications as the user gets a notification mail after the completion of the merging process. DSM lets the user save the searches after running so that the user does not have to perform the whole process again for running the same search again. Users can manage the searches saved in the past all in one place. They can edit as well as delete them.

DSM also has an intelligent dashboard that shows saved jobs that have been performed in the org. You can start, edit, schedule, and abort jobs directly from the dashboard. DSM also lets you view the duplicate groups and records for each saved job so that you can make a decision on which de-duplication job you want to run. So, everything is getting tracked in real-time.

For Salesforce Administrators

Installing DSM

Admins can **install** DSM package from the AppExchange in their salesforce organization.

1. While installing, the first screen asks you to choose from:
 - Install for admins only
 - Install for all users
 - Install for specific profiles
2. **Choose** the first option i.e. **Install for admins only**.
3. Click **install**
4. Wait for the application to get installed and then click **done**.

Uninstalling DSM

Admins can **uninstall** DSM package from their Salesforce Org.

1. From the Setup page, enter 'Installed Packages' in the Quick Find box and select Installed Packages.
2. Click on the '**uninstall**' link adjacent to the DSM package to remove the package and all its components from your Salesforce organization.

Configuring and Using DSM

After installing DSM, you will see the home screen which consists of two tabs:

- **Dashboard** – User gets a tabular representation of all the de-dupe he has previously saved. He gets to start/edit/delete the saved jobs too. The user gets to see real-time duplicate groups and records of the saved jobs. He also gets to schedule and abort the jobs, which would run at the backend and perform the de-duplication.
- **Search and Merge** - User performs a step-by-step process of choosing the search criteria, selecting the records to merge, and merging them.

Search & Merge –

1. Click on **Search & Merge** tab. You will be directed to the landing page where the steps to use DSM are briefly shown. You can start configuring your DSM for searching & merging duplicates.
2. You'll see two panels before you – **Pick a Saved job & Pick the object that requires data clean-up**. In the **Pick the object that requires data clean-up** panel, you can choose the object you want to de-dupe. In the **Pick a Saved job** panel, you get to choose from the searches you have previously run and saved.


The screenshot shows the 'Search and Merge' configuration page in the Mirketa application. At the top, there is a navigation bar with a search bar labeled 'Search Salesforce' and several utility icons. Below the navigation bar, a breadcrumb trail shows 'Duplicate Search an...' > 'Home' > 'Dashboard' > 'Search and Merge'. The main content area features a progress indicator with five steps: 'Pick a job or Create a new job' (active), 'Create Duplicate Search Criteria', 'Create Duplicates Merge Logic', 'Duplicate Search Results', and 'Merge Results'. Below the progress bar, a heading reads: 'Either select a previously run data cleanup job or create a new data cleanup job by selecting the data object that requires data de-duplication.' The page is divided into two columns by a vertical line with an 'OR' button in the center. The left column is titled 'Pick a Saved Job' and contains the instruction 'Select a data cleanup job from the list of previously run jobs.' with a 'Please Select' dropdown menu. The right column is titled 'Pick the object that requires data cleanup' and contains the instruction 'Select an object that requires data cleanup from the list of objects.' with a 'Please Select' dropdown menu. A note below the right instruction states: '(The dropdown shows objects on which you have sufficient permissions to modify)'. At the bottom right, there are two buttons: 'Create Duplicate Search Criteria' and 'Next'.

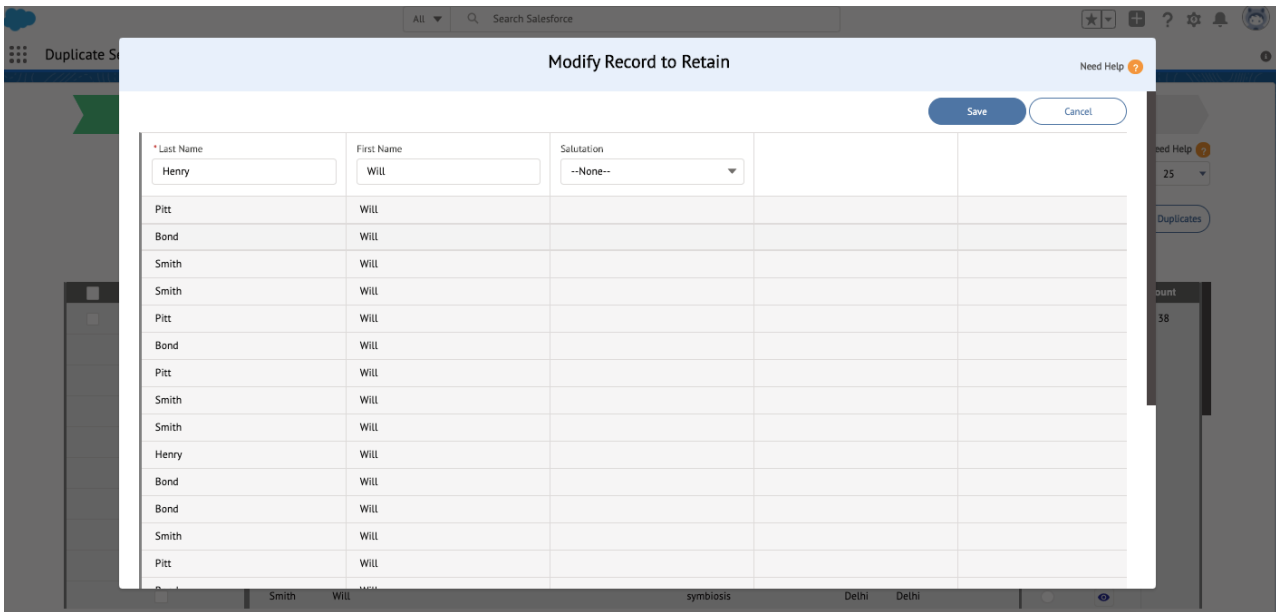
3. Click on **Select an Object** to enable the panel. Select an object from the dropdown and click on **Next**.

4. You will be directed to Step-2 where you can choose the fields (text and picklist data-type) which will form the criteria for searching. You can choose up to 7 fields. After choosing a field, click on **Please select** from the following dropdowns to add more fields. After choosing the criteria fields, click on **Next**.
5. You can choose for exact search or fuzzy search by adding value against respective fields in Step 2(b). Enter the exact value to be searched in case of **text** data type. And in the case of **Picklist** data type, enter all the values separated by “;” that you want to search.
6. You will reach Step-3 now where you get to select the criteria to decide the master record. You get three options, two dropdowns- one for the field in which you get to choose from Created Date and Last Modified Date, second for the comparison value in which you get to choose from Latest & Oldest, and a text field where you get to search and enter the record owner. You also get an additional set of criteria which can be enabled by selecting the **checkbox** given on the panel itself. You can choose up to three fields from the dropdowns given that can be used for fuzzy matching. After you have selected the criteria, click on **Next**.

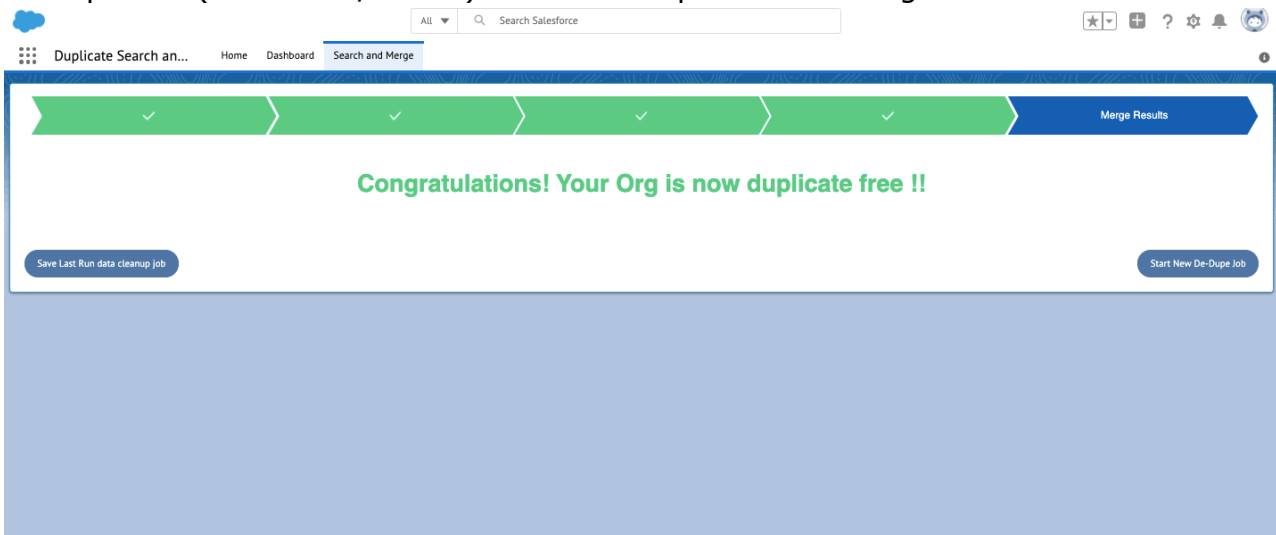
7. You will be directed to Step-4 where all the duplicate records are shown in a tabular form. There are a couple of things you can do in this step. First, you are shown the master records with respect to the master radio button ticked in the right panel of the screen. You can **select the master record to retain if you don't like the suggested record to retain**. You can select either the whole records at once or choose among the secondary records which you want to merge from the left panel of screen of step 4. You also get a button on the top right to download duplicates records in csv file.

Merge All	Last Name	First Name	Salutation	Middle Name	Informal Name	Suffix	Title	Company	Street	City	State/Province	Zip/Post	Master	View	Count
<input type="checkbox"/>	Pitt	Will						HDFC securties	Delhi	Haryana	110030	<input type="radio"/>	View	38	
<input type="checkbox"/>	Bond	Will						HDFC securties	Gurgaon	Maharashtra		<input type="radio"/>	View		
<input type="checkbox"/>	Smith	Will						Honeywell Automation	Delhi	Maharashtra		<input type="radio"/>	View		
<input type="checkbox"/>	Smith	Will						gorakhpur university	Delhi	Delhi		<input type="radio"/>	View		
<input type="checkbox"/>	Pitt	Will						gorakhpur university	Kolkata	Kolkata		<input type="radio"/>	View		
<input type="checkbox"/>	Bond	Will						Honeywell Automation	Kolkata	Delhi		<input type="radio"/>	View		
<input checked="" type="checkbox"/>	Henry	Will						gorakhpur university	Delhi	Maharashtra		<input checked="" type="radio"/>	View		
<input type="checkbox"/>	Pitt	Will						Here - Maps for life	Pune	Haryana		<input type="radio"/>	View		
<input type="checkbox"/>	Smith	Will						gorakhpur university	Delhi	Haryana		<input type="radio"/>	View		
<input type="checkbox"/>	Smith	Will						sybiosis	Delhi	Delhi		<input type="radio"/>	View		

8. Only 25 master records are shown in the table at a time. That number can be increased to 50 or 75 using the page size dropdown given in the pagination panel above. Also, you can move through the pages using the pagination buttons in the same panel.
9. There is a **Modify**  button associated with each master which becomes visible if you check the master. On clicking it, you get the tabular view which shows the updated fields of the master record in edit mode, and the secondary records which will be merged. You can manually edit the master record fields. After editing, you can save the master by clicking the save button.



10. Now you reach Step-5. The merging has started in the background and you will get an email on completion. In the mail, you get the links of all the master records you chose on Step-4 for merging. There is a button of **Start new de-dupe job** – by clicking on which you will be redirected to Step-1 where you can perform the search and merge operation again. Do not perform merge operation till you have received an email for completion (successful/failure) of an earlier performed merge.



11. There is a **Save last run data clean-up job** button on the left where you can save the criterion you just formed. You will see there are three boxes after clicking on it- one shows the formed criteria, the second one is for entering the **Name** you want to give that search and the third one is the **Description** for that search. After entering the details, click on **Save** and your search will be saved.

The 'Save Job' dialog box contains the following elements:

- Name:** An empty text input field.
- Description:** An empty text input field.
- Query:** A text area containing the text: "Object: Lead --> Duplicate Criteria: [Last Name,First Name] --> Master Fields: LastModifiedDate > latest".
- Buttons:** A 'Cancel' button and a 'Save' button.

12. Now, going back to Step-1, if you select the **Pick a Saved Job** panel, you can see the search you just saved. On selecting the search from the dropdown, the corresponding criteria are shown in the textbox below it. You can run it by clicking **Next**.

The screenshot shows the 'Duplicate Search and Merge' workflow with the following details:

- Navigation:** A breadcrumb trail: 'Pick a job or Create a new job' (active) > 'Create Duplicate Search Criteria' > 'Create Duplicates Merge Logic' > 'Duplicate Search Results' > 'Merge Results'.
- Instructions:** "Either select a previously run data cleanup job or create a new data cleanup job by selecting the data object that requires data de-duplication." A 'Need Help' icon is present.
- Options:**
 - Pick a Saved Job:** Selected with a radio button. Instruction: "Select a data cleanup job from the list of previously run jobs." A dropdown menu is open showing: "Please Select", "Account Name", "Contact Name", "Standard Object_First Name", "Custom Object_First Name".
 - Pick the object that requires data cleanup:** Unselected with a radio button. Instruction: "Select an object that requires data cleanup from the list of objects. (The dropdown shows objects on which you have sufficient permissions to modify)". A dropdown menu is present with "Please Select" selected.
- Buttons:** 'Create Duplicate Search Criteria' and 'Next'.

13. This will run the criteria in the background and lead you directly to Step 3 where you can modify the '**Record to retain**' criteria. Rest of the operations are the same as elaborated from point 7.



Note:

- There is a limit of 1,000 groups and 50,000 duplicate records on an object you can search in one run. screenshot
- DSM uses Java Script to a large extent, so please ensure that you have JavaScript enabled in your browser.
- You will be able to perform merging for account record of Person Account Record Type as well.

Steps to activate fuzzy search when person account is enabled:

1. From the quick find box search account object click on fields and from the Account Custom Fields & Relationships. Create two custom fields on account:
 - A. Click on new and select
Datatype -Text
Field Label - PFN_SOUNDEX
Length- 255
External ID- checkbox mark as true
field API name will be advitya__PFN_SOUNDEX__c by clicking on save.
 - B. Click on new and select
Datatype-
Field Label - PLN_SOUNDEX
Length- 255
External ID- checkbox mark as true
field API name will be advitya__PLN_SOUNDEX__c by clicking on save.

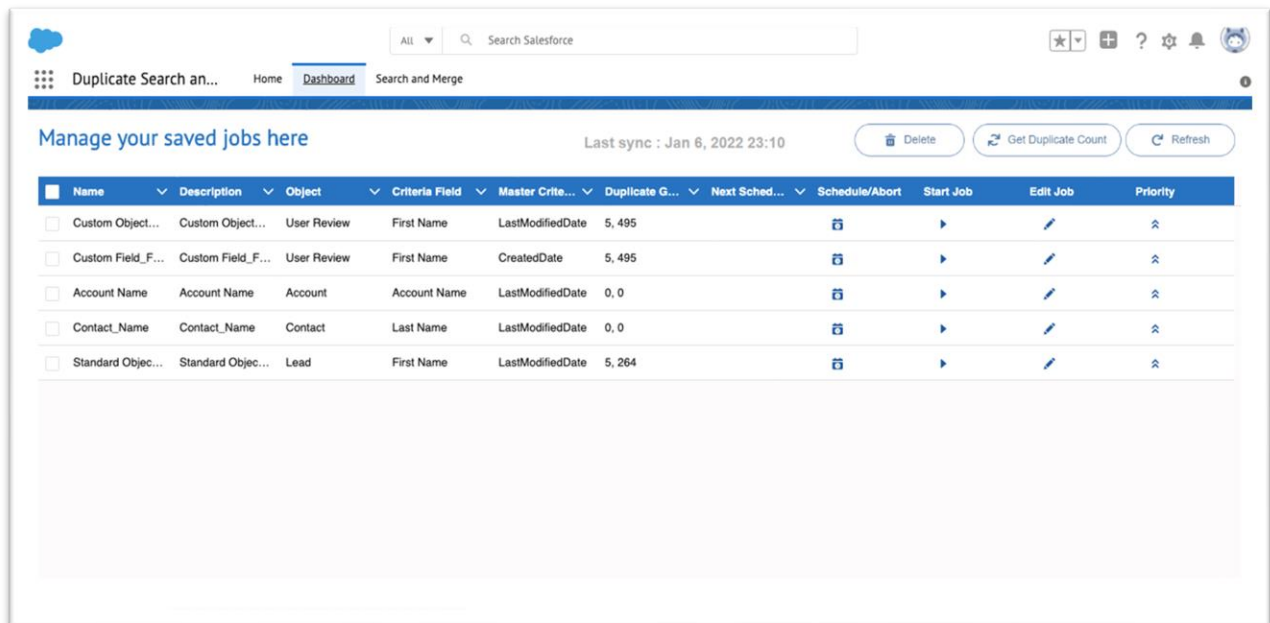
Account Custom Fields & Relationships						
#	Action	Field Label	API Name	Data Type	Indexed	Controlling Field
1	Edit Del	<u>FN_SOUNDEX</u>	advitya__FN_SOUNDEX__c	Text(255) (External ID)	✓	
2	Edit Del	<u>LN_SOUNDEX</u>	advitya__LN_SOUNDEX__c	Text(255) (External ID)	✓	

Create two records on custom metadata:

1. Go to setup and in the quick find box search for Custom Metadata Types.
2. Click on Custom Metadata Types, you can click on Manage Records of SoundexFieldsMapping.
3. Click on the New button and fill in details on metadata fields for FirstName.
Note:- SoundexFieldApiName should be the same on the account field. For this, you can copy the exact name from accounts fields for PFirstName which should be advitya__PFN_SOUNDEX__c.
4. Click on the New button and fill in details on metadata fields for LastName.
Note:- SoundexFieldApiName should be the same on the account field. For this, you can copy the exact name from accounts fields for PLastName which should be advitya__PLN_SOUNDEX__c.



Dashboard –

1. Click on **Dashboard** tab to open this module. You'll see all the searches you have saved in the past runs of DSM, represented in a tabular form.

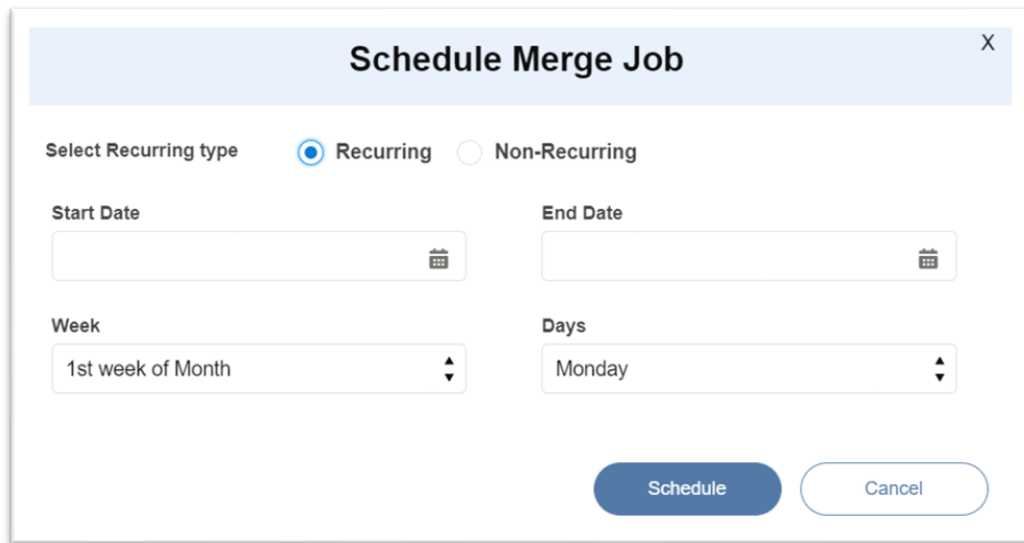


The screenshot shows the Mirketa Dashboard interface. At the top, there is a search bar labeled "Search Salesforce" and a navigation menu with "Home" and "Dashboard" tabs. Below the navigation, there is a section titled "Manage your saved jobs here" with a "Last sync : Jan 6, 2022 23:10" timestamp and buttons for "Delete", "Get Duplicate Count", and "Refresh". The main content is a table with the following columns: Name, Description, Object, Criteria Field, Master Crite..., Duplicate G..., Next Sched..., Schedule/Abort, Start Job, Edit Job, and Priority. The table contains five rows of saved search jobs.

Name	Description	Object	Criteria Field	Master Crite...	Duplicate G...	Next Sched...	Schedule/Abort	Start Job	Edit Job	Priority
<input type="checkbox"/> Custom Object...	Custom Object...	User Review	First Name	LastModifiedDate	5, 495					
<input type="checkbox"/> Custom Field_F...	Custom Field_F...	User Review	First Name	CreatedDate	5, 495					
<input type="checkbox"/> Account Name	Account Name	Account	Account Name	LastModifiedDate	0, 0					
<input type="checkbox"/> Contact_Name	Contact_Name	Contact	Last Name	LastModifiedDate	0, 0					
<input type="checkbox"/> Standard Objec...	Standard Objec...	Lead	First Name	LastModifiedDate	5, 264					


2. The table shows the **Name, Description, Object, Criteria fields, Master Criteria, Duplicate Groups & Records, Schedule/Abort, Start/Edit Job, Priority** as well as **Next Scheduled Date** the of the search.
3. There is an **Delete** button on the right top of screen, it will be enabled if you have selected records from table. After selecting record checkbox, you can **delete** the saved search from the table.
4. There is an **Get Duplicate Count**  on right top screen, by clicking on that you will get the **Real-time** count on the field **Duplicate Groups & Records** for the saved jobs.
5. There is a schedule option  in the table which can be used to schedule your merging process on that saved search. You can select type of scheduler (Recurring or Non- Recurring). If You have selected recurring then you must enter the start date, end date, week and days and click on **Schedule** button to schedule the search on recurring bases.


If you have selected non-recurring type of schedule the you have to provide only schedule date and time.





Schedule Merge Job X

Select Recurring type Recurring Non-Recurring

Start Date 

End Date 

Week 

Days 

After scheduling the saved search, the **Next scheduled date** will come automatically in table.

6. If search is scheduled, then you can abort the schedule after clicking the same button that you used for scheduling.
7. You can access the real time information on **Duplicate group and records** by clicking on **Refresh** button on the top right corner.