

Salesforce's Merge Cases vs. Case Merge Premium

FEATURES & SPECIFICATIONS	STANDARD SALESFORCE Merge Cases	VICASSO Case Merge Premium
Duplicate Case Detection	Not Available ✗	Duplicate cases are detected and surfaced to agents through the Duplicate Detector and Utility Bar components. ✓
Duplicate Detection Criteria	Not Available ✗	Criteria can be configured Org-Wide, Record Type Specific, and for Automerge. Criteria can include Case fields, related object fields, date/time proximity and utilize advanced logic formulas. ✓
Number of Cases to Merge in Single Operation	Select up to 3 cases ✓	Select up to 9 cases (configurable), select 10 or more cases with the Clean Merge option. ✓
Parent Case Selection	Defaults to the first case clicked. Users can choose any of the duplicate cases as the parent. ✓	Defaults to the oldest case to ensure accurate metrics. Admins can control agent flexibility for parent case selection. ✓
Field Edits on the Parent Case when merging	Select values from existing cases. ✓	Select values from existing cases and edit values. ✓
Related Objects	Most related records from the duplicate cases are moved to the master case (Not configurable) ✓	Related records from the duplicate cases are copied (configurable) to the master case and optionally deleted from the duplicate case (configurable). Settings are configured individually for each related object. ✓
End-User Selection of Related Objects	Not Available ✗	Option to configure end user selection of objects to copy during the merge. ✓
Results of the Merge	Duplicate cases can either be deleted to the Recycle Bin (limited to users with Delete permissions on Case), or tagged as "Merged" with a (configurable) Closed status. Restoring deleted cases does not move related records back to the original case. !	Duplicate case status changed to Closed as Duplicate (configurable) and set as Child Cases to the master case. Merged By & Merged Date/Time fields are stamped for easy reporting. Criteria performance is tracked and reflected back in the setup experience. ✓
Automatic Merge of Duplicate Cases	Not Available ✗	Automatically merges cases on case creation/update when meeting specified Automerge criteria. ✓
Unmerge	Not Available ✗	Cases can be unmerged from the Duplicate Detector on the Parent Case. ✓
Criteria Performance	Not Available ✗	Performance of existing criteria and suggestions for additional criteria are provided to improve duplicate detection. ✓
Supports Lightning and/or Classic	Lightning Only !	Lightning and Classic (limitations apply for Classic) ✓

frequently asked questions

QUESTION:	STANDARD SALESFORCE Merge Cases	VICASSO Case Merge Premium
What permissions do you need to merge cases?	Merging cases requires Read and Edit access to the case object. Users will require access to the "Merge Cases" button, available for case list views and case page layouts. Delete permissions are required if the desired result of the merge is a deleted case.	Merging cases requires Read and Edit access to the case object. Licensed users require access to various packaged components (fields, buttons, Visualforce pages & Lightning Components) which can be provided through the "Case Merge End User" permission set.
What options do you have to configure the merge process?	- You can select whether merging deletes cases (requires admin permissions) or merges cases to a merged cases related list. - You can select the master case and select fields on the cases being merged.	- Detection criteria is configured with logic formula and proximity detection of date and date/time fields. Criteria can be configured Org-Wide, Record Type Specific, and for Automerge. - Related records are either moved, cloned, or ignored based on admin configuration settings for each related standard or custom object. - Configurable child object selection during the merge process, as well as allow end-users to choose which objects go to the parent case.
In what situations will this work well?	- Small teams with low case volume and simple business processes. - General data cleansing after support cases are closed.	- Support teams with sharing rules, validation rules, or other standard profile restrictions for handling data. - Detection of duplicate cases in scenarios where multiple contacts from the same account open cases for the same issue.