Streamlined Contact Merging: Seamlessly Navigate to Contact Merge in Salesforce NPSP

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Overview

Data cleanliness is crucial for effective operations, and dealing with duplicate contacts can be a frustrating experience. If you're tired of encountering ghosted Household accounts or searching for a more efficient way to access the NPSP contact merge page, we have the perfect solution for you!

The standard Duplicate Management feature in Salesforce offers users the ability to merge duplicate contacts, ensuring data integrity and eliminating duplication. By merging contacts, you can consolidate information and generate accurate analytical reports.

However, when it comes to NPSP, the standard Salesforce Duplicate Management for contacts doesn't differentiate between Household and Organization accounts as effectively as NPSP does. If you were to merge contacts using the standard tool within NPSP, you might end up with an anonymous household for the merged

contact. To avoid this issue, it is highly recommended to always use the [NPSP Contact Merge](#).

But wait, there's more! We understand the value of convenience, and that is why our Duplicate NPSP Merge package brings you two powerful features:

● 	Instant alerts for duplicate contacts, with a hyperlink directly taking you to the Contact Merge page. This allows you to **save time and avoid unnecessary clicks** by navigating from the contact record itself.

● 	A screen flow that identifies duplicate contact records based on the following criteria: **Fuzzy First Name + Exact Last Name + Exact Email address on either the Personal, Work, or Alternate Email field.**

This flow logic ensures a wider coverage of potential duplicates compared to the NPSP Contact Personal Email Match.

Are you ready to dive in? Follow the step-by-step process to unlock efficient data management with this Duplicate NPSP Merge package. Get ready to experience a new level of simplicity and effectiveness!

Install the Duplicate Merge with Fault Path Unmanaged Package

To install this package in a sandbox environment, you need to modify the URL in the provided link. Replace "login.salesforce.com" with "test.salesforce.com".

1. 	In a Sandbox: Paste the following URL link into your web browser, https://test.salesforce.com/packaging/installPackage.apexp?p0=04tMq00000014eH

2. 	Then, log in to your chosen org using your sandbox credentials.

3. 	In a Developer Org: Simply paste the original link without any modifications, https://login.salesforce.com/packaging/installPackage.apexp?p0=04tMq00000014eH

4. 	Then, follow the log-in prompt.

5. 	Select Install for All Users then click on Install

6. 	The "Install for All Users" option is recommended to grant end users access. However, you should consider the best solution that suits your specific circumstances.

Duplicate Management Settings

Go to Setup → Duplicate Management –> Matching Rules

1. Deactivate the NPSP Contact Personal Email Match Matching Rule (to preserve the standard configuration for future needs). Note that you may have to deactivate the NPSP Contact Personal Email Match Duplicate Rule first.
2. Create a new matching Rule with the name of your Organisation. Here is an example:
3. Only 5 rows display and you need 6 so click Add Filter Logic at the bottom of the list of rows

Then add your last row and update the Filter Logic as below. Set the Matching Method for First name to Fuzzy (Jessie and Jessica match with Fuzzy Logic)

This matching system relies on names and email addresses, without incorporating phone numbers.

If you wish to create a new matching rule for phone numbers criteria, create:

- Fuzzy match on First Name, exact match on Last Name, and any exact match on phone numbers (work, home, or mobile).

4.   Create a new Duplicate Rule called with the same name as your Matching Rule. Ensure you uncheck Alert under Actions

5.   Keep all other fields as they are and check Report on both duplicate record creation and edition, then click on Save and Activate the duplicate rule.

Setting up the Flow

1. Under Flows, search for the flow labelled Duplicate Contact Merge, then activate it.

2. In Lightning App Builder, edit the NPSP Contact Record Page.
3. Drag the flow component from the standard component panel to the desired location on this record page
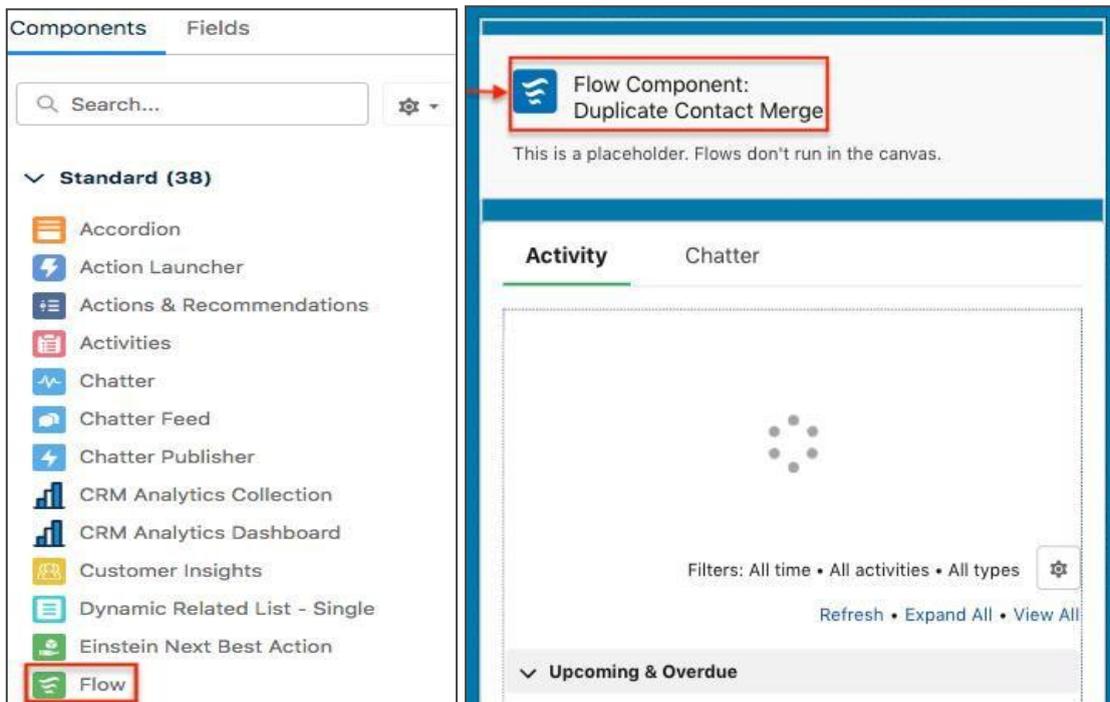
4. Choose "Duplicate Contact Merge" from the Flow drop-down menu.
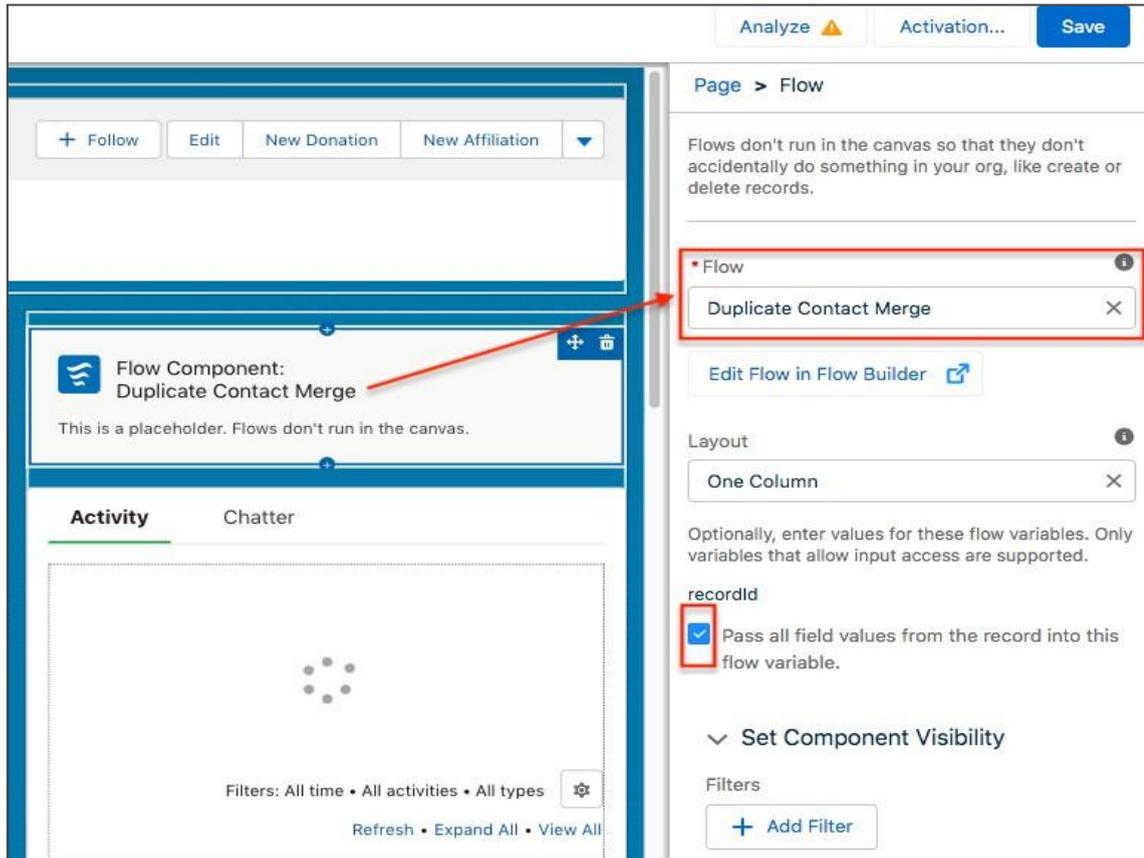
5. Tick the checkbox to allow all field values to pass into the flow variable, then click on Save.

Assign the Permission Set to your Users

The Permission Set is called Duplicate Management. (You might want to add this to your All Users Permission Set Group).

See it in action

1. Create a duplicate contact record with the same name and email address as an existing one. Make sure to enter the email address in one of these preferences: **Personal, Work, or Alternate Email.**

2.   After saving the duplicate contact, an alert message saying "Potential Duplicate Found" will appear on the contact record page where the flow component is located.

3.   Click on the "Click Here" button in the alert message to be redirected to the Contact Merge page.
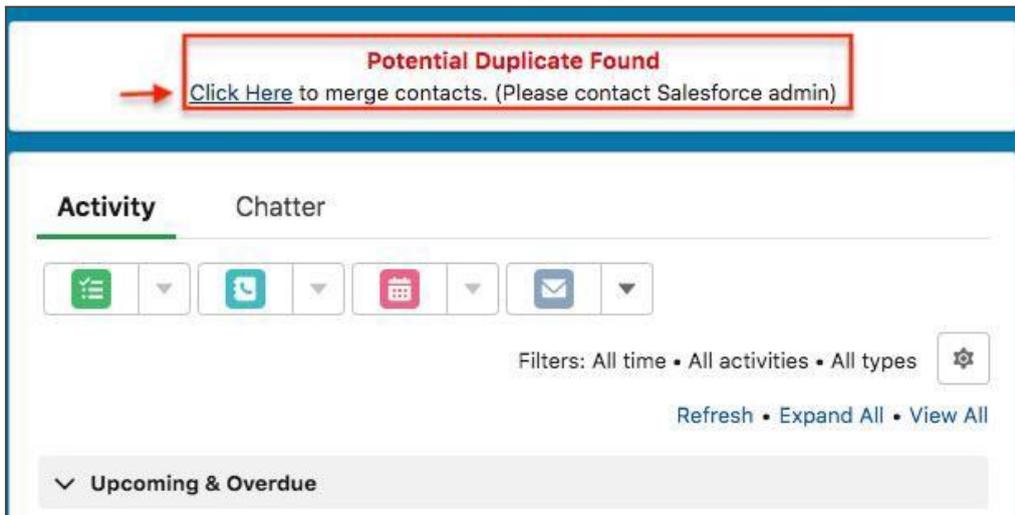
4.   Follow the "See Duplicate Contacts" button to view the Duplicate Record Sets. Alternatively, you can use the "Search Contacts" option to find specific duplicates.

5.   Select the duplicate contacts you wish to merge and follow the steps to proceed with the merge.

6.   Please note that this action is irreversible, so if you have any doubts, contact your Salesforce Administrator at your organisation.

This Duplicate NPSP Merge package offers a seamless and efficient solution for managing duplicate contacts. We hope this documentation has helped guide you through the installation and setup process.

The Gotchas

See the potential things to keep an eye out for:

1. Make sure to give flow access to all the users in the org via their User record - Only then they'll be able to see the Screen Flow after it is added to the Lightning Page
2. Making sure to "Check TRUE" the 'Pass all field from the record into this flow variable' checkbox while adding the Contact Merge Flow into the Lightning Page. See attached screenshot
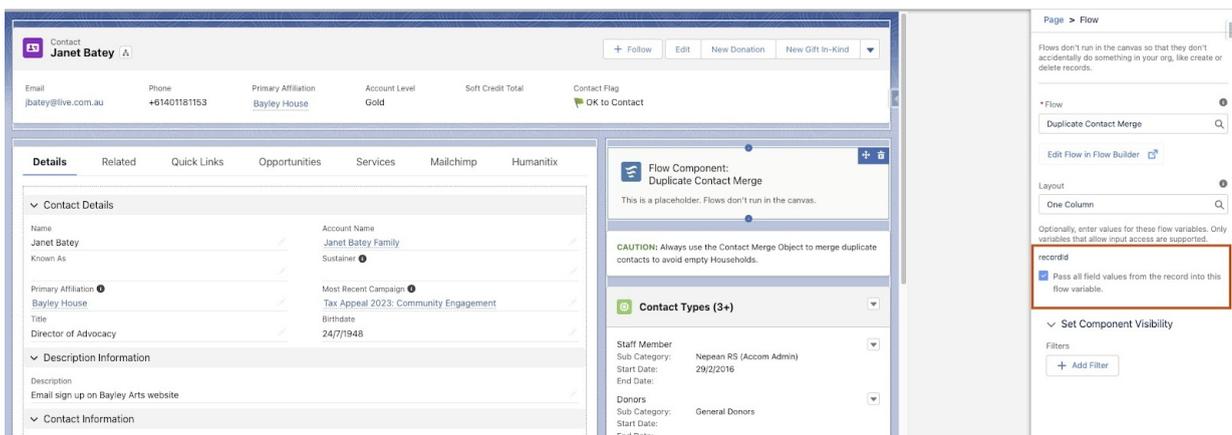
More information

[Manage Duplicate Records](#)

Manage Duplicate Contacts and Accounts