

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

Prepared by Jaclyn Liao and Lakshmi Prabha Subramanian

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Overview	Ī
Install the Duplicate Merge with Fault Path Unmanaged Package	2
Duplicate Management Settings	3
Setting up the Flow	5
Assign the Permission Set to your Users	6
See it in action	7
The Gotchas	8

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 <u>Salesforce Duplicate Management</u> 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 <u>NPSP</u> <u>Contact Merge</u>.

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.

	V	· · · ·		Pick up to 3 Contacts to M	ferge	Pick the winning Contact	\rightarrow	Merge the Contacts
Found Cont	acts							
SELECT	NAME	ACCOUNT ID	TITLE	EMAIL	BUSINESS PHONE	MAILING CITY	MAILING STATE/PROVINCE	
	Alice Max	Max Household		amax@gmail.com				
	Alice Max	Max Household		amax@gmail.com				



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

Matchin	g Criteria		
Tell	the rule which fields to compare and how.		
	Field	Matching Method i	Match Blank Fields i
	First Name ~	Exact ~	AND
	Last Name v	Exact ~	AND
	Email	Exact ~	AND
	Alternate Email	Exact ~	AND
	Personal Email	Exact ~	
<u>Add</u>	Filter Logic Field 5		

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)

Field Matching Method i Match Blank Fiel 1. First Name Fuzzy: First Name 2. Last Name Exact 3. Email Exact 4. Alternate Email Exact			
2. Last Name 3. Email 4. Alternate Email	Name	Matching Method i	Match Blank Fields
Exact Exact Exact Exact Exact Exact Exact Exact C	Name	Fract	
Alternate Email		Exact V	
	I		
Personal Email		✓ Exact ✓	

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

Contact Duplicate Rule Blaze Your Trail Contac	ct Matching Rule		🖨 Help for this Page 🥹
Duplicate Rule Detail	Edit Delete Clone Deactivate		
Rule Name	Blaze Your Trail Contact Matching Rule	Order	7 of 7 [Reorder] i
Description	Fuzzy match on First Name, exact match on Last Name, and any exact match on ema	ils (work email, email, per	sonal email, or alternate email).
Object	Contact		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	Alert 🗹 Report
Action On Edit	Allow	Operations On Edit	Alert 🗸 Report
Alert Text			
Active	\checkmark		
Matching Rule	Size Your Trail Contact Matching Rule Signature Mapped	Matching Criteria	<pre>(Contact: FirstName FUZY:FIRSTNAME MatchBlank = FALSE) AND (Contact: LastName ExACT MatchBlank = FALSE) AND ((Contact: Email EXACT MatchBlank = FALSE) OR (Contact: AlternateEmail EXACT MatchBlank = FALSE) OR (Contact: HomeEmail EXACT MatchBlank = FALSE) OR (Contact: HomeEmail EXACT MatchBlank = FALSE)</pre>
Conditions			
Created By	Jessica Macpherson, 27/11/2023, 12:03 pm Edit Delete Clone Deactivate	Modified By	Jessica Macpherson, 27/11/2023, 12:04 pm

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.

Flow Definitions All Flows					
Flow Label 1	Process Type	✓ Active			
Book Appointment from Invitation	Salesforce Schedu	uler Flow			
Cancel Item Flow	Screen Flow				
Change Case Owner to Incident Owner	Screen Flow				
Close Change Request & Related Issues	Screen Flow				
Create a Case	Screen Flow	\checkmark			
Create Order Summary Flow	Autolaunched Flov	× 🗌			
Create Process Exception Flow	Autolaunched Flov	• 🗆			
Discount Flow	Screen Flow				
Duplicate Contact Merge	Screen Flow	Image: A start of the start			
Even Exchange Flow	Screen Flow				

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

Components Fields	
Q Search	Flow Component: Duplicate Contact Merge
✓ Standard (38)	This is a placeholder. Flows don't run in the canvas.
Accordion	
🔗 Action Launcher	Activity Chatter
E Actions & Recommendations	
E Activities	
Chatter	
👩 Chatter Feed	
Ghatter Publisher	• •
CRM Analytics Collection	
CRM Analytics Dashboard	
R Customer Insights	Filters: All time • All activities • All types 🕸
Dynamic Related List - Single	Refresh • Expand All • View All
Einstein Next Best Action	
Flow	V Upcoming & Overdue

4. Choose "Duplicate Contact Merge" from the Flow drop-down menu.

	Analyze 🛕 Activation Save
	Page > Flow
+ Follow Edit New Donation New Affiliation -	Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.
	*Flow
	Duplicate Contact Merge X
Flow Component:	Edit Flow in Flow Builder
This is a placeholder. Flows don't run in the canvas.	Layout 0
	One Column X
Activity Chatter	Optionally, enter values for these flow variables. Only variables that allow input access are supported. recordId Pass all field values from the record into this flow variable.
	 Set Component Visibility
Filters: All time • All activities • All types 🕸 Refresh • Expand All • View All	Filters + Add Filter

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

 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.

Preferred Phone 0	Preferred Email	÷
Home	Work	*
Home Phone	Personal Email 🚯	
Mobile	Work Email	
	amax@gmail.com	
Work Phone 🚯	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.

-	Click H	P lere to merge	otential Dup e contacts. (P	plicate I Please co	Found Intact Sale	esforce ad	min)	
Activity	С	hatter						
1	•				•			
				Filters:	All time • .	All activitie	es • All types	¢
					R	efresh • E	xpand All • Vi	ew A
	ning & Ov	erdue						

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.

CONTACT MERGE Merge Duplicate Contact Records	
See all duplicate Contacts found using matching rules. Tell Me More	See Duplicate Contacts
Search for specific Contacts to see if they have duplicates	Search Contacts

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:

- 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
- 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

	94 YM CH QU		Page > Flow
Contact Janet Batey 👗		+ Follow Edit New Donation New Gift In-Kind V	Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.
Email Phone Prin jbatey@live.com.au +61401181153 Bay	nary Affiliation Account Level Soft Credit Total Co yley House Gold P	ntact Flag OK to Contact	• Flow
			Duplicate Contact Merge Q
Details Related Quick Links O)pportunities Services Mailchimp Humanitix	Flow Component: Duplicate Contact Merge	Edit Flow in Flow Builder
✓ Contact Details		This is a placeholder. Flows don't run in the canvas.	One Column Q
Name Janet Batev	Account Name Janet Batev Family		Optionally, enter values for these flow variables. Only variables that allow input access are supported.
Known As	Sustainer ()	contacts to avoid empty Households.	recordid
			Pass all field values from the record into this
Primary Affiliation	Most Recent Campaign		flow variable.
Title	Birthdate	Contact Types (3+)	
Director of Advocacy	24/7/1948		 Set Component Visibility
✓ Description Information		Staff Member Sub Category: Nepean RS (Accom Admin) Start Date: 29/2/2016	Filters + Add Filter
Description		End Date:	
Email sign up on Bayley Arts website		Donors	
✓ Contact Information		Sub Category: General Donors Start Date:	
1		End Date:	

More information

Manage Duplicate Records

Manage Duplicate Contacts and Accounts