



# 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.



**Install Duplicate NPSP Merge**  
By Soletrader

**What if existing component names conflict with ones in this package?**

Do not install.  
 Rename conflicting components in package.

**Install for Admins Only**

**Install for All Users**

**Install for Specific Profiles...**

**Install**

App Name	Publisher	Version Name	Version Number
Duplicate NPSP Merge	Soletrader	1.4	1.4

## 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

**Matching Criteria**

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	
<input type="text" value="First Name"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="Last Name"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="Email"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="Alternate Email"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="Personal Email"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	

[Add 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)

**Matching Criteria**

Tell the rule which fields to compare and how.

Field	Matching Method <i>i</i>	Match Blank Fields <i>i</i>
1. First Name	Fuzzy: First Name	<input type="checkbox"/>
2. Last Name	Exact	<input type="checkbox"/>
3. Email	Exact	<input type="checkbox"/>
4. Alternate Email	Exact	<input type="checkbox"/>
5. Personal Email	Exact	<input type="checkbox"/>
6. Personal Email	Exact	<input type="checkbox"/>

[Add Row](#) [Remove Row](#)

[Clear Filter Logic](#)

Filter Logic:  [Tips](#) *?*

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 Contact 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 emails (work email, email, personal email, or alternate email).

Object: Contact

Record-Level Security: Enforce sharing rules

Action On Create: Allow

Action On Edit: Allow

Alert Text: Active

Matching Rule:  [Blaze Your Trail Contact Matching Rule](#)  [Mapped](#)

Matching Criteria: (Contact: FirstName FUZZY:FIRST NAME 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))

Operations On Create:  Alert  Report

Operations On Edit:  Alert  Report

Created By: [Jessica Macpherson](#), 27/11/2023, 12:03 pm Modified By: [Jessica Macpherson](#), 27/11/2023, 12:04 pm

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

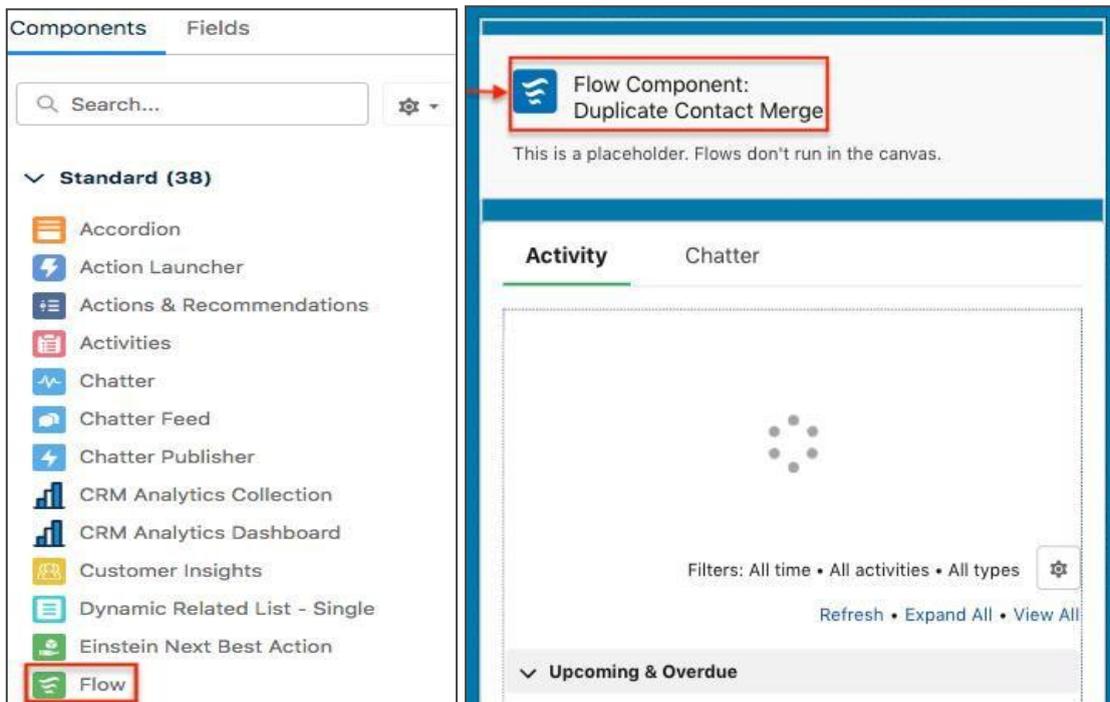
5. Keep all other fields as they are and check Report on both duplicate record creation and edition, then click on Save and Activate the duplicate rule.

# Setting up the Flow

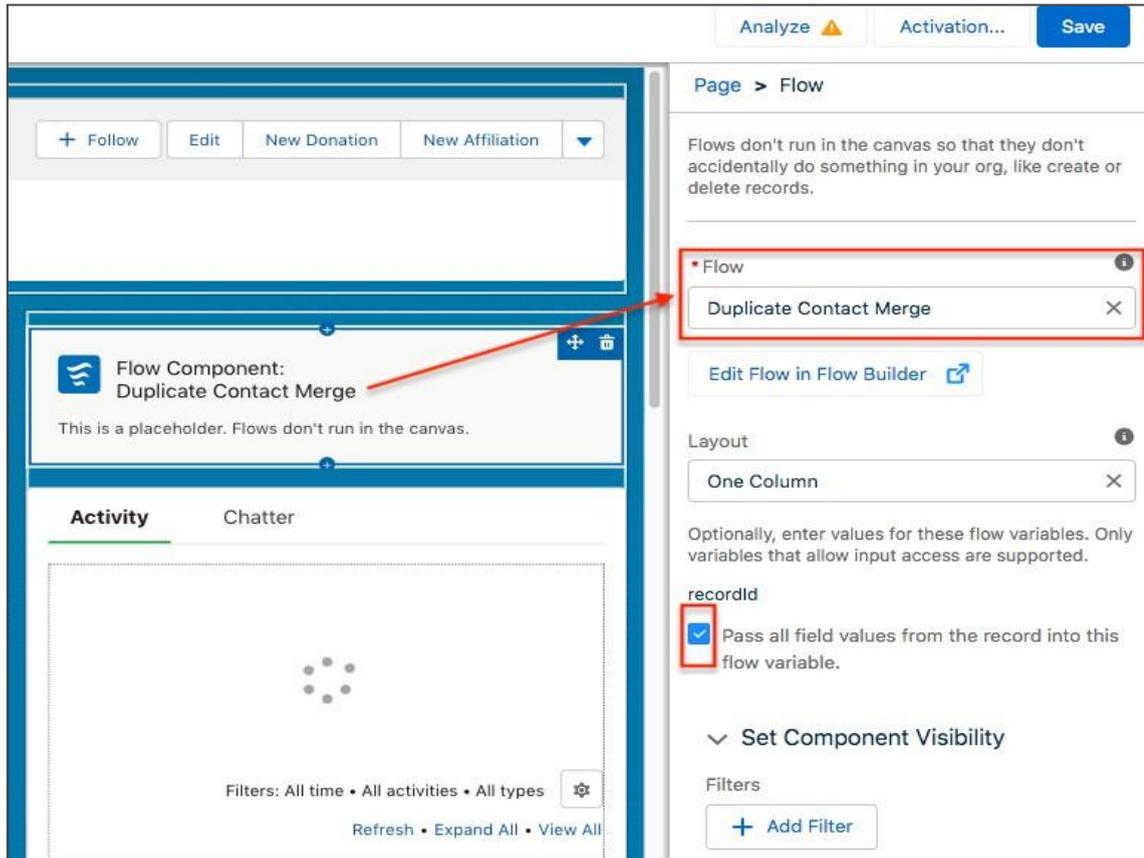
1. Under Flows, search for the flow labelled Duplicate Contact Merge, then activate it.

Flow Label ↑	Process Type	Active
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>
Cancel Item Flow	Screen Flow	<input type="checkbox"/>
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>
Create a Case	Screen Flow	<input checked="" type="checkbox"/>
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>
Discount Flow	Screen Flow	<input type="checkbox"/>
<b>Duplicate Contact Merge</b>	Screen Flow	<input checked="" type="checkbox"/>
Even Exchange Flow	Screen Flow	<input type="checkbox"/>

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

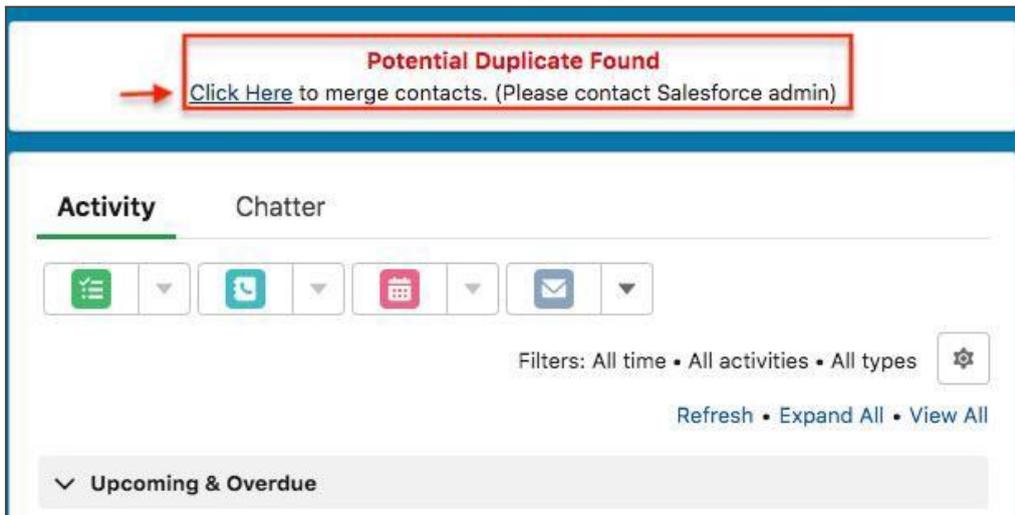
The Permission Set is called Duplicate Management. (You might want to add this to your All Users Permission Set Group).

## 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.

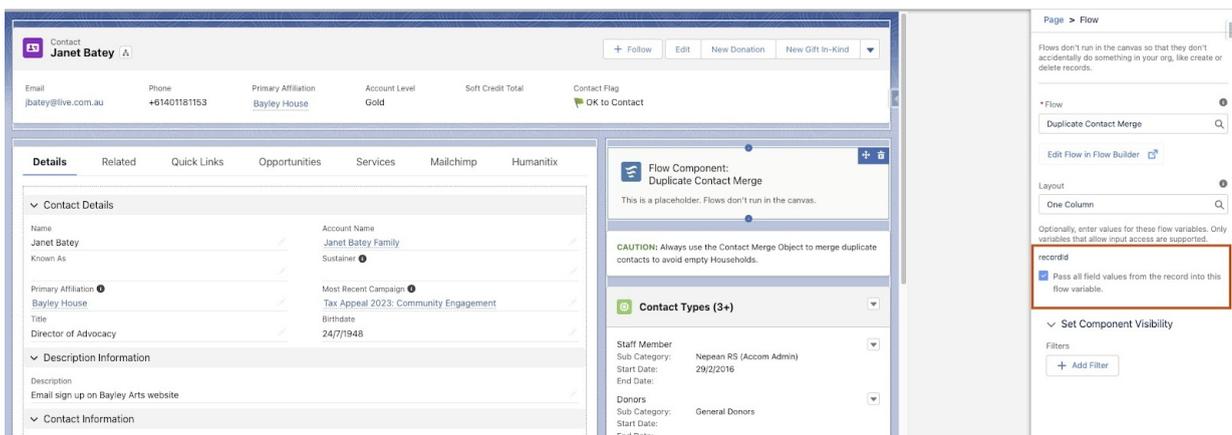
6. Please note that this action is irreversible, so if you have any doubts, contact your Salesforce Administrator at your organisation.

This Duplicate NPSP Merge package offers a seamless and efficient solution for managing duplicate contacts. We hope this flow 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