

FEATURES & SPECIFICATIONS	SALESFORCE · SUMMER '19 OPEN BETA	INTERNET CREATIONS
	Merge Cases	Case Merge Premium
Duplicate Case Detection	✗ Not Available	✓ Lightning component & Visualforce indicator to identify potential duplicate cases; Configurable with logic formula, search on any case field with advanced date/time proximity detection
Find Duplicate Cases by Text (Fields)	✓ Case Number, Subject	✓+ Case Number, Subject, Contact, Account
Number of Cases to Merge in Single Operation	✓ Select up to 3 cases	✓+ Select up to 9 cases (configurable)
Select Fields from Duplicate Cases	✓ Select existing values only	✗ Not Available (Future Roadmap)
Related Objects Supported	✓ 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 configurable 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 are deleted to the Recycle Bin. Restoring 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.
Notification to Owners of Merged Case	✗ Not Available	✓ Configurable using local automation (Workflow rules, Process Builder, etc.)
Cloning of Contact Roles & Case Team Members	✓ Contact Roles Only	✓+ Contact Roles and Case Team Members
Options for Removing Merged Case Data	✗ None Available	✓ Removal of duplicate case data can be performed according to admin preferences and scheduled with local automation to meet audit or compliance requirements.
Supports Lightning and/or Classic	⚠ Lightning Only	✓ Lightning & Classic

FREQUENTLY ASKED QUESTIONS	SALESFORCE • SUMMER '19 OPEN BETA Merge Cases	INTERNET CREATIONS Case Merge Premium
What permissions do you need to merge cases?	Merging cases requires the Delete permission (CRUD) on the case object. The “Merge Cases” button will be visible on a list view or page layout but will show an error when a user without delete permission tries to merge cases.	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 assigning the “Case Merge End User” permission set.
What happens to an email reply to a merged case?	Sending email with the Thread ID of a case that no longer exists, even if it is in the Recycle Bin, will create a new case.	Replies to any of the merged cases will automatically relate to the master case. Your customer doesn't have to know which is the right case and can simply reply to the most convenient one.
What happens to the Case Description (and other field values) when cases are merged?	You can select which of the description fields to keep from the cases during the merge. Once the cases are merged, the description field (and all other fields) from the merged cases are no longer available for reference unless they are restored from the Recycle Bin.	The descriptions from the merged cases can either be created as Case Comments (Public/Private), created as a Chatter Post on the case, or appended to the Description field. Additional fields can be referenced from the merged cases from the Related Cases list.
In what situations will this work well?	<ul style="list-style-type: none"> <li>• Small teams (&lt;5 users) with low case volume and high trust (team already has delete permissions on cases).</li> <li>• Administrative data clean-up after support cases are closed.</li> <li>• Support cases through a phone-channel (or similar) where no inbound or outbound messages are created during customer interactions.</li> </ul>	<ul style="list-style-type: none"> <li>• Support teams with sharing rules, validation rules, or other standard profile restrictions for handling data.</li> <li>• Support cases for channels where inbound and outbound messages are responded to by the customer.</li> <li>• Detection of duplicate cases in scenarios where multiple contacts from the same account open cases for the same issue.</li> </ul>

A better experience for your agents means better service for your customers.

Learn more about Case Merge Premium by visiting <http://ic.force.com/casemergepremium>



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