

# Contact Routing

Merge Dupe Contact Node Guide



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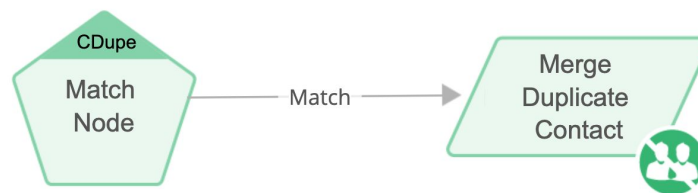
## Overview

The Merge Dupe Contact Node is designed to merge the routed Contact with an existing duplicate Contact in your Salesforce database. While Lead Router also utilizes a Merge Dupe Contact Node for Lead-to-Contact Dupe merges, this guide is focused on the version used in Contact Router to merge Contact-to-Contact Duplicates.

If you want information on the version used in Lead Router, please see the guide for the Merge Dupe Contact Node in the Lead Router:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360041790634-Routing-Merge-Dupe-Contact-Node-Guide>

Before using a Merge Dupe Contact Node, there must be a duplicate identified previously in the router flow using the Duplicate Contact Match (CDupe) Node.



**Example:** Tim is the LeanData administrator for Lighthouse Development. One of the requirements for the Contact Router flow is to be able identify when the routed Contact is a duplicate of an existing Contact record. Tim adds a Duplicate Contact Match (CDupe) Node to find any existing duplicate Contacts and then adds a Merge Dupe Contact Node to merge the Contact into the existing Contact.

**Please Note:** The routed Contact record is the record that is being merged into the existing duplicate Contact. The existing duplicate Contact record will be considered the master record.

## Merge Duplicate Settings

The Merge Dupe Contact Node includes a link to manage your merging preferences on the Merge Duplicate Settings page. We recommend confirming your preferences before adding merging to your router flow.

For more information on merging duplicates please see our Merging Duplicates Guide:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360019986774>

## Customization

You have a number of options to configure the node:

- Node Name
- Description
- Email Notifications
- Advanced Settings

### Action - Merge Duplicate Contact

**Node Name**

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**Description** >

Note: Current **merge settings** prevent Contacts from different Accounts to be merged.

**Email Notifications**

Success Notifications

Failure Notifications

**Advanced Settings** ▾

Specify next node, if any, when a condition below is met.

Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	END OF FLOW ▾

### Node Name

By default, the Node Name is set to Merge Dupe Contact. You can change this label to anything you need. We strongly recommend giving this node a meaningful name.

### Description

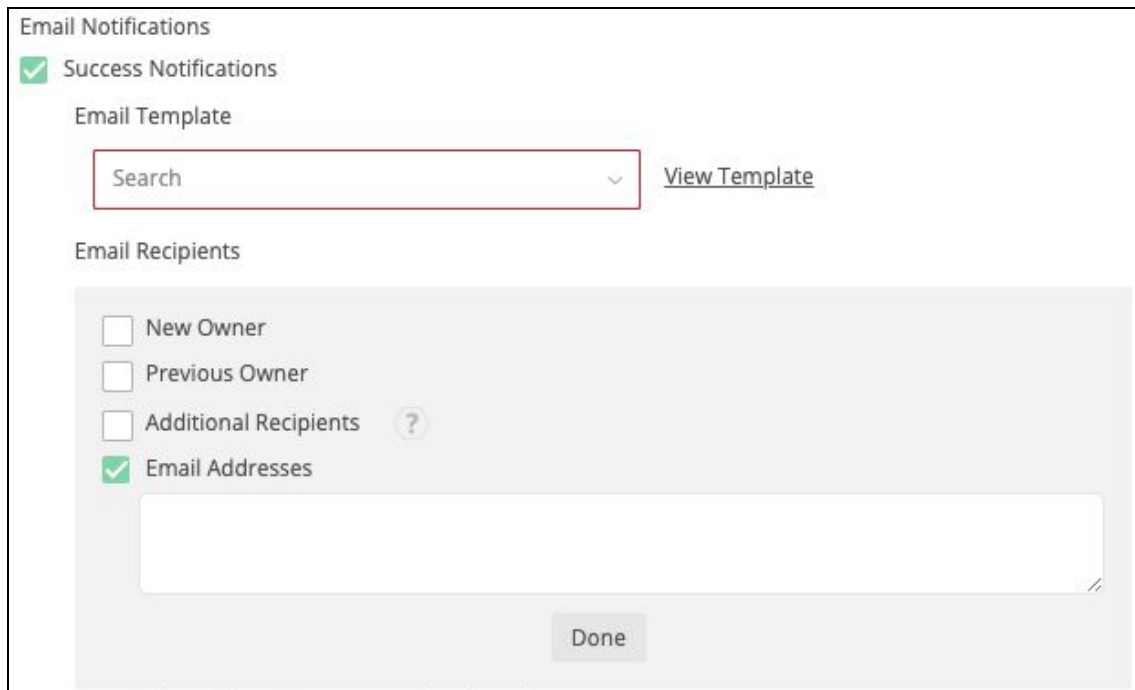
This field is not required but we recommend adding a description to document any

customizations made to the node. If someone else needs to take over the management of the flow, the description will help them to understand the goal of the customizations.

### Email Notifications

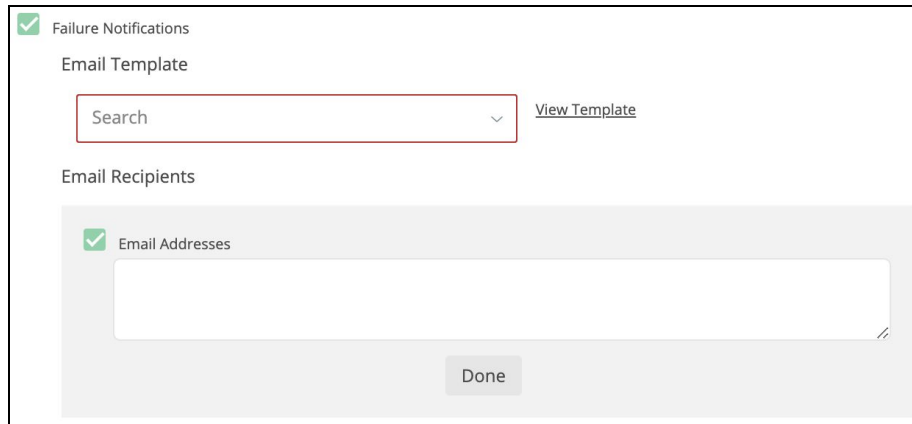
The email notifications allow you to configure how the Merge Dupe Contact Node can notify Users of either a successful merge or a failure. You can select an email template and list of recipients.

- **Success Notifications:** Use these settings to select an email template and Users to send a message to after a successful merge of the Contact record.
  - Select the desired Salesforce email template from the drop-down menu.
  - Use the View Template link to open the template in a new tab.
  - Use the Add Recipients section to pick the desired recipients of the notification.
    - **New Owner** - This option will send the notification to the new owner of record.
    - **Previous Owner** - This option will send the notification to the previous owner of the record.
    - **Email Addresses** - This option will let you enter additional email addresses separated by a comma.
    - **Additional Recipients** - This option lets you send the notification to a User on the Contact, on a matched Object, or on a created Object.



The screenshot shows the 'Email Notifications' configuration panel. At the top, 'Success Notifications' is checked. Below this, the 'Email Template' section features a search dropdown menu and a 'View Template' link. The 'Email Recipients' section contains four options: 'New Owner', 'Previous Owner', 'Additional Recipients' (with a help icon), and 'Email Addresses' (which is checked). A text input field is provided for the 'Email Addresses' option, and a 'Done' button is located at the bottom of the panel.

- **Failure Notifications:** Use these settings to select an email template and Users to send a message when the merge action is unsuccessful.
  - Select the desired template from the drop-down menu.
  - Use the View Template link to open the template in a new tab.
  - Use the Email Recipients section to pick the desired recipients of the notification.
    - **Email Addresses** - This option will let you enter additional email addresses separated by a comma.



The screenshot shows a configuration panel for 'Failure Notifications'. At the top, there is a checked checkbox labeled 'Failure Notifications'. Below it, the 'Email Template' section features a search input field with a red border and a 'View Template' link. The 'Email Recipients' section contains a checked checkbox for 'Email Addresses' and a large text area for entering email addresses, with a 'Done' button at the bottom right.

## Advanced Settings

The Advanced Settings section gives you fallback options for the routed records.

- **Invalid/Inactive User** - When the node tries to merge the routed Contact into an existing Contact that is owned by either an Invalid or an Inactive user, the merge will fail and the Contact will be routed through the Invalid/Inactive User node edge.



The screenshot shows the 'Advanced Settings' section with a dropdown arrow. Below the header, it says 'Specify next node, if any, when a condition below is met.' A table with three columns: 'Condition', 'Label', and 'Target' is displayed. The first row contains 'Invalid/Inactive User' in the Condition column, 'Invalid/Inactive User' in the Label column, and 'END OF FLOW' in the Target column with a dropdown arrow.

Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	END OF FLOW

## Things to Know & Best Practices

- You should always test your Merge Duplicates settings thoroughly before launching in production. You can do this by running a 1x routing job in a sandbox instance and reviewing the results in the LeanData logs. **Merge actions cannot be undone.**
- Other duplicate detecting apps may interfere with LeanData Merge Duplicates, including native Salesforce duplicate detection. If you are using LeanData Merge Duplicates feature you should beware of or disable other duplicate management apps to avoid unexpected behavior.

## Summary

The Merge Duplicate Contact Node is used to merge routed Contact in Contact Router into the existing duplicate Contact record using your merging preferences. Before using a Merge Dupe Contact Node, there must be a duplicate identified previously in the router flow using the Duplicate Contact (CDupeMatch Node).

For more information on merging duplicates please see our Merging Duplicates Guide:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360019986774>

For more information on Contact Router, please see our Contact Router Guide:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360018921854-Routing-Contact-Router-Guide>