ADMIN, DATA AND PLATFORM · AGENTFORCE EMPLOYEE AGENT

Duplicate Detector & Merge Assistant



Scans Leads, Contacts and Accounts each week, explains every likely duplicate pair in Slack.

The Duplicate Detector & Merge Assistant scans Leads, Contacts and Accounts each week, explains every likely duplicate pair in Slack, and merges a pair only after a member of the Sales Ops Approvers group approves it. Every merge writes an audit row.

3	5	10	1	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Duplicate review
Explain one pair and recommend a survivor.

Merge execution
Apply an approved merge.

Duplicate scan request
Run an on demand scan for one object.

THE RULES IT FOLLOWS

- If both records have open Opportunities with different owners, escalate to the sales ops lead and give no survivor recommendation.
- **Only members of the Sales Ops Approvers group can approve**
  Others are told who can.
- **Approvals expire after 7 days**
  Scores below 70 escalate to a human.
- Respect field level security and never print fields the user cannot read.

NOT INCLUDED

- Cross object merges such as Lead into Contact.
- Merging more than three records in one call.
- Merges without approval.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack

RUNS ON
Any Cloud with active Matching Rules and Duplicate Rules, Agentforce, Slack integration

BEST FOR
Sales operations leads, Salesforce admins, account owners, marketing operations and data stewards

INDUSTRIES
Cross-industry · B2B sales · Financial services · Healthcare · Nonprofits · Professional services · Software companies · Distribution

WHAT YOU NEED

- ✓ Agentforce and the Slack integration enabled in the org.
- ✓ Active Duplicate Rules on Lead, Contact and Account.
- ✓ The names of the approvers.

Coming soon. Designed in full and built to the same standard as the live agents.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER