SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · ADMIN, DATA AND PLATFORM · NOVEMBER 2026

Duplicate Detector & Merge Assistant

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



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Duplicate Detector & Merge Assistant takes off your team.

WHAT IT DOES

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.



WHO USES IT Sales operations leads, Salesforce admins, account owners, marketing operations and data stewards

WHAT IT DOES

Everything the Duplicate Detector & Merge Assistant handles.

01

Duplicate review

Explain one pair and recommend a survivor.

02

Merge execution

Apply an approved merge.

03

Duplicate scan request

Run an on demand scan for one object.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 If both records have open Opportunities with different owners, escalate to the sales ops lead and give no survivor recommendation.

02 **Only members of the Sales Ops Approvers group can approve**
Others are told who can.

03 **Approvals expire after 7 days**
Scores below 70 escalate to a human.

04 Respect field level security and never print fields the user cannot read.

TESTED BY REPLAY Scripted conversations, including the awkward ones, are replayed against the records they should create before go-live and before every change.

DELIVERY

Scoped with you, built in your org.

1

Scope with you

The actions it needs, the rules it follows and who approves what, in a fixed plan.

2

Build in your org

The agent, its Apex actions, objects and screens, as deployable Salesforce metadata.

3

Test by replay

Your own conversations replayed against your records before go-live.

4

Go live and hand over

A runbook, the test set and a walkthrough, so your team owns it from day one.

Deployable source
The agent, actions, objects and screens as Salesforce metadata.

Solution design
A Solution Design Document with UML for your architects.

Test suite
Apex tests plus replayed conversations, run before every release.

Least-privilege access
Permission sets for the agent user and for your staff.

Runbook and handover
How to run it, change its rules and roll back.

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

NEXT STEP

Get the Duplicate Detector & Merge Assistant scoped for your org.

A free 60-minute review with an architect: what it would do in your org, what it needs and how long it takes.

EMAIL

contact@synconai.com

THE AGENT

synconai.com/ai-agents/duplicate-detector-and-merge-assistant

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER