



**TGH**

Making Integrations Simpler



# Merge operation in SFDC

**Author**  
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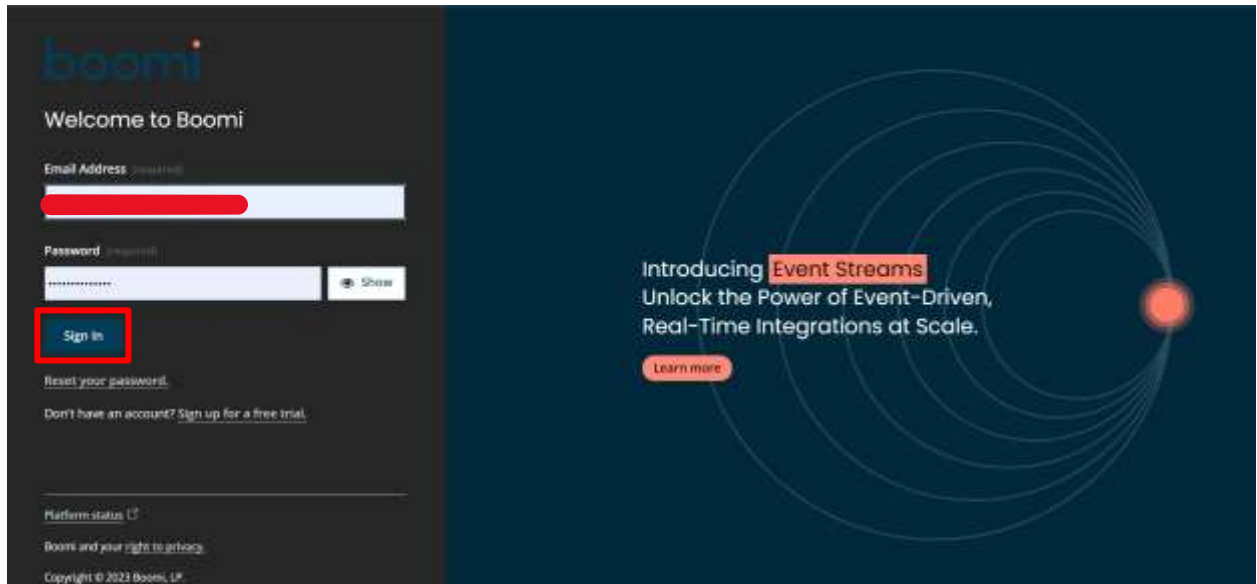


## What is the Merge operation in Salesforce?

In Salesforce, a "merge operation" typically refers to the process of merging duplicate records. This is often necessary when you have multiple records in Salesforce that represent the same real-world entity (e.g., two contact records for the same person).

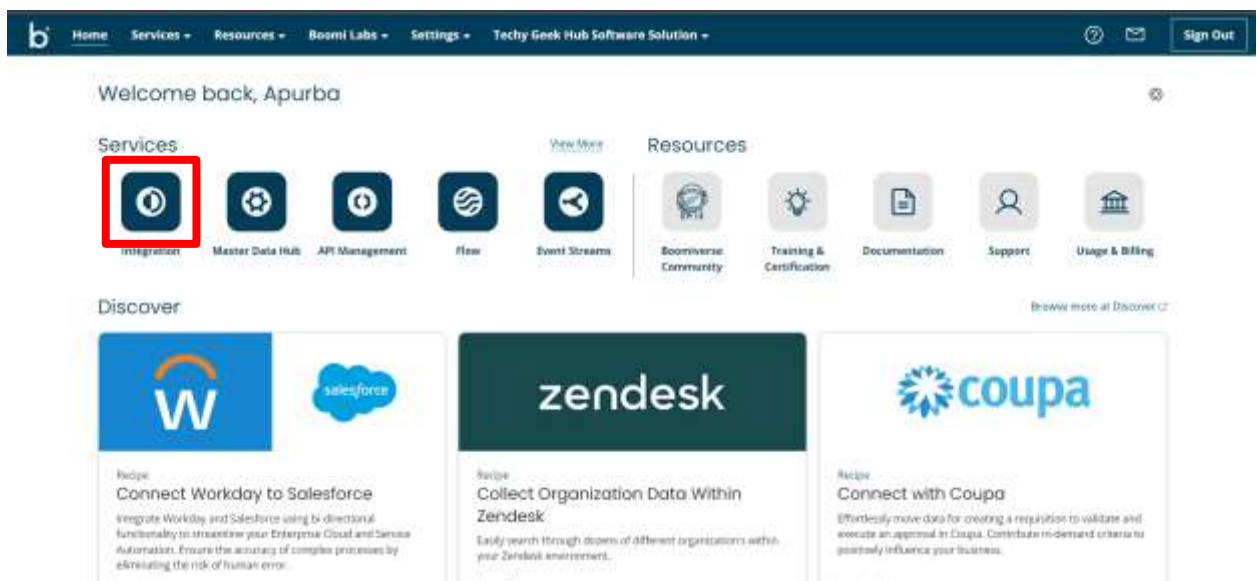
Let's get into the Boomi platform and see how can we perform the Merge operation.

Step 1. Go to [platform.boomi.com](https://platform.boomi.com)



Step 2. Login by giving your valid credentials (Username and Password).

Step 3. Home page will be displayed, now click on 'Integration'.

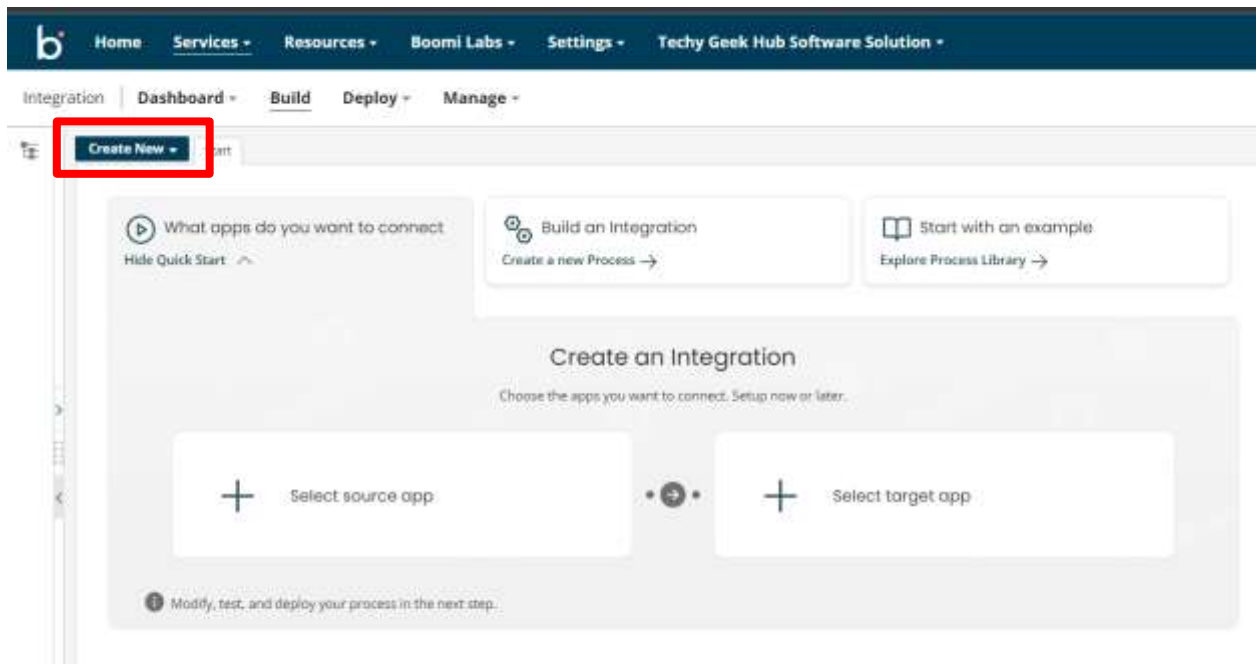


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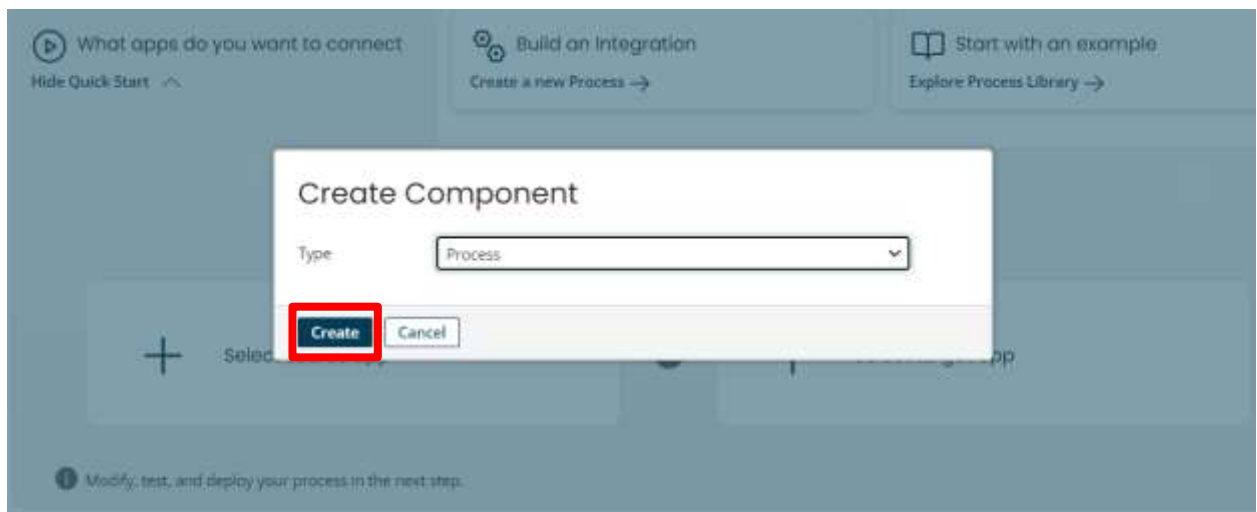
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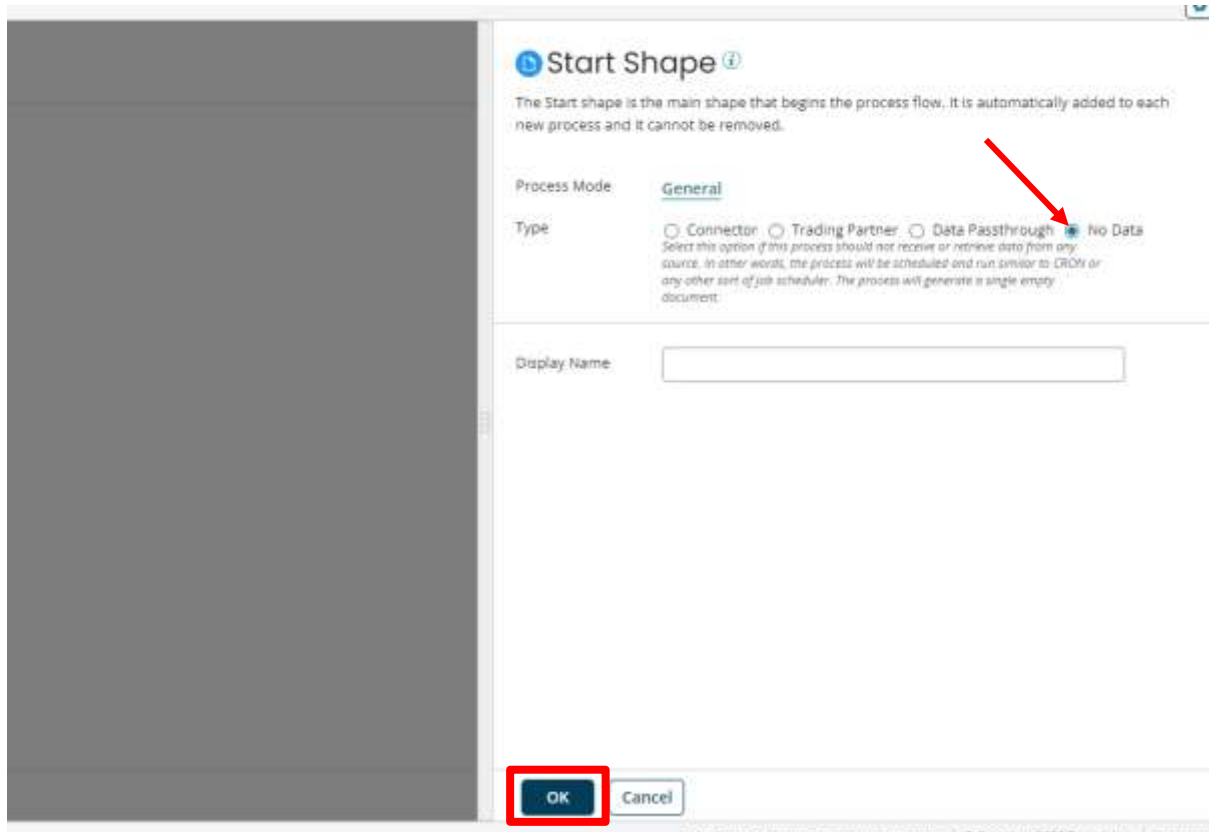
Step 4. Click on 'Create New' button



Step 5. Select 'Process' and click on 'Create'.

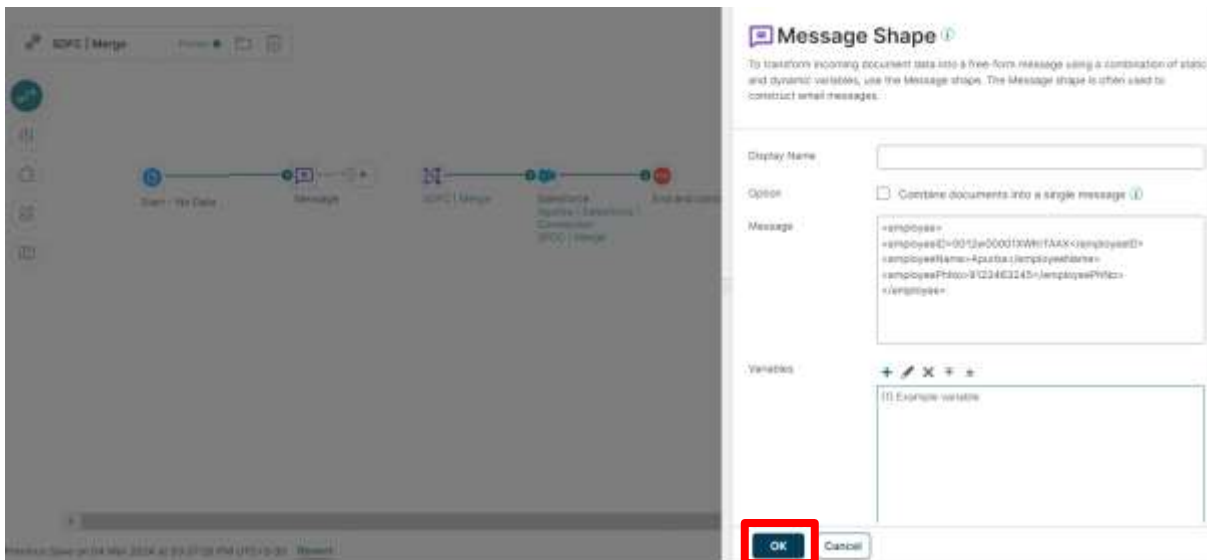


Step 6. Click on “No Data” option and click on “OK”.

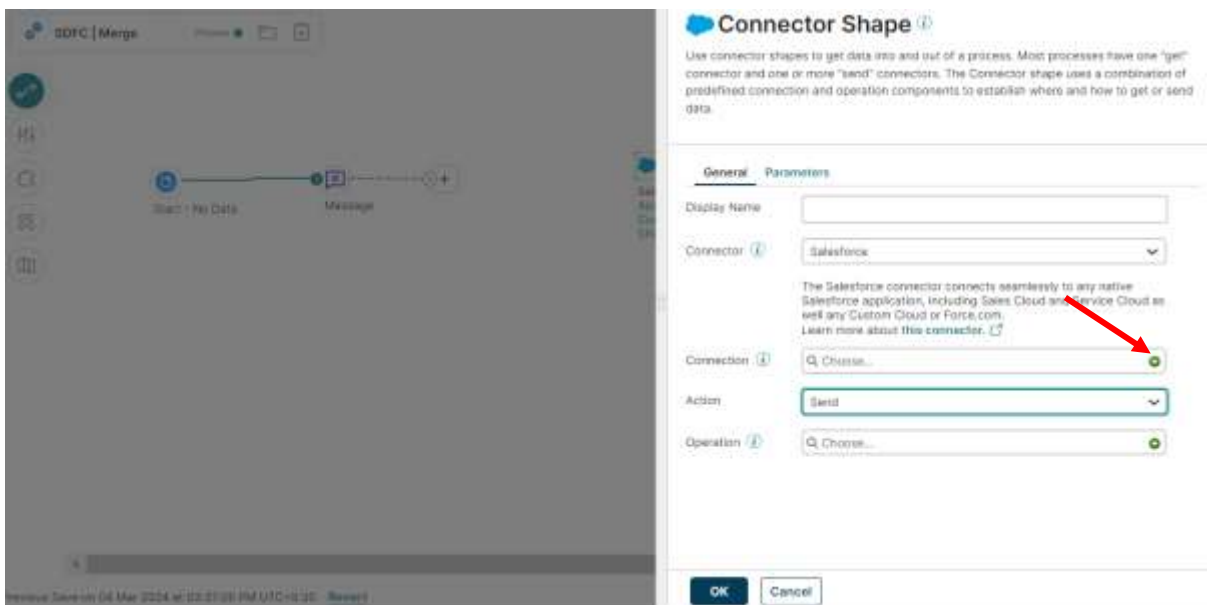


Step 7. Drag and drop one Message shape and put the sample xml data and Click OK.

```
<employee>  
<employeeID>0012w00001XWKrTAAX</employeeID>  
<employeeName>Apurba</employeeName>  
<employeePhNo>9123463245</employeePhNo>  
</employee>
```



Step 8. Drag and drop one Salesforce connector set the action as Send and click on + to create the Connection.



Step 9. Give the User Name and Password.

*Note:* Password would be your SFDC password concatenate with the API token.

**Connection**

URL

User Name

Password

Version

Maximum Concurrent Connections

Step 10. Now configure the operation. Click on Import Operation.

New Salesforce Connector Operation Salesforce Operations

add or update the details below:

**Import Operation**

Options Archiving Tracking Caching

Connector Action

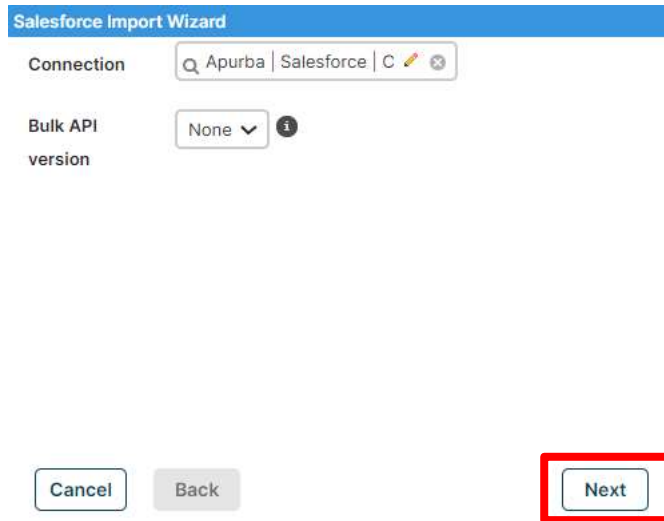
Object Action

Request Profile

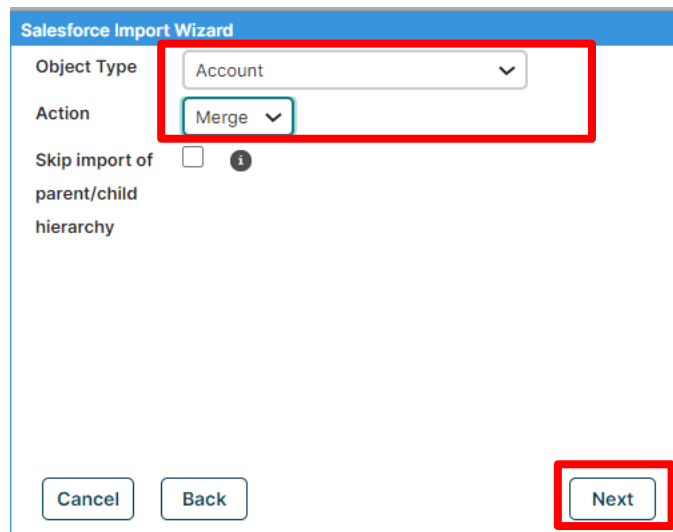
Return Application Error Responses

Batch Count

Step 11. Click on Next.



Step 12. Select the Object type in which object you want to perform the operation.  
Select the Action as Merge. Click on Next.



Step. 13. Click on Finish.

**Salesforce Import Wizard**

<b>Operation Loaded</b>	
Object Type	Account
Object Action	merge
Request Profile	SF_Account_MERGE_Request

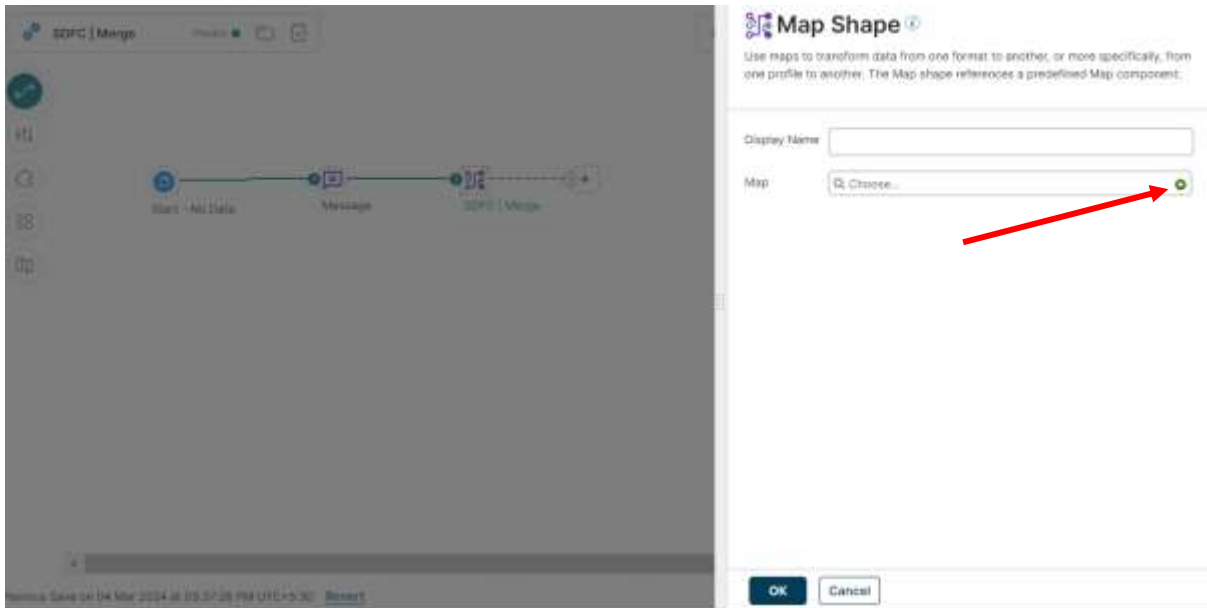
Step 14. Now Save and Close.

**Options** Archiving Tracking Caching

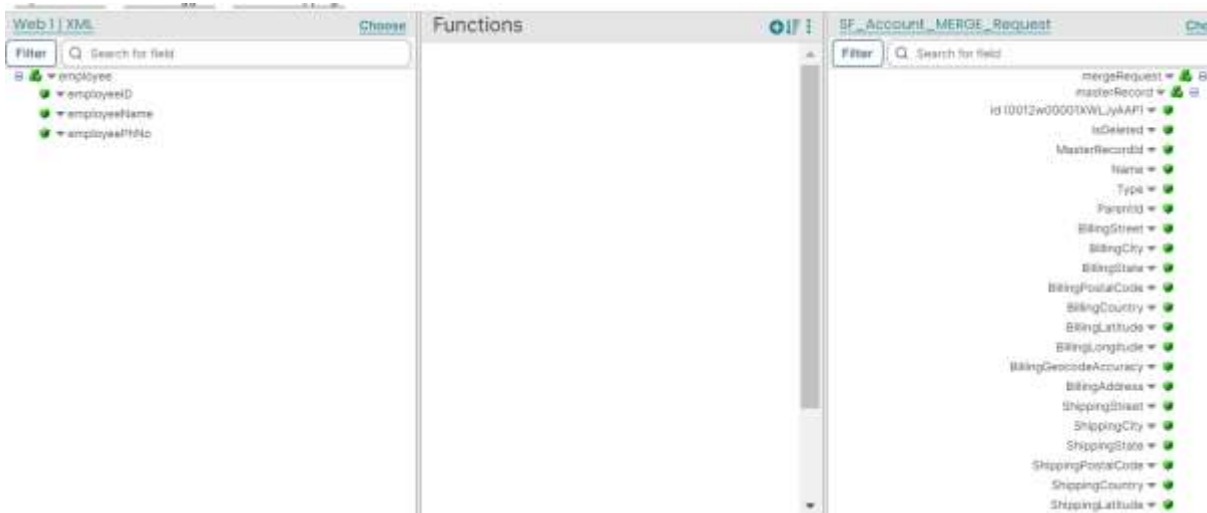
Connector Action	Send
Object	Account
Action	merge
Request Profile	SF_Account_MERGE_Rv ✓
Return Application Error Responses	<input checked="" type="checkbox"/> ⓘ
Bulk API version	None
Batch Count	200



Step 15. Drag nad drop a Map shape, click on + icon to create a Map component.



Step 16. In Source Add the profile for the data that you have given in the message shape (Step 7) at the target choose the requested profile that you have imported in the SFDC connector operation.



Step 17. In Master Record Id you need to map the master record ID (which record you need to exist).

SF\_Account\_MERGE\_Request XML Profile 📁 📅

Data ElementsTypesOptions

- mergeRequest
- masterRecord
- Id**
- IsDeleted
- MasterRecordId
- Name
- Type
- ParentId
- BillingStreet
- BillingCity
- BillingState
- BillingPostalCode
- BillingCountry
- BillingLatitude
- BillingLongitude
- BillingGeocodeAccuracy
- BillingAddress
- ShippingStreet
- ShippingCity
- ShippingState
- ShippingPostalCode
- ShippingCountry
- ShippingLatitude
- ShippingLongitude
- ShippingGeocodeAccuracy

### Element Details

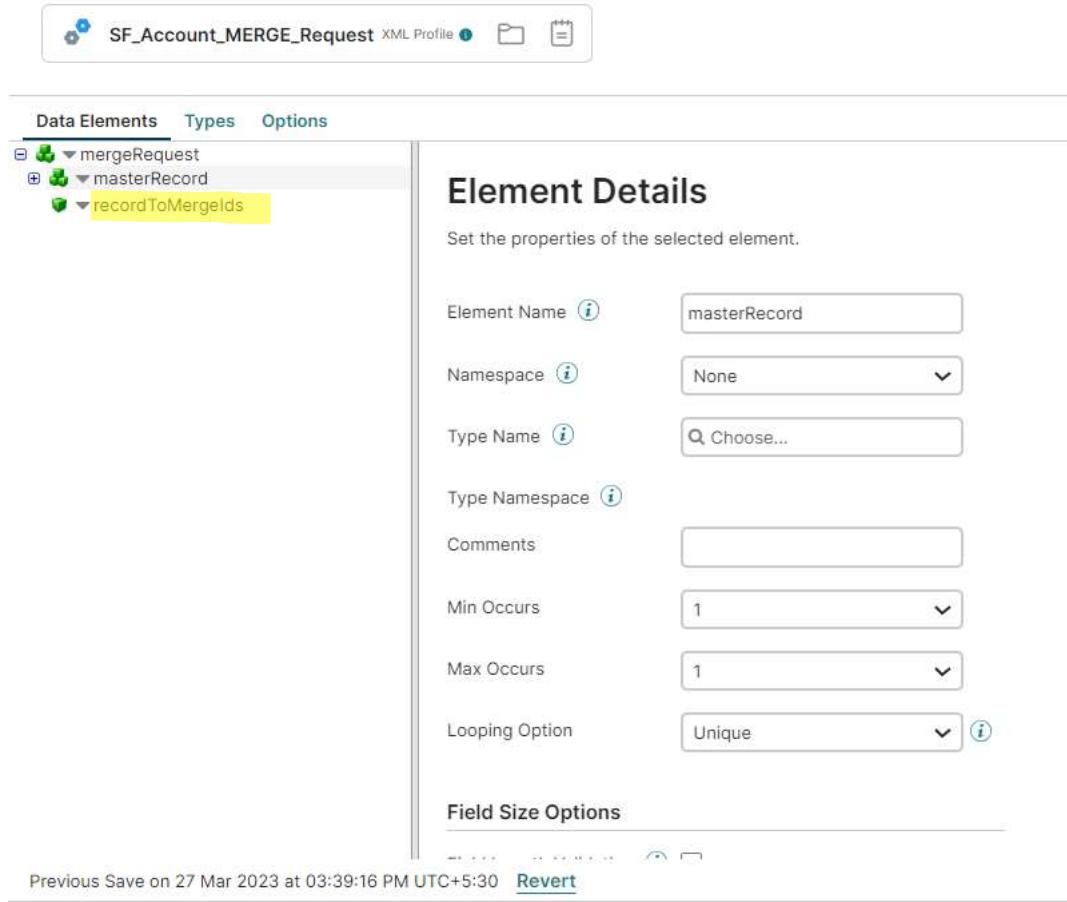
Set the properties of the selected element.

Element Name <span style="font-size: 0.8em;">(i)</span>	<input type="text" value="masterRecord"/>
Namespace <span style="font-size: 0.8em;">(i)</span>	<input type="text" value="None"/>
Type Name <span style="font-size: 0.8em;">(i)</span>	<input type="text" value="Choose..."/>
Type Namespace <span style="font-size: 0.8em;">(i)</span>	<input type="text"/>
Comments	<input type="text"/>
Min Occurs	<input type="text" value="1"/>
Max Occurs	<input type="text" value="1"/>
Looping Option	<input type="text" value="Unique"/> <span style="font-size: 0.8em;">(i)</span>

#### Field Size Options

............

Step 18. In recordToMergeIds field map the Id which needs to be get merged with the Master record.

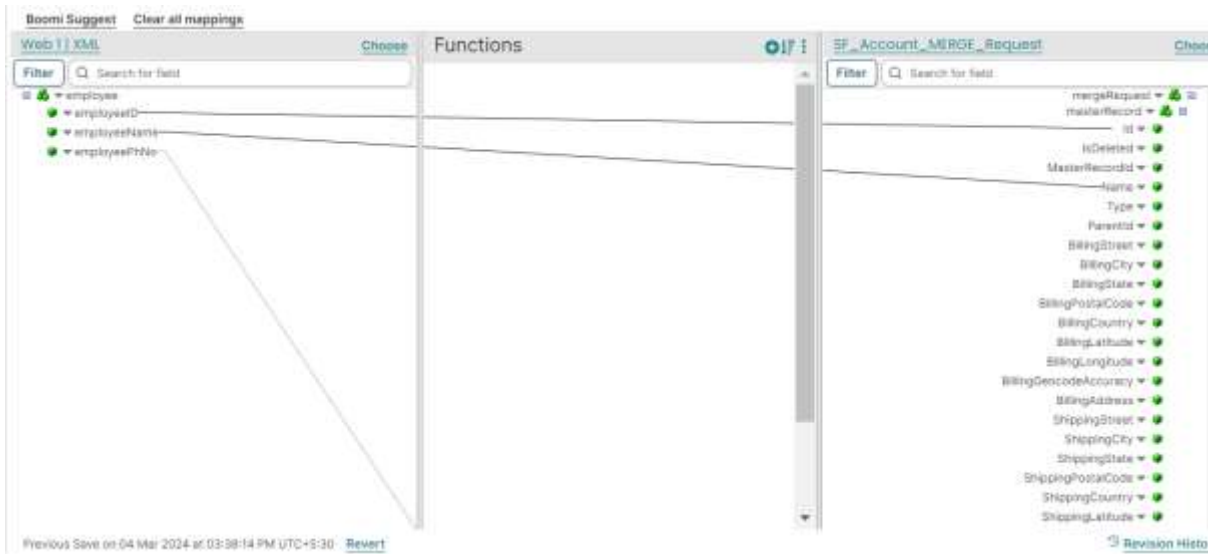


The screenshot shows the configuration for the 'recordToMergeIds' element within the 'SF\_Account\_MERGE\_Request' profile. The 'Element Details' section is expanded, showing the following settings:

- Element Name: masterRecord
- Namespace: None
- Type Name: Choose...
- Type Namespace: (empty)
- Comments: (empty)
- Min Occurs: 1
- Max Occurs: 1
- Looping Option: Unique

Below the details, there is a 'Field Size Options' section which is currently collapsed. At the bottom, it indicates the last save was on 27 Mar 2023 at 03:39:16 PM UTC+5:30, with a 'Revert' button.

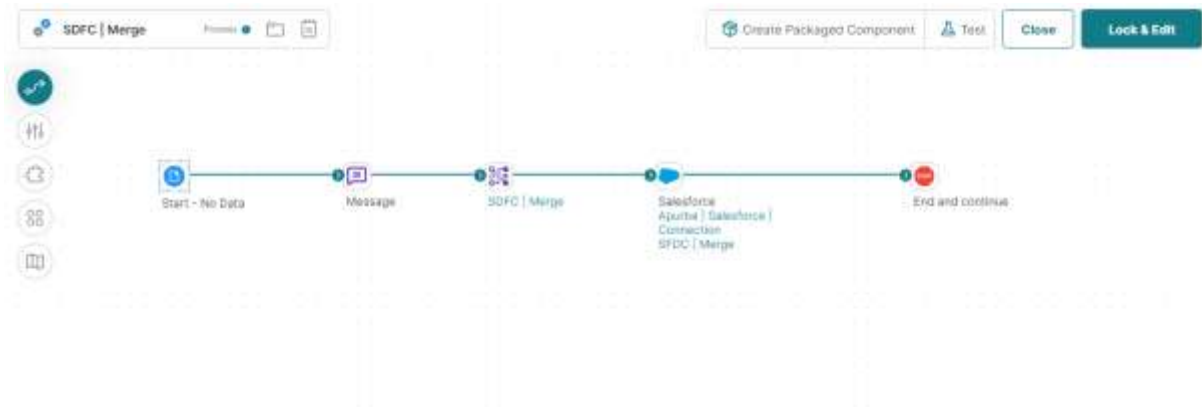
Step 19. Map the fields. In my case I have taken the Master Id from the source profile and given the recordToMergeIds from the default value. You can map it from profile as well.



The screenshot displays the Boomi mapping interface. On the left, the 'Web 1 | XML' source profile is expanded to show fields: 'employee', 'employeeId', 'employeeName', and 'employeePhone'. On the right, the 'SF\_Account\_MERGE\_Request' target profile is expanded to show fields like 'mergeRequest', 'masterRecord', 'name', 'type', 'parentId', 'billingStreet', 'billingCity', 'billingState', 'billingPostalCode', 'billingCountry', 'billingLatitude', 'billingLongitude', 'billingGeocodeAgency', 'billingAddress', 'shippingStreet', 'shippingCity', 'shippingState', 'shippingPostalCode', 'shippingCountry', and 'shippingLatitude'. Lines connect 'employeeId' from the source to 'masterRecord' in the target, and 'employeeName' from the source to 'name' in the target.

Step 20. Add a Stop shape at last.

Finally, our process should look like this:



Step 21. Save and test the process.

Click on Stop shape, click on the Shape source data.

← Process: SDFC | Merge ▾



The screenshot shows the process editor with the "End and continue" shape selected. Below the process flow, there is a "Documents" and "Test Results" section. The "Test Results" section is expanded to show "Logs" for "Shape Source Data".

Logs		Shape Source Data	
	View Source	Size (kB)	
1		0.29	

Step 22. If the success is true, you have successfully Merged the records in SFDC.

## Document Viewer

```
1 <mergeRequest>
2 <id>0012w00001XWLJyAAP</id>
3 <success>true</success>
4 <mergedRecordIds>0012w00001QKN35AAH</mergedRecordIds>
5 <mergedRecordIds>0032w000012JKddAAG</mergedRecordIds>
6 <mergedRecordIds>0032w000012JKdcAAG</mergedRecordIds>
7 </mergeRequest>
```

Formatted view is on. Formatted view may hide some data for easier reading.

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