

Account / Individual Customer / Contact Merge Use Case

- There are multiple duplicate records for the same customer in C4C and this may results in various inconsistencies in the system.
- Master data team would like to have a feature to merge duplicate records and create a golden record from the duplicates.
- It is also expected that the open transactions assigned to the duplicate record should be reassigned to the golden record (in case there are any open lead/opportunity).

From 1602 release, we have introduced a new customer merge feature which will enable data management teams to handle duplicate records by merging them into a golden record.

This account merge document covers the following:

- Highlights of the three phases of account merge process
- New Data Cleansing work Center and step by step process description for account merge
- Status management during account merge
- Node handling descriptions for nodes in account such as relationships, territories, etc.
- Transaction management for tickets, sales orders, leads etc. associated with an account
- FAQs

Account Merge Process

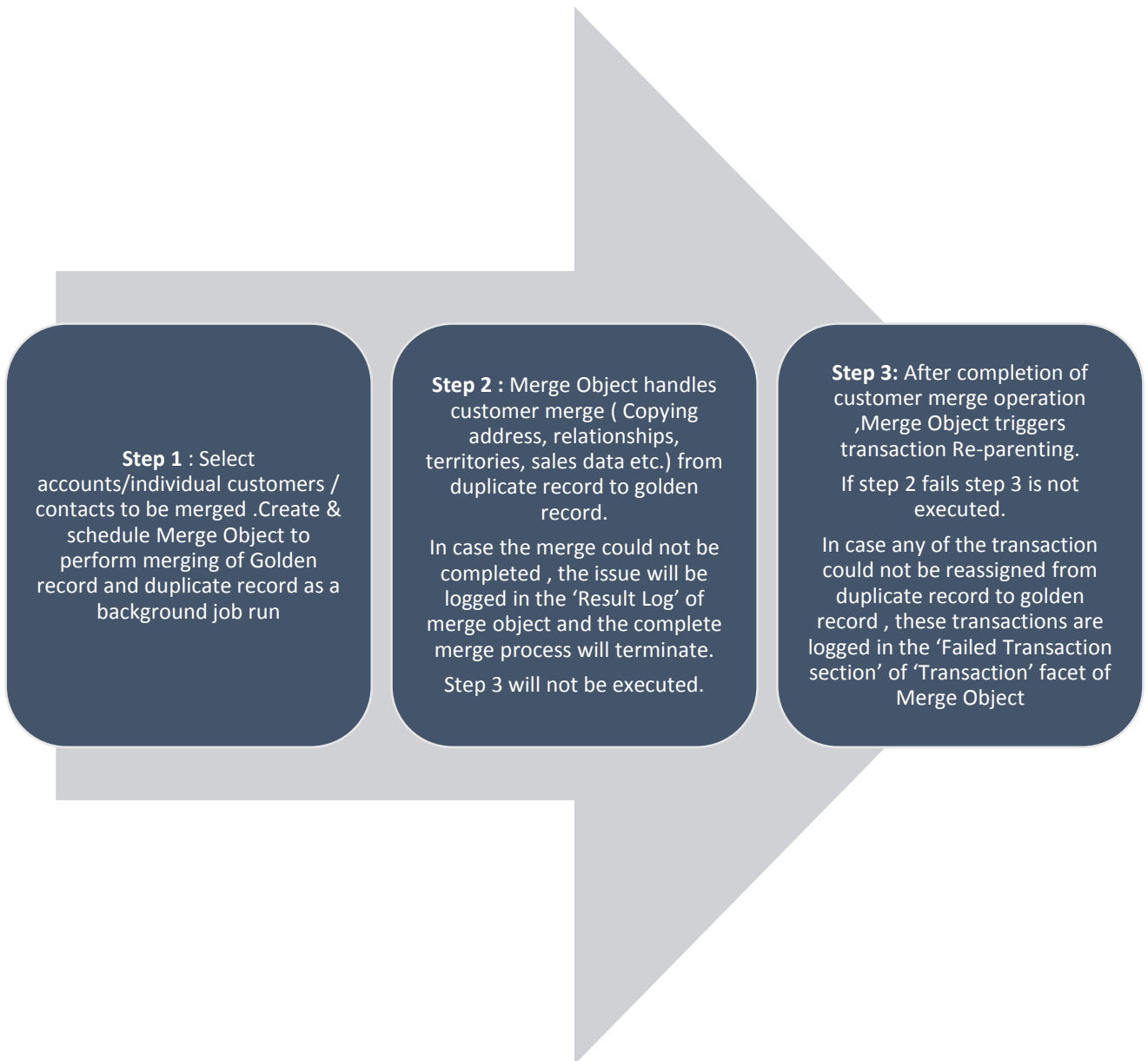


Figure 1: Business Partner Merge Design

Major highlights of the customer merge (phase 2) are as follows:-

1. The duplicate records will be set to obsolete status
2. System will create a relationship 'replaces' and 'Is replaced by' between the master and duplicate record
3. The system as a guiding principal will try to do a union of various dimensions such as addresses, sales data , account team , relationships etc. wherever possible .
4. In case duplicate entries are identified (such as same sales area is maintained in both duplicate and master record) the system will always give precedence & retain the master record

Major highlights of the transaction re-parenting (phase 3) are as follows:-

1. The system will first identify the transactions which are assigned to duplicate record
2. System will then attempt re-parenting these transactions by modifying them and reassigning the transactions to master record
3. As a guiding principal for transaction re-parenting, transactions which could be modified from the UI should be re-parented (assuming there is no PDI validation which fails)
4. All the transactions which could not be re-parented will be listed in the transaction facet of merge transaction and the application log will list down all the issues which resulted in this failure.

Customer Merge: - Configuration Steps

In order to enable customer merge in your tenant, go to

Scoping questions → General business Data → Business Partner → Handling of Business Partners and select the scoping question 'Do you want to enable account merge'.

EDIT PROJECT SCOPE: FIRST IMPLEMENTATION

1 Country and Type of Business 2 Implementation Focus 3 Scoping 4 Questions 5 Review 6 Confirmation

< Previous Next > Finish Cancel Save Draft

Show All Elements >>

Display Scope Changes Hide Details Actions

Scoping Element	Type
Marketing	
Sales	
Service	
Industry Solution	
Business Performance Management	
Communication and Information Exchange	
Administration	
Compliance	
General Business Data	
Master Organizational Management	
Business Partners	
Handling of Business Partners	
Communication for Business Partners	
Reporting and Analytics for Business Partners	
Employees and Service Agents	
Products	
Product and Service Pricing	

Questions for Handling of Business Partners

Group By Group Set as Reviewed Set as Not Reviewed

Business Option	Review Sta...	In Sc...	Conflict
Group: Duplicate Check for Business Partners (4)			
Do you want to apply a medium check for duplicate business partners?	Reviewed	<input checked="" type="checkbox"/>	
Do you want to apply a strong check for duplicate business partners?	Reviewed	<input type="checkbox"/>	
Do you want to apply a weak check for duplicate business partners?	Reviewed	<input type="checkbox"/>	
Do you want to disable the duplicate check for business partners?	Reviewed	<input type="checkbox"/>	
Group: Business Partner Changes in Business Documents (1)			
Do you want name and address data changes to be reflected in the related business documents?	Not Reviewed	<input checked="" type="checkbox"/>	
Group: Business Partner Merge (1)			
Do you want to enable accounts merge?	Reviewed	<input checked="" type="checkbox"/>	

Details:

Dependency Your Notes SAP Store(0)

Explanation

The element(s) below caused the automatic selection or deselection of this element:

Once the scoping question is checked, you can assign the 'Data Cleansing' work center to the user who will be triggering the merge process in the tenant.

BUSINESS ROLE: CRM_OPS - CRM OPS + CUSTOMER SERVICE

CRM_OPS Business Role Update to users has run into errors. Priority: Medium Status: In Progress Due Date: 01/15/2014

CRM_OPS Business Role Update to users has run into errors. Priority: Medium Status: New Due Date: 01/22/2014

CRM_OPS Business Role Update to users has run into errors. Priority: Medium Status: New Due Date: 01/22/2014

CRM_OPS Business Role Update to users has run into errors. Priority: Medium Status: New Due Date: 01/22/2014

Status: Active Obsolete: No

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS ACCESS RESTRICTIONS UI SWITCHES FIELDS & ACTIONS ASSIGNED BUSINESS USERS CHANGES

Work Center/View ID	Work Center/View Name	Assigned ...	Segregati...
SEODADMINWCF	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COD_ANALYSIS	Analysis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ITS_APPLICATIONUSERMANAGEMENT	Application and User Management	<input type="checkbox"/>	<input type="checkbox"/>
ANA_BUSINESSANALYTICS	Business Analytics	<input type="checkbox"/>	<input type="checkbox"/>
BC_BUSINESSCONFIGURATION	Business Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BUSINESSPARTNERS_WCF	Business Partners	<input type="checkbox"/>	<input type="checkbox"/>
COD_COMPETITOR_WC	Competitors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CONTRACT_WCF	Contracts	<input type="checkbox"/>	<input type="checkbox"/>
CODACCOUNTWC	Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C4CE_DASHBOARD_WCF	Dashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COD_DATACLEANSING_WCF	Data Cleansing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DATA_INTEGRATION	Data Integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DATAPRIVACY	Data Privacy Management	<input type="checkbox"/>	<input type="checkbox"/>
COD_DATALOADER_WCF	Data Workbench	<input type="checkbox"/>	<input type="checkbox"/>

Customer Merge: Manual Merge from dataset

- User can select 2 or up to 3 records and trigger merge from dataset (as shown below)

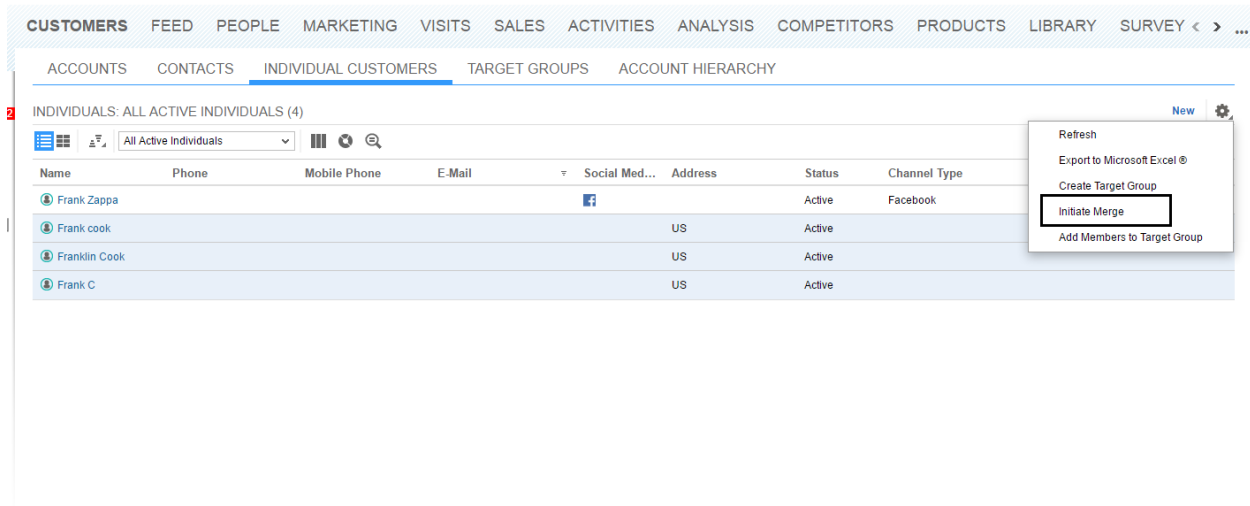


Figure 2: Trigger Merge from Dataset

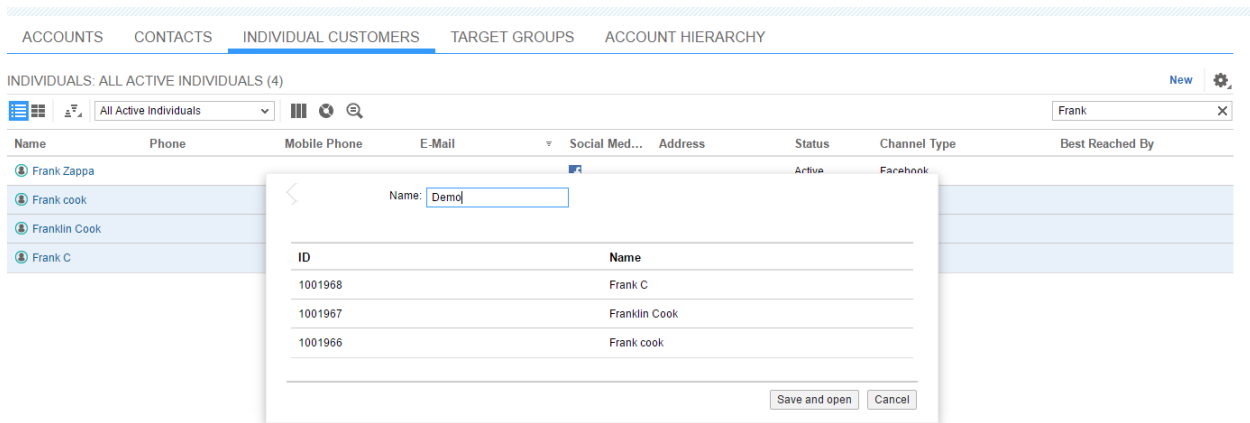


Figure 3: Assign a Name to the merge instance

On click and save the user will be navigated to the merge object attribute selection view.

A new Work center view called 'Data Cleanse' has been introduced to manage customer merge objects

- User can select which amongst the three records should be the master record.
- User can select which element should be selected from which record and create the best record manually
- For example ; the user can select business partner 1 as the master record and then choose that the address should be copied from business partner 2 and may be mobile number should come from business partner 3
- User can then save the merge instance and trigger 'Initiate Merge'

Element	Business Partner 1	Business Partner 2	Business Partner 3
Master	<input checked="" type="checkbox"/> 1311437 - Customer	<input type="checkbox"/> 1311438 - Customer	<input type="checkbox"/> 1311439 - Customer
Name	<input checked="" type="checkbox"/> Frank Cook	<input type="checkbox"/> Franklin Cook	<input type="checkbox"/> Frank C
Gender	<input type="checkbox"/> Gender not known	<input type="checkbox"/> Gender not known	<input type="checkbox"/> Gender not known
Address	<input type="checkbox"/> Frank Cook / AU	<input checked="" type="checkbox"/> Franklin Cook / 12 main street / Canberra QLD 2345 / AU	<input type="checkbox"/> Frank C / AU
Phone	<input checked="" type="checkbox"/> +91 5567800982	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> +91 8798799
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> +91 5698982
E-Mail	<input checked="" type="checkbox"/> frank.cook@TEST.COM	<input type="checkbox"/>	<input type="checkbox"/>
ABC Classification	<input checked="" type="checkbox"/> A-Account	<input type="checkbox"/>	<input type="checkbox"/>

Figure 4 : Merge - Element Selection

Merge details view has four facets:-

- Element selection: To view which elements were selected by the user while initiating merge.
- Overview- To view the master record and slave records
- Transactions- All the transactions which could not be re-parented are listed in this facet.
- Result Log- To view all errors/issues which prevented customer merge or transaction reassignment process.

CUSTOMER MERGE				
23				
<div> <div>ID: 23</div> <div>Name: Demo</div> <div>Surviving record: 1311437 - Frank Cook</div> <div>Status: Merge In Process</div> <div>Created On: 20.01.2016 11:16 GMTUK</div> <div>Created By: TESTUSER</div> <div>Changed On: 20.01.2016 11:20 GMTUK</div> <div>Changed By: TESTUSER</div> </div>				
ELEMENT SELECTION OVERVIEW TRANSACTIONS RESULT LOG				
Reset				
Element	Business Partner 1	Business Partner 2	Business Partner 3	
Master	<input checked="" type="checkbox"/> 1311437 - Customer	<input type="checkbox"/> 1311438 - Customer	<input type="checkbox"/> 1311439 - Customer	
Name	<input checked="" type="checkbox"/> Frank Cook	<input type="checkbox"/> Franklin Cook	<input type="checkbox"/> Frank C	
Gender	<input type="checkbox"/> Gender not known	<input type="checkbox"/> Gender not known	<input type="checkbox"/> Gender not known	
Address	<input type="checkbox"/> Frank Cook / AU	<input checked="" type="checkbox"/> Franklin Cook / 12 main street / Canberra QLD 2345 / AU	<input type="checkbox"/> Frank C / AU	
Phone	<input checked="" type="checkbox"/> +91 5567800982	<input type="checkbox"/>	<input type="checkbox"/>	
Mobile	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> +91 8798799	
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> +91 5698982	
E-Mail	<input checked="" type="checkbox"/> frank.cook@TEST.COM	<input type="checkbox"/>	<input type="checkbox"/>	
ABC Classification	<input checked="" type="checkbox"/> A-Account	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 5: Merge thing inspector (Detail Page)

Transactions Facet will list all the which could not be re-assigned from duplicate record to master record due to any of the following reasons:-

- Status of the transaction does not allow any changes (for example activity 2951 is set to complete and hence system will not allow any changes to this ticket).
- Transaction is in approval status
- Transaction has any other inconsistency.
- A PDI validation has prevented the re-assignment to happen

CUSTOMER MERGE				
1				
<div> <div>ID: 1</div> <div>Name: Satya 1602-1</div> <div>Surviving record: 1310207 - Prestige Ferns</div> <div>Status: Merge Completed - Realignment Failed</div> <div>Created On: 20.01.2016 10:59 GMTUK</div> <div>Created By: TESTUSER1</div> <div>Changed On: 20.01.2016 11:07 GMTUK</div> <div>Changed By: TESTUSER1</div> </div>				
ELEMENT SELECTION OVERVIEW TRANSACTIONS RESULT LOG				
<div> <div>FAILED TRANSACTIONS</div> <div> <div>Document</div> <div> <div>BUSINESS_ACTIVITY (1)</div> <div> <div>2951</div> <div>Activity</div> </div> </div> </div> </div>				

Figure 6: Failed Transactions

Result Log facet lists down the application logs created by the system for each Merge transaction execution.

It shows if the execution resulted in any errors, warning or any other information message.

User can check the complete log by clicking on the application log hyperlink and navigating to the Results section of the application log.

Result section of the application log lists down all the error messages indicating the reason why the transaction reassignment could not be completed. As illustrated in the example the re-assignment could not be completed because the status of the activity was read only.

User can also retrigger merge using the 'initiate' action available on the customer merge list view.

CUSTOMER MERGE		ELEMENT SELECTION OVERVIEW TRANSACTIONS RESULT LOG					
<div>1</div> <div>ID: 1</div> <div>Name: Satya 1602-1</div> <div>Surviving record: 1310207 - Prestige Ferns</div> <div>Status: Merge Completed - Realignment Failed</div> <div>Created On: 20.01.2016 10:59 GMTUK</div> <div>Created By: TESTUSER1</div> <div>Changed On: 20.01.2016 11:07 GMTUK</div> <div>Changed By: TESTUSER1</div>		RESULTS					
Status	Maximum Severity	Application Log ID	Created On	Errors	Warnings	Information	
Finished	Error	175188	20.01.2016 11:07 GM...	2		18	
Finished	Error	175221	20.01.2016 11:01 GM...	2		22	
Finished	Information	175222	20.01.2016 11:06 GM...			15	

Figure 7 : Result Log

Application Log: 175188

Overall Status:

Er...
Occu

Results Originate From: Business Partner Merge RunDocument ID: 1-3Started On 20.01.2016 11:07

Close

Export to Microsoft Excel®

General

Settings

Results

The application log is structured as a hierarchy of messages.
The sums of error, warning, and information messages at the top of the table reflect only the highest level of the hierarchy.

Errors:

1

 Warnings:

0

 Information:

0

[Expand All](#) [Collapse All](#)

Description	Status	Created On
<div>[-] Action NotifyBusinessObject processed in 1 packages</div>	<div></div>	20.01.2016 11:07 GMTUK
<div><div>[-] Work package 1: Finished; messages raised during save</div><div><div>• Objects included: 5</div></div></div>	<div></div>	20.01.2016 11:07 GMTUK
<div>[-] Messages (Count: 5)</div>	<div></div>	20.01.2016 11:07 GMTUK
<div><div>[-] Realignment failed for Activity 2951</div></div>	<div></div>	20.01.2016 11:07 GMTUK
<div><div>[-] Business Partner replace failed</div></div>	<div></div>	20.01.2016 11:07 GMTUK
<div><div>[-] Replace of parties failed for document 2951 (business object Appointm</div></div>	<div></div>	20.01.2016 11:07 GMTUK
<div><div>[-] Replace of parties is rejected because read-only</div></div>	<div></div>	20.01.2016 11:07 GMTUK

Figure 8 : Result Log

User can also create a merge object directly from the data cleansing work center. It is also possible to retrigger a merge instance from data cleansing work center.

- User can search a merge object using Merge ID, Status, master and duplicate record ID.
- User can also manually trigger an initiate action from the data set. This action can only be trigger in case the Merge object status is any one of the following :-
 - Not Started

- Merge Failed
- Merge Completed -Realignment failed
- Merge quick create provides the option to select upto three customers (one master and two duplicate records)
- User can then select which customer instances are required to be merged.
- Click on Save and Open.

The screenshot shows a software interface with a top navigation bar containing 'CUSTOMERS', 'MARKETING', 'SALES', 'PRODUCTS', 'DATA CLEANSING', and 'SERVICE'. Below this is a 'CUSTOMER MERGE' section with a table header: 'Merge ID', 'Name', and 'Surviving Record'. A modal dialog box titled 'New Customer Merge' is open in the center. It contains the following fields and options:

- Name: Demo test
- Individual Customer: ☒ (checked)
- Account: ☐ (unchecked)
- First Customer: Frank Cook
- Second Customer: Franklin Cook
- Third Customer: Frank cook

At the bottom right of the dialog box, there are two buttons: 'Save and open' and 'Cancel'.

Figure 10: Merge quick Create

Merge Status Management

Status	Description
Not Started	This is the initial status & is set when the Merge object is created and Merge process has not yet been triggered.
Merge In Process	This is the status when the merge has been triggered either from the web service call or manually from the UI. This status indicates that merge process has started.
Merge Failed	This is the status when the merge operation of merging master and slave record has failed. The system will not attempt any transaction re-assignment in case the merging of duplicate records has failed.
Merge Completed - Realignment In Process	This is the status when the merge of two customers has been successfully completed and the re-parenting of transactions assigned to the duplicate record to master record has started
Merge Completed - Realignment Failed	This is the status when the merge of two customers has been completed and the re-assignment of transactions has failed
Completed	This status signifies that customer merge and re-assignment of transactions has been completed without any errors

Customer Merge Node Handling Details:-

Nodes	Description
Relationships	<ul style="list-style-type: none">The system will merge the account team and relationship records from the slave account into master account.If a relationship is marked as unique and exists in the master record, the system will ignore the same record in slave records. For unique relationships master account will always take precedence. All relationships copied from slave to master will be deleted from the slave record. All non-unique relationships will be copied over from the slave record to the master record.A new relationship 'Is Replaced' /'Replaces' will be created between golden and duplicate record.

Territory	<ul style="list-style-type: none"> When tenant is configured to have Single territory per account, territory maintained on the slave account shall not be copied to master. Territory on the master will remain as is; territory maintained on the slave account will not be copied. When tenant is configured to have multiple territory per account, all territories assigned to slave account will be merged into the dedicated sales territory section of the master account. All territories assigned to slave account will be merged into the dedicated sales territory section of the master account. System determined sales territories of the master record will not be modified. The newly merged account (master account) will also have all of the territories of the slave account.
Address	<ul style="list-style-type: none"> All addresses of the slave account will be copied over to the master account. The main address in the master account will remain the main address post merge. In case no address information is maintained in the master record, the main address of the slave account will be marked as the main address in the master account post merge.
Notes	The Notes added to Slave Account will be copied over to Master.
Attachments	All attachments from the slave account will be copied over to the master account.
Account team	<p>The system will merge the account team and relationship records from the slave account into master account.</p> <p>If a party role is unique and exists in the master record, the system will ignore the same party role from the slave record. For unique party roles master account will always take precedence. Uniqueness check for a party role in account team will consider the sales area and the validity dates check. For example, an account can have 2 owners with the same sales area information but with different validity dates. Though owner is a unique role, the uniqueness check will also consider the sales area and validity dates.</p>
Sales Area	All sales area information from the slave will be copied over to the master account. If the sales area (Sales org, distribution channel, division) information of the master account also exist in the slave account, then the sales area record will not be overwritten, the sales area details maintained for the master record will take precedence.

Nodes	Description
Social Profiles	<p>If both master and slave record have social profile, then copy the social profile from slave to master .</p> <p>EXAMPLE</p> <ul style="list-style-type: none"> • Customer A (Master) has FB Social profile assigned FB_1. • Customer B (slave) has Twitter Social profile assigned TW_1 • After the merge A will have a new user profile TW_1. • Social profile linked with customer A will have two User profiles one for FB, and one for TW. • If master record does not have a social profile then the social profile from slave will be copied to master record
Social Profiles	<p>If both master and slave record have social profile , then copy the social profile from slave to master .</p> <p>EXAMPLE</p> <ul style="list-style-type: none"> • Customer A (Master) has FB Social profile assigned FB_1. • Customer B (slave) has Twitter Social profile assigned TW_1 • After the merge A will have a new user profile TW_1. • Social profile linked with customer A will have two User profiles one for FB, and one for TW. • If master record does not have a social profile then the social profile from slave will be copied to master record
Marketing Permissions	<p>In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins.</p> <ul style="list-style-type: none"> • Case 1:When all accounts have different marketing permissions assigned for different channels -The master account will have a union of all . • Case 2 : In case of conflict , the permission value maintained in master account will be retained <p>The system will also copy notes and attachments</p>
Communication category	<p>In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins.</p>

	<ul style="list-style-type: none"> Case 1: When all accounts have different assignments for different channels -The master account will have a union of all . Case 2 : In case of conflict , the permission value maintained in master account will be retained
Marketing Attributes	<p>In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins.</p> <ul style="list-style-type: none"> Case 1:When all accounts have different marketing attributes assigned - The resultant account will have a union of all the marketing attributes Case 2: When marketing attributes allows multiple values, there are common marketing attributes but different/common values. The master account will have a union of values. Case 3 : In case of conflict , the attribute value maintained in master account will be retained

Customer Merge: Transaction Reassignment

Transactions	Description
Tickets	All the tickets where slave account is an involved party should be re-parented to the master account .Tickets which could not be re-parented (because of status or due to any other technical reason) to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Sales Order	All the Order where slave account is an involved party should be re-parented to the master account .Orders which could not be re-parented (because of status or due to any other technical reason) to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Leads	All the leads where slave account is an involved party should be re-parented (because of status or due to any other technical reason) to the master account .leads which could not be re-parented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue

Activities (Phone Call , Appointments, tasks ,Emails)	All activities where slave account is an involved party should be re-parented (because of status or due to any other technical reason)to the master account .appointments which could not be re-parented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
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Transactions	Description
Social Media Messages	All social media messages attached to social profile of slave record will also move from Slave Record to Master post Merge
Visits	All the visits where slave account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Visits which could not be reparented to master should
Opportunities	All the opportunities where slave account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Opportunities which could not be reparented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Sales Quotes	All the sales quotes where slave account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Quotes which could not be reparented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue

FAQs

- **What are the conditions under which the customer merge can fails ?**

Customer merge can fail under very few conditions, primarily in case of the customer being open in edit mode by another user (locked for editing) or in case there are any PDI validations which result in failure.

- **What are the conditions under which transaction re-parenting can fail?**

Transaction re-parenting from duplicate to master record can fail for many reasons. The primary reasons can be as follows:-

1. Transaction status does not allow any modification, for example, a service ticket which is in status 'Confirmed/completed' cannot be modified on the UI. Hence a confirmed service ticket cannot be re-parented during merge process.
2. Another case could be that the transaction is in-approval status like sales quote in approval
3. PDI validation fails and results in error
4. Transaction was locked by another user during the merge process and hence could not be modified

- **Where can I find the list of transactions which could not be re-parented i.e. in case the merge status is 'Merge Completed - Realignment Failed'?**

Navigate to the merge details view and click on the facet 'Transactions' . This facet will list the transactions along with transaction type which could not be re-parented.

- **Where can I visualize the reason why the merge has failed for a particular transaction ?**

Navigate to the merge details view and click on the facet 'Result Log' .You will observe a 'Results' table. Select the entry with the status 'Error' and click on 'Application log ID' . In the application log view , click on 'Results' facet . This facet will list all the errors which prevented the customer merge or transaction re-parenting.

- **What should I do incase the merge has failed (status as 'Merge failed' or 'Merge Completed - Realignment Failed'.**

Navigate to 'Data Cleansing' work center and customer merge data set. Select the merge instance which has failed and then click on 'Initiate' action . You will observe that the status will change to 'Merge In Process' . The system will retry merging the customer instances.