OneMerge

SUMMER '24 UPDATE

Features	Free Edition Match and Merge duplicate Accounts, Contacts and Leads hourly or daily. Duplicates are deleted.	Standard Edition Match and Merge Accounts, Contacts, Leads and Custom Objects in real-time Delete or retain Duplicates.	Enterprise Edition As Standard Edition plus targeted matching and merge logic, increased limits, and related record reparenting (custom merge engine).
Guided Setup User friendly, streamlined setup UI for rules management and job scheduling.	✓	✓	✓
Scan a Salesforce Object for Duplicates Run Salesforce Matching Rules to identify existing matches within a Salesforce Object.	✓	✓	✓
Merge Rules Merge Rulesets define a merge configuration for a Salesforce Object. Merge Rules group Standard or Custom fields to be merged using Recency, Quality or Trust factors.			
Rulesets per Salesforce Object	1	1	5
Merge Rules per Ruleset	5	10	50
Merge Engines **Salesforce:** Platform merge operation. Duplicates are deleted and all related records are reparented. Accounts, Contacts, Leads only.	✓	✓	✓
Custom: Merge all objects supported by Salesforce Duplicate Management. Duplicates are deleted or retained for audit purposes.	✗	✓	✓
Merge Mode **Scheduled:** Automate merge hourly or daily.	✓	✓	✓
Real-time: Merge duplicates in-the-moment enabling time-critical processes such as personalised welcome journeys.	✗	✓	✓

hello@onemerge.co.uk
+44 (0) 191 645 0777

OneMerge

SUMMER '24 UPDATE

Cross-Object Merge For example, merge Leads or Custom Object records to Accounts or Contacts. Enables data integration architectures with staging objects.	✗	✓	✓
Salesforce Platform Actions Embed record merge actions into Lightning Flows or access via the Salesforce REST API.	✗	✓	✓
(Record Merge) Platform Events Publish Platform Events to notify connected systems or invoke local process automations.	✗	✓	✓
Data Lineage View how the Master Record has evolved over time with the ability to restore prior field values.	✓	✓	✓
Merge Rollback Restore the Master Record to any point-in-time on the merge timeline. Salesforce Merge Engine note: Undelete of losing records is dependent on existence in the Salesforce Recycle Bin. Undelete does not restore related record relationships.	✓	✓	✓
Data Stewardship Define conditions for data stewardship (accept/reject) versus seamless auto-merge (for example, VIP customers).	✗	✓	✓
Data Stewardship Conditions per Ruleset	-	2	10
Data Consolidation Define related record reparenting logic to consolidate data to the Master Record and enable high-value, accurate KPI such as CLV.	✗	✗	✓
Reparenting Rules per Ruleset	-	-	10

hello@onemerge.co.uk
+44 (0) 191 645 0777

OneMerge

SUMMER '24 UPDATE

Technical	Free Edition Match and Merge duplicate Accounts, Contacts and Leads hourly or daily. Duplicates are deleted.	Standard Edition Match and Merge Accounts, Contacts, Leads and Custom Objects in real-time Delete or retain Duplicates.	Enterprise Edition As Standard Edition plus targeted matching and merge logic, increased limits, and related record reparenting (custom merge engine).
Supported Objects	Account, Contact, Lead & Individual	Account, Contact, Lead, Individual, Custom Objects	As Standard Edition
Record Limits The OneMerge pricing model is based on the maximum total record count in any object where duplicates will be merged. Pricing tiers: 100K > 1M > 2M > 2M+. Example 1: A Salesforce org with 200K Accounts requires the 1M pricing tier. Example 2: A Salesforce org with 50K Leads, 75K Accounts, 90K Contacts requires the 100K pricing tier. Example 3: A Salesforce org with 110K Leads and 90K Contacts requires the 100K pricing tier if Leads are not configured to be merged.	500K (maximum by fair usage policy)	100K to 2M+	As Standard Edition
Platform Limits OneMerge installs from the Salesforce AppExchange as a Certified Managed Package with additional platform limits. Salesforce platform limits still apply to scheduled merge, real-time merge, Platform Action, Platform Event usage and REST API consumption.	-	-	-

hello@onemerge.co.uk
+44 (0) 191 645 0777