

User Guide: Dynamic Account Import into Salesforce

Introduction & Overview

This module facilitates the dynamic import of Account records into Salesforce from an external API source. It is designed to provide a high degree of flexibility in defining duplicate detection criteria at runtime. This ensures a user-driven, context-sensitive import experience tailored to specific business needs.

Operational Workflow

1. Dynamic Duplicate Check Configuration:

- Duplicate checking logic is governed by Custom Metadata records named "Duplicate Matching Criteria."
- Each metadata record specifies the following:
 - **Field API Name:** The API name of the Account / User field utilized for duplicate comparison.
 - **Check With User (Checkbox):** This Boolean flag determines whether the duplicate check is scoped to the current user's context (e.g., Department affiliation).

1. Default Duplicate Check - Domain Matching:

- The "Domain" field is a mandatory component of the duplicate matching process, regardless of any additional metadata configurations.
- This ensures a consistent baseline check for all Account imports, verifying the uniqueness of domain values.

2. User-Scoped Duplicate Matching (Conditional Logic):

- If the "Check With User" checkbox is enabled for a specific field, the system evaluates potential duplicates based on the current user's contextual attributes.
- **Example Scenario:**
 - Imagine two users – one from the **Sales** department and another from **IT** – are importing records at the same time.
 - If a record already exists for the IT department, the system will **not** mark a similar record being imported by the Sales user as a duplicate.
 - This is because the system checks the **"Department"** field (as configured in the Custom Metadata) to ensure that duplicates are only flagged **within the same department**, not across all users.

3. Global Matching (Context-Independent):

- If the "Check With User" checkbox is disabled for a given field, the system performs a global duplicate check across existing Account field imported from catalyst app. This check is performed irrespective of the user initiating the import.

4. Configuring Duplicate Matching Criteria:

- To add or modify fields within the "Duplicate Matching Criteria" Custom Metadata:
 - Navigate to "Custom Metadata" using the Salesforce Setup search bar and select it.
 - Choose "Manage Records" for "Duplicate Matching Criteria."
 - The resulting screen will display the currently configured fields and their associated parameters for duplicate checking.
 - To add a new field, click the "New" button and enter the requisite details: "Label" and "API Name." Only enable the "Check With User" checkbox if duplicate checks should be restricted to the context of the currently logged-in user.

The screenshot shows the Salesforce Setup interface for Custom Metadata Types. The left sidebar contains a search bar with 'custom meta' and a list of categories including 'Custom Code' and 'Custom Metadata Types'. The main content area is titled 'All Custom Metadata Types' and includes a table with columns: Action, Label, Namespace Prefix, Visibility, API Name, Record Size, and Description. The table lists three records: 'CatalystFieldMapping' (Record Size 171), 'CatalystTableDataConfig' (Record Size 396), and 'Duplicate Matching Criteria' (Record Size 406). The 'Duplicate Matching Criteria' record is selected, and its details are shown in a sub-section below. This sub-section has a 'View: All' dropdown and a 'Create New View' button. It contains a table with columns: Action, Label, Duplicate Matching Criteria Name, and Namespace Prefix. The table shows one record with Label 'Department' and Duplicate Matching Criteria Name 'Department'. A 'New' button is located above the table.

Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	CatalystFieldMapping		Public	CatalystFieldMapping__mdt	171	
Del Manage Records	CatalystTableDataConfig		Public	CatalystTableDataConfig__mdt	396	
Del Manage Records	Duplicate Matching Criteria		Public	Duplicate_Matching_Criteria__mdt	406	This metadata defines duplicate detection criteria by specifying the API names of fields used for matching records. * Field API Name: The field to use for identifying duplicates. * Check With User (Checkbox): When checked, the system will compare the field's value with the corresponding field on the currently logged-in User record.

Action	Label	Duplicate Matching Criteria Name	Namespace Prefix
Edit Del	Department	Department	

1. Detailed Example:

- Consider a "Department" field on both the User object and the Account object. A user's "Department" is set to "Sales."
- When importing the Account record "WALMART INC.," the system first checks if an existing record for "WALMART INC." already exists. Subsequently, it verifies if the existing record's "Department" value matches that of the logged-in user ("Sales"). If both the name and department don't match, the new "WALMART INC." record is created.

Employer Search Total Records: 1001741

Import Records

The Following records will be imported to salesforce CRM

Employer Name	EIN	Filing Type	HQ Location	Eligible Employees	Reported Premium	Modeled Premium	Reported Broker Comp	Modeled Broker Comp	Top Carrier	Top Carrier%	T
WALMART INC.	710415188	Retirement Plan	Bentonville, AR	1644160	0	1909237578	0	12490672			0

[Previous](#)[Import](#)

Account

WALMART INC.

+ Follow

New Contact

New Case

New Note

TestField

Billing Address

Shipping Address

Catalyst

Department

Employer Id

242528

Industry Name

(45) Retail Trade

HQ Location

Bentonville, AR

Self-Funded

true

Reported Premium

\$0

Reported Broker Comp

\$0

Modeled Broker Comp

\$12,490,672

Eligible Employees

1644160

Founded

1962

See Details

Account Name

2. Testing Duplicate Detection:

- To validate the duplicate detection mechanism, change the "Department" value of the newly imported "WALMART INC." record to "Sales."

- Account

 **WALMART INC.**

▼ Catalyst

Department

Sales

Employer Id

242528

Industry Name

(45) Retail Trade

HQ Location

Bentonville, AR

Self-Funded

true

Reported Premium

\$0

Reported Broker Comp

\$0

Modeled Broker Comp

\$12,490,672

Top Carrier

Top Broker

Eligible Employees

1644160

Founded

1962

Account Name

WALMART INC.

EIN

710415188

Duplicate Records Found

1 duplicate record(s) found. You can update the existing records or skip them.

Select	Employer Name	Website	Department
☐	WALMART INC.	https://walmart.com	Sales

Listed in Salesforce CRM

Skip

Update

