

Detect duplicates on the go

COMPONENT CONFIGURATION GUIDE

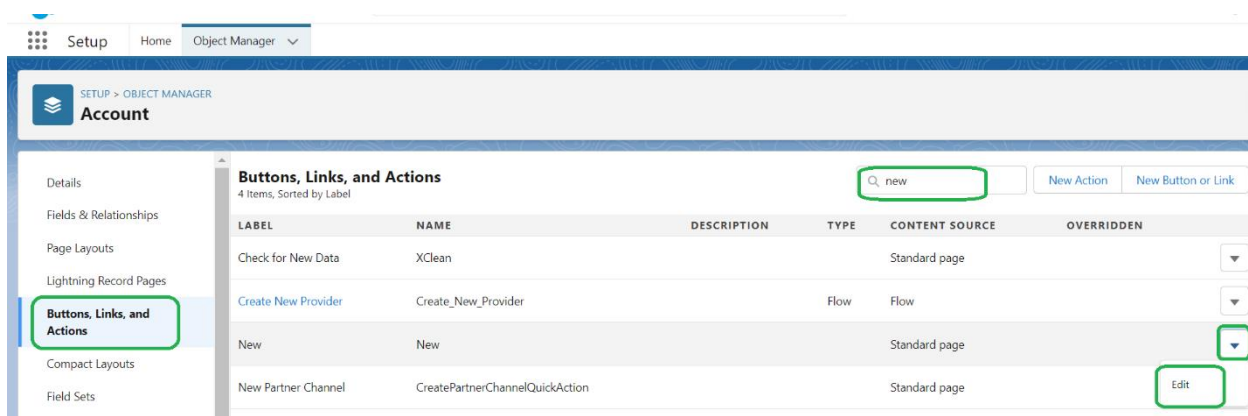
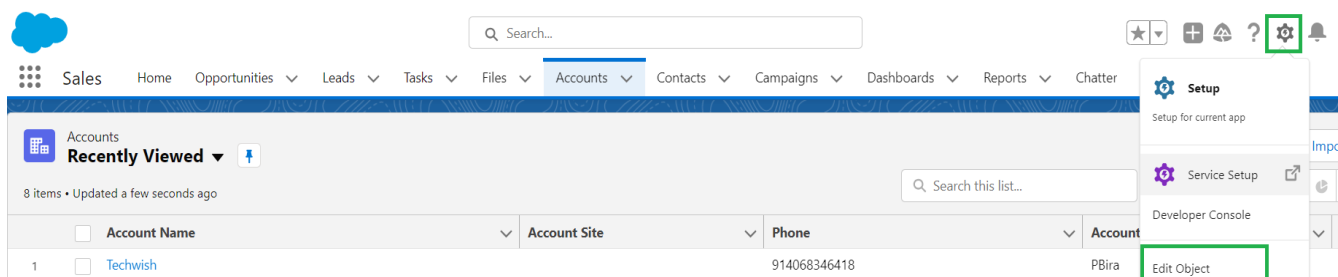
Introduction:

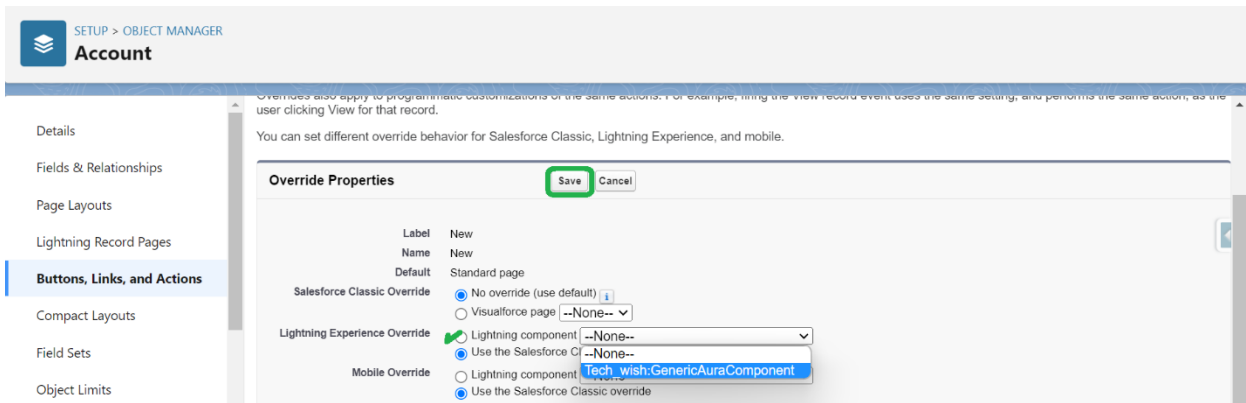
Standard components enable us to create a new record. Instead of creating duplicate records user can search the record by given fields and create a new record. By using this component the user can search easily and if there are no duplicates, create a new record.

The Techwish Detect duplicates on the go component offers an interactive user interface, simplifying the process of preventing duplicates. Users can install the package and override the standard Salesforce New action. This component supports New action override on Account, Contact, and Lead objects. This feature greatly enhances the data quality and prevents duplicates.

Desktop Configuration:

Setup -> Object Manager -> Account -> Buttons and action -> New -> override with lightning Aura component.





SETUP > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Overrides also apply to programmatic customizations of the same actions. For example, firing the View record event uses the same setting, and performs the same action, as the user clicking View for that record.
You can set different override behavior for Salesforce Classic, Lightning Experience, and mobile.

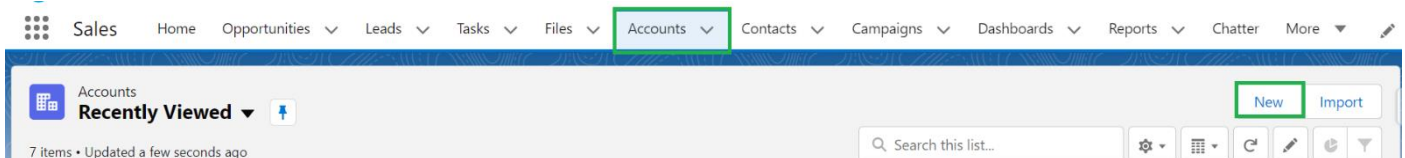
Override Properties Save Cancel

Label	New
Name	New
Default	Standard page
Salesforce Classic Override	☒ No override (use default) ☐ Visualforce page --None--
Lightning Experience Override	☒ Lightning component --None-- ☐ Use the Salesforce Classic override --None-- ☐ Lightning component Tech_wish.GenericAuraComponent ☐ Use the Salesforce Classic override
Mobile Override	☐ Lightning component ☐ Use the Salesforce Classic override

Note: Same configuration steps can be followed Contact and Lead objects.

How to use on Salesforce Desktop :

From Accounts tab, click New.



Sales Home Opportunities Leads Tasks Files **Accounts** Contacts Campaigns Dashboards Reports Chatter More

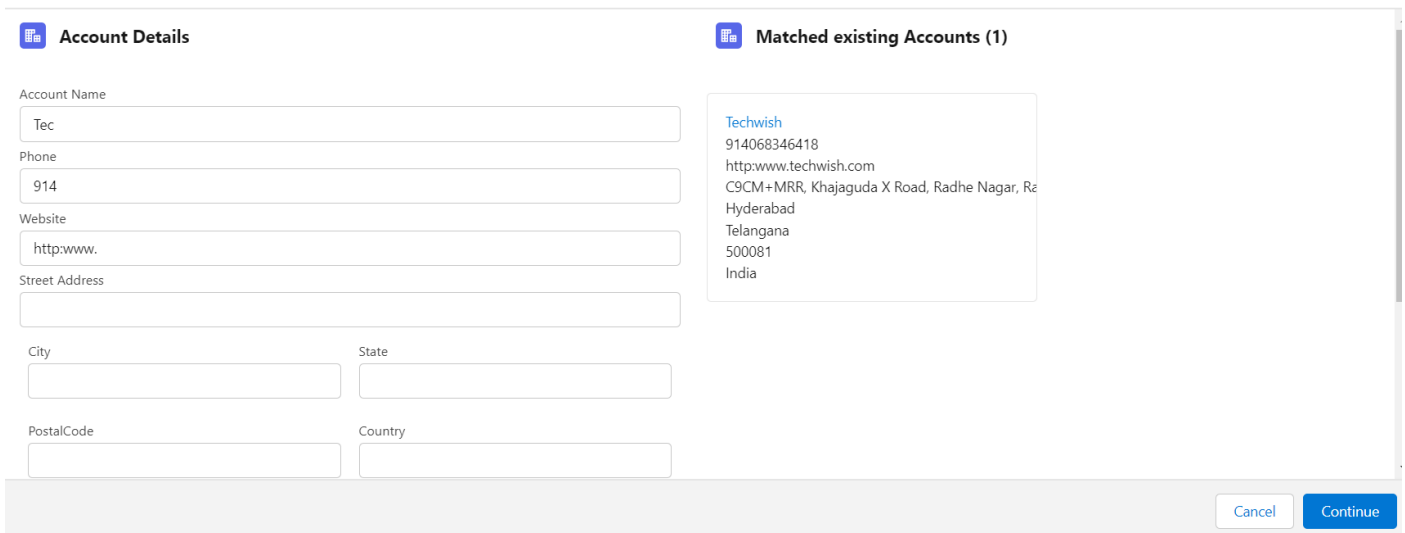
Accounts
Recently Viewed
7 items • Updated a few seconds ago

New Import

Search this list...

Enter key Account fields. If any duplicates are found, it will show on the right under matched existing Account. users can choose to view/edit any of the existing matched record or choose to continue to create New record.

New Account



Account Details

Account Name
Tec

Phone
914

Website
http:www.

Street Address

City
State

PostalCode
Country

Matched existing Accounts (1)

Techwish
914068346418
http:www.techwish.com
C9CM+MRR, Khajaguda X Road, Radhe Nagar, Re
Hyderabad
Telangana
500081
India

Cancel Continue

If the user wants to view all the details of a found record, they can click on the respective record, which will redirect to the record details page, as shown in the image below.

Account Owner	Rating
 Pandhari Biradar	Hot
Account Name	Phone
Techwish	914068346418
Parent Account	Fax
Account Number	Website
Account Site	http://www.techwish.com
Type	Ticker Symbol
Industry	Ownership
Annual Revenue	Employees
	SIC Code
Billing Address	Shipping Address
C9CM+MRR, Khajaguda X Road, Radhe Nagar, Rai Durg Hyderabad 500081 Telangana India	C9CM+MRR, Khajaguda X Road, Radhe Nagar, Rai Durg Hyderabad 500081 Telangana India

If the user does not find any existing record, they can click on the "Continue" button to create a new record. The fields that the user searched for will be automatically mapped when creating the new record.

New Account

Account Details

Account Name

Phone

Website

Street Address

City

State

PostalCode

Country

Matched existing Accounts (0)

Cancel

Continue

New Account

* = Required Information

Account Information

Account Owner

 Pandhari Biradar

Website

http://www.techwish.com

* Account Name

TechWish GTS Pvt. Ltd.

Phone

914068346418

Address Information

Billing Address

Billing Street

C9CM+MRR, Khajaguda X Road, Radhe Nagar, Rai Durg

Billing City

Hyderabad

Billing Zip/Postal Code

500081

Billing

State/Province

Telangana

Billing Country

India

Shipping Address

Shipping Street

C9CM+MRR, Khajaguda X Road, Radhe Nagar, Rai Durg

Shipping City

Hyderabad

Shipping Zip/Postal Code

500081

Shipping

State/Province

Telangana

Shipping Country

India

--None--

Cancel

Save & New

Save

SLA Expiration Date

Using in Salesforce mobile app:



Click [Menu](#) icon then click on "Account" object and tap on the "New" button. Afterward, the user can search for existing records and create a new record.





Menu

 App Launcher

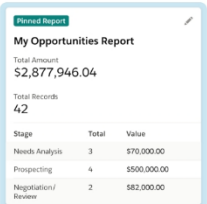
 All Items

 Sales
  Edit



Explore Mobile Home





My Opportunities Report

Total Amount: \$2,877,946.04

Total Records: 42

Stage	Total	Value
Needs Analysis	3	\$70,000.00
Prospecting	4	\$500,000.00
Negotiation/ Review	2	\$82,000.00

Add this feature to receive a personalized set of dynamic cards.

 Leads

 Tasks

 Files

 Accounts



Opportuniti... Leads Tasks Files Menu






Accounts

New

 Search Accounts

Lists

 All Accounts

All Lists

Recent Accounts

Techwish







Opportuniti... Leads Tasks Files Menu



If any duplicates are found, users can view the details of each individual record and decide whether to create a new record or not. When searching for records, if more than five records are found, pagination is used to organize them into separate pages. Users can easily navigate through the paginated list of duplicate records and assess their details before making a decision on whether to create a new record.





Account Details

> Matched existing Accounts (1)

Account Name

Phone

Website

Street Address

City
State

PostalCode
Country







Opportuniti...
Leads
Tasks
Files
Menu





New Account


Account Details

> Matched existing Accounts (1)

> Techwish

Techwish
914068346418
http:www.techwish.com
C9CM+MRR, Khajaguda X Road, Radhe
Hyderabad
Telangana
500081
India

Cancel
Continue

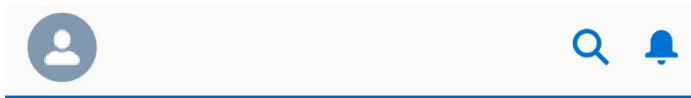






Opportuniti...
Leads
Tasks
Files
Menu

If the user wishes to view the details of a record, they can click on the record, which will navigate them to the record details page.



New Account

Account Details

✓ Matched existing Accounts (1)

✓ Techwish

Techwish

914068346418

<http://www.techwish.com>

C9CM+MRR, Khajaguda X Road, Radhe
Hyderabad

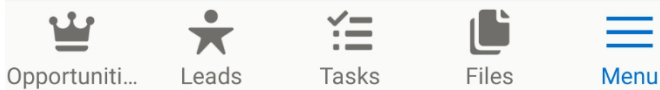
Telangana

500081

India

Cancel

Continue



Post



Create New Prov...



File



More



Account

Techwish

Type

Phone

914068346418

Website

<http://www.techwish.com>

Account Owner

Pandhari Biradar

Account Site

Industry

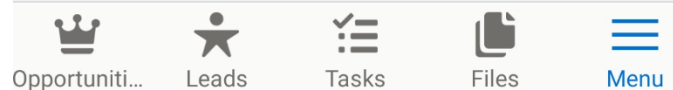
Billing Address

C9CM+MRR, Khajaguda X Road, Rad
Hyderabad 500081
Telangana
India

Parent Account

Annual Revenue

Recent Activity



Users want to create a new record, then click on the continue button.





>
Matched existing Accounts (0)

Account Name

Phone

Website

Street Address

City

State

PostalCode

Country

Cancel
Continue


Opportuniti...


Leads


Tasks


Files


Menu

Cancel
New Account
Save

Account Information

Account Owner
Pandhari Biradar

* Account Name
Fill all required fields and save record

Parent Account

Account Number

Account Site

Type
--None--

Industry
--None--

Annual Revenue

Rating

Notes: In mobile app, field values are not pre-populated due to Salesforce limitation.