



DupesPreventer

Installation Guide

Installation guide:

To install the DupesPreventer package from AppExchange, follow this procedure from scratch.

System Requirements:

- Lightning Requirements: Salesforce requires my domain to be enabled in an org in order to use Lightning Components. If My Domain is not currently enabled please follow the instructions in the Salesforce help article Set Up My Domain.
- Go to -> Quick Find Box -> Enter My Domain -> Click on My Domain -> Select Check Availability. If your name is already taken, choose a different one -> Select Register Domain
- Salesforce Editions Supported:
 - Unlimited Edition
 - Enterprise Edition
 - Developer Edition
 - Professional Edition
- Click the AppExchange “link” in your org or go directly to “www.appexchange.com”.
- Browse the AppExchange site to find the DupesPreventer application you want to install.
- Click “**Get It**” Now from the application information page.
- Select your environment type: “Production” or “Sandbox (test)”.

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment
Install where you or your users work, including developer orgs.

Install in Production

Install in a Sandbox
Test in a copy of a production org.

Install in Sandbox

Cancel

- Enter the requested information. For production environments, enter your “Username” and “Password”, read the user terms, select the agreement checkbox, and click “Install”.
- For sandbox environments, complete the information in the form provided and click “Submit”.
- Review the package items and click “Continue”.
- Once the package is installed on your system, please go the App Launcher & select “DupesPreventer”
- Now, on the DupesPreventer status, user can see “DupesPreventer Credential”. Click on “Edit” and enter valid “system Administrator” email & check the “Activate DupesPreventer” checkbox.

Home Leads Accounts Contacts DupesPreventer Status DupesPreventer Configurations Reports Dashboards +

DupesPreventer Credential

Enter Administrative Email

Administrative Email salesforce@salesforce.com Activate DupesPreventer ☒

Save Cancel

- Once the installation is complete, if a user wants to convert Lead into Account & Contact, the user will have to Map 'Lead Record Id' field of Lead to 'Lead Record Id' field of Account & Contact.