



DupesPreventer

User Manual

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1.INTRODUCTION TO DUPESPREVENTER

There's an old saying in the CRM world – Garbage In Garbage Out. If you put garbage into Salesforce you're going to get garbage out of it. Pure and simple. So Where does this garbage come from ?

The answer is Salesforce duplicate records. Duplicates are nasty. There's no doubt that duplicates in Salesforce are universal pain in the backside.



Elaborated more with an example:

So wondering why duplicates are a pressing problem for external systems marketers? In particular, it is due to a six-letter acronym: AMPSEA (Allow Multiple Prospects with Same Email Address). The change that AMPSEA bought in, means that for every lead or contact in Salesforce, you have an equivalent prospect record. Any duplicates created on the SF side will be synced down to external system. Now it's been turned on as default for any new accounts, many marketers are feeling the bite of bad data.

IS IT TIME TO RECONSIDER AMPSEA?



(ALLOW MULTIPLE PROSPECTS WITH SAME EMAIL ADDRESS)

However, it's an issue not just for Salesforce administrators but also for marketing departments that need to track campaign success. Salesforce duplicates can skew results and often mean a campaign is attached to the wrong record, making it difficult to accurately invest marketing dollars on the most effective campaigns. Sales departments also suffer from Salesforce duplicates. Duplicate leads and accounts can result in account ownership conflicts, incorrect opportunities, and inaccurate forecasts .

If your org is full of duplicate records, Salesforce—or any CRM for that matter—won't reach its full potential.



NO DUPLICATES

BNT DUPESPREVENTER THE ULTIMATE SOLUTION-

B&T's DupesPreventer is the perfect solution for the problem of duplicity. Designed to detect duplicates of standard objects like accounts, contact, lead, lead to account, lead to contact, and vice versa arising from prospect entries, web-to-lead or integrated systems. With the help of this Application any duplicate entry can be blocked or reported based on your requirement.

It can detect duplicates to Accounts, Contacts, Leads, along with, "Lead to Contact" and "Lead to Account" and **VICE VERSA**. It's a **two way Duplicate checker** which gives the application a distinctive characteristic. *Isn't That GREAT!*



*So what are you waiting for – **GET , SET and GO***

1.1 DUESPREVENTER FEATURES

DupesPreventer features real-time deduplication capabilities in addition to the following great features:

- Lightning ready.
- Support for Standard Salesforce objects (Lead, Accounts, and Contacts)
- Supports Cross Objects i.e. "Lead to Account", "Lead to Contact" and vice versa.
- Support for all Salesforce fields, including custom fields.
- Ability to "Bypass user".
- Ability to "Bypass Profile".
- Also, it Allows deduplication by deep filtering the records.
- Ability to reconfigure the existing records based on matching Configuration.
- It is compatible with Developer, Enterprise, Professional and Unlimited Edition.
- All the probable duplicates/Warning can be viewed at once with the help of Standard Salesforce Reports/Dashboards.
- In the case of Mass Insert/Update through Data loader/Workbench with batch size 1,
- Prevent Insert Case: Exception is recorded in the error file
- Report Duplicates: Duplicates gets inserted and recorded in the DupesPreventer Application.

2. GETTING STARTED

DupesPreventer can be easily downloaded from AppExchange and installed directly in the Salesforce platform. It can be installed in both production and sandbox instances. It is available free of cost in the AppExchange centre.

Once DupesPreventer is installed and configured it will start stopping and/or warning end users when they are entering duplicates. Further, it allows comparisons on any field in Salesforce, including, custom fields

3. COMPONENTS OF DUPESPREVENTER

- Status Tab
- Configuration Tab
- Probable Duplicates
- Duplicate Warnings

3.1 STATUS TAB

Here User can see the below details -

- Administrative Email
- Status Control feature to activate/deactivate application functionality

DupesPreventer Status

DupesPreventer Credential

Administrative Email

noreply@salesforce.com

Activate DupesPreventor

☐

Edit

- Installation Details like the License Subscription Date, License Expiry Data, Remaining days to renew

DupesPreventer Status

License Subscription Date: 2/10/2020

Status: Active

License Expiry Date: 2/9/2021

Remaining Days to Renew: 365

- Daily's Blocked/Warned Statistics of Standard Objects .

DupesPreventer Today

Lead

Lead Blocked/Total: 0

Lead Warnings Reported/Total: 0

Account

Account Blocked/Total: 0

Account Warnings Reported/Total: 0

Contact

Contact Blocked/Total: 0

Contact Warnings Reported/Total: 0

DupesPreventer's Total Statistics

Today's Statistics

sObject Blocked/Total: 0

sObject Warnings Reported/Total: 0

3.2 CONFIGURATION TAB ---

After installation, user can configure DupesPreventor . So the Administrator can start with the creation of the Configurations defining the **matching criteria** for detecting duplicates and also define the **actions** that should be taken when duplicates are detected. In case there is no Configuration DupesPreventer functionality will not work .

Points to be considered :

- Multiple configurations can be created for the same object.
- Different actions can be taken for Inserts and Updates for inserting or updating records on the Objects.
- For managing the Duplicates , Configurations can be created on any or all of the standard objects.
 1. Lead
 2. Contact
 3. Account
 4. Lead to Contact and
 5. Lead to Account.

3.2 CONFIGURATIONS' FIELDS ---

DupesPreventer configuration Name: User can save the configuration with this name

Configuration Type : This is the Configuration type which indicates on which sObjects user has to find duplicate records. Users may select any standard object such as Lead, Account, Contact, 'Lead To Account' or 'Lead To Contact'.

Action on Insert : Actions available on Insert.

- **Prevent Insert:** This action support end-user to prevent duplicate records for inserting.

- **Report Duplicate:** This action support end-user to insert duplicate records with Warnings.
- **No Action:** This action supports the end-user to insert records without any action.

Action on Update : Actions available on Update is as follows.

- **Prevent Update:** This action support end-user to prevent duplicate records for updating.
- **Report Duplicate:** This action support end-user to update duplicate records with Warnings.
- **No Action:** This action supports the end-user to insert records without any action.

Configuration Number: This is an auto-generated Number for uniquely maintaining the Configurations.

Error Message: This is the Configurable error message that will be shown to end-user whenever a record is blocked against a configuration.

Activate: This is the feature wherein the user can decide to activate or deactivate a DupesPreventer configuration from functioning.

Reconfiguration Required: Reconfiguration Required checkbox helps to generate duplicates logic codes for the existing records for which DupesPreventer was not executed for any reason. This checkbox is automatically checked whenever an existing configuration is modified or activated .

Lightning View

The screenshot shows the 'Lightning View' of a 'DupesPreventer Configuration' named 'newconf'. The interface includes a top navigation bar with links like Home, Accounts, Contacts, Leads, DupesPreventer Status, DupesPreventer Configurations, Dashboards, and Reports. The main content area is divided into two sections: 'Details' and 'Activity'. The 'Details' section shows configuration parameters such as Configuration Type (Lead), Action on Insert (Report Duplicate), Action on Update (Report Duplicate), Configuration Number (114), and Error Message. It also displays the Owner (DP Lightning), Activate checkbox (checked), and Reconfiguration Required checkbox (checked). The 'Activity' section shows a 'Reconfigure Code' button and a list of activities with filters for All time, All activities, and All types. The 'Upcoming & Overdue' section indicates no next steps and no past activity.

In case of '**LIGHTNING MODE**', any modification is done to an existing configuration, the Reconfiguration Required Checkbox is automatically Checked and the "Reconfigure" Component becomes Visible, which indicates that "Reconfigure" Component has to be clicked to rebuild the code logic based on the new changes.

Classic View

The screenshot shows the 'Classic View' of a 'DupesPreventer Configuration' named 'TestLead'. The interface includes a top navigation bar with links like Customize Page, Edit Layout, Printable View, and Help for this. The main content area is divided into two sections: 'DupesPreventer Configuration Detail' and 'Activity'. The 'Detail' section shows configuration parameters such as Configuration Type (Lead), Action on Insert (Report Duplicate), Action on Update (Report Duplicate), Configuration Number (1), and Error Message. It also displays the Owner (TestOrg DP [Change]), Activate checkbox (checked), and Reconfiguration Required checkbox (checked). The 'Activity' section shows a 'Reconfigure Codes' button and a list of activities with filters for All time, All activities, and All types. The 'Upcoming & Overdue' section indicates no next steps and no past activity.

In case of '**CLASSIC MODE**', any modification is done to an existing configuration, the Reconfiguration Required Checkbox is automatically Checked and the "Reconfigure" button becomes Visible, which indicates that

“Reconfigure” button has to be clicked to rebuild the code logic based on the new changes.

3.2.2 RULES OVERVIEW

Configuration rules determine what fields will be used to identify matches, and how the fields will be matched. All fields that are included in the configuration rules must be populated and must match (based on the mapping type used) for a record to be identified as a duplicate by that configuration. Multiple Rules for a configuration work as ‘AND’, so all fields included in the rules has to match for the configuration to be triggered.

Adding New Rule: for adding new rules simply click on New DupePreventer Configuration Rule.

Configuration Type: Will be auto-populated with the Configuration Type as selected on Configuration Details and cannot be updated.

Match Field: Select the field to match on. ALL fields EXCEPT long text area and multi-select picklist fields are available for matching, including custom fields. (not understood)

Mapping types: Mapping types will determine how a field is evaluated as a match. There are two types of Mapping available.

- **Exact:** Exact mapping means whatever match field is selected, for those match field DupePreventer is working.
- **First XX Letter:** When a user selects First XX Letter, then the Number of Letter pop up is opened for entering numeric digit from 0-9.

Eg: If the user entered 2 numbers in Number of Letters, then DupePreventer works for finding duplicate records from the first 2 digits.

Match Blank: By default, blank fields are not matched against each other. If this option is checked then two blanks fields will be matched.

In the given example, the user wants to detect the duplicate based on the exact match of Full Name.

DupesPreventor Configure Rule

Configuration Rule

Configuration Type: Lead

Match Field: Full Name

Mapping Type: --None--
--None--
Exact
First XX Letters

Match Blank: ☐

Configuration: Sample Configuration on Lead

Save Cancel

3.2.2.1 SPECIAL CONSIDERATION OF LEAD TO CONTACT AND LEAD TO ACCOUNT RULES:

With Lead to Contact or Lead to Account Configuration, a Lead Match Field and a Contact or Account Match Field needs to be specified. The Contact or Account Match Field will be displayed as a Related Field in the Configuration Rule. When the configuration type is on Lead to Account / Lead to Contact, then there is a requirement of mapping a “Lead Record ID” field of Lead to “Lead Record ID” field of Account and Contact. Please refer to the below image.

3.2.2.2 RULES LIST.

The below image displays all the rules created on Lead Object.

DupesPreventor Configure Rules

2 items • Updated a few seconds ago

Rule Number	Match Field	Mapping Type	Related Field	Match Blank	Number of Letters
1	Last Name	Exact	Last Name	☐	
2	Country	First XX Letters	Mailing Country	☐	5

3.2.3 FILTERS OVERVIEW

Filters are commonly used to **satisfy specific field conditions** and are **Optional**. If filters are specified then configuration would work according to that. The filter is specifically used for user records.

Multiple Filters can be specified, but if specified all filters has to be satisfied for a configuration to work on a record. In order to allow Multiple entries for a text field, values are represented as comma separated and the values will be filtered based on the 'OR' condition for that field.

3.2.3.1 FILTERED OBJECT AND FILTERED FIELD

The below image displays a filter creation on Lead and selection of Lead fields.

The screenshot shows the 'DupesPreventor Configure Filter' interface. The top navigation bar includes a search bar and tabs for 'Home', 'Accounts', 'Contacts', 'Leads', 'DupesPreventer Status', and 'DupesPreventer'. The main section is titled 'DupesPreventor Configure Filter'. Below this, there is a 'Filter' section with the following fields:

- Filtered Object:** A dropdown menu with 'Lead' selected.
- Operator:** A dropdown menu with '=' selected.
- Filtered Field Name:** A dropdown menu with 'Email' selected. A list of available fields is shown on the right, including Informal Name, Suffix, Full Name, Title, Company, City, State/Province, Zip/Postal Code, Country, Geocode Accuracy, Phone, Mobile Phone, Fax, Email, and Lead Source.
- Filter Criteria:** A text area for entering filter criteria.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

3.2.3.2 FILTER OPERATOR'S

The below image displays the filter operators available for the Application.

The screenshot shows the 'DupesPreventor Configure Filter' page. The 'Filter' section has three main fields: 'Filtered Object' set to 'Lead', 'Filtered Field Name' set to 'Email', and 'Filter Criteria' containing 'sample@gmail.com'. The 'Operator' field is open, displaying a dropdown menu with the following options: '!=', '=', '!=', 'contains', 'starts with', 'ends with', 'does not contain', 'does not start with', 'does not end with', 'equals null', and 'is not null'. The 'Save' and 'Cancel' buttons are visible at the bottom right of the form area.

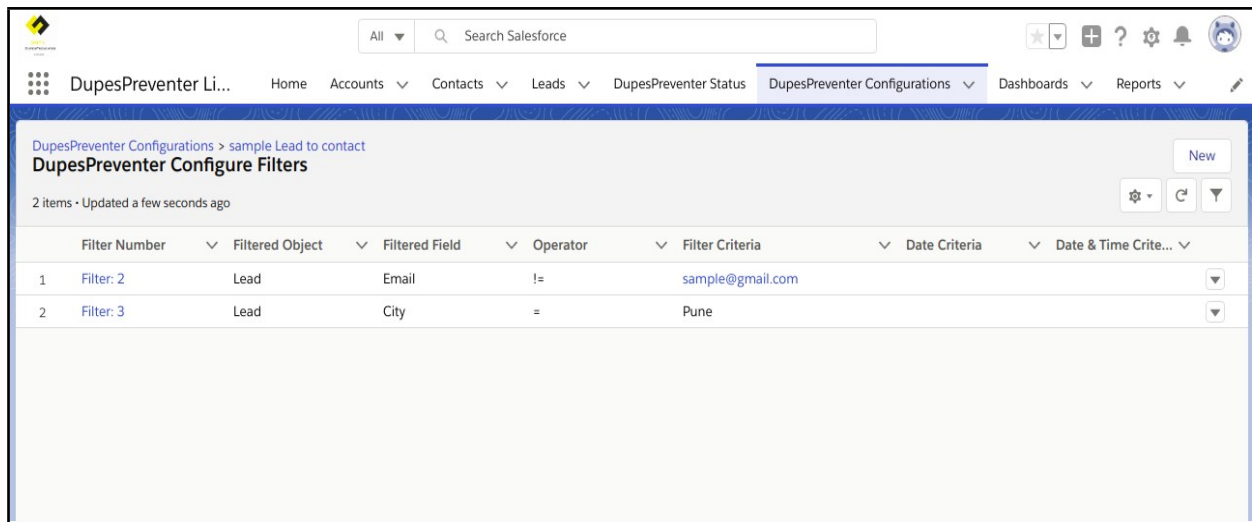
3.2.3.3 FILTER CRITERIA:

The below image displays a filter on Lead's Email field .

This screenshot shows the same 'DupesPreventor Configure Filter' page, but the 'Operator' dropdown menu is now closed. The configuration remains: 'Filtered Object' is 'Lead', 'Filtered Field Name' is 'Email', and 'Filter Criteria' is 'sample@gmail.com'. The 'Save' and 'Cancel' buttons are still present at the bottom right.

3.2.3.4 FILTER LIST:

The below image represents all the filter's on Lead type Configuration .



Filter Number	Filtered Object	Filtered Field	Operator	Filter Criteria	Date Criteria	Date & Time Criteria
1	Filter: 2	Lead	Email	!=	sample@gmail.com	
2	Filter: 3	Lead	City	=	Pune	

3.3 PROBABLE DUPLICATES OVERVIEW

Probable Duplicate is a related list that shows the records that have been identified as potential duplicates.

DupePreventer Probable Duplicate Name: This is a unique name for every probable duplicate.

DupePreventer Duplicate Warning: Generates warning for number of probable duplicates found.

Configuration Type: Configuration Type that triggers the probable duplicate and warning.

DupePreventer Configuration: A link to the Configuration that triggered the warning. Can click on this link to go directly to the Configuration and review the matching rules.

DupePreventer Code: The logic that was created based on the scenario rules which was the basis for identifying the duplicate.

Object Type: The type of Object that was matched (Lead/Contact or Account).

Duplicate Record: A link to the specific Account/Contact or Lead record this duplicate is related to. Can click on this link to go directly to the actual Account/Contact or Lead.

LeadID / AccountID / ContactID : This ID belongs to the duplicate records of particular Object.

DupesPreventer Probable Duplicate Dupe-30	
Related	Details
DupesPreventer Probable Duplicates Name	Object Type ⓘ
Dupe-30	Lead
DupesPreventer Duplicate Warning	Account
Warning: 8	
DupesPreventer Configuration	Lead
use case	sample sample lead1
Configuration Type	Contact
Lead	
Code	
10 pune	
Duplicate Record	
sample sample lead1 at GOV	
LeadId	
00Q6g000001aCAQEA2	
AccountId	

DupesPreventer Configuration use case	
DupesPreventer Probable Duplicates (5) New	
DUPESPREVENTER PROBABLE DUPLICATE: DUPESPREVENTER PROBABLE DUPLICATES NAME	
Dupe-25	▼
Dupe-26	▼
Dupe-30	▼
Dupe-31	▼
Dupe-32	▼
View All	
DupesPreventer Duplicate Warnings (2) New	
DUPESPREVENTER DUPLICATE WARNING NO.	
Warning: 6	▼
Warning: 8	▼

3.4 DUPLICATE WARNINGS OVERVIEW

Warnings are created in Dupe Preventer when a Probable duplicate has been detected for a particular Configuration and the "Match on Insert/Update Action" is set to "Report Duplicate" in Configuration details. Warnings will be created for each Configuration that triggers a Probable duplicate. Therefore, it is possible to have multiple warnings generated for one insert/update. Below are the Warnings Fields

Dupe-Preventer Duplicate Warnings Name :Unique Name assigned to each warning.

Configuration Type: The Configuration type that triggered the

Warning. Code: This code is for particular duplicate records.

DupesPreventer Configuration :A link to the Configuration that triggered the warning. Can click on this link to go directly to the Configuration and review the matching rules.

Triggering Action :Message shown to indicate Prevent Insert and Update


DuplesPreventer Duplicate Warning
Warning: 8

Related

Details

DuplesPreventer Duplicate Warning No. Warning: 8	DuplesPreventer Configuration use case
Configuration Type Lead	Triggering Action ⓘ Duplicate Found on Update
Code 10 pune	
Created By  TestOrg DP, 1/27/2020, 1:40 AM	Last Modified By  TestOrg DP, 1/27/2020, 1:40 AM

3.5 BYPASS USER / BYPASS PROFILE

DuplesPreventer's 'ByPass User /ByPass Profile' allows admin to Bypass the blocking functionality of DuplesPreventer Application for a user or for a profile.

3.6 GRANTING OF PERMISSION SETS:

By Default, DuplesPreventer Application is downloaded for Admin users however, user can download it for Non-Admin users too.

DuplesPreventer Application is shipped with two different Permission Sets Depending on the Admins requirement he can assign one of the permission set to the Non-Admin user.

1. **DuplesPreventer Read-Only:** 'DuplesPreventer read-only' Permission Sets give authority to view only related List of 'Probable Duples' of that respective

records. Even the Application name 'DupesPreventer' is not visible to the Non-Admin user.

2. **DupesPreventer Read-Write:** Here Non-Admin User can Create, Edit, Read and Delete the configuration. He can also view or modify any existing configuration created by admin.

Even the Read-Write permission set does not give the full accessibility of the records to non-admin users .

Let's understand this with an example -

Let's Consider Admin has assigned '**DupesPreventer Read-Write**' Permission Set to a Non-Admin User

- If the admin wants that User should reconfigure code and find all duplicates for the records for which he himself (Non-Admin) is the owner . Then the admin must check for following conditions,
 - ◆ OWD is Private(Account/Contact/Lead)
 - ◆ User Role of the Non-Admin is not at top of hierarchy than Admins Role

If the above Condition's are Satisfied, then whenever non-admin user will reconfigure the configuration then only records of which he is the owner will get reconfigured whereas records whose owner is admin will not get reconfigured.

- If the admin wants that the Applications functionality should behave the same way as it does for a Admin User then he has to create an additional Permission Set for the Non-Admin User in the targeted org with '**View all**' access for Account, Contact and Lead Object.

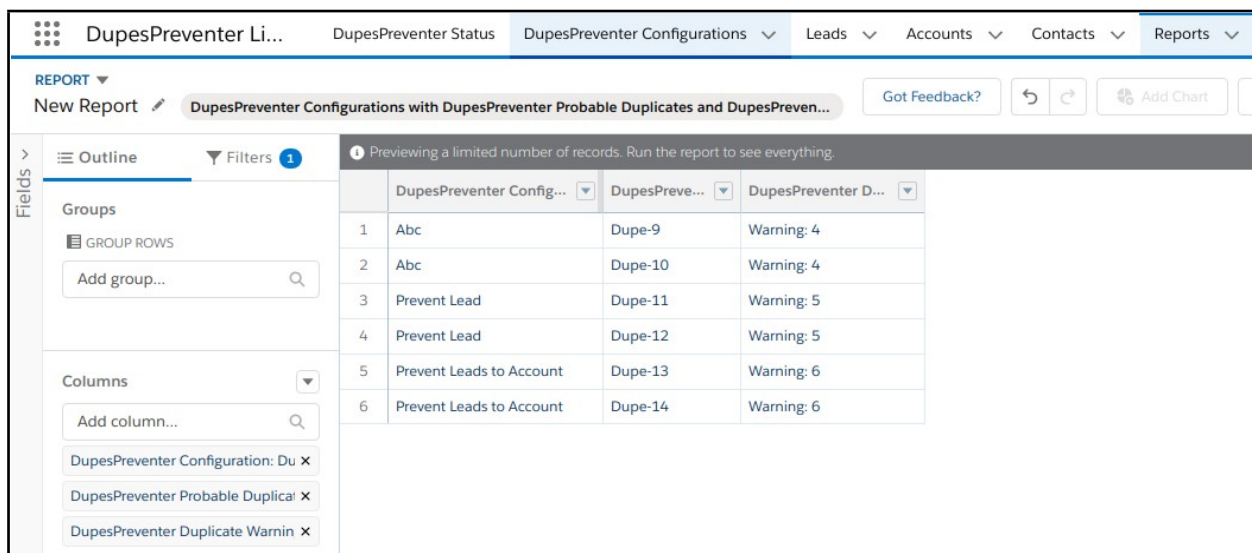
Finally, the Non-Admin User will have 'DupesPreventer Read-Write' Permission as well as 'View all' the additional Permission Set .

3.7 REPORTS

If the Administrator wish to see all the duplicate records and Dupespreventer details at one place he can navigate to the standard salesforce reports tab and can create and run a report to view all the details report .

Some of the reports user can execute are

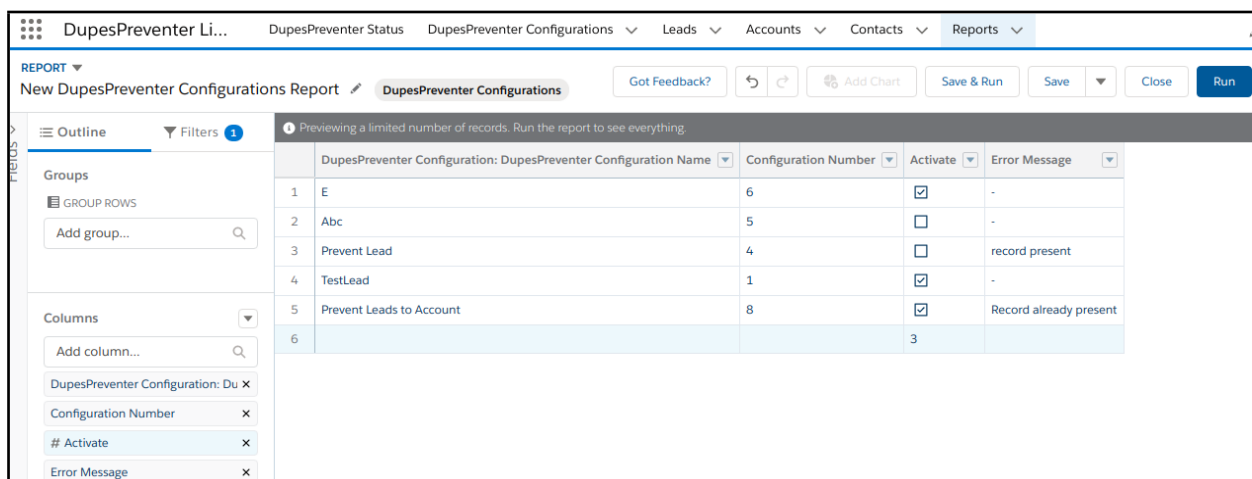
- Report on Probable duplicates



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'DupesPreventer Li...', 'DupesPreventer Status', 'DupesPreventer Configurations', 'Leads', 'Accounts', 'Contacts', and 'Reports'. The 'Reports' tab is active. Below the navigation bar, there's a 'REPORT' dropdown and a 'New Report' button. The report title is 'DupesPreventer Configurations with DupesPreventer Probable Duplicates and DupesPreven...'. There are buttons for 'Got Feedback?', a refresh icon, and an 'Add Chart' button. On the left, there's a 'Fields' sidebar with 'Outline' and 'Filters' tabs. The 'Outline' tab is selected, showing 'Groups' and 'Columns'. The 'Columns' section has 'Add column...' and three selected columns: 'DupesPreventer Configuration: Du', 'DupesPreventer Probable Duplica', and 'DupesPreventer Duplicate Warnin'. The main table displays a preview of records with columns: 'DupesPreventer Config...', 'DupesPreve...', and 'DupesPreventer D...'. The table has 6 rows of data.

	DupesPreventer Config...	DupesPreve...	DupesPreventer D...
1	Abc	Dupe-9	Warning: 4
2	Abc	Dupe-10	Warning: 4
3	Prevent Lead	Dupe-11	Warning: 5
4	Prevent Lead	Dupe-12	Warning: 5
5	Prevent Leads to Account	Dupe-13	Warning: 6
6	Prevent Leads to Account	Dupe-14	Warning: 6

- Report on configuration details



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'DupesPreventer Li...', 'DupesPreventer Status', 'DupesPreventer Configurations', 'Leads', 'Accounts', 'Contacts', and 'Reports'. The 'Reports' tab is active. Below the navigation bar, there's a 'REPORT' dropdown and a 'New DupesPreventer Configurations Report' button. The report title is 'DupesPreventer Configurations'. There are buttons for 'Got Feedback?', a refresh icon, an 'Add Chart' button, and 'Save & Run', 'Save', 'Close', and 'Run' buttons. On the left, there's a 'Fields' sidebar with 'Outline' and 'Filters' tabs. The 'Outline' tab is selected, showing 'Groups' and 'Columns'. The 'Columns' section has 'Add column...' and four selected columns: 'DupesPreventer Configuration: Du', 'Configuration Number', '# Activate', and 'Error Message'. The main table displays a preview of records with columns: 'DupesPreventer Configuration: DupesPreventer Configuration Name', 'Configuration Number', 'Activate', and 'Error Message'. The table has 6 rows of data.

	DupesPreventer Configuration: DupesPreventer Configuration Name	Configuration Number	Activate	Error Message
1	E	6	☒	-
2	Abc	5	☐	-
3	Prevent Lead	4	☐	record present
4	TestLead	1	☒	-
5	Prevent Leads to Account	8	☒	Record already present
6			3	

3.8 CONFIGURATION, RULES, FILTERS LIMITATIONS

Configurations Limits:

Each object user can create a maximum number of 30 Configuration. For Example: 'Lead', 'Lead To Account', 'Lead To Contact', these all configuration is considered for 'Lead'. Suppose there is 'Lead': 10, 'Lead To Account':10, 'Lead To Contact':10. So the maximum number of configuration count reaches to 30 for a single standard 'Lead' object.

Rule Limits:

DupePreventer limits the total number of rules for a configuration to a total of 10.

Filter Limits:

Total number of Filters for a specific configuration limits to 10.