

Case Study NGO Humanitarian Organization: Eradicate Duplication Account Permanently



The Client

The client consists of both international and local non-governmental organizations, which are coming together to change the humanitarian system. They currently have over 80 members working to solve systemic issues in the sector. Their goal is to improve how help gets to people in need across the world.



The Project

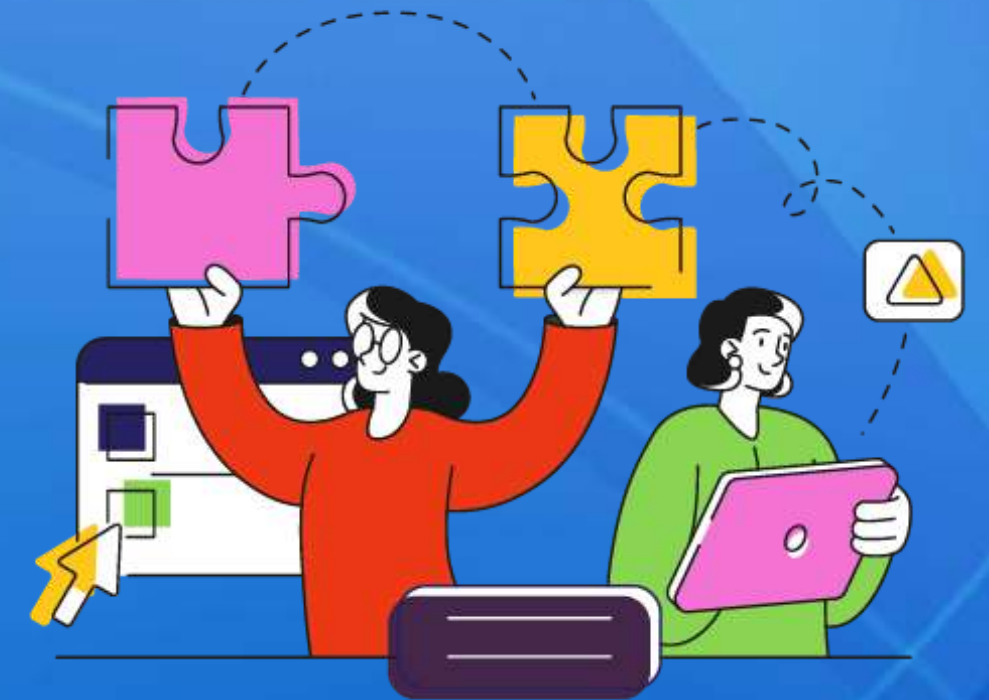
Project Background

- The client has its doors open to organizations around the globe that share its mission.
- These organizations submit their applications for membership through the form on the client's website.
- Then it is created in Salesforce as accounts.
- At times, organizations could submit their applications twice or more, which creates duplicate accounts.



The Project

Salesforce has matching rules that flag these duplicates, showing this notification "It looks as if duplicates exist for this Organization. View Duplicates." When clicked, it displays a list of duplicate records, the differences in each record, and the option to merge the accounts.



The Problem

- The client wanted Application House to merge all the duplicate accounts.
- While merging duplicate records is a solution, it doesn't necessarily tackle the actual problem.
- There could be hundreds, even thousands, of duplicate records, and manually merging these records one by one is laborious and inefficient.
- More importantly, if users just continuously create duplicate accounts, then the client will keep repeating the task of merging these records.
- So, the best thing to do is to tackle this problem to the core; meaning to stop the creation of duplicate accounts.



The Solution

- The project initially aimed to tackle the duplicate organization account records that the client had.
- But Application House explained the importance of fixing the management of duplicate accounts.
- So, to handle and stop the creation of duplicate account records, we've used the matching and duplicate rules in Salesforce.



Salesforce's Matching and Duplicate Rules

Let's first define these rules!

Matching Rules

These rules are how the duplicate rules identify duplicate records. Salesforce has standard matching rules, but one can also create custom ones.

Duplicate Rules

These rules dictate the action to duplicate records, either when one views a duplicate record or creates one. Salesforce has standard duplicate rules. Each rule comes with a standard matching rule. Similar to the matching rules, users can also create custom duplicate rules.



How Do These Two Rules Work Together?



Salesforce uses a mix of matching and duplicate rules to identify and manage duplicate records. The matching rule is how the system identifies duplicates. The duplicate rule enumerates the action to take for these duplicates.

Here's a quick run-through:

1. Set the matching rule that will differentiate the records on the same or one other object. Once activated, the rule will start identifying duplicates across existing records.
2. Using the matching rule, the duplicate rule prompts an alert on the duplicate records found and lists these records.

The Application House Process for the Solution

- Application House had a series of calls with the client. Along with how to address their existing duplicates.
- We discussed with them the importance of not allowing the creation of duplicate records. We explained how the solution—matching and duplicate rules—works and other things involved and that this will keep their Salesforce data cleaner.
- The client initially opposed the plan as they didn't want to restrict the creation of an organization/account.
- While we assured them that managing duplicates is only to help clean their records, they were still reluctant.
- So, we suggested giving this solution a chance: a one-month trial run, we said. The client agreed.



The Application House Process for the Solution

1. The client's Salesforce uses the standard matching rule to determine duplicates. The duplicate rules had the following actions:

- Action on Create: Allow
- Action on Edit: Allow

And we changed this to:

- Action on Create: Block
- Action on Edit: Allow

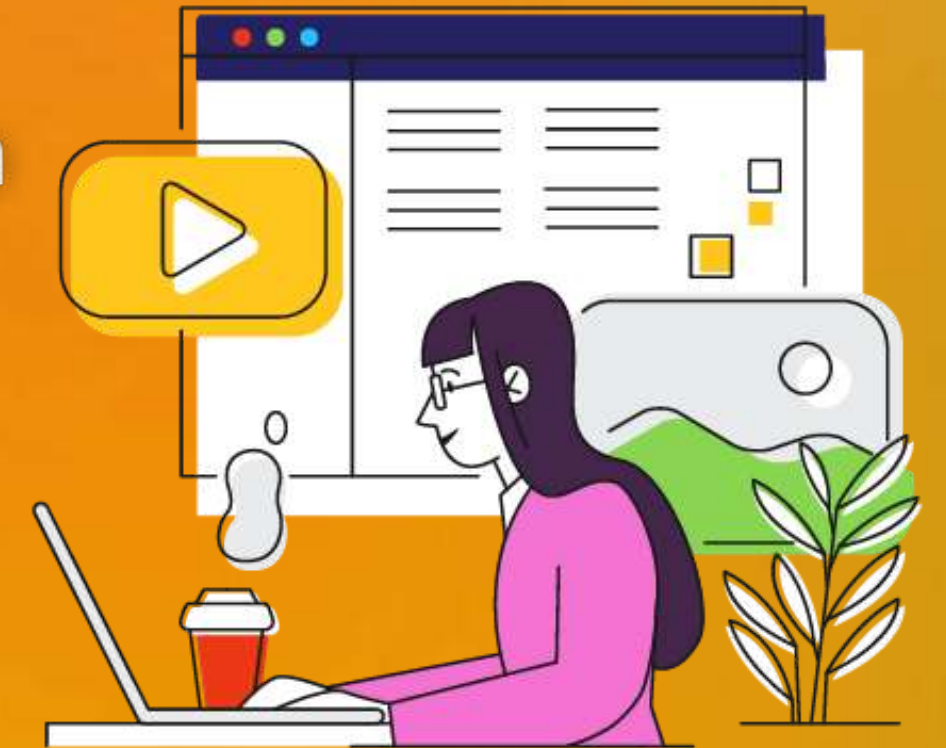


2. Next is to address the existing duplicates by merging them. We did this first on their sandbox, as we didn't want to disrupt their daily use of their Salesforce production org. However, they only have the Developer and Developer Pro Sandbox, which doesn't come with the data. So, Application House had to export data from their production org, and then import it to the sandbox.

The Application House Process for the Solution

3. In the sandbox, we merged duplicate account records to form single records. Once completed, we created a report and showed the client how their data looks once deduplicated.

4. After they approved the results in the sandbox, Application House implemented the same actions in their production org.



The Results

The client has cleaner records now with no duplicate account records. More importantly, they now control the creation of duplicate records, eradicating this problem permanently.

With duplicate-free data, the client ensures:

- They have all the right information in one account record;
- They update a single account record rather than scatter the information across multiple copies;
- Their employees aren't interacting with the same prospect multiple times unnecessarily;
- Organized, more accurate, and reliable data that improves productivity and effectiveness.



Client Feedback

"The Application House team was a great help to our organization, worked quickly and efficiently, and suggested new solutions and approaches to our processes. We were overall very happy working together!"



Project Review - Salesforce Verified

Available on AppExchange : <https://appexchange.salesforce.com/appxConsultingListingDetail?listingId=a0N4V00000G6nevUAB&legacy=true>

The Application House Value

Application House offers true solutions that build a strong foundation to support your future success. In this project, the team didn't just do a quick fix by addressing the present duplicate records but permanently solved the problem by properly setting up the duplicate rules. By doing so, the client pursues its missions with its Salesforce, which helps them better manage and keep its data clean.



Services that Application House offers

- BAU development
- Manager service or support service
- Offshore & Onshore team presented in the continents: Europe, North America, & Asia (India and Philippines).
- Greenfield project development
- Salesforce developer, Salesforce admin with developer capabilities, Salesforce business admin, and Salesforce architect.
- Ad hoc short-period support to fill the emergence gap.
- Project length ranges from one month to six months to 12 months.



The Application House Team

Application House members are proficient in various facets of IT, and all share one goal: to get you the best solutions. Our team includes:

Salesforce Developer:

Experience with more than 10 hands-on experiences with Salesforce trigger, custom component development using Apex controller, Visualforce page, and Lightning Web Components. Developed complex integration to batch apex.

Salesforce Senior Developer:

Hands-on experience developing code using design patterns, complex trigger and platform events, and managing and mentoring teams. Extensively work with Stakeholders to fulfill their BAU needs.



The Application House Team



Salesforce Business Analyst:

Expert in writing User Stories with Gherkin format who is an expert in Stakeholder communication and making a bridge between developer and business.

Salesforce Technical and Solution Architect:

Salesforce Architect who worked at Salesforce and British Petroleum Company plc multinational company. Grew from Salesforce consultant to developer to senior developer to technical and solution architect implementing Salesforce sales, service, experience, CPQ, Non-profit, and Education cloud.

Wider industries experience ranges from Enterprise Java development to Microsoft .NET development to Embedded system development to Salesforce development experience.

Application House's Salesforce Certification

Admin Certifications



Consultant Certifications



Architect Certifications



Developer Certifications



Application House's Clients & Global Presence



United Kingdom ,United states,
India, Philippines & Australia

Start Your Successful Salesforce Journey With Us!

Application House is the helping hand you need to scale your Salesforce, so it matches your future needs. We'll provide you with the right solutions so you can focus on pursuing your missions.





CONTACT US

Client company names can be shared on request

Book a consultation call now or
send us an email at
sales@applicationhouse.com for
any inquiry.

