DupeCatcher

FREE APP!

Frequently Asked Questions

I've downloaded DupeCatcher from the AppExchange and installed it in my Salesforce org, but now I can't find it. How do I access the app?

DupeCatcher is accessed from the pull down menu on the top right of your Salesforce home page (usually defaulted to Sales).

Does DupeCatcher support Person Accounts?

Yes, DupeCatcher works with Person Accounts.

I use User Profiles in my org. Will DupeCatcher work with different Profiles?

Yes, but you will need to add DupeCatcher permissions to your user Profiles. This is done at installation. See the Installation Guide on our website or at our AppExchange listing.

What criteria should I match first to get rid of my duplicates?

We've pre-built filters based on customer feedback that we think are the most important, such as Last Name and Email Address on Leads and Contacts. These filters would be a great starting place and can also serve as templates to build your own filters.

How do I override a DupeCatcher block and insert a new record, even if it matched on fields set in my Filters and Rules?

DupeCatcher includes and Override function that is enabled by the Salesforce or DupeCatcher admin via the DupeCatcher Application Settings tab. Once enabled, an Override button appears as part of the warning message for the Do Not Insert & Do Not Update matching actions.

What is the logic of Filters and Rules?

You can have multiple Filters and multiple Rules within individual Filters running at the same time. Filters operate on an OR logic, and Rules operate on an AND logic.

ALL Rules within an individual Filter must match for that Filter to trigger an alert, or for the record entry to be blocked.

What is the difference between blocking a duplicate on insert vs. update?

Match on Insert applies to a new record that's being entered into the database. Match on Update applies to an existing record that is being modified or edited in some way and saved.

What is a "triggering action/event?"

Triggering events are when a lead, contact, or account is manually entered into Salesforce, edited in Salesforce, or converted in Salesforce.

When selecting "Display Matching Records" as the action on insert or update, I do not see the record I was trying to create. I only see the original record as the duplicate was not created. What am I doing wrong?

On "Display Matching Records," the table will only display those records in the database that matched on the field(s) set in your Filter & Rule(s). It does not display the record that was being entered at the time the duplicate(s) were found.

Can I create a Filter and Rule that triggers a warning message about a duplicate record, but still allows the duplicate record to be created in the database?

Yes. You can enable the Override function via the DupeCatcher Application Settings tab.

Alternatively ou can use the "Report Duplicate" feature of the "Match on Insert/Update Action" setting. Override will allow you to save the duplicate record. Report Duplicate will allow the duplicate record to be created and will also set an alert for the admin pointing out the duplicate and enabling him/her to drill into the records.

With this feature you also have the option of creating a task for the user as a secondary alert to the duplicate. This matching action also enables DupeCatcher's Merge/Convert functions.

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Are blocked duplicate records stored anywhere for later review or for tracking?

DupeCatcher does not store a record that has been blocked. If your Filter use "Report Duplicate" for a matching action on insert or update, duplicates are NOT blocked. Instead, they are allowed into Salesforce, and an alert is set for the Salesforce admin. That alert will have hyperlinks to all of the duplicate records, and DupeCatcher's Merge/Convert functions will be enabled.

For tracking purposes, there is a counter on the DupeCatcher Filter summary page where you can see the number of duplicates that were blocked as a raw number.

Is there a way to merge or convert records that are identified as duplicates?

Yes. Typically DupeCatcher blocks the insert of a duplicate record, so there is nothing to merge. But, using "Report Duplicate" as a matching action on a Filter will enable DupeCatcher's Merge and Convert functions. This matching action allows the duplicate record to be created and triggers an alert. From the alert, users can Merge or Convert records via side-by-side data tables.

Sometimes leads coming from web registration forms are blocked and I don't know it, and other times leads from those sources are entered into Salesforce but are duplicates. How do I manage web leads?

DupeCatcher has a special "Applications Settings" tab to handle web leads. There are three default lead sources listed on the tab (they can be removed). DupeCatcher will allow leads with lead sources that are listed in the Web Lead Sources box on the Application Settings tab to enter the database, AND will create an alert for the Salesforce/DupeCatcher admin that a possible duplicate was created (to be dealt with manually later).

When a web lead source is NOT listed on the Application Settings Tab, DupeCatcher may block the lead based on the Filters and Rules you have set. But, as a user, you are not alerted that the lead has been blocked.

When adding the lead source for web-to-leads to this chart, you must enter the lead source EXACTLY as it appears on the lead record.

Can a standard user create Filters & Rules, or is DupeCatcher management limited to a Salesforce Administrator?

Yes, standard users can create Filters and Rules, but you need to enable those permissions by creating a Profile in the setup screens and assigning that Profile to selected users.

When upgrading versions of DupeCatcher, should I uninstall my previous version first?

DupeCatcher is easily upgraded from the AppExchange. You do not need to uninstall your current version before upgrading to the latest version. However, if you do uninstall the current version and upgrade via a fresh install, all previously set Filters and Rules will be lost.

Do I lose my Filters and Rules when I upgrade versions of DupeCatcher?

No. As long as you follow the upgrade process (in other words, you don't first uninstall your existing version of DupeCatcher), your Filters and Rules will be preserved. If you first uninstall your version of DupeCatcher, and then do a fresh install, your Filters and Rules will be lost.

Is there a user manual that I can follow to use this application?

Yes. Documentation for DupeCatcher, including a manual, a quick start guide, and a datasheet are all available both at the DupeCatcher listing on the Salesforce AppExchange, and on dupecatcher.com

How does DupeCatcher work with a mass import of records from CSV, data loaders, or other import?

Currently DupeCatcher does not support mass imports. Our other application, Cloudingo, cleanses and dedupes your entire existing database as well as supports dedupe after a mass upload. Learn more at cloudingo.com.

Does DupeCatcher identify and eliminate duplicate records currently existing in the Salesforce database?

DupeCatcher only identifies duplicates in real time at the point of entry (either on manual entry, or via a web registration forms). It does not deduplicate on mass import nor does it cleanse and deduplicate records already in Salesforce. However, our other application, Cloudingo, cleanses and dedupes your entire existing database as well as supports dedupe after a mass upload. Learn more at cloudingo.com.

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For more information visit dupecatcher.com.
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Eliminate duplicates that already exist in your database.
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