THE ESSENTIAL GUIDE TO DUPLICATE ALERTS AND BLOCKING
The Salesforce CRM Spring ‘15 release includes one of the all-time top requested features from the Salesforce user community: how to identify and prevent the entry of duplicate records.

Powered by Data.com, Duplicate Alerts and Blocking is provided as a standard feature for all Salesforce CRM customers with Professional Edition and above! To take advantage of this new capability, check out the following tips that will help you get started with improving the quality of your CRM data.

1. Learn the Rules of the Game
2. Give Duplicate Detection a Power Boost
3. Clean Your Data for a Better CRM
LEARN THE RULES OF THE GAME

Configurable rules are at the core of Duplicate Alerts and Blocking. There are two types of rules that need to be both defined and activated in order for this capability to work:

Matching rules define the criteria used to identify potential duplicate records:
- Watch video tutorial on matching rules
- Learn about pre-configured standard match rules
- Learn how to create custom matching rules

Duplicate rules define the actions that will occur when potential duplicate records are identified:
- Watch video tutorial on duplicate rules
- Learn how to create duplicate rules

Rules can be configured by going to the Data.com Administration section of the admin navigation.
GIVE DUPLICATE DETECTION A POWER BOOST

Once you have set up and tested an initial set of rules, you should start thinking about ways to leverage the full power of Duplicate Alerts and Blocking. Here are a couple advanced features to consider using:

**Implement cross-object duplicate checking (duplicate rules)**
Check one type of record against records of multiple object types. A great case is the ability to check a lead record input against both existing leads and contacts.

**Add conditional filters (duplicate rules)**
Restrict when duplicate rules are to be used by specifying field-level attributes to the rule.

![Duplicate Management](image)

The above conditions exclude accounts in a specified set of countries from using this rule.

**Use fuzzy logic (matching rules)**
The Data.com duplicate matching engine can assess similarities between records using a set of matching algorithms that are available for certain fields. See the list that are available for you to use.
CLEAN YOUR DATA FOR A BETTER CRM

The Data.com Duplicate Management matching engine uses sophisticated technology to detect potential duplicate records. But, technology can only take you so far – if your CRM data is missing information in key fields, or if it has lots of field-level inconsistency (e.g., company name in lead records), then duplicates could get through.

Data.com Clean provides the solution to poor CRM data quality by filling in missing information, as well as by standardizing key individual and account-level fields, so that your data is more usable, reliable and relevant. With Data.com Clean, you will not only improve Duplicate Alerts and Blocking, you will also make your data more actionable by both Marketing and Sales!

Data.com Clean offers a number of options for updating and enriching your CRM records.
WANT TO LEARN MORE?

Join the Duplicate Management Collaboration Group on the Salesforce Success Community

Get the Facts on Your CRM Data Quality with the Data.com Assessment App