Prevent Duplicate Records

Remove redundant records from the equation.
The entry of duplicate records can waste valuable time and compromise the quality of your data. This Accelerator will provide the means to alert users and prevent redundancies before they happen.

What it can do for you
• Improve data quality
• Reduce administrative overhead
• Eliminate wasted efforts and increase rep efficiency

How it works
Certified Specialists will guide you through the process over a predetermined timeframe (typically 3-4 weeks):

Discovery
• Review your current lead, account and contact creation process
• Identify key profiles and roles of individuals entering this data
• Develop quantifiable success criteria for use case identified

Analysis
• Configure duplicate management rules and reports

Outcomes
• Duplicate rules configured and created
• Review steps to getting started with duplicate management
• Three duplicate management reports configured

ADDITIONAL INFORMATION
GOAL
Minimize operating costs

INTENDED USER
Sales leadership teams looking to get Duplicate Management enabled and start preventing users from entering duplicate records.

PREREQUISITES
• Salesforce Professional Edition license purchased and assigned
• No code or customization needed
• No data migration required

Contact your account executive or success team today! Learn how we can help you accelerate your CRM success.