

Quickstart Guide

Unique Entry


Get it Now

Unique Entry is installed quickly and easily from the AppExchange via the "Get it Now" button. During the installation wizard, you must make sure you grant access to all profiles which have the ability to Create Leads, Accounts, or Contacts. The easiest way to do this is to select "Grant access to all users" in Step 2 as illustrated here:




Install Unique Entry: As -You-Type Duplicate Prevention. No Duplicates.


By RingLead



Install for Admins Only



Install for All Users



Install for Specific Profiles...

Install
Cancel

Configure

You will now see Unique Entry listed in your list of "Installed Packages" in the setup menu. Click the "Configure" link to change any options as desired. This is where you select which fields are displayed in the duplicate alert box, which fields are used for detecting duplicates, and more. For information on the configuration screen and how to best utilize it, see the full Unique Entry Product Manual.

Build

- ▾ Customize
- ▾ Create
- ▾ Develop
 - Schema Builder
 - Canvas App Previewer
 - Installed Packages
 - AppExchange Marketplace
 - Critical Updates

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall Configure	Unique Entry	RingLead	4.0	UniqueEntry
<p>Description</p> <p>RingLead Unique Entry is a revolutionary duplicate prevention application</p>				

Uninstalled Packages

No uninstalled package data archives

Override

In the “Buttons and Links” section under Accounts, Contacts, and Leads in the setup menu override the “New” button with the corresponding Unique Entry Visualforce Page. If you use multiple Record Types you will see an option to “Skip Record Type Selection Screen”, leave this unchecked. Note that you do not have to use the app for all three objects, you may override the “New” button for only one or two as desired.

When overriding your “New” buttons, you will see several RingLead Visualforce Pages available for selection. Use the one that says “uniqueLeadNavigation” as part of the label as pictured below. The other Pages are for optionally adding inline VisualForce Pages to your Page Layouts (explained later in this document).

Override Properties

Label	New
Name	New
Default	Standard Salesforce.com Page
Override With	<input type="radio"/> No Override (use default) <input checked="" type="radio"/> Visualforce Page
Comment	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;"> <input checked="" type="checkbox"/> --None-- </div> <div style="padding: 2px;">uniqueLead [UniqueEntry__uniqueLead]</div> <div style="padding: 2px;">RingLead Unique Entry - Duplicate Display for Lead Page Layouts [UniqueEntry__uniqueLeadDuplicateRecords]</div> <div style="padding: 2px;">uniqueLeadEntry [UniqueEntry__uniqueLeadEntry]</div> <div style="background-color: #0070c0; color: white; padding: 2px;"> <input type="checkbox"/> uniqueLeadNavigation [UniqueEntry__uniqueLeadNavigation] </div> <div style="padding: 2px;">RingLead Unique Entry - Related Records for Lead Page Layouts [UniqueEntry__uniqueLeadRelatedRecords]</div> <div style="padding: 2px;">uniqueLeadSF1Version [UniqueEntry__uniqueLeadSF1Version]</div> </div>

Additionally, you may repeat this step for the “Edit” buttons on your Accounts, Leads, and/or Contacts. Overriding your “Edit” buttons ensures that when a user goes to Edit an individual record Unique Entry will immediately alert of any existing duplicates for that record, and will continue updating that warning as they change information. Keep in mind that if you choose to do this and override your “Edit” buttons, the Salesforce “inline editing” feature will no longer function.

Remote Site Setting

In order for Unique Entry to be able to gather your Page Layout information you must add a "Remote Site" for your specific Salesforce server. The easiest way to do this is to first override your "New" buttons as described in the previous step and then go to create an Account, Contact, or Lead. You will be presented with a warning that explains there is no Remote Site Setting yet. Simply click the button at the bottom of that message and you'll be taken to the Remote Site creation screen and everything will be filled in for you, so all you have to do is click "Save".

Accounts Contacts Opportunities Reports Dashboards Products +

Account Edit
New Unique Account

RingLead

You're almost ready to start using Unique Entry.

As part of the installation process, you must create a 'Remote Site Setting' so that Unique Entry is able to gather information about your Page Layouts.

If you have access to manage security settings in Salesforce, simply click the button below to create the Remote Site now. If you do not have such access, please notify your administrator(s).

Add Remote Site

Remote Site Edit Save Save & New Cancel

Remote Site Name

Remote Site URL

Disable Protocol Security [i](#)

Description

Active

Save Save & New Cancel

Inline Visualforce Pages

Unique Entry is primarily designed to display duplicates when creating a new record, but as of version 3 there are two new sections you can choose to display for users who are viewing an existing Account, Contact or Lead:

- "Duplicate Display" pages display possible duplicates just like the ones displayed by Unique Entry when you are creating a duplicate.
- "Related Records" pages display other records that have similar company information, for example when viewing a Lead it will display any Accounts with a similar name, and Contacts or Leads at companies with a similar name.

Optionally add one or both of these Visualforce Pages to your desired Account, Contact, or Lead Layouts as illustrated below. You should add the Pages to any single column section. Once added, click the "wrench" icon in the top right corner and make sure that "Show scrollbars" is checked, and "Height (in pixels)" is set to at least 250. For more information on how to configure how Related Records are determined, please reference the full product manual.

The screenshot shows the Salesforce layout editor interface. At the top, the 'Contact Layout' is selected. The left sidebar shows a list of components, with 'Visualforce Pages' circled in green. The main area displays a table of components:

Section	Page Name	Shield Override C...
+ Section	ContactTestPage	Shield Override C...
+ Blank Space	RingLead Unique E...	Shield Override C...
CAContactsOverride	RingLead Unique E...	
ContactEditTestPage	RingLead Unique E...	

Green arrows point from the 'RingLead Unique E...' entries in the table to the corresponding sections in the layout preview below:

- One arrow points to the 'RingLead - Duplicate Records' section, which contains a Visualforce page titled 'RingLead Unique Entry - Duplicate Display for Contact Page Layouts (Scrollbars)'. This section is highlighted in grey.
- Another arrow points to the 'RingLead - Related Records' section, which contains a Visualforce page titled 'RingLead Unique Entry - Display for Account Page Layouts (Scrollbars)'. This section is highlighted in light blue.

That's it!

Your users will now be warned when they are entering information that matches one or more records already in the database, as they type! The entry pages displayed are designed to look and feel just like the standard entry pages as you've defined them in your Page Layout definitions. Small differences between your standard pages and Unique Entry include the following:

- Error messages that used to appear next to a specific field (Validation Rule errors, missing required fields, etc) will now display only at the top of the page.
- The Campaign Field on Lead Layouts will show at the bottom of the Page regardless of where you have it placed in your Page Layout definition (You can control if and how it displays in the Configure screen).
- Rich Text entry is not yet supported, Rich Text fields on your layout will appear as Long Text input fields.