User Guide   Unique Entry

As someone who creates records in Salesforce, you're going to save time and frustration with Unique Entry. It's designed to work in the background as you enter data, seeking out and presenting existing records that may be duplicates for what you're typing. Users can benefit from this application with no training at all, but armed with the quick info and tips below you'll be a duplicate avoiding machine!

How it works

The app will seek possible duplicates every 15 seconds OR when you enter or change information in one of the following key fields and stop typing for a couple of seconds:

Key Account Fields	Name, Account Number, Phone, Website, Ticker Symbol, Billing Postal Code, Billing City, Billing State
Key Person Account Fields	First Name, Last Name, Email, Mobile, Title, Home Phone, Website, Mailing Postal Code, Mailing State
Key Contact Fields	First Name, Last Name, Email, Mobile, Title, Account Name, Phone, Mailing Postal Code, Mailing State
Key Lead Fields	First Name, Last Name, Email, Mobile, Title, Company, Phone, Website, Postal Code, State

You will know that a search is underway when small text "seeking duplicates..." appears at the top of the form.

The illustration to the right depicts the types of results that may appear depending on what it is you are entering.
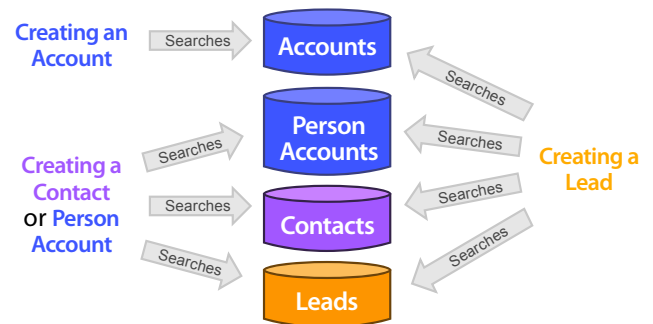
Tips

- When entering Leads and Contacts, start with the email address (when available) as this is a strong duplicate indicator.

- When entering company names (Account Names or the Company field on Leads) start with longer more distinguishing words first. For example, if entering "Smith Boysenberry, Co." start with "Boysenberry" and if no dupes display, enter the rest.

- Don't save a new record if you see "seeking duplicates..." at the top of the form, wait until it disappears to ensure there are no duplicates.

- If a warning displays you don't necessarily need to stop entering information, populating more fields may uncover more possible duplicates.