

# The Ultimate Guide to Salesforce Duplicate Management

How to leverage the **RingLead Platform** in **13 Steps** for a clean, duplicate-free Salesforce Org

## Part 1: Analyzing and Merging Salesforce Duplicates

### 1. How to identify duplicates in Salesforce (Leads, Contacts, Accounts, Custom Objects)

The first step in your clean data campaign involves locating duplicates and analyzing how bad the duplicate problem truly is. Unfortunately, native Salesforce duplicate detection uses cursory matching logic that can only uncover surface level dupes (e.g exact email match). [Running reports](#) on duplicate types can help users get a sense of the problem. The best way to identify more complex duplicates is to manually look through your data and locate duplicates on an SFDC record; or use a free tool like [Dupe Dive](#) to uncover your Salesforce duplicate situation.

### 2. How to normalize existing data for better exact and fuzzy matching

Normalizing the values used for logic should always be prerequisite to merging duplicates, as standard naming conventions help improve match rates which will yield a greater chance of deduplication success. In Salesforce, Admins can set up formula fields to standardize data, though the number of variations is very limited. RingLead provides an alternative to normalizing mass amounts of SFDC data at once.

RingLead's patented normalization methods give you advanced standardization for fields like:

- Company Names
- Names
- URLs
- Geolocation fields (Street, City, States & Provinces)
- Phone Numbers
- Job Titles

RingLead also allows admins to set up custom segmentation on any field value (e.g. Title to Persona and Level). Normalizing your data reduces redundancy, improves data integrity, and will lead to more robust duplicate matching thereafter.



### 3. How to use fuzzy logic matching to find even more duplicates

Email address alone is not always the best matching criteria. Email is a good place to start, but it leaves behind a high percentage of real duplicates, not to mention the false positives this method can identify.

Multiple matching sets can also be used for more advanced duplicate detection, for example:

- first name - last name - company name
- first name - last name - phone number

RingLead Cleanse, our flagship deduplication solution, allows users to run duplicate reports with custom logic on any object in SFDC. This tool is very simple yet comprehensive for finding out how many duplicates you have.

### 4. How to use master record rules to select the best record in a merge group

When you merge a record manually in SFDC, it presents up to 3 records in a group and allows you to manually select the best option for the master record. RingLead allows you to apply any rules you use to manually select master records against an entire set of duplicates.

### 5. How to select the best field values when merging duplicates

When you merge a record manually in SFDC, it presents up to 3 records in a group and allows you to manually select the best option for each individual field. A tool like RingLead allows you to apply any rules you use to manually select field values. Paint the perfect picture of your winning records while mass merging, all while saving hundreds of hours of manual work.

### 6. How to mass merge your duplicates with confidence (Strict Logic)

There is no Salesforce native tool for this process. After setting master record and field level merge rules, you can work between the resolution screen and the ruleset to refine rules before mass merging. In the platform, RingLead allows users to merge anywhere from 1 group to 1000 groups at a time. It also allows them to run an unlimited global merge.

### 7. How to merge fuzzy duplicates more methodically (Loose Logic)

In Salesforce, you can locate dupes manually with a limited logic editor that doesn't provide fuzzy matches.

RingLead allows users to define fuzzy logic with any standard or custom field and over 40 match types. The RingLead resolution screen allows users to work on up to 1000 groups of duplicates on a page. After manual review, the user can click merge the entire page of duplicates.

When merging groups of duplicates in SFDC, the limit is 3 records per duplicate group. RingLead has seen cases of the same record being in a database over 20 times. There is no limit to records in a duplicate group.



## 8. How to schedule strict logic mass merging and fuzzy logic duplicate scans

RingLead Cleanse allows users to schedule a deduplication task to run and merge on hourly, daily, weekly, quarterly, or other custom time frames. It also allows users to schedule duplicate scans on fuzzy matches and send an email alert to the owner of the project for manual resolution.

## Part 2: Enriching Data for Better Deduplication

### 9. How to improve duplicate matching through data enrichment

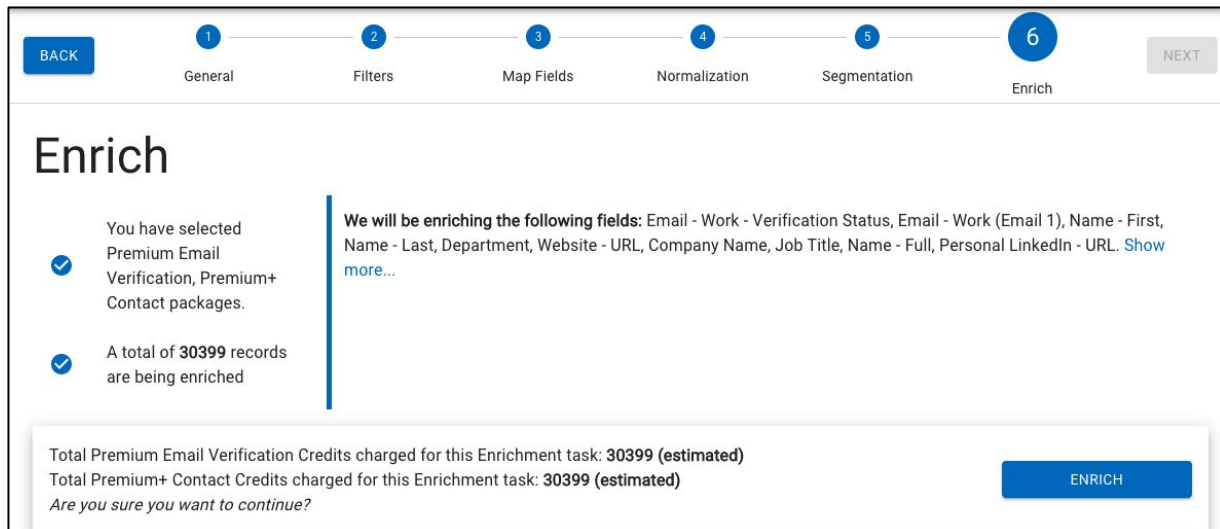
Real-time enrichment at the point of contact fills in missing fields that can improve duplicate matching rates for more robust duplicate protection. RingLead Enrich does just that, providing more fields upon which RingLead Cleanse and Prevent can use to match duplicates and link Leads to Accounts.

When identifying duplicate Leads, Contacts, and Accounts, your ability to match is severely reduced by missing data. Common missing fields include:

- Last name
- Company
- Website
- Email
- Title
- Geolocation (City, state, zip code, etc.)

RingLead's batch enrichment technology allows users to append data from third parties directly to Salesforce Leads, Contacts, and Accounts. The enrichment API is not limited to a single source. Customers can literally choose any data vendor to enrich their records. Data enrichment improves various data processes, including deduplication, segmentation, lead scoring, and lead routing.

An example of an enrichment task in the RingLead Platform



The screenshot shows the 'Enrich' step (6) of a 6-step process in the RingLead Platform. The steps are: 1. General, 2. Filters, 3. Map Fields, 4. Normalization, 5. Segmentation, and 6. Enrich. The 'Enrich' step is currently active. The interface displays the following information:

- BACK** button on the left and **NEXT** button on the right.
- Enrich** header.
- Two status items with checkmarks:
  - You have selected Premium Email Verification, Premium+ Contact packages.
  - A total of 30399 records are being enriched.
- We will be enriching the following fields:** Email - Work - Verification Status, Email - Work (Email 1), Name - First, Name - Last, Department, Website - URL, Company Name, Job Title, Name - Full, Personal LinkedIn - URL. [Show more...](#)
- Summary of credits charged:
  - Total Premium Email Verification Credits charged for this Enrichment task: 30399 (estimated)
  - Total Premium+ Contact Credits charged for this Enrichment task: 30399 (estimated)
- A confirmation question: *Are you sure you want to continue?*
- ENRICH** button on the right.



## Part 3: Preventing Future Duplicates

Most SFDC admins hate cleaning mass amounts of duplicates because there are too many intricacies involved. It is all too easy to make mistakes, causing teams to use manual processes rather than automation.

Most Salesforce implementations are connected to ERPs, MAPs, and other databases. It can be difficult in many cases to remove duplicates from SFDC because connected systems don't all recognize the merge.

*Cleaning data takes time and heavy thought.*

### 10. How to prevent manual entry duplicates

Salesforce comes native with a tool called Dupe Alerts. It allows admins to define logic, but requires users to type in an entire record, then click save, only to find out they have created a duplicate. This makes most end-users want to pull their hair out.

RingLead offers an alternative that does not require a trigger (save) to find duplicates. While a user types, RingLead refines its search. Most duplicates are found after entering only a few field values. This saves users up to 3 minutes per duplicate entry and greatly improves user adoption.

[Learn more about RingLead Unique Entry](#)

### 11. How to prevent list import duplicates in Salesforce

Most SFDC admins use the data loader to upload files from trade shows, list buys, acquisitions, etc. The issue with the data loader is that it does not allow users to set up duplicate prevention logic. List imports are a massive source of duplicates and dirty data.

RingLead provides an alternative solution for imports. The import tool allows users to apply customizable exact or fuzzy match logic against existing Leads, Contacts, and Accounts. Users can run a quick scan and pull the reports back to .csv, or they can map fields to SFDC and provide actions at a field level for how to update an existing record with information matched on the spreadsheet. If there is no match RingLead allows users to insert the new record to SFDC as a Lead, Contact, or Account.

Lastly, if RingLead identifies an Account match it can automatically convert or link the new lead to the existing Account.



## 12. How to preventing duplicates on web forms

Preventing duplicates from web forms in Salesforce can be done with Dupe Alerts. However, Dupe Alerts does not actually prevent the duplicate from being created. It allows the record to be saved and then triggers a lookup with an alert or auto merge.

This process is flawed because when a new record is saved, Apex Triggers, auto emails, system syncs, assignment rules, and other automated processes can be kicked off. In some cases, if a record syncs to an outside system before the merge, the dupe can be looped right back into SFDC on the next sync cycle.

When a web form is submitted through RingLead post action URL, it is automatically:

- Normalized
- Validated
- Enriched
- Matched for deduplication
- Matched for account-linking.

All of this is done before the record is created in Salesforce. If a matched Lead or Contact is found, RingLead updates the existing record with flexible field actions and alerts the owner.

## 13. How to prevent duplicates via API (marketing automation and other connectors)

Salesforce's native Dupe Alerts also works based on triggers for records submitted through the Salesforce API. The record is created and then retroactively cleansed.

RingLead allows Salesforce admins to redirect any system sending data through the standard Salesforce API through perimeter protection. When a record is submitted through RingLead's API integration, it is automatically normalized, validated, appended, matched for duplication, and matched for account linking.

## In Conclusion

Salesforce's Duplicate Alerts is not an ideal solution for preventing duplicates. It is actually a retroactive cleansing application. RingLead sets the standard for proactive data management, checking for duplicates before the record gets into your Salesforce. If you would like to run a free data quality analysis or get started cleaning your data now, click below.

[GET STARTED](#)

