

## Abstract

DataTrim Entry Check is an easy to use and simple solution which prevents duplicates from entering into your Salesforce database.

By applying an advanced search and matching process the solution checks directly and instantly for existing Contacts, Accounts or Leads before the new record is stored thus preventing duplicates from being created.

DataTrim Entry Check presents the user with a list of possible dupes, ranked by match score to enable the user to continue working with an existing record or create a new record without double entry effort.

## Description

The Team behind DataTrim has combined their Dupe Alerts matching algorithms and Salesforce's apex platform and developed **Entry Check** to enable users to check new records before these are being entered into Salesforce.

With this data quality assurance Tool you can now prevent duplicates from being created when users enter new records.

Type in the information you have or part of it (i.e. grabbed from a website an email etc.) and the DataTrim Entry Check will show you all existing records that match. By applying a scoring system you can quickly see if an exact or similar Contact, Account or Lead record already exists and go directly to the edit screen for this record, or create a new record if no match is found.

The solution integrates completely into Salesforce and allows you to override the New buttons for Lead, Contact and Account to ensure that users are taking advantage of this new process. It also comes with a Quick Entry Check component which you can add to the home page to enable even faster data entry processes.

## Setup

### Step Instruction

1. Install and deploy the DataTrim Entry Check package.
2. Add the Entry Check Tab to the apps where you want it to appear – e.g. Sales.
3. Add the Quick Entry Check home page component to the homepage layout. (Optional)
  - a. Customize the user interface; Enable "Show all Custom Sidebar Components on All Pages" (Optional).
4. Override the New Button for Lead, Contact and Accounts with an S-Control: DataTrim Entry Check (Optional)
5. Insert Dynamic Dupe Status Component on Page Layout

Simple – It only takes a few minutes – Try it out!

## Features & Benefits

- Prevents duplicate records from being created.
- Ranked match scoring of existing records to help find the best matching record.
- Quick Entry Check allows fast search and create process.
- Replace existing "New" buttons with Entry Check to enforce the check process for new Contacts, Accounts or Leads.

## Requirements

<b>External Service</b>	None
<b>Salesforce.com Edition</b>	<b>Unlimited, Enterprise, Professional, Developer</b>

## Specifications

<b>Publisher</b>	d2b International/DataTrim
<b>Type</b>	Native
<b>Pricing</b>	5 Entry Check User Licenses for <b>FREE</b> Additional License: \$5 pr user pr. year + a fixed yearly fee:\$299 pr. org.

Screenshot



Search All... ▾

Search

Frank Scaramanga ▾

Help & Training

Sales ▾

Home About DataTrim **Entry Check** Dashboards Chatter Leads Accounts Contacts Opportunities Campaigns Forecasts Reports +

### Quick Entry Check

First Name:

Last Name:

Company:

Email:

Phone:

Powered by DataTrim

Create New... ▾

Recycle Bin

### DataTrim Entry Check

**Enter:** [Setup](#)

<b>First Name:</b> <input type="text" value="Elizabeth"/>	<b>Last Name:</b> <input type="text" value="Blair"/>	<b>Email:</b> <input type="text" value="blair@abankingco.com"/>
<b>Company:</b> <input type="text" value="American"/>	<b>Website:</b> <input type="text"/>	<b>City:</b> <input type="text"/>
<b>Street:</b> <input type="text"/>	<b>Postal Code:</b> <input type="text"/>	<b>Mobile:</b> <input type="text"/>
<b>State:</b> <input type="text"/>	<b>Country:</b> <input type="text"/>	
<b>Phone:</b> <input type="text"/>	<b>Fax:</b> <input type="text"/>	

### Leads [1]

Action	Match Level	Name	Company	Email	Phone	Status	LeadSource	Owner
<a href="#">Edit</a>	★★★★☆	<a href="#">Betty Blair</a>	American Bank	eblair@abankingco.com	(610) 265-9100	Open - Not Contacted		Frank Scaramanga

### Contacts [1]

Action	Match Level	Name	Account	Email	Phone	Owner
<a href="#">Edit</a>	★★★★☆	<a href="#">Beth Blair</a>	<a href="#">American Bank</a>	eblair@abankingco.com		Frank Scaramanga

### Accounts [2]

Action	Match Level	Name	Site	Billing Zip	Billing City	Billing State	Billing Country	Phone	Type	Owner
<a href="#">Edit</a>	<a href="#">New Contact</a>	★★★★☆	<a href="#">American Bank</a>		New York	NY	USA			Frank Scaramanga
<a href="#">Edit</a>	<a href="#">New Contact</a>	★★★★☆	<a href="#">Burlington Textiles Corporation of America</a>	NC 27215	BURLINGTON	NC	United States	+1 (336) 222 7000	Demo Dupe Alerts	Frank Scaramanga