



## Dupe Alerts Setup and Users Guide (v24)

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## 1 Introduction

### 1.1 About this Document

Thank you for registering for the DataTrim Dupe Alerts application.

Although we have tried to make our application as intuitive as possible and focused on making it simple to use by hiding a lot of the usual technical data matching concepts and terminology behind the scenes, we realize that there are certain elements in the concept that makes this application unique and therefore needs further explanation.

We have described our service from a usage point of view with examples. These examples are no where near exhaustive, but the idea has been to provide you with sufficient information for you to follow the idea and adapt our solution to your specific needs.

In this document you will find the instruction for how to install the solution and how to get started with you first de-duplication.

You will also find guidelines for how to use the more advanced features of our solution, and a few recommendations for how you can customize the solution to become completely sub-merged into your business processes.

Please feel free to contact us at [info@datatrim.com](mailto:info@datatrim.com) for details if you have any questions to this guide or feedback, which is much appreciated.

### 1.2 Bookmarks used in this document

To help you identify key pieces of text we have put bookmarks in the margin throughout the guide:



This bookmark indicates a **tip** or a good idea which can save you a lot of time.



This is **important information** which you should consider reading carefully because the info will help you understand the fundamentals of our solution.



This arrow indicates a note or a small **remark** which you might not need to worry about initially, but which might be something to remember for future use. This bookmark is for you to quickly find these notes again.



You might enhance the functionality of our solution by combining DataTrim Dupe Alerts with other Salesforce features implying an **advanced use**, or **customizing** it to meet your business processes, or simply to make better use of the built-in integration with your Salesforce application. This bookmark indicates references to such advanced usage and/or customizations. All customizations referenced in the user guide are described in detail in a separate chapter towards the end of this document.



If you are a Trial user you might want to pay attention to this bookmark, as it highlights behavior that is specific to the **Trial License**.

## 2 What you need to know

This section gives you an overview of how this solution works and how you may use the different components to run your de-duplications and merge your duplicates. In the following chapters we will explain each part in detail.



The DataTrim Dupe Alerts application is a 100% integrated Salesforce solution. There is no software to install locally on your PC/server – everything you need to do you can do by using the familiar user interface of Salesforce.

The application is optimized to identify and classify potential dupes in your database and presents all the found dupes to you in lists and throughout the application where it becomes a natural part of the day-to-day work for admin and end users.

When reviewing the duplicates you have multiple options as explained in the chapters: [Reviewing your duplicates](#) and **Error! Reference source not found.**

The de-duplication is performed **upon entry** of the new records and/or **as a background process**. You will use the admin part (see below) to setup and define what, how and when you would like the de-duplications to run, and our solution takes care of the rest.

Once installed into your salesforce environment you can access the application from the dropdown list in the top right corner of your screen.

The application consists of 4 tabs:

### Dupe Alerts Console

The Dupe Alerts Console is the admin part of the app.

Here you create alerts, and monitor their status and the results generated by the processing of the Alert (matching process).

The screenshot displays the Dupe Alerts Console interface. At the top, there are four status boxes: Active (4), Scheduled (3), Failed (0), and All (44). Below this is the 'Alert Queue (7)' section with a table of alerts. The 'Recent Dupe Alert Result - Last (10) Results' section shows a table of completed alerts. On the right, there are summary cards for 'Outstanding Potential Duplicates (top 10 by Alert Name)', 'Alerts - Last 30 days' (7 alerts, 522 records checked, 94 potential dupes found), and 'Alert Types - Last 30 days' (Accounts: 1 processed, 9 checked, 5 dupes found; Contacts: 4 processed, 252 checked, 42 dupes found; Leads: 0 processed, 0 checked, 0 dupes found).

Name	Selection	Type / Match Level	Run / Time Slot	Run Status	Actions
Candidates A-F Alert is scheduled to run in Next timeslot		Contact-Contact SuperTight	Once Next	Pending	Edit Check Filter
Accounts Recurring Alert Active and Scheduled		Account-Account Tight	Every Sunday EMEA	Pending	Edit Check Filter
NFP - Fundraiser vs Member Alert is scheduled to run in Next timeslot		Contact-Contact Tight	Once Next	Pending	Edit Check Filter
Lead Import (Contacts) Alert is scheduled to run in Next timeslot		Lead-Contact SuperTight	Once Next	Pending	Edit Check Filter
Lead Alert is scheduled to run in Next timeslot		Lead-Lead SuperTight	Once Next	Pending	Edit Check Filter
Candidates (TR) - Status + Exact Email Recurring Alert Active and Scheduled		Contact-Contact Medium	Every Saturday Americas	Pending	Edit Check Filter
Business Contacts - UK Recurring Alert Active and Scheduled		Contact-Contact Tight	Every Thursday EMEA	Pending	Edit Check Filter

Run Date	Alert Name	Type/ Match Level	Checked	Dupes (new)	Actions
9/20/2022 3:10 AM (AR000396)	Candidates A-F FINISHED	Contact-Contact Tight	40	20	View
6/28/2022 8:08 AM (AR000395)	Candidates (TR) - Standard OK	Contact-Contact SuperTight	100	10	View

Alert Type	Alerts Processed	Records Checked	Dupes Found
Accounts	1	9	5
Contacts	4	252	42
Leads	0	0	0

The Dupe Alerts Console also provides you with access to the Setup, user guide, video tutorials and our news blog.



### DataTrim Dupe Alert:

This tab contains all your Alerts – accessible and viewable from the Dupe Alerts Console. An Alert contains a set of parameters to describe **what** you want to match, **how** you want the matching to be performed and **when**.

#### Key features:

1. Matching Lead, Account and Contact data.
2. Real time and scheduling of recurrent de-duplications
3. Filtering capabilities
4. Advanced parameter settings.

<input type="checkbox"/>	Dupe Alert Name	Active	Dupe Alert Type	Run	Match Level	Last R...	Run Status	Last Modifi...
1	<input type="checkbox"/> Candidates (TR) - Standard	<input type="checkbox"/>	Contact-Contact	Once	SuperTight	OK	Completed	6/28/2022 8:09...
2	<input type="checkbox"/> Candidates A-F	<input type="checkbox"/>	Contact-Contact	Once	Tight	OK	Completed	6/28/2022 8:09...
3	<input type="checkbox"/> Lead-contact Import	<input checked="" type="checkbox"/>	Lead-Contact	Once	SuperTight		Ready	6/28/2022 8:08...
4	<input type="checkbox"/> Account	<input checked="" type="checkbox"/>	Account-Account	Once	SuperTight		Ready	6/28/2022 8:08...
5	<input type="checkbox"/> Lead Import (Contacts)	<input checked="" type="checkbox"/>	Lead-Contact	Once	SuperTight		Ready	6/28/2022 8:08...
6	<input type="checkbox"/> Lead	<input checked="" type="checkbox"/>	Lead-Lead	Once	SuperTight		Ready	6/28/2022 8:07...
7	<input type="checkbox"/> Candidates (TR) - Status + Exact Email	<input checked="" type="checkbox"/>	Contact-Contact	Every Saturday	Medium		Ready	6/28/2022 6:42...
8	<input type="checkbox"/> Person Accounts in Household	<input type="checkbox"/>	Contact-Contact	Once	SuperTight	No Rec...	Completed	6/28/2022 6:36...
9	<input type="checkbox"/> Candidates with Resume	<input type="checkbox"/>	Contact-Contact	Once	SuperTight		Ready	10/28/2021 2:2...
10	<input type="checkbox"/> Business Contacts - UK	<input checked="" type="checkbox"/>	Contact-Contact	Every Thursday	Tight		Ready	7/5/2021 8:28 ...
11	<input type="checkbox"/> Dealer Accounts	<input type="checkbox"/>	Account-Account	Every Wednesd...	SuperTight		Ready	7/5/2021 8:27 ...
12	<input type="checkbox"/> Car Owners (BE)	<input type="checkbox"/>	Contact-Contact	Once	Tight		Ready	7/5/2021 8:27 ...
13	<input type="checkbox"/> Candidates (TR) - Standard, Same email	<input type="checkbox"/>	Contact-Contact	Once	Medium	OK	Completed	6/16/2021 8:00...
14	<input type="checkbox"/> Candidates (TR) - Same Name, No email	<input type="checkbox"/>	Contact-Contact	Once	Tight	OK	Completed	6/16/2021 7:49...
15	<input type="checkbox"/> Candidates (TR) - Same Email	<input type="checkbox"/>	Contact-Contact	Once	Medium	OK	Completed	6/16/2021 7:43...
16	<input type="checkbox"/> Not-Parsed Name, Basic	<input type="checkbox"/>	Contact-Contact	Once	Tight		Ready	5/28/2021 8:17...
17	<input type="checkbox"/> Not-Parsed Name, Exact Emails	<input type="checkbox"/>	Contact-Contact	Once	Medium		Ready	5/28/2021 8:16...
18	<input type="checkbox"/> Candidates with Not-Parsed Emails	<input type="checkbox"/>	Contact-Contact	Once	Tight		Ready	5/28/2021 8:14...
19	<input type="checkbox"/> Not parsed emails to Candidates with e...	<input type="checkbox"/>	Contact-Contact	Once	Medium		Ready	5/28/2021 8:14...
20	<input type="checkbox"/> Lead PRSPX-against All	<input type="checkbox"/>	Lead-Lead	Once	SuperTight		Ready	2/25/2021 12:3...
21	<input type="checkbox"/> Leads	<input type="checkbox"/>	Lead-Lead	Once	SuperTight		Ready	5/15/2020 12:2...
22	<input type="checkbox"/> Leads	<input type="checkbox"/>	Lead-Lead	Once	Tight	OK	Completed	4/28/2020 5:48...
23	<input type="checkbox"/> Lead Import	<input type="checkbox"/>	Lead-Lead	Once	SuperTight	No Rec...	Completed	4/17/2020 8:23...

# DataTrim

## Dupe Alerts



### DataTrim Dupe Alert Result:

This tab becomes populated with a new Alert Result (record) each time a de-duplication has been processed and represents therefore an activity log for all the Alerts you have processed. The Information here is static and created by the system.

This information is used to e.g. support the Dashboards, and other reporting facilities.

If you enable the Email Notification option in the setup, the owner of the Alert is automatically notified by email when the deduplication is done.

Alert Re...	Dupe Alert	Run Date	Result	Match Level	Sec...	Mast...	Tota...	New...
1	AR000395 Candidates (TR) - Standard	6/28/2022 8:08 AM	OK	SuperTight	100	100	10	10
2	AR000394 Candidates A-F	6/28/2022 8:08 AM	OK	Tight	40	40	21	12
3	AR000393 Lead Import (Contacts)	6/28/2022 7:07 AM	No Records to match!	SuperTight	0	285	0	
4	AR000392 Account	6/28/2022 6:48 AM	OK	SuperTight	9	332	5	5
5	AR000391 Candidates (TR) - Status + Exact Email	6/28/2022 6:36 AM	OK	Medium	12	85	10	10
6	AR000390 Person Accounts in Household	6/28/2022 6:36 AM	No Records to match!	SuperTight	0	0	0	
7	AR000389 Candidates (TR) - Standard	6/28/2022 6:35 AM	OK	SuperTight	100	100	10	10
8	AR000388 Candidates (TR) - Status + Exact Email	5/31/2021 3:18 AM	OK	Medium	12	85	10	10
9	AR000387 Candidates A-F	5/31/2021 3:11 AM	OK	Tight	40	40	21	21
10	AR000386 Candidates A-F	5/31/2021 2:22 AM	OK	SuperTight	20	20	0	0
11	AR000385 Candidates (TR) - Status + Exact Email	5/31/2021 2:21 AM	OK	Medium	12	59	4	4
12	AR000384 Car Owners (BE)	2/9/2021 12:56 AM	OK	Tight	4	4	2	2
13	AR000372 Leads	10/31/2019 6:59 AM	OK	Tight	99	99	11	9
14	AR000371 Lead-Contact	4/4/2019 9:00 AM	OK	Tight	113	160	56	56
15	AR000370 Leads	4/4/2019 8:41 AM	OK	Tight	113	113	15	13
16	AR000366 Candidates	4/4/2019 8:39 AM	OK	Tight	68	68	34	33
17	AR000365	4/4/2019 8:39 AM	OK	SuperTight	295	295	22	14
18	AR000360 Lead Custom	3/1/2019 6:17 AM	OK	SuperTight	113	113	1	1
19	AR000359 Candidates-Contacts	3/1/2019 6:16 AM	OK	SuperTight	68	91	58	57
20	AR000339 Business Contacts	12/2/2015 4:07 PM	OK	Tight	4	161	4	4

The Dupe Alert Result Detail page, gives you an overview of the result of the matching process as well as direct access to reviewing and merging the potential duplicates found during the matching.

**DataTrim Dupe Alert Result: AR000371**

**DUPE ALERT NAME: LEAD-CONTACT**

ALERT TYPE	MATCH LEVEL	RESULT	TOTAL NO OF DUPE	SURVIVORSHIP RULES
Lead-Contact	Tight	OK	56	Oldest Record Survives

RECORDS MATCHED	NEW DUPE	100% SCORE	MATCH LEVEL
113 Secondary	56	49	21 Exact Match
160 Master			6 SuperTight Match 29 Tight Match

**RUN DATE:** Thu Apr 04 16:00:55 GMT 2019

**FILTERS AND ADVANCED PARAMETERS:**

Filter: Secondary:  
Filter: Master:  
Advanced Parameters: Secondary\_MAXNumberOfRecords=50000

Review Potential Dupes

All from Alert  
From Alert Result (AR000371)

Potential Dupes  
(Matched Records)  
to Review

Use Batch



### DataTrim Matched Records:

This tab is the main tab for reviewing the possible duplicates which our solution has found in your database.

You can use the standard salesforce List View function to edit the existing views or create your own views to select the records you want to review.

A Match Class/Level is provided to indicate a level of confidence with which our solution considers 2 records to be a match. This helps you organize your review and merging work.

By using the button on top of the screen you can merge records pair by pair by using the **Review Wizard**, or perform a **Mass Merge** of multiple pairs at the same time (see: [Mass merging](#) for more details).

Key Features:

1. Multiple List views for reviewing possible dupes
2. Merge/Convert using the Review Wizard
3. Mass Merge and Mass Convert functionality
4. Advanced scoring and classification mechanism to isolate duplicates to merge

DataTrim Matched Records													
Review Accounts													
22 items • Sorted by Match Class • Filtered by All datatrim matched records - 5 more filters applied • Updated a few seconds ago													
	Mat...	Account (Surviv...	Account (Dupe) ↑	Dupe Alert ...	Match Class ↑	Sc...	Sc...	Scor...	Sa...	Sa...	Parent Relationship		
1	<input type="checkbox"/>	Acc...	DUNKER	DUNKER	Account-Acc...	★★★★★	100	100	100	100	👍	?	Dupe is Parent
2	<input type="checkbox"/>	Acc...	Benioff Hawaiian...	Benioff Hawaiian ...	Account-Acc...	★★★★★	100	100	100	100	👍	?	Dupe is Parent
3	<input type="checkbox"/>	Pete...	Pyramid Construc...	Pyramid Construc...	Account-Acc...	★★★★★	100	100	100	100	👍	?	No Parent-Child Rela...
4	<input type="checkbox"/>	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100	👍	?	No Parent-Child Rela...
5	<input type="checkbox"/>	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100	👍	?	Dupe is Parent
6	<input type="checkbox"/>	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100	👍	?	Survivor is Parent
7	<input type="checkbox"/>	Acc...	Benioff Hawaiian...	Benioff Hawaiian ...	Account-Acc...	★★★★★	100	100	100	100	👍	?	No Parent-Child Rela...
8	<input type="checkbox"/>	Pete...	Hildur Inc.	Hildur Islands	Account-Acc...	★★★★★	100	100	100	100	👍	👍	No Parent-Child Rela...
9	<input type="checkbox"/>	Pete...	Weidemann Mas...	Weidemann Gmb...	Account-Acc...	★★★★★	100	100	100	100	👍	👎	No Parent-Child Rela...
10	<input type="checkbox"/>	Pete...	United Oil & Gas...	United Oil & Gas...	Account-Acc...	★★★★★	100	100	100	100	👍	?	No Parent-Child Rela...
11	<input type="checkbox"/>	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100	👍	?	No Parent-Child Rela...
12	<input type="checkbox"/>	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100	👍	?	Dupe is Parent
13	<input type="checkbox"/>	Acc...	DUNKER	DUNKER SA	Account-Acc...	★★★★★	100	100	99	100	👍	?	No Parent-Child Rela...
14	<input type="checkbox"/>	Acc...	Color Imprint	Color Imprint LLC	Account-Acc...	★★★★★	100	100	0	100	👍	?	No Parent-Child Rela...
15	<input type="checkbox"/>	Acc...	Color Imprint	Color Imprint	Account-Acc...	★★★★★	100	100	0	100	👎	?	No Parent-Child Rela...
16	<input type="checkbox"/>	Acc...	Color Imprint	Color Imprint LLC	Account-Acc...	★★★★★	100	100	0	100	👍	?	No Parent-Child Rela...
17	<input type="checkbox"/>	Acc...	Golfing Pro Ltd.	Golfing United	Account-Acc...	★★★★★	99	100	97	100	👎	👎	No Parent-Child Rela...
18	<input type="checkbox"/>	Acc...	Tip-Top GmbH	TipTop	Account-Acc...	★★★★★	99	100	97	100	👍	👎	No Parent-Child Rela...
19	<input type="checkbox"/>	Acc...	Reinhold BV	Reinhold BV	Account-Acc...	★★★★★	96	100	88	100	👍	👎	No Parent-Child Rela...
20	<input type="checkbox"/>	Acc...	Buchhandel Sch...	Buchhandel Alfre...	Account-Acc...	★★★★★	99	100	96	100	👍	👎	No Parent-Child Rela...
21	<input type="checkbox"/>	Acc...	Color Imprint, Inc.	Color Imprint, Inc.	Account-Acc...	★★★★★	97	100	0	100	👍	?	No Parent-Child Rela...
22	<input type="checkbox"/>	Acc...	The Pyramid Gro...	Pyramid US	Account-Acc...	★★★★★	97	99	0	100	👍	?	Survivor is Parent

### 3 Installation

#### 3.1 Install the Application

Our solution is 100% integrated into salesforce, so there is no software for you to install and maintain on your PC or local servers.

The installation will insert the DataTrim Dupe Alerts tabs into your salesforce application and all you need in order to use the application will be available from within salesforce.



**Trial License Note!** We recommend you to initially install the Trial into a Sandbox, Test or Development environment. This will allow you to try out Dupe Alerts with your real data (merge and conversion of records) without modifying records in your live system.

To install the application, you would need to request a License Number from us. You can do this by requesting a Trial License from our website or if you have purchased a subscription to our service, we have provided you with a License Number as a part of the Order Confirmation. We will also provide you with a link which you need for the installation.

To start the installation, simply click on the link that we provided and follow the Installation Wizard step by step.

#### **Access Control**

During the Installation you will be asked a number of questions. For access control you can decide to enable the application for all, for admin only or to a select group of users.

App Name	Publisher	Version Name	Version Number
DataTrim Dupe Alerts	d2b International ApS	Spring 2024 - DA	2.14

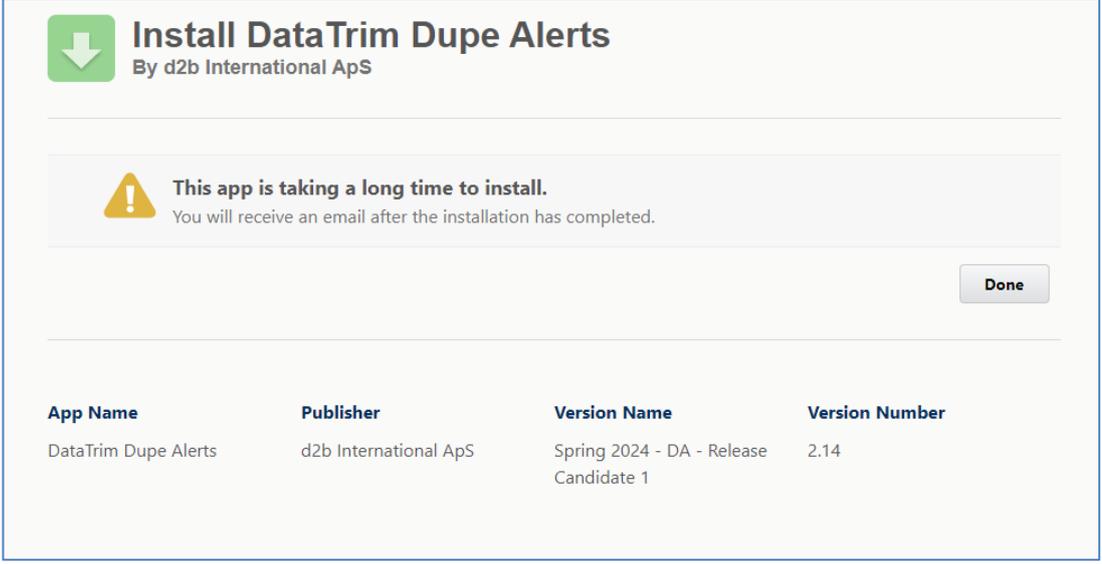
[Additional Details](#) [View Components](#)

**Click Install to continue...**

Note: You can always expand or limit the scope at a later stage, but if you plan to utilize the Dupe Status components for the Account, Contact and/or Lead page layout it is easiest to grant access for all users at this point of the process.

If you want to grant access to users by profile at a later time, you do so by editing their profiles. See Appendix E: DataTrim User Profil for more details.

The installation may take some time and you may receive the following message:



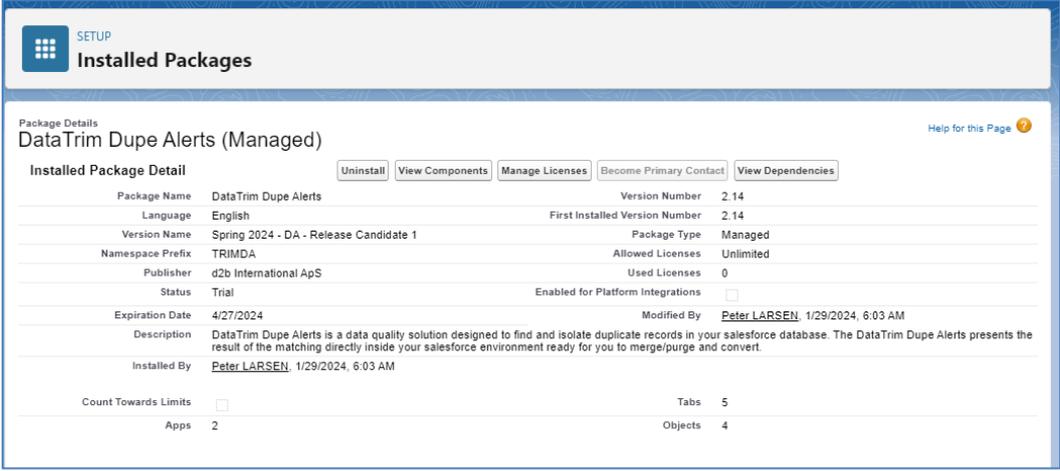
**Install DataTrim Dupe Alerts**  
By d2b International ApS

**Warning:** This app is taking a long time to install.  
You will receive an email after the installation has completed.

[Done](#)

App Name	Publisher	Version Name	Version Number
DataTrim Dupe Alerts	d2b International ApS	Spring 2024 - DA - Release Candidate 1	2.14

Once the installation is complete you should now have the following details in your Installed Package section:



**Installed Packages**

Package Details  
**DataTrim Dupe Alerts (Managed)**

[Uninstall](#) [View Components](#) [Manage Licenses](#) [Become Primary Contact](#) [View Dependencies](#)

Package Name	DataTrim Dupe Alerts	Version Number	2.14
Language	English	First Installed Version Number	2.14
Version Name	Spring 2024 - DA - Release Candidate 1	Package Type	Managed
Namespace Prefix	TRIMDA	Allowed Licenses	Unlimited
Publisher	d2b International ApS	Used Licenses	0
Status	Trial	Enabled for Platform Integrations	<input type="checkbox"/>
Expiration Date	4/27/2024	Modified By	Peter LARSEN, 1/29/2024, 6:03 AM
Description	DataTrim Dupe Alerts is a data quality solution designed to find and isolate duplicate records in your salesforce database. The DataTrim Dupe Alerts presents the result of the matching directly inside your salesforce environment ready for you to merge/purge and convert.		
Installed By	Peter LARSEN, 1/29/2024, 6:03 AM		
Count Towards Limits	<input type="checkbox"/>	Apps	2
		Tabs	5
		Objects	4

Click on the **View Link** to start the Setup and Initialization of the package, or navigate to the DataTrim Dupe Alerts App in the App Manager.

### 3.1.1 Upgrading from a previous version

The Page Layouts for the DataTrim Objects are not automatically updated during the upgrade installation.

Adapting the page layouts to include any new fields introduced by the upgrades have to be done manually.

See the Appendix for our proposed (standard Layout)

### 3.2 Application Initialization and Setup

Before you can start using the app, there are 3 steps to perform in completing the initialization and Setup:

1. Add the license number provided by DataTrim.
2. Activate the subscription by Performing the OnBoarding Process.
3. Add the DataTrim IP addresses to your network access list.
4. Add the DataTrim domain to your Remote Site list

After the installation is completed, go to the DataTrim Dupe alerts Tab, and the wizard will guide you through the 4 basic steps.

If you upgrade, or needs to go back changing the data you can always access the settings from the DataTrim Setup page.

#### 3.2.1 Enter your license Number



## DataTrim Dupe Alerts

### Initialization and Setup

The screenshot shows a web interface for the 'Initialization and Setup' process. At the top, it says 'Initialization and Setup in 5 steps...' with a 'Back' button. Below this is a red header for 'Step 1: License Number Update'. The main content area has a 'License no.' label and a text input field containing 'License No.'. Below the input field is a blue 'Next' button. To the right of the input field, there is instructional text: 'You should automatically receive a 18 character license number in an email from DataTrim. Please check your mailbox, it might take a few minutes for it to get there. If you haven't received the license number, please reach out to us at [support@datatrim.com](mailto:support@datatrim.com) to request the license number to be resent.'

Once you have initiated the installation you should receive an automated email containing your dedicated license number, enter the 18-character license number.

If you do not have a license number, please contact [support@datatrim.com](mailto:support@datatrim.com) to have it resent.

#### 3.2.2 Activate the subscription by Performing the OnBoarding Process



In order for DataTrim to perform the de-duplication of your data you must grant us access to it.

If you signed up for the DataTrim Dupe Alerts you already have our commitment with regards to non-disclosure of the information from the registration process.

There are 2 alternatives for granting us access to your data.

**Alternative 1: Create a Specific DataTrim user**

**Alternative 2: Reusing an existing salesforce License**

Alternative 1 is the optimal solution, as it gives less implication while delivering the service to you. We and our solution will be able to reset the password when it expires, and you can

setup a specific profile for this user, limiting the DataTrim user to having access to the relevant data only.

Alternative 2 however, has the benefit of saving you from buying another license from salesforce, but we would have to manually go through the OnBoarding process each time the user changes the password.

Initialization and Setup in 5 steps... [Back](#)

**Step 2: Providing DataTrim access to your data**

In order for the DataTrim Dupe Alert solution to perform the de-duplication of your data you must grant us access to it.

There are 2 alternatives for granting us access to your data.

**Alternative 1: Create a Specific DataTrim user**  
**Alternative 2: Reusing an existing salesforce License**

OnBoarding Options:

Using a Specific DataTrim user  
 Reusing an existing salesforce License

[Confirm](#)

**Alternative 1** is the optimal solution, as it gives less implication while delivering the service to you. We and our solution will be able to reset the password when it expires, and you can setup a specific profile for this user, limiting the DataTrim user to having access to the relevant data only.

**Alternative 2** however, has the benefit of saving you from buying another license from salesforce, but we would have to manually go through the OnBoarding process each time the shared user changes the password.

### 3.2.3 How to set it up....

#### **Alternative 1: Create a DataTrim user in your system i.e. allocating a new salesforce license to the Dupe Alerts Application**

##### **Step-by-Step**

1. E.g. create a user: **DataTrim@yourcompanyname.com** (replace "yourcompanyname" with your usual Domain Name).
2. Set this user's **e-mail address** to [dataLaundry@datatrim.com](mailto:dataLaundry@datatrim.com)
3. Make sure that this user has full access to the DataTrim Dupe Alerts Application, Objects and Tabs, and that the user has Read access to the Lead, Contact and Account tables.  
Assign or create a new Profile to this user, to control what the application has access to (see Appendix E: DataTrim User Profil for more details).
4. Enable the user and reset the password
5. When we have received the e-mail with the reset password, we will:
  - a. Set a new password (8 char, random generated including characters and numerics)
  - b. Encrypt the password, and activate the user on our server

#### **Alternative 2: Reusing an existing salesforce license**

##### **Step-by-Step**

1. Enter the License number provided to you by DataTrim
2. Enter an Active salesforce user name and password
3. Accept to share the information with DataTrim
4. Click the OnBoarding button to submit the information

Initialization and Setup in 5 steps... [Back](#)

**Step 3: Reusing an existing salesforce License**

License No:

User Name:

Password:

I accept to share this information with DataTrim.

[OnBoarding](#)

By clicking the OnBoarding button below, you will be forwarding an OnBoarding Key to DataTrim.

With this key the DataTrim Dupe Alerts application will be able to access your data using your login and profile.

The information being sent will be encrypted, so no credentials will be exposed in clear text at any point in the process.

Information sharing during the OnBoarding process is covered by our standard: [Non-Disclosure Agreement](#)

The submitted information is encrypted using an AES 128-Bit encryption algorithm. No user credentials are at any point displayed in clear text to anyone. When we receive the OnBoarding request, we will verify the connection and complete the OnBoarding process. Once this verification is complete you will be notified by Email.



Note: If you have setup password expiry in your salesforce organization or if you change your password, then you will have to perform the OnBoarding process each time you change the password.

### 3.2.4 Add the DataTrim IP addresses to your network access list

To ensure a secure connection between salesforce and the servers which are running the matching processes, the IP addresses needs to be added to your list of secure connections.

Go to: Setup-Administration Setup-Security Controls-Network Access

Add the following IP ranges to your list:

- Start IP Address: 72.32.205.66      End IP Address: 72.32.205.70
- Start IP Address: 88.170.119.32      End IP Address: 88.170.119.34

When done you should see the following details in your Network Access list:

Action	Start IP Address ↑	End IP Address	Description
<a href="#">Edit</a>   <a href="#">Del</a>	72.32.205.66	72.32.205.70	DataTrim
<a href="#">Edit</a>   <a href="#">Del</a>	88.170.119.32	88.170.119.34	DataTrim

Note: If you do not add our IP address' to your Network Access list we will reset the Security Token and we will use this, but it might give us trouble when connecting to your data from different servers, thus we strongly recommend to white-list the IP address', although it is not 100% required for the Trials and ad hoc project work.

### 3.2.5 Add the Web Server to your list of Remote Sites

To dynamically create the List views on the DataTrim Matched Records Tab, we leverage the Metadata services API of salesforce, but as this is wrapped into our managed package, the site/domain must explicitly be added to your list of Remote Sites

Go to: Setup-Administration Setup-Security Controls-Remote Sites Settings

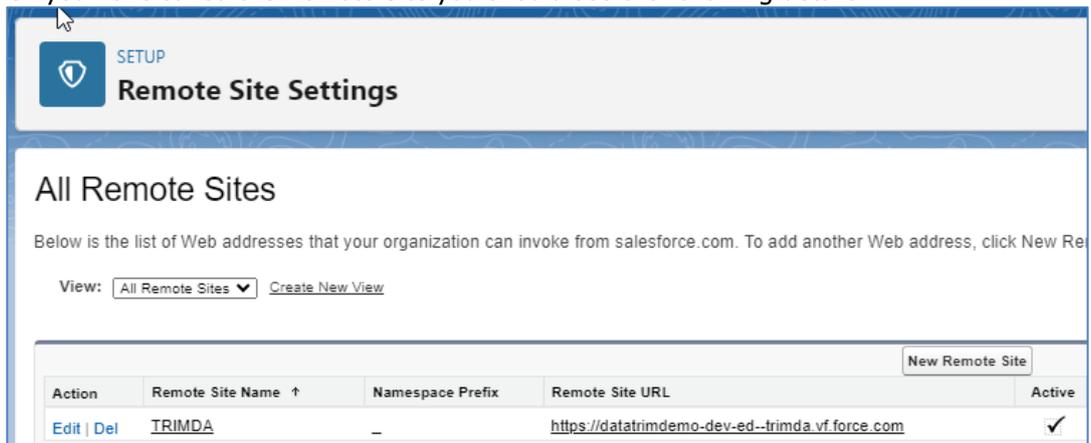
Add:

Remote Site Name: **TRIMDA**

Remote Site URL: <https://mydomain--trimda.vf.force.com>

Description: **DataTrim**

When you have saved the Remote Site you should see the following details:



The screenshot shows the Salesforce 'Remote Site Settings' page. At the top, there is a 'SETUP' icon and the title 'Remote Site Settings'. Below this, the section 'All Remote Sites' is displayed. A message states: 'Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site'. There is a 'View:' dropdown menu set to 'All Remote Sites' and a 'Create New View' link. A table lists the remote sites with columns for Action, Remote Site Name, Namespace Prefix, Remote Site URL, and Active. One entry is shown for 'TRIMDA' with a namespace prefix of '-' and a URL of 'https://datatrimdemo-dev-ed--trimda.vf.force.com'. The 'Active' column for this entry has a checkmark. A 'New Remote Site' button is located in the top right corner of the table area.

Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL	Active
<a href="#">Edit</a>   <a href="#">Del</a>	TRIMDA	-	<a href="https://datatrimdemo-dev-ed--trimda.vf.force.com">https://datatrimdemo-dev-ed--trimda.vf.force.com</a>	<input checked="" type="checkbox"/>

**Note:** the value **mydomain** above is a subdomain used in login URL and application URLs across your Salesforce org.

In your case this should be replaced with the name of your subdomain. Check out your browser URL for your value.

If you are using a personalized url and your browser displays e.g.

<https://mydomain.my.salesforce.com>, you must include your domain in the Remote Site URL like this: <https://mydomain--trimda.vf.force.com>

### 3.3 You are done!

When your application is active (we will confirm by e-mail when this is done) and your de-duplication will be executed as scheduled.

For the Trial we might perform the first 1 or 2 matches manually, but afterwards it will be switched to automated mode.

### 3.4 Note on Security



#### **Security Note:**

We are just as interested in the security and confidentiality of your data as you are. We have therefore undertaken the salesforce certification process to make sure that we comply with all security measures defined by salesforce.

You should also make sure that you are in possession of a Non-Disclosure-Agreement (NDA) signed by us, or if you registered from our website the NDA is found in the terms and conditions section. The NDA provides you with our guarantees that you can safely trust to share your data with us.

To add additional safety with regards to the DataTrim user, you should/could limit the access. You can create a separate User Profile e.g. DataTrim Dupe Alerts User, and in this profile you can:

- 1) Limit the Custom App Settings and only make the DataTrim App visible
- 2) In Admin Permissions you can disable most options, except: API Enable
- 3) Standard Object Permissions, make Account, Contact and Lead read-only
- 4) Custom Object Permissions provide full access rights to the DataTrim objects.

This reduces the exposure to the minimum need-to and thus improves your arguments in regard to security.

If you want to go further you can even create views/page layouts for the Account/Contact/Lead object, where you can "hide" fields which you do not want to have exposed. In fact to be able to do the matching we only need access to 5-10 fields on each object (name, address, phone, email etc.)!

## 4 Setting up and Running the Alerts

Once the Application is initialized and the setup is completed (see above), you are ready to start running your deduplications.



When you want to set up a de-duplication you define your criteria for the deduplication by creating or editing a DataTrim Dupe Alerts record.

You can have multiple Alerts and you can use the list to store your old settings, so that you can retrieve and re-use the settings you used last time you imported e.g. a file.

The Alert records are divided into 4 sections:

**Alert Settings:** Here you select the fundamental parameters. When you have populated all the fields in this section the Alert will be able to run. The other sections below are for advanced use and thus not required.

**Data Filter:** You might want to reduce the scope of your de-duplication by applying a filter to the datasets being used for the de-duplication. You can set a filter on the Master Data, the New and Changed data or on both. So, if as an example you only want to include your US Account records in the de-duplication you apply a filter (BillingCountry='USA') in both filter fields.

**Advanced Settings:** The Advanced settings section is a backdoor to our matching engine. Here you can provide parameters which will make our system behave in various ways, e.g. if you are not using the Billing Country field to keep your country information, because you have created a custom field to keep country values as a pick list, then this is where you will tell the matching engine to pick your custom field instead of the default Billing Country Field.

**Last Run Details:** Our matching engine updates these fields to communicate the actual status of the matching back to you.  
**These fields should normally not be edited by the users.**

### 4.1 My First Dupe Alerts

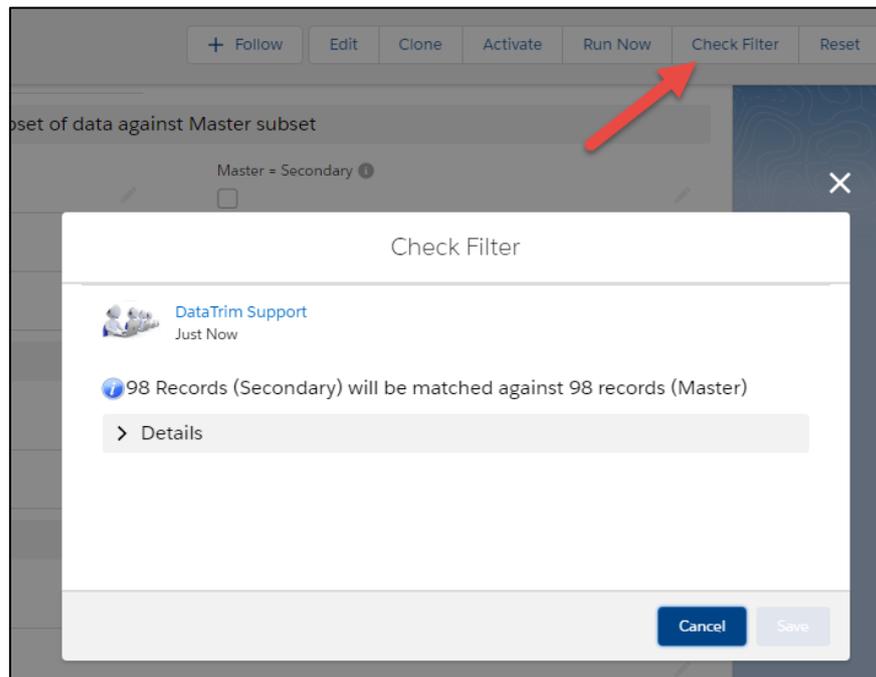
Once you have completed the Setup process, you are ready to create your first Dupe Alert. From the setup wizard you will automatically be navigated to creating your first alert, but you can also create Dupe Alerts directly from the Dupe Alerts Console or from the DataTrim Dupe Alerts Tab.

The DataTrim Dupe Alerts is a definition of **WHAT** you want to de-dupe, **WHEN** and **HOW**. In order to process an Alert, you need to make it **Active**, choose an **Alert Type**, a **Run** value and a **Match Level**.

In this example we will show you how to setup a de-duplication of your account records.

1. First go to the DataTrim Dupe Alerts tab (the admin section), and create a new Alert.
2. Give the Alert a name. Note that the name of the Alert is carried across to the matched records so that if you as an example name the Alert "US Accounts" all the matched records from this alert will be named: "US Accounts – Detail". This way you can filter the outcome by the name and quickly find the matched pairs which came from this Alert.
3. In the Alert Settings section, select the **Alert Type: Account-Account** (matching Accounts against Accounts).
4. Your Alerts can be scheduled to run on a recurrent basis, but in this example, we only want it to run it as a single time job, thus we select the **Run** setting to **Once**.
5. Since this is a one-off de-duplication, we would like to include all **new records added to the database or changed since: 1/1-2022** and match these against the Master Data set.
6. We set the **Match Level** to **SuperTight** to limit the matched pairs to be either Exact or SuperTight.
7. **Survivorship Rule** is set to **Oldest Records Survives**.
8. And finally, again because this is a one-off de-duplication and we want it to process as soon as possible, we set the **When (Time slot)** to **Next** and finish by ticking the **Active** tick box on.
9. If you haven't set the default value of the **License No** field, make sure that you enter the appropriate License Number and **License type** (Trial, Standard, etc.). Once you have created your first Alert the Setup button appear and you can use this button to store your license number, so that you do not have to put it in manually each time you create a new Alert.

The Alert is now ready to be processed!



You can use the button CHECK FILTER to Check your filter (if any), to run the deduplication as a single time deduplication or activate the alert (scheduled).

Reset will de-activate an already activated alert.

### 4.2 Running the Alert

The Alert is automatically triggered when the Alert is **Active**, the **Run** setting match the actual day, and the **When (Time slot)** matched the current time.

The **Timeslot** field allows you to choose a certain time of the day when you want the Alert to run. Choosing e.g. EMEA implies that the Alert will run during the European night, etc. The timeslot **Next** is to be used together with the **Run** value set to **Once** which will make the Alert run in the next available timeslot.



#### ***Run Status and Last Run Results are not to be changed***

As you might be an administrator these fields will be read-write enabled for you, but for a normal user they are read-only. Our matching engine is using these fields to communicate the current status back to you:

- ``Scheduled`` = Job has been put in Queue for processing.
- ``Started`` = Job has been started and the scanning of records has started.
- ``Completed`` = Job has completed – see Last Run Result for details.
- ``Ready`` = This is a new Alert, which has not yet been processed (default value for new Alerts).

#### TRAIL

The Trial version only allows you to use the **Run Frequency** setting **Once**. In the Trial Version the system resets the **Active Flag** of the Alert each time we have processed the matching activity, but you can re-activate the Alert and the Alert will run again, thus you can make several iterations on the same day.

### 4.3 Alert Settings (What, When and How)

In the previous 2 chapters you saw how to set up and run a simple de-duplication. In this chapter we will explain each of the fields in the Alert Settings section in detail and give you examples on how to use them.

#### 4.3.1 Dupe Alerts Type

The Dupe Alerts Type field is the representing the WHAT. Here you choose what type of de-duplication you want to perform:

Account-Account	De-duplication of Account records
Contact-Contact	De-duplication of Contact records (and Candidates <sup>1</sup> )
Lead-Lead	De-duplication of Leads records
Lead-Contact	Matching of Lead records against the Contact records
Lead-Account	Matching of Lead records against the Account records, i.e. checking to see if the contact is a new contact on an existing Account.



**Person Accounts/Candidates:** To perform deduplications on this type of records we recommend using the Advanced Parameter: **ContactOnly=Yes** or **Candidates=Yes** in order to get an optimal deduplication of their records.



Assuming that you have limited time to review the results, and that you do not like to do double work, we recommend you to perform the **Account** matching before the Contact

<sup>1</sup> ) Candidates are contact records without an associated account, or where all contacts are associated with the same account (container account). Candidates are used in the JobScience application as well as a concept in other HR solutions.

matching. This makes the identification of possible contact dupes more obvious if they after the account merge is performed now are within the same Account.

Also perform the Account, Contact and Lead-Lead matching and merging before you do the Lead-Contact and Lead-Account matching, as possible duplicates within the Account, Contact and/or Lead table will generate multiple matched pairs for the same lead, thus double the review work.

Finally, you would want to perform the **Lead-Contact** matching and convert these leads before you run the Lead-Account, as leads which are duplicates of a contact in the Contact table ALSO are duplicates of the Account.

### 4.3.2 Match Level

The Match Level is a way of indicating which confidence level you want the deduplication to work with.

When the matching is performed it will identify a number of possible and less possible duplicates. Each possible dupe pair is classified into 5 confidence levels to help you understand how likely the two records in a pair is to be duplicates.

By default, the matching process will compare the name of the **company, street, city, postcode, country, phone, fax and mobile, website, first name, last name and email.**

If you activate the Social CRM matching it will also include **Facebook, LinkedIn, twitter and Google+** Ids or links.

As you can see on the Matched Records the system provides scores for each field being compared. Classifying these values into a Match confidence level is a way to gather this information into one value, so e.g. **Exact** match means that all the scores generated is 100, whereas for **SuperTight** we allow minor misspellings and differences and so forth down to **Loose** where we allow large variances across the fields. Obviously the lower you go on this scale the more possible dupe pairs you will get for review.

When selecting e.g. **Tight** the system will return all pairs that are Tight or above (Exact and SuperTight) but not the pairs classified as **Medium** and **Loose**.

On the Matched Records you will be presented with the Match Level for each pair, and a Match Class which is a visual representation of the Match Level, where an Exact match is represented with 5 stars, SuperTight with 4 stars etc.



Never set the Match Level to Loose the first time you run your de-duplication. We recommend that you take a phased approach where you first identify the Exact and SuperTight duplicates. This way you will quickly identify the most obvious dupes and have them merged first, thus giving you the largest impact on your database with minimum time. Later you can re-run the Alert setting the Match Level lower, and spend a bit more time carefully reviewing the outcome.

### 4.3.3 Survivorship Rule

When presenting the dupe pairs in the Matched Record Tab you will see data presented in 2 columns, one labeled Survivor and the other labeled Dupe. The survivorship rule determines which of the 2 records goes where, so as an example if you choose the survivorship rule to: 'Oldest Record Survives' then for the outcome from this Alert, the oldest record will always be listed on the left side of the screen, thus the most recently created record will be on the right.

Depending on how you use salesforce and how you have adapted it in your business with regards to the sources from where you get new records (possible duplicates) etc. we normally recommend:

1. For records (normally **Accounts** and **Contacts**) where you already have a relationship (Customers etc.) always keep the oldest record, as this is likely the record which have most detail as it has existed, and hopefully been worked with, for the longest time.
2. For **Prospects** with whom you have no relation, keep the most recent records. If e.g. you have a record which is 12 months old and you have campaigned against it without any luck, then a recently imported matching record may be your better option as it could be that the new record is more up to date and thus more valuable.

### Advanced survivorship rules

If your survivorship rules are more complex than comparison of dates you can define your own survivorship rules as formula fields on the Matched Record Object. You can read more about this feature in the under customization: [Use formula fields to help determine survivor](#)



**Note: No records are automatically merged according to the survivorship rule!**

The rule is meant as a guideline for the reviewer as to which records to choose as survivors, but up until someone manually clicks on the merge button the user has full control over which records are going to be the Master under which all merged data will be consolidated, and which one ends up as the dupe.

### 4.3.4 Use Social CRM references

With the September '12 release we introduce an additional way of identifying and comparing records. Like emails, names and websites, the references to social media like Facebook, Twitter, LinkedIn and Google+ represent an opportunity to identify duplicates. Although 2 contacts may have different emails, but if their LinkedIn Ids are the same it is most likely a duplicate.

To enable the use of Social CRM references in the dupe detection and matching, select the tick box: Use Social CRM on the Alert.

The screenshot shows a settings panel titled 'Alert Settings (what, when and how)'. It contains several rows of settings, each with a label on the left and a control on the right. The 'Use Social CRM' setting is checked, and a red arrow points to the checkmark.

Alert Settings (what, when and how)	
Dupe Alert Type	Active
Lead-Lead	<input type="checkbox"/>
Match Level	Run
Tight	Once
Survivorship Rule	When (Time Slot) ⌵
Most Recent Record Survives	Next
Use Social CRM ⓘ	<input checked="" type="checkbox"/>

There are many implementations of Social CRM possible, so in order for our matching process to function you have to specify the fields where our solution will find the Social CRM values. See the Setup section for more details.

### 4.3.5 Run setting

The Alerts can be processed either as a one-off de-duplication or as a recurrent scheduled process.

The availability of the options mentioned below may depend on the License Type you have (see Appendix for details).

For recurrent scheduled de-duplication you can choose between daily, weekly or monthly de-duplications. Choosing one of these options, the system will automatically keep track of the date it last ran (represented in the "Include New and Changed Records since" field) and included records, which have been added or changed since last time, and will match these against the Master Data.

Once the scheduled Alert is set up it will keep being processed until you de-activate it.



You might want to the setup to enable the email notification to notify you when an Alert has been processed so that you don't forget to go and review the outcome.

If you want to perform a one-off de-duplication simply choose the **Once** option. When a one-off de-duplication is completed, the system will automatically reset the Active Flag to prevent the Alert from looping. You can re-activate the Alert by setting the Active flag and the system will process it again, thus you can perform multiple de-duplications during the same day.

When choosing the Once option, you might also want to manually set the "Include New and Changed Records since" date back in time to include more records in the de-duplication.



So as an example, if you are about to run one of your first de-duplications and you want the system to identify duplicates that have been introduced since the first day you used salesforce, you can simply set the date back to a date before you started to use salesforce. This way the system will Include New and Changed Records since then and match them against the Master Data set, which means it will match all records against all records.



Note: Be careful using the Run Frequency **Every Sunday** in combination with certain time slots (see below). Sunday is the day salesforce normally use for their maintenance, and often the access to their system is limited, thus our matching engine cannot get access to your data either and the matching will therefore not be performed as expected.

### 4.3.6 When will the Alert Run (Time Slot)?

When you run your Alerts on a recurrent scheduled basis you might want them to run on a specific time of the day. In the default setup we have included 4 predefined time slots:

- Next** You alert is triggered by a mechanism that detects if the time is right based on the time slot and time zone, but if you simply want the Alert to run as soon as possible regardless of what time it is and what time zone you are in, simply choose the option **Next**, and the Alert will start being processed in the next time slot (within 30 minutes).
- EMEA** Europe-Middle-East-Africa. Selecting this time slot will make your Alerts run at night, when it is night in Europe (between 2:00am and 8:00am CET).
- Americas** Selecting this time slot will make your Alerts run at night, when it is night in the Americas (between 2:00am and 8:00am Pacific).
- APAC** Asia-Pacific. Selecting this time slot will make your Alerts run at night, when it is night in Asia (between 2:00am and 8:00am Japan Time).

Note! Selecting e.g. Every Thursday + Americas will make the Alert run between 2am and 8am every Thursday morning.



I you need more accuracy in the timing you can add your own timeslot values to the pick list. Although this gives you more flexibility there is no guarantee that your Alert is process at the exact minute.

Examples:

*If you like your Alert to run at 6am Pacific time (UTC-8), you should add "UTC+10" ( $8 + 6 = 14$ ;  $UTC-14 = UTC+10 = 2pm$  GMT) to the pick list and use this value for your Alerts.*

*For 4am Central European time (UTC+1), you should add "UTC-5" ( $1 + 4 = 5$ ;  $UTC-5 = 5am$  GMT)*

*For 1am Eastern Australian time (UTC+8), you should add "UTC-9" ( $8 + 1 = 9$ ;  $UTC-9 = 9am$  GMT)*

### 4.4 Matching Subsets of Data – Using Data Filters

You can limit the de-duplication to run on a subset of your data only, e.g. include only records which are entered from your web-to-lead feature, records which you recently imported, or records from a particular country/region.

Fundamentally the matching engine always matches something against something else – we refer to this as **a) Secondary Data** and **b) Master Data**.

The Secondary Data filter also include a date filter: 'Include New and Changed data since' and is based on the date stated, and the Master data represents all the records in your table.

The screenshot shows a web interface titled "Data Filter - Matching Secondary subset of data against Master subset". It features several input fields and controls:

- Campaign:** A search box with the placeholder text "Search Campaigns..." and a magnifying glass icon.
- Filter: Secondary Data Set:** A text input field containing the filter expression "BillingCountry = 'USA'".
- Filter: Master Data Set:** An empty text input field.
- Master = Secondary:** A checkbox that is currently unchecked, with an information icon to its right.
- Include New and Changed data since:** A date input field containing "12/9/2000" and a calendar icon.

This allows you, as in the example above, to run an Alert which matches all account records with the Billing Country is USA against all your accounts (Master Data).

If you want to match one subset of records against itself you can use the **"Master=Secondary"** check box. So, with the Check box enabled in the example above the records with Lead source = 'web' will be matched against themselves.

Note: that if you have this checkbox selected, anything you may put into the Master Data Set will be ignored.

Normally the fields being referenced by the filter have to be fields from the corresponding Alert Type, e.g. Account fields for an Account-Account Filter.

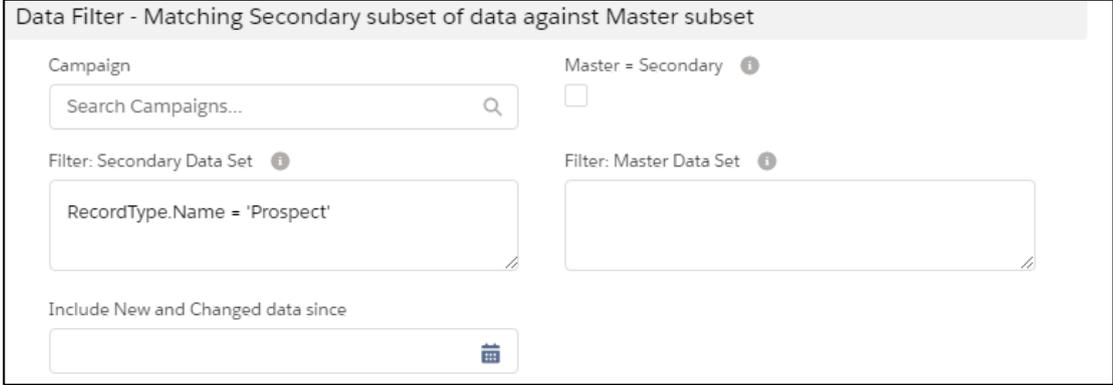
When matching Leads against Contacts or Accounts (**Lead-Contact or Lead-Account**), the Secondary Filter relates to the Lead data, and the Master Filter relates to the Account/Contacts.



When using filters, you should validate the Alert using the **Check Button**. The validation will tell you how many records (New and Changed) that are going to be matched against the rest of your database (Master Data). If you have made an error in your filter the validation will present you with a syntax error.

### 4.4.1 Filtering by Record Type

Filtering by Record Type can easily be done by referencing the records type name using the salesforce field reference syntax: `RecordType.Name = 'Prospect'`



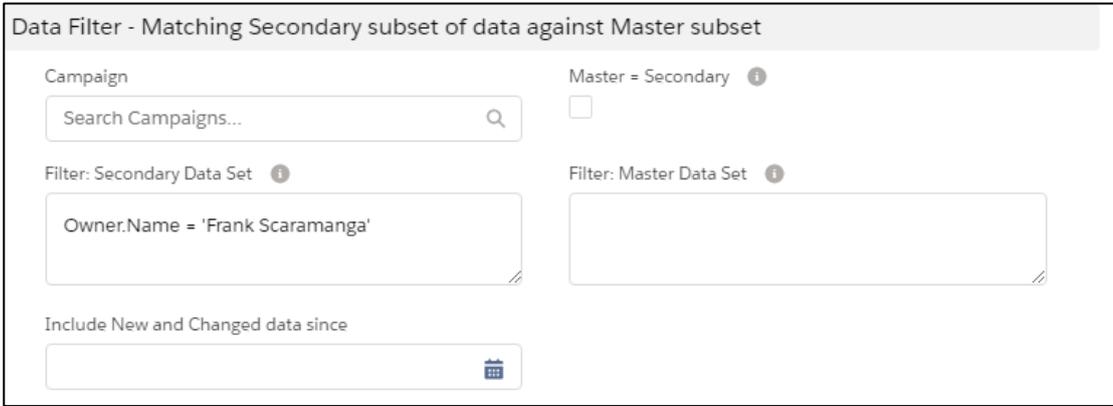
The screenshot shows the 'Data Filter - Matching Secondary subset of data against Master subset' interface. It includes a 'Campaign' search field, a 'Master = Secondary' checkbox, and two filter input boxes. The left filter box contains the formula `RecordType.Name = 'Prospect'`. The right filter box is empty. There is also an 'Include New and Changed data since' date picker.



NOTE! When referencing a field value in the formula make sure you embrace the value with single-quote signs, e.g.: `BillingCountry = 'USA'`

### 4.4.2 Filtering by Owner

Filtering by Owner can easily be done by referencing the owner name using the salesforce field reference syntax: `Owner.Name = 'Test User1'`



The screenshot shows the 'Data Filter - Matching Secondary subset of data against Master subset' interface. It includes a 'Campaign' search field, a 'Master = Secondary' checkbox, and two filter input boxes. The left filter box contains the formula `Owner.Name = 'Frank Scaramanga'`. The right filter box is empty. There is also an 'Include New and Changed data since' date picker.

### 4.4.3 Deduping Campaign records

You can also select records by specifying which campaign the lead/Contact is linked to. This is quite convenient when e.g., you have performed an Import towards a Campaign, and want to dedupe those records before you start processing the Campaign members.

The filtering by Campaign is available for Dupe Alert Types: Lead-Lead, Contact-Contact, Lead-Contact and Lead-Account.



NOTE! The Campaign Module is not available in all editions of salesforce, the Campaign field is therefore not included on the page layout as default. In order to enable this feature, create a Lookup Relationship field on the Object: 'DataTrim Dupe Alert', link it to Campaign, Name it 'Campaign', and add it to your page layout.

Data Filter - Matching Secondary subset of data against Master subset

Campaign

Filter: Secondary Data Set

Filter: Master Data Set

Master = Secondary

Include New and Changed data since

### 4.4.4 Filtering by Custom Fields

If you want to filter by a Custom field, you must use the Unique API Name of the field for the reference, and the Label Name which you see on your page layouts not necessarily identifies a unique field on the Object.

Data Filter - Matching Secondary subset of data against Master subset

Campaign

Filter: Secondary Data Set

Filter: Master Data Set

Master = Secondary

Include New and Changed data since

You will find the API Names in the Fields section of the setup for the Object (Account, Contact and/or Lead):

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Account

Details

**Fields & Relationships**  
38 • Items, Sorted by Field Label

Q Quick Find

FIELD LABEL	FIELD NAME	DATA TYPE
Account Name	Name	Name
Account Number	AccountNumber	Text(40)
Account Owner	OwnerId	Lookup(User)
Account Record Type	ART__c	Formula (Text)
Account Record Type	RecordTypeId	Record Type
Account Site	Site	Text(80)
Account Source	AccountSource	Picklist
Active	Active__c	Picklist

### 4.4.5 Filtering by Date

Filtering by date can be done in different ways.

- 1) By using the Field: Include New and Changed data since, you can include records added or modified since a give data by simply selecting the day from the Calendar wizard, or edit the date directly by editing the data value in the field e.g. when you want to go back more the 1-2 years.

Data Filter - Matching Secondary subset of data against Master subset

Campaign

Master = Secondary

Filter: Secondary Data Set

Filter: Master Data Set

Include New and Changed data since

- 2) If you want to identify data which e.g. was imported on a specific date, you would need to enter a filter covering the full range of the date:

Filter: Secondary Data Set

Note that the **syntax** in salesforce for dates are: **YYYY-MM-DDTHH:MM:SS.sssZ**

- 3) By using the built-in date references

Filter: Secondary Data Set

-or-

Filter: Secondary Data Set

### 4.4.6 Other Filter Examples:

In the table below, you will find other examples of filter statements often used.



**Note:** The field name must be the Unique API Field name, not the Label name as it might not be unique within the table. For custom fields this includes the suffix: *\_\_c* (double under score + c)



For a full listing of the filter conditions see [Appendix A: Filter Statements in DataTrim Dupe Alerts](#)

<b>Example 1:</b>	<b>Filter by Simple Standard field</b>
	Match the new and changed Account data against all other records (Master Data) where the Billing Country is set to USA
Filter:Master Data:	BillingCountry='USA'

<b>Example 2:</b>	<b>Filter by Multiple Standard field</b>
	Match the new and changed Account data against all other records (Master Data) where the Billing Country is set to USA or UK
Filter:Master Data:	BillingCountry='USA' OR BillingCountry='UK'

<b>Example 3:</b>	<b>Filter by Custom Field (Region)</b>
	Match the new and changed data against records with region field NOT set to EMEA Note that since Region Field is a Custom Field you would need to add the suffix <i>“__c”</i> (double under score + c)
Filter:Master Data:	Region__c != 'EMEA'

<b>Example 4:</b>	<b>Filter Contacts by Account Region</b>
	For the contact alert type <b>Acc+Contact-Acc+Contact</b> you can use fields from the Account for filtering simply by <b>adding the prefix “a.”</b> to the field reference. Example Match Contacts in companies where the account region field is NOT EMEA
Filter:Master Data:	a.Region__c != 'EMEA'

<b>Example 5:</b>	<b>Match newly imported data against existing data</b>
	You have imported a set of leads and now you would like to match them against the existing leads (for this purpose make sure that you consistently always update a record with the source from which it came, in this example we assume we have a field called ImportSource ). Match new and changed records where the ImportSource field set to <i>“Imports2008-03-12.csv”</i> against the rest of the database. Note that since ImportSource field is a Custom Field you would need to add the suffix <i>“__c”</i> (double under score + c)
Filter: Secondary Data:	ImportSource__c='Imports2008-03-12.csv'

<b>Example 6:</b>	<b>Match newly imported data against existing EMEA data</b>
	Match new and changed records in the ImportSource field set to <i>“Imports2008-03-12.csv”</i> against records with region field set to EMEA.
Filter:Master Data:	Region__c='EMEA'
Filter: Secondary Data:	ImportSource__c='Imports2008-03-12.csv'

### 4.5 Using Advanced Settings

#### 4.5.1 Additional Review Field

The Additional Review Field is an option to carry additional data from the records onto the DataTrim Matched Record entries, e.g. an account number.

The Additional Review Field will not be included in the matching process, but you can make a comparison of the values on the DataTrim Matched Record entry.

You can append other fields, even custom fields, to the pick list by editing the field on the DataTrim Dupe Alert Object. The field name shall be the Unique API Field name not the Label name, as it might not be unique within the table. For custom fields this includes the suffix: **\_\_c**, and include the prefix **"a."** for **Account** fields, **"c."** for **Contact** fields and **"l."** for **Lead** fields.

We are using the salesforce functionality: Field Dependencies to control which pick list values that are made visible and controlling this by Alert Type so that you as an example only see Account fields when you have selected the Match Type to be Account-Account.

In order to get your new value displayed you will need to edit the Field Dependencies and include your value for the relevant Dupe Alert Types.

SETUP > OBJECT MANAGER  
DataTrim Dupe Alert

Details Fields & Relationships 25 Items, Sorted by Field Label

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Active	TRIMDA__Active__c	Checkbox		
Add. Review Field	TRIMDA__ReviewField1__c	Picklist	Dupe Alert Type	
Add. Review Field (Lead)	TRIMDA__ReviewFieldX__c	Picklist	Dupe Alert Type	
Advanced Parameters	TRIMDA__ADVConfiguration__c	Long Text Area(1024)		
Alert Status	TRIMDA__Alert_Status__c	Formula (Text)		
Campaign	Campaign__c	Lookup(Campaign)		✓
Created By	CreatedById	Lookup(User)		

Click button to include or exclude selected values from the dependent picklist

Include Values Exclude Values

Showing Columns: 1 - 5 (of 6) < Previous | Next > View All | Go to

Dupe Alert Type:	Account-Account	Acc+Contact-Acc+Contact	Contact-Contact	Lead-Lead	Lead-Account
Add. Review Field:	a.Site	a.Site	a.Site	a.Site	a.Site
	a.BillingState	a.BillingState	a.BillingState	a.BillingState	a.BillingState
	a.Rating	a.Rating	a.Rating	a.Rating	a.Rating
	a.Type	a.Type	a.Type	a.Type	a.Type
	a.RecordTypeId	a.RecordTypeId	a.RecordTypeId	a.RecordTypeId	a.RecordTypeId
	c.Email	c.Email	c.Email	c.Email	c.Email
	c.LeadSource	c.LeadSource	c.LeadSource	c.LeadSource	c.LeadSource
	c.MailingState	c.MailingState	c.MailingState	c.MailingState	c.MailingState
	l.Email	l.Email	l.Email	l.Email	l.Email
	l.LeadSource	l.LeadSource	l.LeadSource	l.LeadSource	l.LeadSource
	l.Rating	l.Rating	l.Rating	l.Rating	l.Rating
	l.State	l.State	l.State	l.State	l.State
	l.Status	l.Status	l.Status	l.Status	l.Status
	l.RecordTypeId	l.RecordTypeId	l.RecordTypeId	l.RecordTypeId	l.RecordTypeId

Showing Columns: 1 - 5 (of 6) < Previous | Next > View All



For other ways of getting additional data displayed on the Matched Record see [Adding more Review fields to the Matched Record Object](#) for more options.

### 4.6 Advanced Use

The solution is designed around the ease of use, and the ability to easily set up a deduplication and run it, thus you do not need to worry about which fields to use for the deduplication, which algorithms to use for comparing the fields etc. This has all been defaulted by the solution.

However, sometimes your matching requirement goes beyond the default setup.

The Advanced settings section is the place where you can pass specific commands/parameters to the matching engine to make it perform certain special operations.

Advanced Settings

Add. Review Field ?  [View all dependencies](#)

Add. Review Field (Lead) ?  [View all dependencies](#)

Advanced Parameters ?

```
ExactMatchField=OwnerId
FieldMap=BillingCountry=BillingState
```

#### 4.6.1 Optimizing the Matching Process

<b>1</b>	<p><b>Matching only records that share common exact values (e.g. External ID, Account Number, VAT no. etc.)</b></p> <p>If using an Exact Match Field for matching, only records with identical field values will be compared.</p> <p>The records will still be compared across the various fields and scoring will be provided, but only if the 2 Exact Match Field values are identical the result will be presented in the Matched Records Tab.</p> <p>Use this to find duplicate entries with same 'DUNS Number', Account Number, Email, Owner etc.</p> <p><b>Note: You can only have one Field referenced as the Exact Match Field.</b></p> <p>Syntax: <b>ExactMatchField</b>=&lt;FieldRef&gt;</p> <p><i>Example: (match only records with identical AccountNumbers)</i></p> <p><i>ExactMatchField=AccountNumber</i></p> <p><i>or (match records with identical Emails)</i></p> <p><i>ExactMatchField=Email</i></p> <p><i>or (only match records with same owners)</i></p> <p><i>ExactMatchField=OwnerId</i></p> <p><i>or (to match Contacts within the same accounts)</i></p> <p><i>ExactMatchField=AccountId</i></p>
----------	--

### 2

#### Modifying the Match Algorithms

Our algorithms have already been preconfigured with a lot of best-practice optimization processes and referenced.

As an example the algorithm which compares account names already have a long list of reference words which is used to understand the field value, e.g. it recognized the words: Corporation, Limited, builder, systems etc. and when it is comparing 2 field values which both contain the word 'systems' it is capable of taking a relaxed look at this value and concentrate on the remaining part, so e.g. when comparing ABC Systems with XYZ Systems, it puts more weight on the ABC – XYZ part of the names, thus provide you with a more intelligently calculated score.

In certain cases, your database may contain company names or other values which can confuse the matching algorithms in a similar way. For this Purpose, we have introduced 3 Advanced Parameters:

**Relax** Use this parameter when you as in the example above want the matching to reduce its focus on this word.

**Normalize** Use this parameter when you want to transform words into normalized/standardized values. This is of interest if you have many account names which are the same company but which can be spelled in many different ways: IBM = International Business Machines etc.

**Exclude** Use this for dummy values which you may have in certain fields which is part of the deduplication. If e.g. your email field is mandatory you might find that people who enter records or even importing records puts a dummy value into the field to make sure that the record is saved. When you then later perform a matching and find 2 records which both have the same email (none@none.com) thus the classification of a dupe pair may become misleading as it looks like the 2 records are having the same email. The Exclude Parameter simply removed the value from the field prior to the matching thus the dummy values will no longer influence the matching process.

Syntax:

**Relax:=<FieldRef>:<Word>**

**Normalize:= <FieldRef>:<Word>=<NormalizedWord>**

**Exclude:=<FieldRef>:<Word>**

Where <Word> is any word which may occur in the field (not case sensitive).

Where <NormalizedWord> is the normalized word to be used for the comparison.

Where <FieldRef> is one of the following Values:

**ORGNAME**

**EMAIL**

**ALL**

*Examples:*

*Relax:=ORGNAME:Florida*

*Relax:=ORGNAME:Sparkasse*

*Relax:=ORGNAME:Telco*

*Normalize:=ORGNAME:sforce=salesforce*

*Normalize:=ORGNAME:Minnesota Mining and Manufacturing Company=3M*

*Normalize:=NAME:Dave=David*

*Exclude:=EMAIL:none@none.com*

*Exclude:=EMAIL:.@.com*

*Exclude:=ALL:NOZIP*

*Exclude:=ALL:LastName*

### 4.6.2 Changing the Field References for Matching

<b>1</b>	<p><b>Use of non-default fields for matching</b></p> <p>To make the setup procedure as simple as possible we have built in default mappings between the salesforce fields and the matching algorithm, e.g. when matching Accounts the system assumes that it can find the city value in Billing City, the Country value in Billing Country, etc. You might have chosen to implement custom fields to keep some of this data, thus you would need to tell our system where to find these values.</p> <p>Syntax: <b>FieldMap</b>=&lt;comma separated list of field maps&gt; Where a field map represents the Default Field value an equal sign followed by the custom field</p> <p>Account Example (use Billing State in stead of Billing Country) <i>FieldMap=BillingCountry=BillingState</i></p> <p><i>Lead Example (remapping Country and email fields):</i> <i>FieldMap=Country=Country__c,Email=Email2__c</i></p> <p><i>Contact example:</i> <i>FieldMap=MailingCountry="Country__c",MailingCity="City__c",MailingPostalCode="ZIP_Code__c",MailingStreet="Street__c",Phone="Work_Phone__c"</i></p> <p>For Leads the following fields are used as default (use on the left side of the equal sign): Country, PostalCode, City, Street, Company, Website , Phone , Fax, MobilePhone, FirstName, LastName, Email</p> <p>For Accounts the following fields are used as default: BillingCountry, BillingPostalCode , BillingCity, BillingStreet, Name, Phone, Fax, Website</p> <p>For Contacts the following fields are used as default: MailingCountry, MailingPostalCode, MailingCity, MailingStreet, Phone, fax, MobilePhone, FirstName, LastName, Email</p>
<b>2</b>	<p><b>Excluding default fields from the matching</b></p> <p>If you are not using a particular field, or if you are not using it consistently throughout your database, you might want to exclude the field from the matching process. You can do this in a similar way as when re-mapping the field (above), but use the value NULL instead of a valid field reference.</p> <p>Syntax: <b>FieldMap</b>=&lt;comma separated list of field maps&gt; Example (Let the matcher ignore the Country field) <i>FieldMap=Country=NULL</i></p> <p>or <i>FieldMap=BillingCountry=NULL, BillingStreet=NULL</i></p> <p>For Leads the following fields are used as default: Country, PostalCode, City, Street, Company, Website , Phone , Fax, MobilePhone, FirstName, LastName, Email</p> <p>For Accounts the following fields are used as default: BillingCountry, BillingPostalCode , BillingCity, BillingStreet, Name, Phone, Fax, Website</p> <p>For Contacts the following fields are used as default: MailingCountry, MailingPostalCode, MailingCity, MailingStreet, Phone, fax, MobilePhone, FirstName, LastName, Email</p>

### 4.7 Other

<b>1</b>	<b>Exclude Parent-Child Relationships</b>
	Duplicate accounts may turn out to be related by a parent-child relationship. If you want the solution to ignore these possible dupes use this advanced parameter
	Syntax: <b>ExcludeParentChild</b> =YES <i>Example:</i> <i>ExcludeParentChild=YES</i>
<b>2</b>	<b>Matching Contact Data Only – Person Accounts</b>
	If you are using salesforce for contact data only, and are not populating the Company name field with a company value, you might use this option to make sure that the matching process ignores the company field during matching.
	Syntax: <b>ContactOnly</b> =YES <i>Example:</i> <i>ContactOnly=YES</i>
<b>3</b>	<b>Matching Contact Data Only – Candidates</b>
	If you are using salesforce for candidates (e.g.Using JobScience ), and are not populating the Company name field with a company value, you might use this option to make sure that the matched records are classified by the special Candidate algorithm.
	Syntax: <b>Candidates</b> =YES <i>Example:</i> <i>Candidates=YES</i>
<b>4</b>	<b>Matching Company Data Only</b>
	If you as an example would like to match your lead while ignoring the contact details (first name, last name and email) you might use this option to make sure that the matching process ignores the contact detail fields during matching.
	Syntax: <b>CompanyOnly</b> =YES <i>Example:</i> <i>CompanyOnly=YES</i>
<b>5</b>	<b>Statistics Only</b>
	Runs the matching and provides an entry in the Dupe Alerts Result tab, but no records are inserted/updated into the Matched Records Tab.
	Syntax: <b>StatsOnly</b> =YES <i>Example:</i> <i>StatsOnly=YES</i>
<b>6</b>	<b>Custom Keys (NEW)</b>
	You can use up to 3 extra fields (in addition to the default fields) for the matching. The Custom keys can be used in 2 different ways, a) in combination with the default fields (YES or BOTH) or b) as the principal match field, regardless of the default fields (ONLY).
	Syntax: <b>CustomKeyUse</b> =<YES/BOTH/ONLY> <b>CustomKey1</b> =<API field name> <b>CustomKey2</b> =<API field name> <b>CustomKey3</b> =<API field name> <i>Example: Matching by email address only:</i> <i>CustomKeyUse=ONLY</i> <i>CustomKey1=email</i> <i>Example: Matching including additional email addresses:</i> <i>CustomKeyUse=BOTH</i> <i>CustomKey1=email_1__c</i>

*CustomKey2=email\_2\_\_c*

*Example: Matching using formula field concatenating e.g. City and Zip:*

*CustomKeyUse=BOTH*

*CustomKey1=City\_and\_Zip\_\_c*

**7**

### **Custom Classification**

The classification of the matched Pairs (Exact, SuperTight etc.) can be customized, but as the classification is an integral part of the matching process, the classification rules cannot be modified by the users.

We do offer though a service which allows you to have your custom classification.

Example: Based on a request from our Partner we were requested to create a classification where the emphasis on the company name was reduced in order to more easily spot duplicates on e.g. the same address. This Custom Classification is now available for all by referencing the Classification Name as stated below. Contact us for more information.

Syntax: **CustomClassification**=<ClassificationName>

*Example:*

*CustomClassification=Hulina*

## 5 The Dupe Alerts Console

The Dupe Alerts Console, provides you with an overview on all that is going on with regards to your deduplication initiatives.

In a single view you can:

1. Access to outstanding potential duplicates for review.
2. Get a Quick overview on active, scheduled and failed alerts
3. See which alerts is currently queued for processing
4. Quickly identify Alerts which failed and take appropriate actions
5. See the results of the most resent alerts.
6. Get statistics on the number of records being checked and number of dupes being found, but at an overall level, as well as per alert type.

The screenshot displays the DataTrim Dupe Alerts Console interface. At the top, there are four status boxes: 'Active' (4), 'Scheduled' (3), 'Failed' (0), and 'All' (44). Below these is the 'Alert Queue (7)' section, which lists various alerts with columns for Name, Selection, Type / Match Level, Run / Time Slot, Run Status, and Actions. The 'Recent Dupe Alert Result - Last (10) Results' section shows a table of recent alert runs with columns for Run Date, Alert Name, Type/ Match Level, Checked, Dupes (new), and Actions. On the right side, there are three summary widgets: 'Outstanding Potential Duplicates (top 10 by Alert Name)', 'Alerts - Last 30 days' (showing 7 alerts, 522 records checked, and 94 potential dupes found), and 'Alert Types - Last 30 days' (showing counts for Accounts, Contacts, and Leads).

The Dupe Alerts Console is interactive.

By clicking on the Alert boxes on top you can get the list of Alerts displayed.

Creating a new alert or activating an existing alert can be done with a single click.

In order to get duplicates identified you will need to create and run some alerts.

Once an Alert has been processed, the potential duplicates are available for review in the DataTrim matched Records Tab.

The widget in the top right corner will give you a break-down, alert by alert of how many potential duplicates are available for reviewing.

You can start reviewing directly by clicking the **Review Dupes** link in the widget.

Other ways of Reviewing/Viewing the potential dupes are:

- 1) Top level (**Review ALL Potential Duplicates**): This will simply take you to the DataTrim Matched Records tab from where you can start working with the List Views
- 2) Alert Level: The **Review Dupes** link will take you to a Dynamic List View on the DataTrim Matched Records Tab, displaying all the potential dupes pending review and merge for the given Alert, regardless of when the potential dupes were found (which result they belong to).
- 3) Alert Result Level: The **Review Dupes** link at this level will take you to a Dynamic List View on the DataTrim Matched Records Tab, displaying all the potential dupes pending review and merge for that particular Alert Result, i.e. specific run on the alert.

The **Batch Merge Etc.** button will take you to the Batch processing wizard, which will allow you to process (Merge/Convert or Delete) large amount of Matched Records in a single operation.

### Dupe Detection Upon Entry

On the right side, you can see the status of your Dupe Detection Upon Entry Features, and by clicking the buttons you can go directly to the setup to activate/deactivate the feature.

### Quick Tips

The Dupe Alerts Console also include to keep you up to date on functions and features you may not yet utilize as well as references to the user guide, our data quality blog, tutorials and support.

## 5.1 DataTrim Dupe Alert Results

The DataTrim Dupe Alert Result tab contains records for each deduplication performed. Once a deduplication is completed a Result record is created and the statistics from the deduplication is stored on the record detail.

The Alert Result records contain information about the number of records for the deduplication, the filter you used and when it was processed.

It also provides you with counts for number of duplicates found:

<b>Total No of Dupes</b>	The Total Number of possible duplicates found in the dataset with a classification at the selected level or higher.
<b>New Dupes</b>	The Total Number of possible duplicates identified minus those already flagged as false dupes.
<b>Overall Score</b>	Number of New Dupes where the overall score is 100
<b>Exact Match</b>	Number of New Dupes with the Match level of Exact
<b>SuperTight Match</b>	Number of New Dupes with the Match level of SuperTight
<b>Tight Match</b>	Number of New Dupes with the Match level of Tight
<b>Medium Match</b>	Number of New Dupes with the Match level of Medium
<b>Loose Match</b>	Number of New Dupes with the Match level of Loose

**DataTrim Dupe Alert Result: AR000371**

DUPE ALERT NAME:	MATCH LEVEL	RESULT	TOTAL NO OF DUPES	SURVIVORSHIP RULES
Lead-Contact	Tight	OK	56	Oldest Record Survives

RECORDS MATCHED	NEW DUPES	100% SCORE	MATCH LEVEL
113 Secondary	56	49	21 Exact Match
160 Master			6 SuperTight Match
			29 Tight Match

RUN DATE: Thu Apr 04 16:00:55 GMT 2019

FILTERS AND ADVANCED PARAMETERS:  
Filter: Secondary  
Advanced Parameters: Secondary\_MAXNumberOfRecords=50000

Review Potential Dupes

[All from Alert](#)

[From Alert Result \(AR000371\)](#)

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Potential Dupes  
(Matched Records)  
to Review

[Use Batch](#)

The Review Potential Dupes Button will Create a new List View on the Matched Records Tab dynamically, and navigate the user to this View. If the List View already exists, the user will be navigated to the existing List View.

**Note:** Users without the **Modify All Data** administrative permission, cannot dynamically create List Views using the blue Button above.

These users can navigate to existing List Views, it is therefore recommended that the system Admin creates a (1) View per Alert, using the Review Dupes buttons on the console or on the

Dupe Alerts Detail page. Once the View exist, all users will be able to navigate to the existing View.

The **Use Batch** button will take you to the batch processing function, where you can merge/convert large volumes of data, as well as e.g. delete all the matched records from an alert/result, should you want to clean up the Matched Records object.

## 6 Reviewing your duplicates



The DataTrim Matched Records Tab contains all the possible duplicates found by your Alerts.

You should use this tab for your main reviewing activity and make use of the built-in views or create your own views to select subsets of the data for review, just as when you e.g. review your lead or contact records.

### 6.1 A List of Duplicates

DataTrim Dupe Alerts doesn't automatically merge records identified as potential duplicates. All potential duplicates are stored as pairs of dupes in the DataTrim Matched Records Tab.

#### 6.1.1 Dynamic List Views

The Potential Dupes are stored with reference to the Alert which found the dupes and from which Dupe Alerts Result they origin.

When you are in the Console or in the detail view for a Dupe Alerts Result record, you can use the "View Dupes" function to get a dynamic list view of the potential dupes related to the Result/Alert.

This functionality leverages the native salesforce List View functionality, and creates new List view and adds it to your list.

Once the List View is added, you can modify the View to change e.g. which columns to display, and this information will be stored for next time you re-open the view (View Dupes).

Matching Detail	Account (Surviv...)	Account (Dupe)	Dupe Alert Type	M...	Sc...	Sc...	Sc...	S...	S...	R...	Match F...	
1	Account-Weekly...	Buchhandel Sch...	Buchhandel Alfre...	Account-Accou...	99	100	100	👍	👍	?	No	9/14/20...
2	Account-Weekly...	Merlin Ltd	Merlin Ltd	Account-Accou...	97	100	0	👍	👍	?	No	9/14/20...
3	Account-Weekly...	Buchhandel Sch...	Schmidt Buch Ge...	Account-Accou...	98	95	100	👍	👍	?	No	9/14/20...
4	Account-Weekly...	HipHop hf	HipBop	Account-Accou...	98	93	100	👍	👍	?	No	9/14/20...
5	Account-Weekly...	Color Imprint Am...	Color Imprint	Account-Accou...	97	99	96	👍	👍	?	No	9/14/20...
6	Account-Weekly...	Color Imprint, Inc.	Color Imprint, Inc.	Account-Accou...	97	100	100	👍	👍	?	No	9/14/20...
7	Account-Weekly...	The Pyramid Group	Pyramide	Account-Accou...	97	98	100	👍	👍	?	No	9/14/20...
8	Account-Weekly...	The Pyramid Group	Pyramid US	Account-Accou...	97	99	100	👍	👍	?	No	9/14/20...

#### 6.1.2 Native List Views

The native List View functionality of salesforce is your way of organizing your review work. By using these views, you can easily identify the matched records you want to focus on and thereby prioritize your reviewing efforts to e.g. merge all the obvious duplicates first and then later concentrate on the trickier ones.

Our solution is installed with a set of List Views which you can use, but the set is not complete and is also intended to serve as examples for you to create your own views.

To review e.g. your account duplicates, simply select the View **Review Accounts**.

Screenshot: Reviewing Accounts using the List View

The screenshot shows the 'DataTrim Dupe Alerts' interface. At the top, there are navigation tabs: 'DataTrim Dupe Alerts', 'Dupe Alert Console', 'DataTrim Dupe Alert', 'DataTrim Dupe Alert Result', 'DataTrim Matched Records', 'Leads', 'Accounts', and 'More'. Below the tabs, there's a search bar and a list of 'RECENT LIST VIEWS'. The main area displays a table of 'Matched Records' with columns for 'ds ago', 'Sc...', 'Sc...', 'Scor...', 'Sa...', 'Sa...', and 'Parent Relationship'. The table contains 22 rows of data, each representing a pair of records with various scores and relationship types like 'Dupe is Parent', 'No Parent-Child Rela...', and 'Survivor is Parent'. A 'Review Wizard' dropdown menu is open, showing options like 'Review Accounts', 'Review Accounts (w Review Feedback)', and 'Review Candidates (Email=100)'. The 'Review Accounts' option is selected.



Notice that the Matched Records are assigned to the same user/owner as the alert from which they were identified. You can use this tip build views where each user only can see records which they are the owner of.

## Merging and Converting

In salesforce the terminology when you want to consolidate 2 records of the same type (leads, accounts or contacts) is to **Merge** the records, but for duplicates between a lead and a contact or a lead and an account (new lead/contact on existing account) **Convert** the lead. Merging can therefore be done for dupe Alert Type: Lead-Lead Account-Account, Contact-Contact and Acc+Contact-Acc+Contact, and Converting can be done for dupe Alert Type: Lead-Account, Lead -Contact

To merge/convert duplicates you have 2 options from the List View;

- Use the Review Wizard to merge/convert one of more pairs using the Wizard, or
- Use the **Mass Merge** and **Mass Convert** buttons respectively to perform a mass merging/conversion of multiple pairs at the same time.

## False Dupe

When running deduplications, you will experience that you from time to time also is presented with records which after close review isn't true duplicates. This is typical for account of parent-child relationships or other scenarios where there is a commonality between the 2 records, but due to the way you perceive it the 2 records shall not be merged.

As you do not merge the records, a new deduplication in the future (tomorrow, next week etc.) will of cause identify these pairs again. To avoid having to review these same pairs over and over again you simply flag the pairs as a **False Dupe**

To do this you can use the **False Dupe** button. By flagging the pair as a false dupe the pair will disappear from your list view, and next time you run a similar de-duplication the pairs will not be in the list even if the 2 records are still in your database.

(See list definition detail on the screenshot below:)

Screenshot: Edit List view:

	Mat...	Account (Surviv...)	Account (Dupe)	Dupe Alert ...	Match Class ↑	Sc...	Sc...	Sc...	Scor...
1	Acc...	DUNKER	DUNKER	Account-Acc...	★★★★★	100	100	100	100
2	Acc...	Benioff Hawaiian...	Benioff Hawaiian ...	Account-Acc...	★★★★★	100	100	100	100
3	Pete...	Pyramid Constru...	Pyramid Construc...	Account-Acc...	★★★★★	100	100	100	100
4	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100
5	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100
6	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100
7	Acc...	Benioff Hawaiian...	Benioff Hawaiian ...	Account-Acc...	★★★★★	100	100	100	100
8	Pete...	Hildur Inc.	Hildur Islands	Account-Acc...	★★★★★	100	100	100	100
9	Pete...	Weidemann Mas...	Weidemann Gmb...	Account-Acc...	★★★★★	100	100	100	100
10	Pete...	United Oil & Gas...	United Oil & Gas...	Account-Acc...	★★★★★	100	100	100	100
11	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100
12	Acc...	Benioff (Holding)	Benioff (Holding)	Account-Acc...	★★★★★	100	100	100	100
13	Acc...	DUNKER	DUNKER SA	Account-Acc...	★★★★★	100	100	99	100
14	Acc...	Color Imprint	Color Imprint LLC	Account-Acc...	★★★★★	100	100	0	100
15	Acc...	Color Imprint	Color Imprint	Account-Acc...	★★★★★	100	100	0	100
16	Acc...	Color Imprint	Color Imprint LLC	Account-Acc...	★★★★★	100	100	0	100
17	Acc...	Golfing Pro Ltd.	Golfing United	Account-Acc...	★★★★★	99	100	97	100
18	Acc...	Tip-Top GmbH	TipTop	Account-Acc...	★★★★★	99	100	97	100
19	Acc...	Reinhold BV	Reinhold BV	Account-Acc...	★★★★★	96	100	88	100

### Cleaning up your list – Removed resolved

If you use the Mass Merge or Mass Convert functions the Matched Records are automatically deleted when the pairs are resolved, and you list will after a while be shorter and shorter. But when you use the Wizards you are being navigated back to standard salesforce functionality and our solution is therefore not capable of cleaning up the list.

For this purpose, we have included a field called 'Is Resolved'. This field will indicate to you whether the 2 records in a matched pair has been resolved by a merge, a deletion etc. To clean up your list you may from time to time delete these resolved pairs from the list by using the **Removed Resolved** button

## TRIAL

### Trial Info

The Trial License is limiting the outcome from each Alert to only insert **50** records as sample data.

### 6.1.3 The Matching Details

Each entry in the Matched Records list is generated from the matching process and contains details about the comparison of 2 records which are considered a possible dupe pair. If you click on the Detail Link (Name column) you will be able to see all the information elements which are provided by the matching process.

1. When matching a pair of records, the matching engine uses fuzzy logic algorithms to compare the content of multiple fields. For each comparison a score between 0 and 100 is returned. These scores are available for your evaluation, and allows you e.g. to create views where you display all contact dupes where the email score is 100. Note that some scores are weighted based on multiple internal scores, e.g. using the Cross checking on phone numbers, the score 100 may indicate that the Mobile Phone and the Phone field are the same although the 2 phone fields may be different.
2. To simplify and provide an overview of all the scores we convert the various scores into a 5-level classification: Match Level (**Exact, SuperTight, Tight, Medium** and **Loose**). I.e. if all the compared fields return a score of 100 the pair is classified as

Exact, if one or more of the compared fields returns a lower score it becomes classified as SuperTight, etc.

- On the Record Detail View we also provided some visual components (a green thumbs up 👍 or a red alarm bell 🚨) which at a quick glance tells you if the two records in the pair are owned by the same user, is in the same country (territory) or if they have the same review value (e.g. Account Number), etc.

This feature is particularly useful when you decide to merge or not, as you might want to be more careful about merging records owned by two different users or if they both have an account number and the numbers are different.

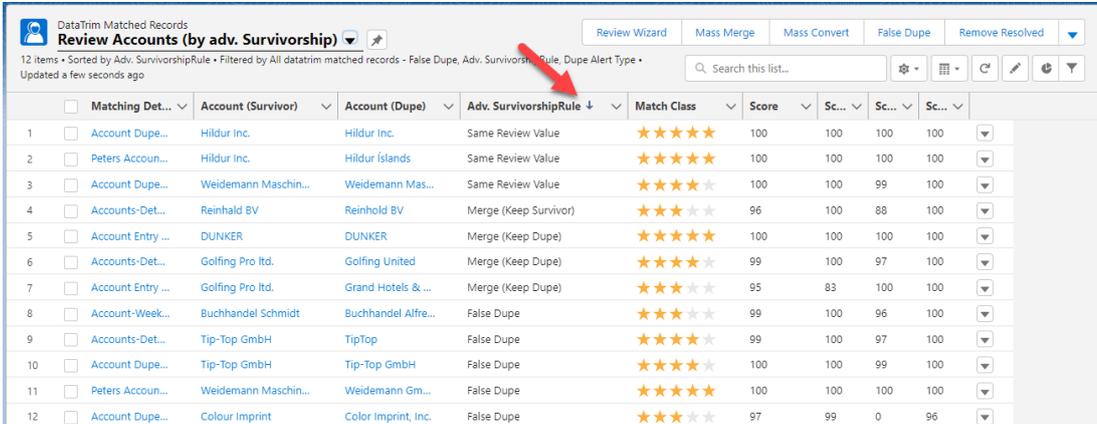
- The two records in the dupe pair are listed next to each other, one is marked **survivor** and the other **dupe** (the assignment of this status is controlled by the survivorship rule in the Alert setup see: [Alert Settings \(What when and how\)](#)).

## 6.2 Mastering the List Views

### 6.2.1 List View with Advanced Survivorship Rules

If you have created an Advanced Survivorship Rule, you can use the views to quickly get the list of Matched Records which you can process using either Mass Merge or Mass Convert. In the set of List Views, we have provided you will find a view called: Review Accounts (by Adv. Survivorship). This List View will show all Account-Account pairs with an Adv. Survivorship value. You can of course refine the List View to make your selection more specific.

Your listing may look like the screenshot below, and you can now use the list functions to mass merge/convert or flag the pairs as false dupes.



<input type="checkbox"/>	Matching Det...	Account (Survivor)	Account (Dupe)	Adv. SurvivorshipRule	Match Class	Score	Sc...	Sc...	Sc...
1	Account Dupe...	Hildur Inc.	Hildur Inc.	Same Review Value	★★★★★	100	100	100	100
2	Peters Accoun...	Hildur Inc.	Hildur Islands	Same Review Value	★★★★★	100	100	100	100
3	Account Dupe...	Weidemann Maschin...	Weidemann Mas...	Same Review Value	★★★★★	100	100	99	100
4	Accounts-Det...	Reinhold BV	Reinhold BV	Merge (Keep Survivor)	★★★★★	96	100	88	100
5	Account Entry ...	DUNKER	DUNKER	Merge (Keep Dupe)	★★★★★	100	100	100	100
6	Accounts-Det...	Golfing Pro Ltd.	Golfing United	Merge (Keep Dupe)	★★★★★	99	100	97	100
7	Account Entry ...	Golfing Pro Ltd.	Grand Hotels & ...	Merge (Keep Dupe)	★★★★★	95	83	100	100
8	Account-Week...	Buchhandel Schmidt	Buchhandel Alfre...	False Dupe	★★★★★	99	100	96	100
9	Accounts-Det...	Tip-Top GmbH	TipTop	False Dupe	★★★★★	99	100	97	100
10	Account Dupe...	Tip-Top GmbH	Tip-Top GmbH	False Dupe	★★★★★	100	100	99	100
11	Peters Accoun...	Weidemann Maschin...	Weidemann Gm...	False Dupe	★★★★★	100	100	100	100
12	Account Dupe...	Colour Imprint	Color Imprint, Inc.	False Dupe	★★★★★	97	99	0	96

### 6.2.2 List View with Dupes reviewed in Excel, or by End Users

The Application supports a number of different collaborative features which allows you to have multiple people help reviewing the potential dupes found by the alerts.

The Review Wizard in Review mode (Involving the End-Users in the Review and Merge process) is one way of involving the end users in the review process using list of records, and the Dupe Status on the Detail page of the Lead/Account and Contact is another way to treat the records one-by-one.

In any scenario the objective is to provide feedback into the field called **Review Outcome** on the Matched Record Object. Once this field is populated you can have views displaying the feedback provided and take action accordingly using the buttons on the Matched Records Tab.

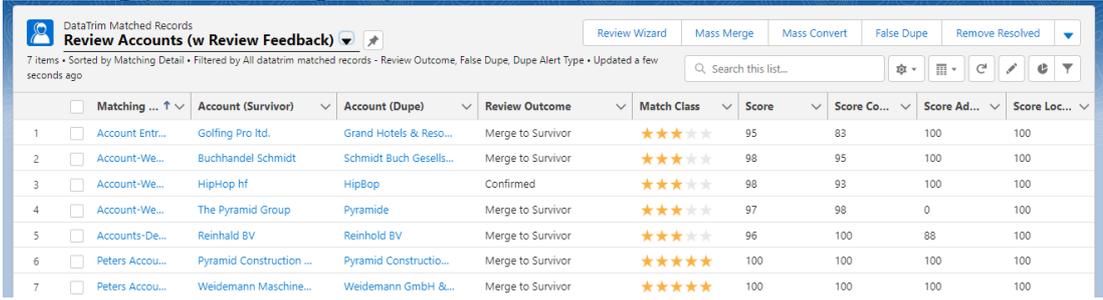
# DataTrim

## Dupe Alerts

For more information about review in Excel see: [Review duplicates in Excel](#), or how to enable the collaboration with the end-users using the Dupe Status component on the Page layout see: [Displaying the Dupe Status on the Account/Contact/Lead Record](#)

In the set of List Views, we have provided you will find a view called: Review Accounts (w Review Feedback). This List View will show all Account-Account pairs with a value in the Review Outcome field. You can of course refine the List View to make your selection more specific.

Your listing may look like the screenshot below, and you can now use the list functions to mass merge/convert or flag the pairs as false dupes.



The screenshot shows the 'Review Accounts (w Review Feedback)' list view in DataTrim. The interface includes a search bar, a filter dropdown, and a table of 7 items. The table columns are: Matching (checkbox), Account (Survivor), Account (Dupe), Review Outcome, Match Class (stars), Score, Score Co..., Score Ad..., and Score Loc... The data rows show various account pairs with their respective review outcomes and scores.

<input type="checkbox"/>	Matching ... ↑	Account (Survivor)	Account (Dupe)	Review Outcome	Match Class	Score	Score Co...	Score Ad...	Score Loc...
<input type="checkbox"/>	Account Entr...	Golfing Pro Ltd.	Grand Hotels & Reso...	Merge to Survivor	★★★★★	95	83	100	100
<input type="checkbox"/>	Account-We...	Buchhandel Schmidt	Schmidt Buch Gesells...	Merge to Survivor	★★★★★	98	95	100	100
<input type="checkbox"/>	Account-We...	HipHop hf	HipBop	Confirmed	★★★★★	98	93	100	100
<input type="checkbox"/>	Account-We...	The Pyramid Group	Pyramide	Merge to Survivor	★★★★★	97	98	0	100
<input type="checkbox"/>	Accounts-De...	Reinhald BV	Reinhald BV	Merge to Survivor	★★★★★	96	100	88	100
<input type="checkbox"/>	Peters Accou...	Pyramid Construction ...	Pyramid Constructio...	Merge to Survivor	★★★★★	100	100	100	100
<input type="checkbox"/>	Peters Accou...	Weidemann Maschine...	Weidemann GmbH &...	Merge to Survivor	★★★★★	100	100	100	100

### 6.3 Using the Review Wizard

To Merge/Convert records using the Review Wizard, simply select the pair(s) and click on the Review Wizard button.

In the Review Wizard you can review each individual pair of records and easily merge the records using the merge wizard in the bottom of the page, or flag the records as False Dupes in case you want to keep both records.

The Review Wizard is divided into 3 sections.

On top you will have a list of records concerned. For each row you will have the references to the original records, as well as some basic information from the corresponding DataTrim Matched Record.

In the Summary Section, you will for each Selected row (in the top part) see the scores and other information which may be relevant for you decision as to how you want to merge the records, e.g. portal user status, inactive owners etc.

In the bottom part you will have the Merge Wizard or Convert Wizard depending on the Match type of the selected pair.

Screenshot: Review Wizard with records to merge

The screenshot displays the DataTrim Review Wizard interface. At the top, it shows 'Remaining Records to Review [5]' with buttons for 'Refresh', 'Hide', and 'Remove Resolved'. Below this is a table of records with columns: Select, Match Class, Survivor, Dupe, Matching Detail Name, Resolved, Same Owner, Same Country/State, Same Review Value, and False Dupe. One record for 'Samantha Taylor' is selected. Below the table is a 'Summary' section with a 'Hide' button and a table comparing 'Survivor' and 'Dupe' records across fields like NAME, EMAIL, COMPANY, E-MAIL, PHONE, LOCATION, PORTAL USER, and OWNER. At the bottom is the 'Merge Wizard' section, which includes 'Merge Contacts' buttons, a note about master record updates, 'Contact Merge Rules Applied' (Email: KeepMostRecent, Last Data Laundry Date: KeepOldest, Lead Source: KeepOldest, Mailing Country), and a comparison table for 'Survivor' and 'Dupe' records with 'Use as Master' checkboxes.

### 6.3.1 Merging using the DataTrim Merge Wizard

The **DataTrim Merge Wizard**, will display the 2 records next to each other with the option for you to choose using the checkboxes which values you want to keep on the master record.

When you perform the merge the 2 records will be merged and all related data like Opportunities, Activities, etc. will be consolidated under the survivor record.

The DataTrim Merge facility will in addition provide you with the option to mark the potential duplicates as False Duplicates, or when comparing Accounts, give you the option to link the accounts as parent-child instead of merging them.

Merge rules are applied to pre-select the values, but can be overridden by the user choice.

You can also edit the individual fields prior to merging, by double-clicking the field-value to edit.

Field	Karl Obermeier	Carl Obermeier
Master Record	<input checked="" type="checkbox"/> Use as Master	<input type="checkbox"/> Use as Master
Last Name	Obermeier	Obermeier
First Name	<input checked="" type="checkbox"/> Karl	<input type="checkbox"/> Carl
Record Type	[Empty]	[Empty]
Mailing Street	<input checked="" type="checkbox"/> Rathaus	<input type="checkbox"/> [Empty]
Email	<input type="checkbox"/> karl.obermeier@gmail.com	<input checked="" type="checkbox"/> carl.obermeier@gmail.com
Title	<input checked="" type="checkbox"/> Media Director	<input type="checkbox"/> [Empty]
Department	<input checked="" type="checkbox"/> Marketing	<input type="checkbox"/> [Empty]
Owner	Frank Scaramanga	Frank Scaramanga
Languages	<input checked="" type="checkbox"/> Deu	<input type="checkbox"/> [Empty]
Vehicle Reg Nr.	<input checked="" type="checkbox"/> 0ZDT823	<input type="checkbox"/> 30ZR788
Full Name	Karl Obermeier	Carl Obermeier
Created Date	11/23/2007 2:46 AM	4/9/2008 6:27 AM
Last Modified Date	9/17/2013 6:41 AM	7/12/2013 6:16 AM
System Modstamp	1/18/2017 5:33 PM	1/13/2018 3:32 AM
Data Quality Description	Missing: Phone,	Missing: Phone, Complete Address, Job Title,
Data Quality Score	80	40
MatchKey	KarlObermeierkarl.obermeier@gmail.comBurgermister	CarlObermeiercarl.obermeier@gmail.comBurgermister
Data Quality Indicator		
Data Quality Score	87%	67%

### 6.3.2 Merging Accounts or Contacts with conflicting Account Contact Relation

When merging Account and Contacts, the related data are all moved to the surviving records. For Account Contact Relations, this may create a conflict - if e.g. one or more contacts has a direct and an indirect relation to the same account.

In this case the Merge will normally give you an error:

**"MERGE\_FAILED, These contacts have the same related account. Open the related account record and remove redundant account-contact relationship, then try Merging again!"**

With the DataTrim Merge wizard these conflicting Account Contact Relation are displayed in a separate section, and an algorithm predicts the outcome for the merge, i.e. which Account Contact Relations that will be removed in order for the merge to succeed.

Survivor	Dupe
Test Account #1	Test Account #2
<input checked="" type="checkbox"/> Use as Master	<input type="checkbox"/> Use as Master

Contact Name	Relationship	Created	Last Modified
Sam Smith	Indirect / Active	05-02-2024	05-02-2024
Jane Doe	Direct / Active	05-02-2024	05-02-2024
Philip Jansen	Indirect / Active	05-02-2024	05-02-2024

Field	Test Account #1	Test Account #2
Account Name	Peter Larsen	Peter Larsen
Owner	Peter Larsen	Peter Larsen
Last Modified Date	05-02-2024 16:59	05-02-2024 16:59
System Modstamp	05-02-2024 16:59	05-02-2024 16:59

In the example above (an Account Merge), Test Account #1, has a direct contact: Jane Doe  
Test Account #2 has a direct Contact Sam Smith.

The same Sam Smith is also having an indirect relationship with Test Account #1.  
Jane Doe, also has an indirect relationship with Test Account #2.

Philip Jansen, had an indirect relationship with both Test Account #1 and Test Account #2.  
In a normal merge (which will fail for this reason):

Sam Smith and Jane Doe should be Direct contacts of the new master Account, which implies that the 2 indirect relationship records should be removed.

Philip Jansen, will remain an indirect contact on the new master account, but one of the indirect relationship records should be removed.

In total 3 indirect relationship records, shall be removed/deleted in order to perform the merge.

The DataTrim merge Wizard will, based on the selection of the Master Record, determine which indirect relationship records that needs to be removed/deleted, and performs this as an integral part of the merge.

If you switch the selection for the Master (survivor), the selection of indirect relationship records to remove/delete will change accordingly.

### 6.3.3 Summary Section

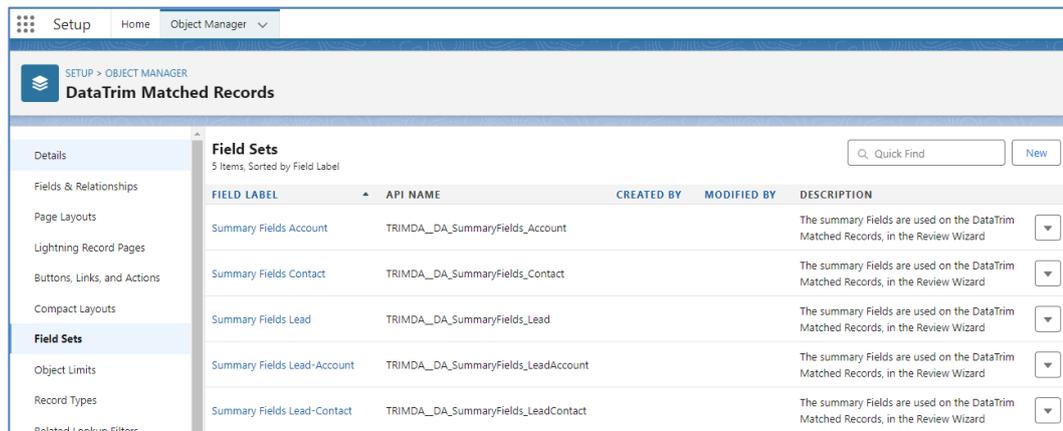
When selecting a potential pair of duplicates in the top list, a summary section is updated providing you with fundamental information available for you to evaluate the validity of the dupes and help you decide if they truly are duplicates and which of the records you might want to keep as you master (survivorship)

The list of fields will adapt to the type of records, and will e.g. for Contact records show if one of the (or both) contacts are **portal users**.

**Note:** If you Merge a Portal user into a non-portal user, the portal user records will be made inactive. So as rule of thumb, always make the portal user the survivor.

The summary also contains the information from the **Feedback** fields. So, if you are engaging your end users in providing feedback on the potential duplicates (see: 7 Involving the End-Users in the Review and Merge process), you will then have the information they provided here, to merge accordingly to their recommendation.

You can customize the fields being displayed by changing the Field Sets on the DataTrim Matched Records Object:



The screenshot shows the 'DataTrim Matched Records' page in the Object Manager. It features a sidebar with navigation options like 'Details', 'Fields & Relationships', and 'Field Sets'. The main content area displays a table of field sets with columns for 'FIELD LABEL', 'API NAME', 'CREATED BY', 'MODIFIED BY', and 'DESCRIPTION'. Each row includes a dropdown arrow for actions.

FIELD LABEL	API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
Summary Fields Account	TRIMDA_DA_SummaryFields_Account			The summary Fields are used on the DataTrim Matched Records, in the Review Wizard
Summary Fields Contact	TRIMDA_DA_SummaryFields_Contact			The summary Fields are used on the DataTrim Matched Records, in the Review Wizard
Summary Fields Lead	TRIMDA_DA_SummaryFields_Lead			The summary Fields are used on the DataTrim Matched Records, in the Review Wizard
Summary Fields Lead-Account	TRIMDA_DA_SummaryFields_LeadAccount			The summary Fields are used on the DataTrim Matched Records, in the Review Wizard
Summary Fields Lead-Contact	TRIMDA_DA_SummaryFields_LeadContact			The summary Fields are used on the DataTrim Matched Records, in the Review Wizard

### 6.3.4 Merge using the DataTrim Quick Merge function.



This feature has been deprecated as of Spring 2024.

### 6.3.5 Convert Leads using the Review Wizard

To convert records using the Review Wizard, simply select the pair(s) and click on the Review Wizard button.

In the Review Wizard you can review each individual pair of records and easily convert the records using the convert wizard in the bottom part of the screen, or flag the records as False Dupes in case you want to keep both records.

You can also choose and decide which status to give the converted lead, create an opportunity, and/or a task during the conversion etc.

When you click Convert the Lead will be converted to a Contact and if matched to a Contact the data will be merged to the Existing Contact record.

Screenshot: Review Wizard with records to convert

The screenshot displays the 'Review Wizard' interface in the DataTrim application. At the top, it shows 'Remaining Records to Review [4]' with buttons for 'Refresh', 'Hide', and 'Remove Resolved'. Below this is a table with columns: Select, Match Class, Survivor, Dupe, Matching Detail Name, Resolved, Same Owner, Same Country/State, Same Review Value, and False Dupe. Four records are listed, each with a 'Review' button and a star rating. The first record is selected.

Below the table is a 'Summary' section with a 'Hide' button and a table with columns: NAME, EMAIL, ACCOUNT NAME, OVER ALL, COMPANY, PHONE, LOCATION, WEBSITE, and OWNER. It shows a survivor 'Timm Djuff' and a dupe 'Vestas Groep'.

The 'Convert Wizard' section is active, showing 'Convert Lead: Timm Djuff'. It includes a 'Converted Status' dropdown set to 'Closed - Converted', checkboxes for 'Overwrite Lead Source' and 'Send Email to Owner', and input fields for 'Owner' (Frank Scaramanga) and 'Opportunity Name'. There are two buttons: 'Convert' and 'Convert Lead with Opportunity'. A 'Lead Conversion' note explains that leads can be converted to companies/accounts, contacts, and opportunities, and should only be converted once identified as qualified.

At the bottom, there are two detail panels. The 'Lead Detail' panel shows fields for Name, Company, Title, Website, Phone, Mobile, and Email. The 'Account Detail' panel shows fields for Account Name, Account Site, Type, Active 2, and Account Source.

### 6.4 Mass Merging

To merge multiple Matched Records at a time, simply select the Matched Records and click on the button Mass Merge.

#### Merging – Keep Survivor or Keep Duplicate

In the Alert you choose a survivorship rule e.g. the Oldest Records Survives. For each matched pair being generated from this Alert the one record in the pair which fulfills your survivorship rule is labeled Survivor and the other Dupe.

Screenshot: Confirmation screen when performing a mass merge

Match Type	Survivor	Dupe	Result
Lead-Lead ★★★★☆	B Gold, Carting America	Burdette Gold, Karting America	Pending
Lead-Lead ★★★★☆	Fiorinda Garbani, J2 Industries	Fiorinda Garbani, J2 Industries	Pending
Lead-Lead ★★★★☆	Susan White, Blue Banjo	Susanne White, Blue Banjo Incorporated	Pending
Lead-Lead ★★★★☆	Franz Turnberg, DatenBank AG	Franz Turnberg, DatenBank	Pending
Lead-Lead ★★★★☆	Gean Walters, MPE Communications	Gean Walters, MPE Communications, Inc.	Pending
Lead-Lead ★★★★☆	Herbert Diezel, Davo THIG	Herbert Diezel, Davo	Pending
Lead-Lead ★★★★☆	Ingolf Heidur, salesforce	Ingolf Heidur, sforce	Pending
Lead-Lead ★★★★☆	H P Niemann, Walter Körner	Hans-Peter Niemann, Walter Körner	Pending

When merging you can choose to merge and keep the records which fulfilled your survivorship rule by using the button Merge (Keep Survivor), or if your selection is based on e.g. an advanced survivorship rule (see: [List View with Advanced survivorship rules](#)) or user feedback (see: [List View with Dupes reviewed in Excel, or by end users](#)) you can merge the records and keep the record labeled Dupe as the surviving records by using the Merge (Keep Duplicate) button.

#### Merge Settings

Once you have selected your Matched Records for merge, you will be given some options for how the merge is processed.

During a Mass Merge all the **associated data like Opportunities; Activities etc. will be moved across** and consolidated under the surviving record.

On a field-by-field level the basic rule applied is, that if the field on the record you merge towards (the Master) has the field populated then this value remains, but if the field is blank and the corresponding field on the duplicate record is populated then the information from the duplicate record is moved across so that the master record (Survivor) after the merge will contain the additional information.

# DataTrim

## Dupe Alerts

For fields where there are conflicting values on the 2 records you have the option to store this duplicate information in a Completed Activity, a Note linked to the surviving records, and as text appended to a Text Area field.

Screenshot: Duplicate data added as a completed Activity

The screenshot shows a CRM interface for an account named 'BelgaCom'. The account details include: Type: Demo Dupe Alerts; Phone: +32 (0) 2 540 69 00; Website: www.belgacom.be; Account Owner: Frank Scaramanga; Account Site: ShipTo; Industry: ShipTo. The 'Details' tab is active, showing fields for Account Name, Account Site, ShipTo, Type, Active 2, and Account Record Type. A 'Dupe Status' section indicates 'No Duplicates Found!'. The 'Activity' tab is also visible, showing a list of activities. A red arrow points to an activity titled 'Account Merged with...' which occurred in February 2011, 9 years ago. The activity description includes 'You had a task'.

Screenshot: The Detail of the Completed Activity contains the conflicting Account Number in the Comments Field.

The screenshot shows a task detail view for 'Account Merged with: Belgacom SA/NV'. The task is assigned to Frank Scaramanga. The subject is 'Account Merged with: Belgacom SA/NV'. The due date is blank. The priority is 'Normal'. The comments field contains the following information: Website: www.belgacom.com; Account Name: Belgacom SA/NV; Billing Street: 2 Rue du Cardinal Mercier; Fax: +32 (0) 2 540 69 01.

### **Pick list fields**

Pick list fields are merged intelligently - meaning that the data is consolidated during the merge, so that the surviving record after the merge will contain the values from both records.

To change the default settings for the Mass Merge see: [Changing the Default Selection for Mass Merge and Mass Convert](#)

### **Merge Rules**

The Mass Merge (as well as the Quick Merge) makes use of the Merge Rule and Field Exclusion setting defined in the setup section.

This means that you, during merge, apply certain fields specific rules like: always keep the Max./Min. value from the 2 records. See [10.6 Changing the Default Settings for Mass Merge and Mass Convert](#) for details.

Use the Check box: Disable Merge Rules to disable the Merge rules for this particular mass merge operation. You can also Edit the rules directly from here.

### **Use Batch**

Using Batch to perform the merge is an option which will enable you to Merge larger sets of duplicates without running into e.g. salesforce governor rules.

Using Batch will create an Apex Batch Job which will run in the background.

You can choose to get an email notification once the Merge is done, or wait for the merge to complete

Batch Block Size, is the size of each block being processed in each batch. E.g. If you have 100 records and want to merge only 5 at the time, generating 20 batches, simply set the value to 5.

## **6.5 Mass Conversion of Leads**

To Convert multiple Leads at the same time; select the Matched Records with leads to convert and use the Mass Convert button.

### **Creating an Opportunity during conversion**

During the Mass Convert you will be able to choose whether you want to create opportunities or not. If you choose to do so, the Opportunities need to be names.

For this feature we have provided 4 naming conventions to use (templates). E.g. if you choose the Value 'Account Name – New' the Opportunity name will be constructed from the Leads company names plus a hyphen and the word new, so for the first example in the figure below the opportunity will be named: 'Tranås Hotell AB – New'.

The Default setting is 'New' which will result in Opportunities with the name: 'New'.

To change the default value (not creating an opportunity) see: [Changing the Default Selection for Mass Merge and Mass Convert](#)

**DATA TRIM**  
**Mass Lead Convert**

Mass Convert Settings

**CONVERT SETTINGS**

Do not create a new opportunity upon conversion

Opportunity naming convention

Converted Status

Overwrite Lead Source

Send Email to Owner

Delete Matched Record after successful conversion

**BATCH CONVERT SETTINGS**

Batch Name:

Notification when Batch is Done:

Notification Email:

Batch Block Size (1-199):

Selected Leads to Convert (40) Convert Convert (Batch) Back

Match Type	Lead	Account/Contact	Result
Lead-Contact ★★★★★	Trands Hotell AB, Christian Christensen	Trands Hotell AB, Christian Christensen	Pending
Lead-Contact ★★★★★	Greenspan, Gustav Wasa	Greenspan, Gustav Wasa	Pending
Lead-Contact ★★★★★	BTM Ltd, Susan James	BTM Ltd, Susan James	Pending
Lead-Contact ★★★★★	Albert BV, Erik Tappen	Albert BV, Erik Tappen	Pending
Lead-Contact ★★★★★	Merlin, David Baden	Merlin Ltd, David Baden	Pending
Lead-Contact ★★★★★	Sirocco, Julia Hauser	Sirocco AktienGesellschaft, Julia Hauser	Pending
Lead-Contact ★★★★★	Hoff Assurance, Shirley Thomas	Hoff Assurance, Shirley Thomas	Pending
Lead-Contact ★★★★★	Nordic Ricardo, Hugo Wahleen	Nordic Ricardo, Hugo Wahleen	Pending
Lead-Contact ★★★★★	Electric City Ltd, Sean Thomas	Electric City Ltd, Sean Thomas	Pending
Lead-Contact ★★★★★	Fondamenta SpA, Jeno Stassiano	Fondamenta SpA, Jeno Stassiano	Pending

### Convert Status

When a Lead is being converted in salesforce the Lead is not deleted from the Lead table, but it is updated with a Lead status which indicates that the Lead has been converted, and that it e.g. no longer should pop-up when you perform a search.

First time you start using salesforce the value which corresponds to the converted status is: 'Qualified'.

Your business processes and your lead management process may have introduced new and other status values for your leads. In order to properly convert a Lead, you should select a value which corresponds to the Converted status.

To change the default value ('Qualified') to your custom value see: [Changing the Default Selection for Mass Merge and Mass Convert](#)

### Overwrite Lead Source and send Email to owner

These are 2 options inherited from the salesforce convert wizard who allows you to update the Lead Source on the Contact with the value from the Lead, and send a notification to the Lead owner.

### 6.6 Merge/Convert in Batch

If you have a large database, and you need to merge / convert a very large volume of data. When using the mass merge or mass convert buttons on the DataTrim Matched Record Page, you may have noticed that salesforce only allow you to select a maximum of 200 records at a time, and although it is workable it is quite cumbersome if you have 10.000's of dupes to process.

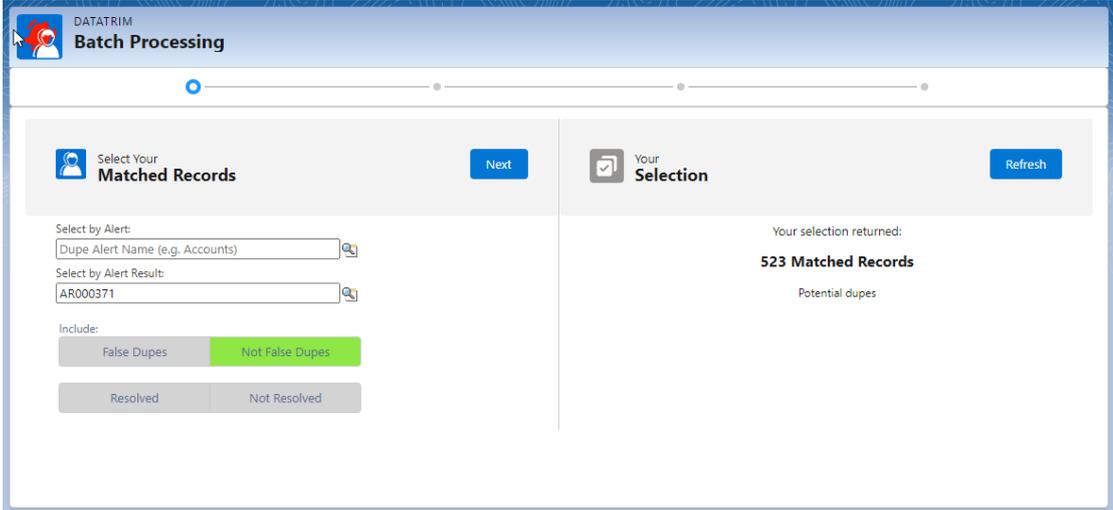
You may also have run some alerts which have generated 1000's of records in the DataTrim Matched Records object, potential dupes, but you realize that the result was not what you expected, and you want to refine the matching criteria and run the matching again. Now you want to delete ALL of the Matched Records related to this "bad" matching process, but again you are limited to 200 at a time, or obliged to use tools like the Apex Data Loader to remove them.

In both scenarios above, you can use the DataTrim Matched Records **Batch Processing** feature.

The batch processing will allow you to select up to 10.000 (50.000 for deleting Matched Records) records and process them all in a single batch process.

You can access the Batch processing feature from the **Batch Merge etc** button on top of the Dupe Alert Console.

-or from the "Use Batch" option on the menu items for the Alerts or Alert Results



The DataTrim Matched Records **Batch Processing** page.

#### How it works:

1. Select the Matches Records to process
  - a. Use Alert and Alert Result fields to get Matched Records associated with these.
  - b. Use the buttons, to include/exclude False Dupes and Matched Records resolved or not.
2. Use the Filter function to refine your selection.
3. Select the Action: Delete / Merge / Convert
4. Start the Batch Process.

#### Include/Exclude: False Dupes

False Dupes are potential duplicates which has been flagged by users as false dupes, i.e. duplicates which are not to be merged. If you delete these you will also delete the information

about the false dupes, and DataTrim Dupe Alerts will find these dupes and present them to the users for review again.

By default, you should therefore not include the False Dupes in a list of records to Delete / Merge / Convert

### **Include/Exclude: Resolved**

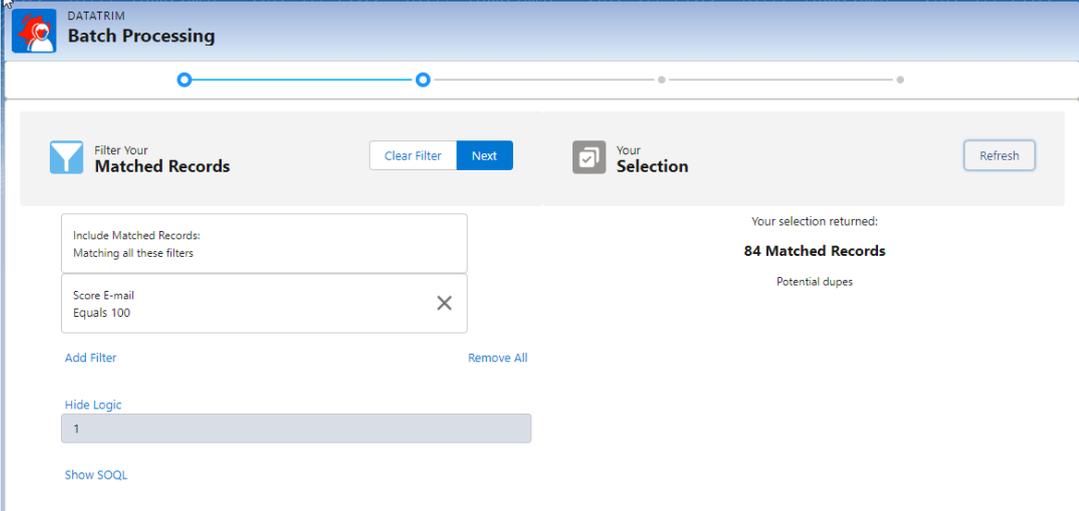
Duplicates are Resolved if they have been merged, or if one or both records in a Matched Record has been deleted.

Duplicates which already are resolved will fail to merge / convert, as there is no action to take.

### **6.6.1 Filter**

In addition to the basic filter functions on the main page you can create your own specific filter.

Display the filter by clicking the Filter button, and you are ready to add your first Filter criteria.



The screenshot shows the 'Batch Processing' interface in DataTrim. It features a progress bar at the top. Below it, there are two main sections: 'Filter Your Matched Records' and 'Your Selection'. The 'Filter Your Matched Records' section includes a 'Clear Filter' button, a 'Next' button, and a 'Refresh' button. A filter criterion is displayed: 'Score E-mail Equals 100'. Below this, there are 'Add Filter' and 'Remove All' buttons. A 'Hide Logic' section shows the number '1'. At the bottom, there is a 'Show SOQL' button. The 'Your Selection' section shows 'Your selection returned: 84 Matched Records' and 'Potential dupes'.

The filter logic can be changed by replacing the default values AND with OR, parentheses etc. If you change the filter logic, you can use the button Check and Apply SOQL filter, to verify if your syntax is correct.

Once the Update button, turns blue your filter has been registered and you can apply the filter to get a new count for the number of records selected. -And proceed taking action on your selection as described above.

### **6.6.2 Batch Process.**

The Batch process is performed in the background when the resources on the salesforce servers allow for it to be processed.

Similar to the Mass Merge (above), you can store the information from the Dupe as an activity/note or into a text field.

Merge rules, as defined in the setup, are applied to the Batch Merge.

The Merge Rules allow you to exclude fields from the merging, as well as selecting e.g. the highest/lowest value, date from the oldest/most recent record etc.

Progress: Batch Merge Job

MERGE SETTINGS [Setup](#) [Refresh](#)

- Store Duplication Information as Activity
- Store Duplication Information as Note
- Store Duplication Information as Text
- Merge Multi Pick Lists
- Delete Matched Records After Merge

ACCOUNT MERGE RULES

- Disable Merge Rules [Edit](#)

BATCH MERGE SETTINGS

Batch Name:

Send Notification Email when done?

Batch Block Size:

Please confirm your choice to Merge 84 Matched Records

[Merge \(Keep Survivor\)](#) [Merge \(Keep Dupe\)](#)

Processed: 0 of 84 Ready 0% Complete

Using the Edit link, you can modify the rules for this process only, and using the Save and Apply you can save your edits for future Mass and Batch merges.

**Batch Block Size:** This is the number of records which are processed in each block iteratively until your entire selection is processed. So e.g. having 1000 records to process with a Batch Block Size of 50 will generate 20 interactions.

You may need to modify this Batch Block Size in case you have triggers and workflow rules which are fired as a consequence of the Delete / Merge / Convert operation. Salesforce's governor rules limit e.g. the number of queries you can run against the database for each iteration (Max. 100 SOQL queries). If you have e.g. 5 triggers and each fire 1 query each for each time an account is updated, each merge will therefore count as 5, giving you a maximum of 20 accounts to be merged before you reach the limit of 100 pr. iteration. In this case you should set the Batch Block Size to 20 or lower.

### Email Notification:

You can choose to have an email sent out when then batch process is completed. The Name of the batch will be added as the subject of the email.

### DATATRIM DUPE ALERTS

#### DATATRIM BATCH PROCESS

SUBMITTED BY: PETER LARSEN

**Your Batch Merge Job: DataTrim Batch (Merge) at 2020-04-23 13:35:42**

**With a total of 2264 record(s) has been processed!**

#### Result (records):

2264 where merged successfully

0 where ignored (already merged etc.)

0 failed to be merged successfully

2264 DataTrim Matched Records where deleted after the merge

Thank you for using Dupe Alerts

DataTrim - Your Data Laundry  
Support Team



E: [support@datatrim.com](mailto:support@datatrim.com)

W: [www.datatrim.com](http://www.datatrim.com)

For other parameters, Merge and Convert, please see the description of the respective Mass actions.

### 6.7 Review duplicates in Excel

If you have many duplicates, which you are likely to have the first time you run the de-duplication, you might want to review the duplicate pairs outside salesforce. We have provided you with a few reports which you can use in order to export the data into e.g. Excel and perform the review there. We have found, based on numerous projects, that this review process is highly effective and gives you a flexible way of reviewing the records, but admittedly the process is slightly complicated and involves a few non-trivial steps.



For a full walkthrough of all the steps see [Appendix G: Review duplicates in Excel – Step by Step](#)):

## 7 Involving the End-Users in the Review and Merge process

As the result of the matching is stored inside salesforce, the duplicates can be presented to users in many different ways. The use of the List views above represents a structured approach, most suitable for a centralized user or a team of users.

On a one-by-one basis the Dupe Status components (see: **Error! Reference source not found. Error! Reference source not found.**) allows the information about the found duplicates to be presented at the end user level on the detail page of the account, contact or lead record. The links in the dupe status as described below will allow the end-user to merge or review the dupes.

Involvement of the end users can also be obtained by providing each user with an option to review his/her duplicates, using e.g. the Custom links as described in **Error! Reference source not found.**

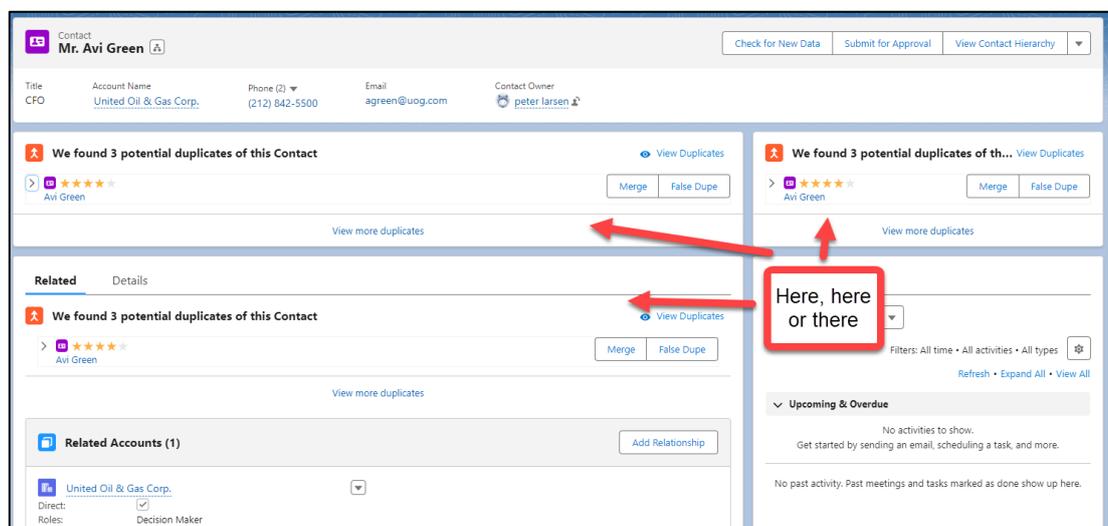
The Review Wizard as described above is an effective way to get an overview and merge records in a structured process, but sometimes it is the end-user who knows best if 2 records are real duplicates and how they should be merged, below you will find 2 methods for involving the end user in the review/merge process.

### 7.1 Potential Duplicates List (Dynamic) for Accounts, Contacts and Leads

The DataTrim Dupe Alerts package contains a Lightning Web Component (LWC): "*Potential Duplicates List (Dynamic)*", which you can place on the Account, Contact and Lead Page layout, using the Lightning App Builder, to get information about potential duplicates directly on the detail page for each Account, Contact or Lead.

#### 7.1.1 Involve the End-user in the Merging/Converting process

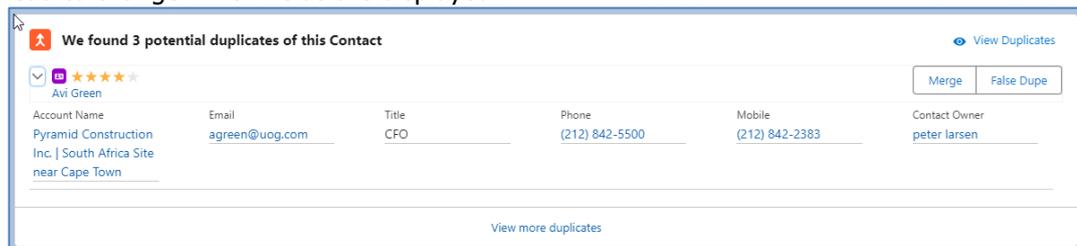
The "Potential Duplicates List (Dynamic)" component can be placed in different parts of the Detail page for the Account, Contact and Lead. It can even be configured with a range of display options which you can explore below.



Screenshot: The Potential Duplicates List, can be displayed both in the sidebar or directly in main section of the page layout.

When the "Potential Duplicates List (Dynamic)" is added to the page layout and configured, it will alert the end users about any potential duplicates for the current record. The users will be able to view all the potential duplicated in the DataTrim Review Wizard. From where they also will be able to Merge/Convert the duplicates.

But the component also has some shortcuts implemented which may save you a few clicks. By expanding the details for the duplicates (clicking on the little right-arrow), you will be able to see a selection of field values from the potential duplicate. You can modify the Field Set: "Dynamic Dupe Status Review Fields" for account, contact and lead to change which fields are displayed.



For each potential duplicate you will also find the action button: Merge or Convert. The False duplicate is, as mentioned elsewhere in this user guide, a very powerful feature of DataTrim Dupe Alerts.

While the term "Potential Duplicates" imply that some duplicates presented may not actually be "true" duplicates, not all potential duplicates should be merged or converted. The False Dupe action will update the underlying information about the fact that this might be a potential duplicate, but that you, while reviewing has decided that it is not, and it should not be merged.

Furthermore, it remembers this information, so even if someone is updating this or the potential duplicates, the 2 records which were not flagged as potential duplicates again in the future.

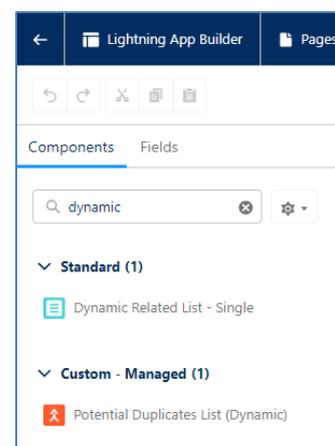
When the current record is a potential duplicate of multiple other records, the "Potential Duplicates List (Dynamic)" becomes a list and you can see all the duplicates directly from here – without having to navigate away from the current record.

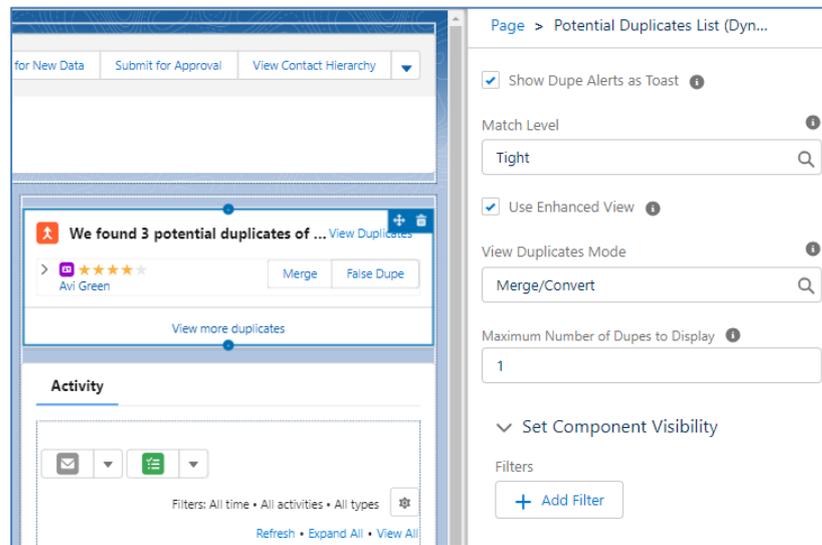
### 7.1.2 Configuring the Lightning Web Component

In the Lightning App Builder for Account, Contact or Lead, you should have the component available on the left side panel:

The component can be configured directly on the Page Layout in the Lightning App Builder. You can freely place it on the left or right sidebar, or place it in the main region etc. Simply drag the component to the desired place.

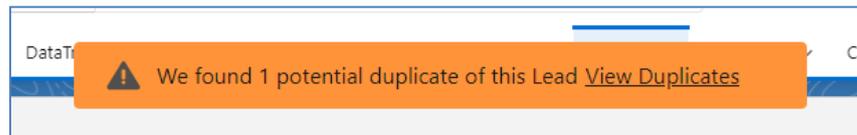
Once you have placed the component onto the page, the right-most sidebar of the App Builder will show the configuration options.





### Show Dupe Alerts as Toast

This option (default = Checked) will enable the Dupe Alerts, a message being displayed on the detail page, whenever a user navigates to a record for which there are potential duplicates.



### Match Level

Potential duplicates are classified on a 5-level scale: Exact, SuperTight, Tight, Medium, Loose. This option sets a threshold for which potential duplicates you want to present to the user. If you select tight (default), the component will display potential duplicates which are classified as Tight, SuperTight or Exact. I.e. the selected level or higher.

### Use Enhanced View

When you enable Enhanced View for Account and Contacts you will also be presented with Leads which are potential duplicates of the current record. You will in this case be presented with the option to Convert the Lead (not Merge).

This feature only applies for Accounts and Contacts. When you place the component on the Lead Detail Page, it will always present you with potential duplicates of Accounts and Leads.

### View Duplicates Mode

DataTrim Dupe Alerts provides support for a collaborative way of processing duplicates.

By default (Merge/Convert), the user will be presented with a button which will take the user to the Merge/Convert wizard for processing the duplicates.

In some organizations, there might be restrictions on WHO can merge/convert.

With the Review option, the end users will instead of the Merge/Convert button be presented with a Review button.

This Review button will take them to a page similar to the merge/convert wizard, but the user will not be able to merge, but provide feedback, i.e. conform that the records are duplicates, which record to keep, etc.

This feedback can then be picked up by someone with the appropriate merge/convert permissions, and the merge/convert can be performed in a controlled manner - picked up by a Data Steward, who then can merge the records with all the additional complexity that may involve.

### **Maximum Number of Dupes to Display**

The "Potential Duplicate List ((Dynamic))" component can present a list of potential duplicates directly on the main screen.

This option control how many duplicates will be displayed by default (default = 1).

When more potential duplicates are available, a "View more duplicates" link is displayed, and an additional 5 potential duplicates are added to the list view for each time this link is clicked.

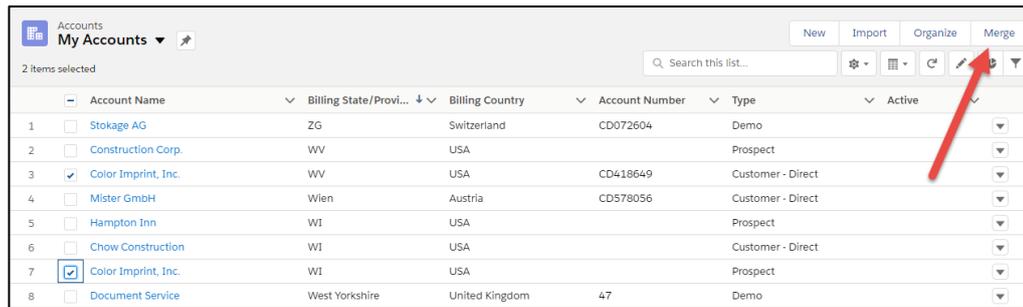
### **Set Component Visibility**

This is a standard salesforce capability, and it gives you the possibility to hide/show the component based on a filter setting: I.e. based on field values on the record, -which device the user is using, or specific user settings, such as Profile/Role etc.

### 7.2 List View Merge Buttons

You may also come across situation where you or end-users comes across duplicates while searching salesforce, and looking at list views.

With the List View Merge Buttons for Lead, Contact and Account, you can provide the user with the ability to jump directly into the Merge wizard from the list view.



**If you select 2 records**, and click on Merge, the merge wizard will be launched with the 2 selected records (maximum number of records to select is 2).

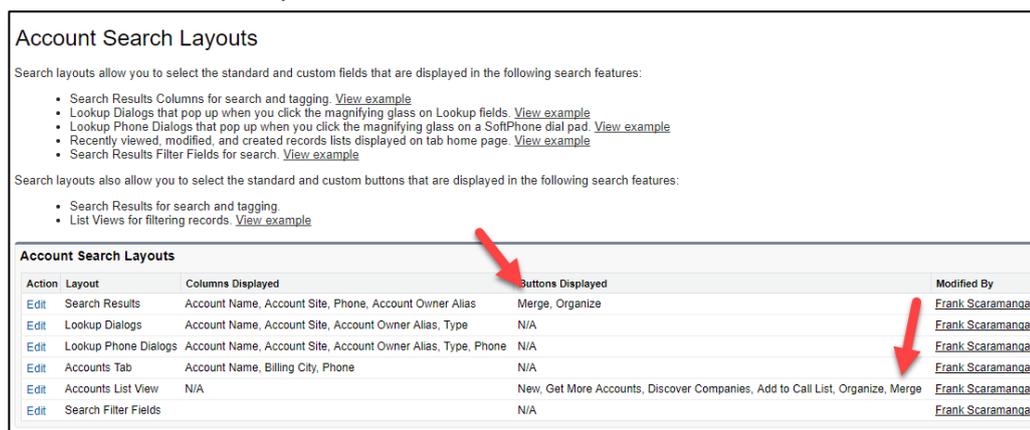
**If you ONLY select 1 record** and click Merge, you will also be taken to the Review Wizard, which will present all the potential duplicates found by any Alert where the selected record takes part.

The Review Wizard integrates the Merge Wizard, and you can then merge the duplicates.

For Leads, the Review Wizard will in addition to duplicate Leads, also present Contacts and Accounts as potential duplicates, and you will have the possibility to use the Convert Wizard to convert the Lead.

#### Setup:

Go to the salesforce setup, and customize the Account. Contact and/or Lead, adding the buttons to the search layouts as below:



**In classic:**

The merge button is also visible on the search result like shown below:

The screenshot displays the 'Search Results' interface. On the left, a sidebar lists various search categories: Search Feeds, Records, Accounts (2), DataTrim Matched Record (1), DataTrim Dupe Alert (0), Contacts (1), DataTrim Dupe Alert Resl (0), Leads (0), and DataTrim Dupe Alerts Par (0). The 'Accounts (2)' category is selected. The main content area shows a search for 'bip-bop' with a 'Search Accounts' button circled in red. Below the search bar, there are 'Merge' and 'Organize' buttons, also circled in red. A table lists two accounts:

Action	Account Name	Account Site
<input checked="" type="checkbox"/>   Edit	<a href="#">Bip-Bop</a>	Baden-Württemberg
<input checked="" type="checkbox"/>   Edit	<a href="#">BipBop_KG</a>	Baden-Württemberg

### 7.3 Getting the End-User to review only and not merge

The Merge Wizard can run in "Review-Mode".

Review mode will allow the user to see the 2 dupes, compare the records, and determine whether they are dupes or not. The user can then provide Feedback.

This feedback process is highly convenient in organizations where the end-user is limited in the permissions with regards to updating and deleting records.

**Review Wizard**

Remaining Records to Review [2] Refresh Hide

Select	Match Class	Survivor	Dupe	Matching Detail Name	Review Feedback	Resolved	Same Owner	Same Country/State	Same Review Value
<input checked="" type="checkbox"/>	★★★★	Julio Agansa	Julio Agansa	Candidates-Contacts-Details		No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	★★★★	Julio Agansa	Julio Agansa	Candidates-Contacts-Details		No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Summary** Hide

	NAME	EMAIL	ACCOUNT NAME	REVIEW FIELD	NAME	COMPANY	E-MAIL	PHONE	LOCATION	PORTAL USER	OWNER
Survivor:	Julio Agansa		MAXICA	jagansa@hotmail.com	<input checked="" type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	FScarama
Dupe:	Julio Agansa	jagansa@hotmail.com	Candidates		<input checked="" type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	FScarama

**Review Wizard**

Provide Feedback Review Outcome: --None-- Review Notes Submit

Showing fields with different values only. Show All (77)

	Survivor	Dupe
Account	MAXICA	Candidates
Last Name	Agansa	Agansa
First Name	Julio	Julio
Record Type	[Empty]	[Empty]
Mailing Street	C. Jeroni Pujadas S/n	C. Jeroni Pujadas
Email	[Empty]	jagansa@hotmail.com
Owner	Frank Scaramanga	Frank Scaramanga
Vehicle Reg Nr.	4RJN827	0AQ913
Number of potential dupes	2	0
Full Name	Julio Agansa	Julio Agansa

Using the list views effectively on the Matched Records Tab, the records with feedback can be listed and effectively be merged by a Data Stewards or an administrator.

### 8 Dupe Detection upon Entry

The fundamentals of DataTrim Dupe Alerts are to be able to dedupe salesforce records no matter where the records are coming from (imports, web-to-lead, user entry etc.)

As the process of identifying potential matching records - comparing them and classifying them - is a time-consuming process for large databases the DataTrim Dupe Alerts application is based on a concept of matching records in batch.

Although the batching can be scheduled and duplicates can be detected overnight or weekly based on the scheduling the ability to detect duplicates as they enter salesforce is a way to prevent, at least some, duplicates from being created and processed.

With the Dupe Detection upon entry feature, DataTrim Dupe Alerts now also embraces this aspect of deduplication.

By means of a few settings you can activate this trigger-based deduplication.

We have integrated this new functionality tightly with the remaining functionality, so that when duplicates are detected using this feature, Matched Records pairs are dynamically added to the DataTrim Matched Records tab, and users can then promptly be notified using the DataTrim Dupe Status for the newly created record, or be picked up by structured reviewing processes based on the duplicates in the DataTrim Matched Records tab.

You can activate and set the match level from the DataTrim Setup page, or by using the buttons on the DataTrim Console.

#### Use RecordType

When enabling the 'Use RecordType' option, the search for potential duplicates will only be performed within the same record type scope.

E.g. if you have Business Contacts and Candidates as different Record Types, you will only get potential duplicated identified within the same Record Type segment, and not duplicates of Contacts against Candidates.

**Dupe Detection Upon Entry** Save

**Dupe Detection on Account Entry**  
Enable/Disable the automated Dupe Detection upon Entry feature for Account/Contact/Lead

**Use Record Type**  
By enabling this option, any search for potential duplicates will be limited to records with the same record type.

**Match Level for Dupe Detection upon Entry**  
Define the Match level for the matching process during Dupe Detection Upon Entry.  
Only potential duplicates with a match class corresponding to (or higher than) the given Match Level will be considered

<input checked="" type="checkbox"/> Dupe Detection upon Entry - Accounts	
<input checked="" type="checkbox"/> Dupe Detection on Account Entry	Account Dupe Detection, Match Level
<input checked="" type="checkbox"/> Account Dupe Detection, Use RecordType	SuperTight
<input checked="" type="checkbox"/> Dupe Detection upon Entry - Contacts	
<input checked="" type="checkbox"/> Dupe Detection on Contact Entry	Contact Dupe Detection, Match Level
<input type="checkbox"/> Contact Dupe Detection, Use RecordType	SuperTight
<input checked="" type="checkbox"/> Dupe Detection upon Entry - Leads	
<input checked="" type="checkbox"/> Dupe Detection on Lead Entry	Lead Dupe Detection, Match Level
<input type="checkbox"/> Lead Dupe Detection, Use RecordType	Tight

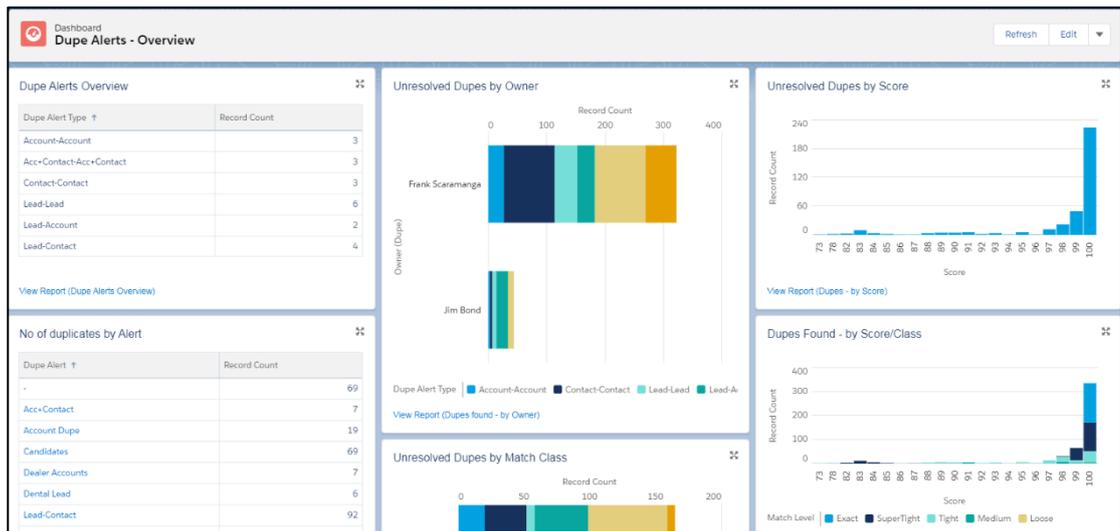
## 9 Alert Results, Reporting and Dashboards

### 9.1 Dash Boards – Deduplication Data Quality Monitoring

We have incorporated this data together with basic reports on the Matched Records into a dashboard which you can use to monitor your deduplication efforts as well as keeping an eye on the overall dupe quality level in your database.

The Dashboard gives you an overview of:

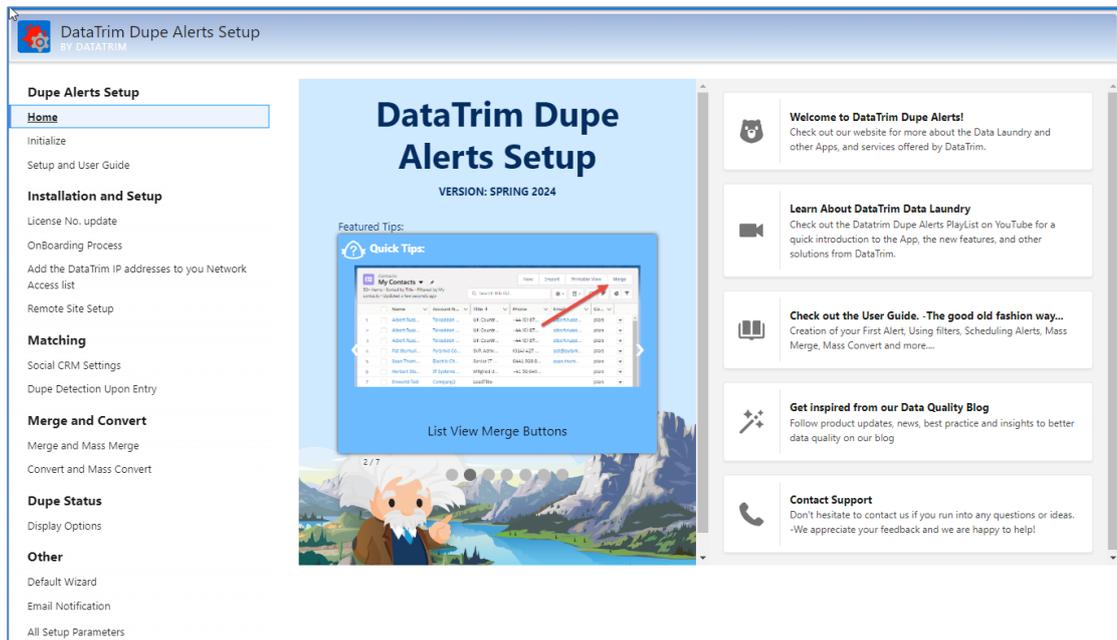
1. How many Alerts you have per type.
2. How many duplicate pairs each Alert have detected.
3. How many duplicates that where in your database at a given time
4. Who the owner of the duplicates is.
5. What the classification of the unresolved duplicates are
6. How the unresolved dupes are distributed by score and match class



### 10 Setup and Customization

**DataTrim Dupe Alerts** is provided as a Managed package, which means that you do not have the ability to edit the source code and thus change the behavior of the solution. Certain parts of the application is parameterized which means that you can change parameters and this way change the way the solution works. This chapter outlines these parameters.

 To access the Parameter detail page, go to the Dupe Alerts Console, and click on the Setup Icon.



The All Setup Parameters menu offers you the possibility to manage all parameters,

For the most common used settings we have provided a few shortcuts, and described them in detail below.

For a full list of all parameter, please see the Appendix.

### 10.1 Setting the License Number

Each Alert needs to be populated with License number and License Type.

In order to prevent you from having to search for the license number each time you create an Alert, you can enter the license number here, and the Alert will automatically get the license number and License Type inserted every time you save an Alert.

License No. Update Save

**Your DataTrim Dupe Alerts License Number**  
Once you enter your license number here, and save it, this license number will be applied to all Alerts in this Org.  
Each License number is associated with one salesforce org.  
If this is a sandbox org, you might need to enter a different license number than the one you are using in your Production Org.

License No

### 10.2 Add the DataTrim IP addresses to your Network Access List

Network Access Setup Save

**Add the DataTrim IP addresses to your Network Access List.**  
To enable your deduplications to run as batch jobs, e.g. during the night, you will for security reasons need to whitelists the servers on which the Matching Engine are running.

To ensure a secure connection between salesforce and the servers which are running the matching processes, the IP addresses of the servers needs to be added to your list of trusted IP connections:

Add the following IP ranges to your Trusted IP Range list:

Start IP Address:	End IP Address:	Description:
72.32.205.65	72.32.205.70	DataTrim
88.170.119.32	88.170.119.34	DataTrim

**Setup Network Access**  
[Do it Now!](#)

-or Go to: Setup  
-> Administration Setup  
-> Security Controls  
-> Network Access

### 10.3 Remote Site Setup

To dynamically create list vies in the standard salesforce environment, our App needs be able to connect to the salesforce Webservice API

This Webservice is residing on salesforce servers, but need to be listed as a Remote site (simply because the domain name may be different).

#### Remote Site Setup

Save

Add the DataTrim Dupe Alerts app as a Web address which your organization can invoke from salesforce.com .  
To dynamically create list vies in the standard salesforce environment, our App needs be able to connect to the salesforce Webservice API  
This Webservice is residing on salesforce servers, but need to be listed as a Remote site (simply because the domain name may be different).

**Remote Site / Web Server**  
[Do it Now!](#)

-or Go to: Setup  
-> Administration Setup  
-> Security Controls  
-> All Remote Sites

Add the following Remote Site to your list of Remote Sites:  
**Remote Site Name:** TRIMDA  
**Remote Site URL:** <https://datatrimdemo-dev-ed--trimda.vf.force.com>  
**Description:** DataTrim

When done you should see the following details in your Remote Site List:  
With this value as Remote Site URL: <https://datatrimdemo-dev-ed--trimda.vf.force.com>

#### All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add a

View: [All Remote Sites](#) [Create New View](#)

A | B | C | D | E | F | G | H | I

Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL	Active
<a href="#">Edit</a>   <a href="#">Del</a>	TRIMDA	TRIMDA	<a href="https://dupealerts--trimda.vf.force.com">https://dupealerts--trimda.vf.force.com</a>	✓

[New Remote Site](#)

### 10.4 Matching Using Social CRM

With the September '12 release we introduce matching and dupe detection using Social references like Facebook, LinkedIn, Twitter and Google+.

These fields, when included, are treated like emails and websites as keys for detection of duplicates. The fields may contain URL references with the full URL, or simply the ID.

We have included custom parsing processes so that we from URLs can extract the unique identifiers for the provided reference to improve the matching.

To enable the use of Social CRM fields in the matching whether it is for your Alerts or for the Dupe Detection upon Entry feature, you must specify the fields to use for the matching.

In the setup you will find fields to fill in for each reference.

Note that you must use the Fields API name in order to uniquely identify a field in Salesforce (normally they end with \_\_c).

#### Social CRM Settings

Save

To allow the Matching Engine to include Social CRM values, please provide API field references for the fields where applicable (e.g. LinkedIn\_Id\_\_c).

**Social CRM Match Settings: Accounts**

Account: Facebook

Account: LinkedIn

Account: Twitter

**Social CRM Match Settings: Contacts**

Contact: Facebook

Contact: LinkedIn

Contact: Twitter

**Social CRM Match Settings: Leads**

Lead: Facebook

Lead: LinkedIn

Lead: Twitter

### 10.5 Dupe Detection upon Entry

Dupe Detection upon entry is a function which allows duplicates to be detected when created in salesforce. You can enable/disable this option using the check box for Contacts, Accounts and Leads respectively.

By using the Match Level settings for this functionality, you can control what type of duplicates you want detected.

Note, that due to the different technologies behind the matching and classification, the classification upon entry is not 100% identical to the classification given by the Batch processing of Alerts.

When enabling the 'Use RecordType' option, the search for potential duplicates will only be performed within the same record type scope.

E.g. if you have Business Contacts and Candidates as different Record Types, you will only get potential duplicated identified within the same Record Type segment, and not duplicates of Contacts against Candidates.

**Dupe Detection Upon Entry** Save

**Dupe Detection on Account Entry**  
Enable/Disable the automated Dupe Detection upon Entry feature for Account/Contact/Lead

**Use Record Type**  
By enabling this option, any search for potential duplicates will be limited to records with the same record type.

**Match Level for Dupe Detection upon Entry**  
Define the Match level for the matching process during Dupe Detection Upon Entry.  
Only potential duplicates with a match class corresponding to (or higher than) the given Match Level will be considered

<input checked="" type="checkbox"/> Dupe Detection upon Entry - Accounts	
<input checked="" type="checkbox"/> Dupe Detection on Account Entry	Account Dupe Detection, Match Level
<input checked="" type="checkbox"/> Account Dupe Detection, Use RecordType	SuperTight
<input checked="" type="checkbox"/> Dupe Detection upon Entry - Contacts	
<input checked="" type="checkbox"/> Dupe Detection on Contact Entry	Contact Dupe Detection, Match Level
<input type="checkbox"/> Contact Dupe Detection, Use RecordType	SuperTight
<input checked="" type="checkbox"/> Dupe Detection upon Entry - Leads	
<input checked="" type="checkbox"/> Dupe Detection on Lead Entry	Lead Dupe Detection, Match Level
<input type="checkbox"/> Lead Dupe Detection, Use RecordType	Tight

### 10.6 Changing the Default Settings for Mass Merge and Mass Convert

#### 10.6.1 The Default Merge Settings

**Merge and Mass Merge**
Save

---

General Merge Settings (Quick Merge and Batch Merge)

Create Activity for Merged Data ⓘ

Append Merge Data to a Field ⓘ

Add Merged data as Note ⓘ

Merge Multi Pick-lists ⓘ

Delete Matched Records After Merge ⓘ

Merge Type ⓘ  
2Survivor ⓘ

Activity Closed Status ⓘ

Merge Append Field ⓘ

---

Batch Merge

**Enable Batch**  
Activates the possibility to merge records in Batch mode. Batch Mode will automatically be imposed if the selected number of records is higher than the value set in 'Mass Merge Batch Size (Max.)'

Enable Batch

Mass Merge Batch Size (Max.)  
50 ⓘ

The following parameters can be changed:

Delete Matched Records After Merge	Set to 'true' (Default) enables the Matched Records to be deleted automatically when the merge is successful. If you want to keep the Matched Records and remove them manually afterwards set the value to 'false'
Mass Merge Batch Size (Max.)	The Maximum number of pairs a user can merge in one mass merge (limited by salesforce's governor limits to 90)
Create Activity for Merged Data	Set to 'true' (Default) will create an Activity with status completed for each matched record pair where there are conflicting data in any editable field. The Activity record will be associated with the surviving record. Set to 'false' to prevent the Activity records to be created.
Default Owner for Activity	By default the Owner of the created Activity will be the user who performs the Merge. I you want to assign this Activity to a common user independent of who is performing the merge, enter the name of the user here.
Activity Closed Status	The Activity which is created will by default de set with a status value of: Completed, which is the default salesforce status for completed/closed activities. If you have custom statuses and want to use one of these you can enter the value here.
Add Merged Data as Note	Set to 'true' will create a Note record for each matched record pair where there are conflicting data in any editable field. The Note record will be associated with the surviving record. Set to 'false' (Default) to prevent the Note records to be created.
Default Owner for Note	By default the Owner of the created Note will be the user who performs the Merge. I you want to assign this Note to a common user independent of who is performing the merge, enter the name of the user here.
Append Merged Data to a Field	Set to 'true', the conflicting data will be append to the text field specified by the parameter: 'Merge Append Field'. Set to 'false' (Default), the conflicting data will not be stored in any text field.

Merge Append Field	API name for the default Text field where the conflicting data shall be appended. A value must be given if the <i>MergeAppend2Field</i> parameter is set to true.
Merge Multi Pick-Lists	Set to 'true' (Default), the Multi Pick List fields are merged in a way where the data from the dupe and the survivor is consolidated to include all values from the 2 records. When set to 'false' the Multi Pick List values of the surviving record will take priority over the values from the dupe record.
Enable Batch	If you commonly Mass merge large volumes of records, you may want to enable the Batch Merging and allow the merging to be processes in an asynchronous batch mode.
Mass Merge Batch Size (Max.)	The Maximum number of pairs a user can merge in one mass merge without having to switch to Batch Merge. This value is used to force the batch merge, so if the use selects more records than this number, they must use Batch Merge, and if less, then they can mass merge normally. (this value should typically be something between 10 and 90)

### 10.6.2 Merge Rules and Field Exclusions

Merge Rules and Field Exclusion  
Advanced Merge Options/Rules for Merging. Please consult the User Guide for further details

**Account Merge Rules** [Edit](#)

Billing Country
  Billing State/Province
  Shipping Country
  Shipping State/Province

**Contact Merge Rules** [Edit](#)

No Merge Rules

**Lead Merge Rules** [Edit](#)

Lead Source: KeepOldest
  Owner ID: KeepLastActivity

In the setup you can define your merger rules.

The Rules can either be to exclude particular fields from the merge or to select values based on a number of criteria.

By default, the merge rule is to: Keep the value of the Surviving record, and if this is blank carry across the value from the Dupe (exception for Multi-Pick-List, see above)

But there are scenarios where you may want a more specific rule.

Example A: For Tracking the original Lead source, you may want to keep the value from the oldest record, but keep all other values from the more recent record. This way you keep track of the original source even if the lead approaches you from multiple sources.

Example B: Lead Score; even if you merge 2 leads you may always want to keep the highest score, even if your surviving records by your survivorship rule indicates that you should keep the other.

The following parameters can be changed:

Rule	Description
Min	<b>Keep the Min Value</b> Selects the smallest value of 2 values Applies to values, dates and text fields (text beginning with the letter 'A' is smaller than text starting with the letter 'B' etc.
Max	<b>Keep the Max Value</b> Selects the highest value of 2 values Applies to values, dates and text fields (text beginning with the letter 'A' is higher than text starting with the letter 'B' etc.
KeepDupe	Always keep the value from the records labelled as Dupe
KeepOldest	Keep the Value from the records which has the oldest created date.
KeepMostRecent	Keep the Value from the records with the most recent created date.
KeepLastModified	Keep the Value from the records with the most recent last modified date.
KeepLastActivity	Keep the Value from the records with the most recent closed activity.
Prio	<b>Keep Picklist value by priority</b> Picklist values must be ordered with the most important value first etc. The merging process will select the value from the 2 picklist which is highest in the ordered list.
InvPrio	<b>Keep Picklist value by Inverse priority</b> Picklist values must be ordered with the least important value first etc. The merging process will select the value from the 2 picklist which is lowest in the ordered list.
Excl	<b>Exclude from merging</b> Exclude the selected field from the merge process.

### 10.6.3 The Default Convert Settings

**Convert and Mass Convert**
Save

**Do Not Create opportunity**  
Oppty. Naming Convention  
New ⓘ

**Overwrite Lead Source**

**Send Notification to Owner**

Converted Status

**Delete Matched Records After Convert**

**Enable Batch**

Mass Convert Batch Size (Max.)  
200 ⓘ

**Do Not Create opportunity**  
Enable to prevent an Opportunity to be create for each converted Lead. Disable to create the opportunities.

**Oppty. Naming Convention**  
Select the naming convention to be used when Creating and Naming Opportunities (Default: New)

**Overwrite Lead Source**  
Enable to overwrite the contacts Lead source with the value from the Lead (Default: Unchecked))

**Send Notification to Owner**  
Enable to send an Email notification to the Owner (Default: Unchecked)

**Converted Status**  
Set the Default Converted Status for the Lead when converted. Check the Lead Status field for details. (Default: Closed - Converted)

**Delete Matched Records After Convert**  
When a mass convert is successfully completed, shall the Matched Record be deleted?

**Enable Batch**  
Activates the possibility to merge records in Batch mode. Batch Mode will automatically be imposed if the selected number of records is higher than the value set in 'Mass Merge Batch Size (Max.)'

The following parameters can be changed:

Delete Matched Records After Convert	Set to 'true' (Default) enables the Matched Records to be delete automatically when the convert is successful. If you want to keep the Matched Records and remove them manually afterwards set the value to 'false'
Converted Status	Default Value for the status used to indicate that the Lead has been converted. If you have multiple values corresponding to Converted, the user will still be able to select from the pick list.
Do Not Create opportunity	Set to 'true' (Default) no opportunity is create upon conversion of the lead. Set to 'false' an Opportunity is created for each converted Lead. The naming of the Opportunity is constructed from the users selected naming convention.
Oppty. Naming Convention	Default Naming convention to be used for naming the Opportunity if the parameter 'Do not Create Opportunity' is set to 'false'
Overwrite Lead Source	Set to 'true' the Lead source of the matched contact will be changed/updated to reflect the Lead status of the converted Lead Set to 'false' (Default) the Lead Source of the Contact remain unchanged.
Send Notification to Owner	Set to 'true' a notification Email is sent to the Owner of the Lead. Set to 'false' (Default) no email is sent.
Mass Convert Batch Size (Max)	The Maximum number of leads a user can convert in one mass convert (limited by salesforce's governor limits to 200)

### 10.7 Dupe Status / Display Options



This feature has been deprecated as of Spring 2024  
Please use the Lightning Component: **Potential Duplicates List (Dynamic)** instead.

The Dupe Status components for Leads, Contacts and Accounts can be customized by means of a few setup options.

By enabling the Action Link, the Merge/Convert link will appear in the Dupe Status. You can disable this link if you do not want your end users to merge/convert the records, but only use the Dupe Status as a notification about the potential dupes.

By default the Merge/Convert link will direct the user to the Review Wizard.  
Note that you can control whether the Review Wizard shall launch the salesforce merge wizard or the DataTrim Quick Merge Wizard.

For Accounts and Contact, you might also be interested in the cross object duplicates (Lead-Account and Lead-Contact). You can enable/disable this option using the check box.

Object	Show Action Link	Include Leads to Convert	Match Level
Dupe Status - Accounts	<input checked="" type="checkbox"/> Account: Show Action Link	<input checked="" type="checkbox"/> Account: Include Leads to Convert	Account Dupe Status, Match Level SuperTight
Dupe Status - Contacts	<input checked="" type="checkbox"/> Contact: Show Action Link	<input checked="" type="checkbox"/> Contact: Include Leads to Convert	Contact Dupe Status, Match Level SuperTight
Dupe Status - Leads	<input checked="" type="checkbox"/> Lead: Show Action Link		Lead Dupe Status, Match Level SuperTight

You can set the Match Level for the dupes to be displayed using the new parameters, which you find under the *All Setup Parameters* link.

### 10.8 Wizard Settings

Default Wizard Save

DataTrim Dupe Alerts provides 2 options for choosing your favorite Merge facility when working with the Review Wizard

- 1) The Quick Merge facility
- 2) The [Datatrim Merge Wizard](#) (New as of 2019)
- 3) The Quick Merge facility

---

Select which Merge facility to use as default

Use Merge Wizard as Default ⓘ

Use Quick Merge as Default ⓘ

---

Clickjack Protection

If you have enabled clickjack protection in your salesforce setup, the Merge Wizard may not show as it is using an iframe.

To allow the DataTrim iframe based visualforce page to display, you should add the following domain to your list of trusted domains:

<https://trimda.lightning.force.com>

[Add Trusted Domain](#) to the list of "Trusted Domains for Visualforce and Survey Inline Frames"

### 10.9 Email Notification

The Alerts are being processed in batch, and based on your selections sometimes at night. By activating the Email Notification an Email is automatically sent to the Owner of the Alert once the deduplication is completed and the DataTrim alert Result Record has been created/updated.

By default the notification email is sent to the owner of the Alert, but if you have multiple owners, and would like to consolidate all the notification emails in a common mailbox, you can enter an Notification Email Address and ALL notification will then be sent to this address.

Email Notifications on Complete Save

Send Notification on Complete ⓘ

Notification Email Address ⓘ

AdditionalNotification CC Email Address ⓘ

**Send Notification on Complete**  
Enable/disable to have an Email sent automatically when the deduplications are completed.

**Notification Email Address**  
Enter the Email Address to which the Notification Email is sent. If left blank the Notification Email is sent to the Alert Owner (Default)

**AdditionalNotification CC Email Address**  
Additional (multiple) Notification Email Address. Separate several addresses by semi-comma (;), no spaces

Links in the email will direct to this org: <https://datatrimdemo-dev-ed.my.salesforce.com>

You can add additional notification email addresses creating a semi-colon separated list.

### 10.10 Adding more Review Fields to the Matched Record Object

As you might have seen in the section about setting up the alerts, you can select a field e.g. Account Number and the data will then be carried across to the DataTrim Matched Record so that you quickly can see if the 2 records have the same account number or not.

If you want more fields like this you have 2 options:

- Create a Formula Field which is a reference field to automatically retrieve data from the survivor and dupe record.
- Create an Visualforce Page which performs a lookup on the survivor and duplicate record and display the data for you on the screen.

How to create a Visualforce to retrieve the data is outside the scope of this guide, but let's at least explain the advantages and disadvantages of option a) and b).

With the first option you have a very quick solution, it's easy to do, and you will be able to use your formula fields in the list view etc. On the other hand, salesforce has a limitation, so that on one object (the DataTrim Matched Record) you can only have 10 references in the formulas (currently 8 are used: Account1, Account2, Contact1, Contact2, Lead1, Lead2, Owner1, Owner2).

The screenshot displays the Salesforce interface for editing a custom field. The main title is "Edit DataTrim Matcher Result Custom Field Custom Review Field Survivor". Below this, there are buttons for "Save", "Quick Save", and "Cancel". The "Field Information" section contains the following details: Field Label is "Custom Review Field Surv", Field Name is "ReviewFieldSurvivor1", and the Description is "Custom Review Field: Retrieving Site from Account and Email from Contact. Note! This field retrieves the data for the surviving record (relation Account1\_\_r and Contact1\_\_r), you should create a similar field to retrieve data from the dupe record." The "Formula Options" section shows the "Formula Return Type" set to "Text". A "Quick Tips" box provides links for "Getting Started", "Resources on successforce.com", and "Operators & Functions". The "Advanced Formula" tab is active, showing the formula: `CASE(ObjectName__c, 'Account-Account', Account1__r.Site, 'Contact-Contact', Contact1__r.Email, '-')`. A "Functions" list is open on the right, showing options like ABS, AND, BEGINS, BR, CASE, and CEILING.

Screenshot: Editing a custom field for retrieval of dynamic data from survivor record.

The second option (the Visualforce Page) can be designed to display the data in any format you like, and potentially replace the entire page layout and thus provide you with full flexibility, but you cannot reference the Visualforce Page in the List view and you cannot have it displayed in the List View either.

### 10.11 Advanced Survivorship Rules - Using formula fields

We already provided you with a number of formula fields on the DataTrim Matched Records Page layout which in a visual way shows you the result of comparing the e.g. Country values (Same Country), Owners (Same Owner), etc.

In the same way you can create your own Survivorship Rules, and use these rules to guide you as to how to merge the Duplicates.

If as an example you are using the Account Number for the Additional Review field you can make a similar Formula field to check which of the records have an account number and, if both have one, if they are different.

You can then let this formula field produce a text, Merge Left, Merge Right, False Dupe, which you can use in your list views to get a listing of all the dupe pairs that needs to be merged in a certain way.

```
IF(AND(TRIMDA__Review_Field_1__c="", TRIMDA__Review_Field_2__c=""),"Not Provided",  
IF( TRIMDA__Review_Field_1__c = TRIMDA__Review_Field_2__c , "Same Review Value",  
IF( AND(TRIMDA__Review_Field_1__c = "", TRIMDA__Review_Field_2__c<>"") , "Merge Right",  
IF( AND(TRIMDA__Review_Field_1__c <> "", Review_Field_2__c="") , "Merge Left",  
"False Dupe"))))
```

In salesforce it would look like this:

The screenshot shows the Salesforce 'Custom Field Definition Edit' interface for a field named 'Merge Recommendation'. The field is of type 'Text'. The description states: 'Formula Field which produces a text value, which should be used as a recommendation for how the 2 records should be merged: Merge Keep Dupe, Merge Keep Survivor, False Dupe etc.'. The 'Formula Options' section shows the 'Formula Return Type' set to 'Text'. Below this, there are tabs for 'Simple Formula' and 'Advanced Formula', with the 'Advanced Formula' tab selected. The formula text is: `IF(AND(TRIMDA__Review_Field_1__c="", TRIMDA__Review_Field_2__c=""),"Not Provided", IF( TRIMDA__Review_Field_1__c = TRIMDA__Review_Field_2__c , "Same Review Value", IF( AND(TRIMDA__Review_Field_1__c = "", TRIMDA__Review_Field_2__c<>"") , "Merge Keep Dupe", IF( AND(TRIMDA__Review_Field_1__c <> "", TRIMDA__Review_Field_2__c="") , "Merge Keep Survivor", "False Dupe"))))`. On the right side, there is a 'Functions' dropdown menu with a list of functions including ABS, AND, BEGINS, BLANKVALUE, BR, and CASE.

### Appendix A: Filter Statements in DataTrim Dupe Alerts

This section is an extract from Salesforce’s SOQL documentation, outlining the syntax for the Filter Statements which are incorporated into the DataTrim Dupe Alerts Filter Statements.

Source: [http://www.salesforce.com/us/developer/docs/soql\\_sosl/index.htm](http://www.salesforce.com/us/developer/docs/soql_sosl/index.htm)

### The Filter Expression (after the WHERE Clause)

#### Examples:



Use the Check Button to check the syntax of your statement

<b>Example 1:</b>	<b>Filter by Simple Standard field</b>
	Match the new and changed Account data against all other records (Master Data) where the Billing Country is set to USA
Filter:Master Data:	BillingCountry='USA'
<b>Example 2:</b>	<b>Filter by Multiple Standard field</b>
	Match the new and changed Account data against all other records (Master Data) where the Billing Country is set to USA or UK
Filter:Master Data:	BillingCountry='USA' OR BillingCountry='UK'
<b>Example 3:</b>	<b>Filter by Custom Field (Region)</b>
	Match the new and changed data against records with region field NOT set to EMEA Note that since Region Field is a Custom Field you would need to add the suffix “ _c” (double under score + c)
Filter:Master Data:	Region__c != 'EMEA'
<b>Example 4:</b>	<b>Filter Contacts by Account Region</b>
	For the contact alert type <b>Acc+Contact-Acc+Contact</b> you can use fields from the Account for filtering simply by adding the prefix “a.” to the field reference. Example Match Contacts in companies where the account region field is NOT EMEA
Filter:Master Data:	a.Region__c != 'EMEA'
<b>Example 5:</b>	<b>Match newly imported data against existing data</b>
	You have imported a set of leads and now you would like to match them against the existing leads (for this purpose make sure that you consistently always update a record with the source from which it came, in this example we assume we have a field called ImportSource ). Match new and changed records where the ImportSource field set to “Imports2008-03-12.csv” against the rest of the database. Note that since ImportSource field is a Custom Field you would need to add the suffix “ _c” (double under score + c)
Filter: Secondary Data:	ImportSource__c='Imports2008-03-12.csv'
<b>Example 6:</b>	<b>Match newly imported data against existing EMEA data</b>
	Match new and changed records in the ImportSource field set to “Imports2008-03-12.csv” against records with region field set to EMEA.
Filter:Master Data:	Region__c='EMEA'
Filter: Secondary Data:	ImportSource__c='Imports2008-03-12.csv'

### fieldExpression

*fieldExpression* uses the following syntax:

*fieldName comparisonOperator value*



Note: The fieldname must be the Unique API Field name, not the Label name as it might not be unique within the table.

Syntax	Description
<i>fieldName</i>	The name of a field in the specified object. Use of single or double quotes around the name will result in an error. You must have at least read-level permissions to the field. It can be any field except a long text area field, encrypted data field, or base64-encoded field. It does not need to be a field in the <i>fieldList</i> .
<i>comparisonOperator</i>	See <a href="#">Comparison Operators</a> for a list of valid operators.
<i>value</i>	A value used to compare with the value in <i>fieldName</i> . You must supply a value whose data type matches the field type of the specified field. You must supply a native value—other field names or calculations are not permitted. For date values, use the formatting listed in <a href="#">Date Formats and Date Literals</a> . If quotes are required (for example, they are not for dates and numbers) use single quotes. Double quotes result in an error.

### Comparison Operators

The following table lists the *comparisonOperator* values that are used in [fieldExpression](#) syntax. Note that comparisons on strings are case-insensitive.

Operator	Name	Description
=	Equals	Expression is true if the value in the specified <i>fieldName</i> equals the specified <i>value</i> in the expression. String comparisons using the equals operator are case-insensitive.
!=	Not equals	Expression is true if the value in the specified <i>fieldName</i> does not equal the specified <i>value</i> .
<	Less than	Expression is true if the value in the specified <i>fieldName</i> is less than the specified <i>value</i> .
<=	Less or equal	Expression is true if the value in the specified <i>fieldName</i> is less than, or equals, the specified <i>value</i> .
>	Greater than	Expression is true if the value in the specified <i>fieldName</i> is greater than the specified <i>value</i> .
>=	Greater or equal	Expression is true if the value in the specified <i>fieldName</i> is greater than or equal to the specified <i>value</i> .
LIKE	Like	Expression is true if the value in the specified <i>fieldName</i> matches the characters of the text string in the specified <i>value</i> . The LIKE operator in SOQL and SOSL is similar to the SAME operator in

Operator	Name	Description
		<p>SQL; it provides a mechanism for matching partial text strings and includes support for wildcards.</p> <ul style="list-style-type: none"><li>• The % and _ wildcards are supported for the LIKE operator.</li><li>• The % wildcard matches zero or more characters.</li><li>• The _ wildcard matches exactly one character.</li><li>• The text string in the specified <i>value</i> must be enclosed in single quotes.</li><li>• The LIKE operator is supported for string fields only (see <a href="#">string</a>).</li><li>• The LIKE operator performs a case-insensitive match, unlike the case-sensitive matching in SQL.</li><li>• The LIKE operator in SOQL and SOSL does not currently support escaping of special characters % or _.</li><li>• You should not use the backslash character in a search (except to escape a character), as it is reserved.</li></ul> <p>For example: SELECT AccountId, FirstName, lastname FROM Contact WHERE lastname LIKE 'appl_%' matches Appleton, Apple, but not Appl and not Bappl</p>

## Logical Operators

The following table lists the logical operator values that are used in `fieldExpression` syntax:

Operator	Syntax	Description
AND	<code>fieldExpressionX and fieldExpressionY</code>	true if both <code>fieldExpressionX</code> and <code>fieldExpressionY</code> are true.
OR	<code>fieldExpressionX or fieldExpressionY</code>	true if either <code>fieldExpressionX</code> or <code>fieldExpressionY</code> is true.
NOT	<code>not fieldExpressionX</code>	true if <code>fieldExpressionX</code> is false.

## Quoted String Escape Sequences

You can use the following escape sequences with SOQL:

Sequence	Meaning
<code>\n</code>	New line
<code>\r</code>	Carriage return
<code>\t</code>	Tab
<code>\b</code>	Bell
<code>\f</code>	Form feed
<code>\"</code>	One double-quote character
<code>\'</code>	One single-quote character
<code>\\</code>	Backslash

If you use a backslash character in any other context, an error will occur.

### Reserved Characters

Reserved characters, if specified in a SELECT clause as a literal string (between single quotes), must be escaped (preceded by the backslash \ character) in order to be properly interpreted.

An error occurs if you do not precede reserved characters with a backslash.

The following characters are reserved:

' (single quote)

\ (backslash)

For example, to query on the Account field Name for Bob's BBQ, you would type the following SELECT statement:

```
SELECT Id FROM Account WHERE Name LIKE 'Bob\'s BBQ'
```

### Appendix B: DataTrim Dupe Alerts – Page Layout

#### Dupe Alert Detail

**DataTrim Dupe Alert Leads** [+ Follow](#) [Edit](#) [Clone](#) [Activate](#) [Run Now](#) [Check Filter](#) [Reset](#) [Delete](#) [Review Dupes](#) [Change Owner](#)

Dupe Alert Type: Lead-Lead | Match Level: Tight | Alert Status: Alert is not Active | Active:  | Run: Once

---

#### Details

Dupe Alert Name: Leads | Owner: [Frank Scaramanga](#)

Description (Short):

Alert Status: Alert is not Active

**Alert Settings (what, when and how)**

Dupe Alert Type: Lead-Lead | Active:

Match Level: Tight | Run: Once

Survivorship Rule: Most Recent Record Survives | When (Time Slot): Next

Use Social CRM:

**Data Filter - Matching Secondary subset of data against Master subset**

Campaign: | Master = Secondary:

Filter: Secondary Data Set: | Filter: Master Data Set: |

Include New and Changed data since: 12/9/2000

**Advanced Settings**

Add. Review Field: | Add. Review Field (Lead): |

Advanced Parameters: ExactMatchField=OwnerId

**Last Run Details**

Run Status: Completed

Last Run Result: OK

**Reports**

**System Information**

License Type: Enterprise | Created By: [Frank Scaramanga](#), 11/5/2009 5:07 AM

License No: 22LC6v0Tds39779000 | Last Modified By: [Frank Scaramanga](#), 4/28/2020 5:48 AM

#### DataTrim Dupe Alert Result (3+)

[AR000372](#)  
Run Date: 10/31/2019 6:59 AM  
Total No of Du...: 11  
Secondary Rec...: 99

[AR000370](#)  
Run Date: 4/4/2019 8:41 AM  
Total No of Du...: 15  
Secondary Rec...: 113

[AR000294](#)  
Run Date: 3/11/2015 8:56 AM  
Total No of Du...: 654  
Secondary Rec...: 983

[View All](#)

### Appendix C: DataTrim Matched Records – Page Layout

The screenshot displays the 'DataTrim Matched Records Leads-Details' page. It features a header with a user icon and the text 'DataTrim Matched Records Leads-Details'. Below the header, there are two tabs: 'Related' and 'Details', with 'Details' being the active tab. The main content area is divided into several sections:

- Matching Detail Leads-Details:** A table with two columns. The left column contains 'Matching Detail Leads-Details' and 'Match Found Date 4/4/2019'. The right column contains 'Dupe Alert Leads' and 'Dupe Alert Result AR000370'. Each row has an edit icon.
- Match Data:** A section with a dropdown arrow. It contains a table with two columns. The left column contains 'Dupe Alert Type Lead-Lead', 'Adv. SurvivorshipRule -', 'Survivor Candidate-Contact -', and 'False Dupe' (with an unchecked checkbox). The right column contains 'Owner Frank Scaramanga', 'Resolved' (with a thumbs up icon), and 'Parent Relationship'.
- Review Detail List:** A section with a dropdown arrow. It contains a table with two columns. The left column contains 'Name (Survivor) Håkon Fleksness, Golgata Aksjeselskap', 'Territory (Survivor) Norway', 'Owner (Survivor) Frank Scaramanga', 'Owner Active (Survivor) Yes', 'Review Field (Survivor)', and 'Custom Review Field (Survivor)'. The right column contains 'Name (Dupe) Håkon Fleksness, Golgata AS', 'Territory (Dupe) Norway', 'Owner (Dupe) Frank Scaramanga', 'Owner Active (Dupe) Yes', 'Review Field (Dupe)', and 'Custom Review Field (Dupe)'. Each row has an edit icon.

Screenshot: Top part of the DataTrim Matched Records page layout.

### Match Score Details

Match Class



Same Owner



Match Level

Exact

Same Country



Score

100

Same Review Value



Score Company

100

Score Phone

0

Score Address

0

Score Name

100

Score Location

100

Score LastName

100

Score Country

100

Score E-mail

0

Score Website

0

Score Facebook

0

Score Custom Key 1

0

Score LinkedIn

0

Score Custom Key 2

0

Score Twitter

0

Score Custom Key 3

0

Score Google+

0

### References

Account (Survivor)

Account (Dupe)

Contact (Survivor)

Contact (Dupe)

Lead (Survivor)

[Håkon Fleksness](#)

Lead (Dupe)

[Håkon Fleksness](#)

### Review Outcome

Id of Survivor

Derived Review Outcome

Not Reviewed

Screenshot: Bottom part of the DataTrim Matched Records page layout.

### Appendix D: Custom Meta Data – Page Layout

 **SETUP**  
Custom Metadata Types

#### DataTrim Dupe Alerts Setting Help for this Page

DataTrim Dupe Alerts Setting Detail Edit Delete Clone

▼ License Information

DataTrim Dupe Alerts Setting Name	Global	License No	226fF5Nykf09020900
		OnBoarding Option	Reusing an existing salesforce License

▼ Account Matching

Account: Facebook

Account: LinkedIn

Account: Twitter

▼ Contact Matching

Contact: Facebook

Contact: LinkedIn

Contact: Twitter

▼ Lead Matching

Lead: Facebook

Lead: LinkedIn

Lead: Twitter

▼ Email Notifications on Complete

Send Notification on Complete

Notification Email Address

AdditionalNotification CC Email Address

# DataTrim

## Dupe Alerts

<b>▼ Default Wizard</b>	
Use Merge Wizard as Default <input checked="" type="checkbox"/>	
Use Quick Merge as Default <input type="checkbox"/>	
<b>▼ DataTrim Merge Parameters</b>	
Create Activity for Merged Data <input checked="" type="checkbox"/>	Activity Closed Status <input type="checkbox"/>
Append Merge Data to a Field <input type="checkbox"/>	Merge Append Field <input type="checkbox"/> Description
Add Merged data as Note <input type="checkbox"/>	
Delete Matched Records After Merge <input checked="" type="checkbox"/>	
Merge Multi Pick-lists <input checked="" type="checkbox"/>	
Merge Type <input type="checkbox"/> 2Survivor	
<b>▼ Advanced Merge Options</b>	
Merge Field Exclusions (Account) <input type="checkbox"/> BillingCountry; BillingState; ShippingCountry; ShippingState	Merge Rules (Account) <input type="checkbox"/>
Merge Field Exclusions (Contact) <input type="checkbox"/>	Merge Rules (Contact) <input type="checkbox"/>
Merge Field Exclusions (Lead) <input type="checkbox"/>	Merge Rules (Lead) <input type="checkbox"/> LeadSource=KeepOldest; OwnerId=KeepLastActivity
<b>▼ Convert and Mass Convert</b>	
Do Not Create opportunity <input checked="" type="checkbox"/>	
Oppty. Naming Convention <input type="checkbox"/> New	
Overwrite Lead Source <input type="checkbox"/>	
Send Notification to Owner <input type="checkbox"/>	
Converted Status <input type="checkbox"/> Closed - Converted	
Delete Matched Records After Convert <input checked="" type="checkbox"/>	
<b>▼ Dupe Status Display Options</b>	
Account: Show Action Link <input checked="" type="checkbox"/>	Account: Include Leads to Convert <input checked="" type="checkbox"/>
Contact: Show Action Link <input checked="" type="checkbox"/>	Account Dupe Status, Match Level <input type="checkbox"/> SuperTight
Lead: Show Action Link <input checked="" type="checkbox"/>	Contact: Include Leads to Convert <input checked="" type="checkbox"/>
	Contact Dupe Status, Match Level <input type="checkbox"/> SuperTight
	Lead Dupe Status, Match Level <input type="checkbox"/> SuperTight
<b>▼ Dupe Detection Upon Entry</b>	
Dupe Detection on Account Entry <input checked="" type="checkbox"/>	Account Dupe Detection, Match Level <input type="checkbox"/> SuperTight
Dupe Detection on Contact Entry <input checked="" type="checkbox"/>	Contact Dupe Detection, Match Level <input type="checkbox"/> SuperTight
Dupe Detection on Lead Entry <input checked="" type="checkbox"/>	Lead Dupe Detection, Match Level <input type="checkbox"/> SuperTight
<b>▼ Batch Processing and Limits</b> derived by salesforce Governor Rules	
Enable Batch <input checked="" type="checkbox"/>	Mass Convert Batch Size (Max.) 200
	Mass Merge Batch Size (Max.) 50
<b>▼ Other</b>	
Hide Console <input type="checkbox"/>	
Beta On <input type="checkbox"/>	
SOQL Count Query (Max.)	
Label Global	Protected Component <input type="checkbox"/>
	Namespace Prefix TRIMDA

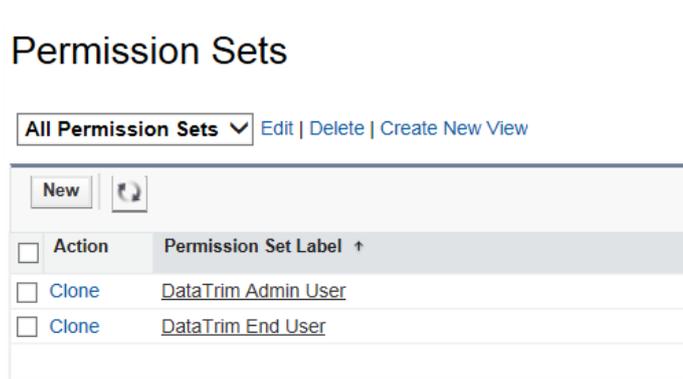
### Appendix E: DataTrim User Profiles – Permission Sets

#### Users who will need access to DataTrim

If you during the installation choose NOT to make the application available to all, you may at a later point need to update the profile of all or selected users so that they have access to e.g. the Dupe Status component on the Page Layouts.

The Package contains 2 permission Sets:

1. DataTrim Admin User  
This permission set is to be used for the users (admin, data steward etc.) who will be creating editing and running the alerts.
2. DataTrim End User  
This permission set is to be used for the all users who will be reviewing and potentially merging the duplicates identified by the application. Users who will need to see the Dupe Status on the Detail View of the Account/Contact/Lead and/or benefit from the Dupe Detection upon entry will also need to have this permission set.



**In addition to having access to the various DataTrim elements, you must also make sure that the users have permissions to modify/delete leads, contacts and accounts.**

Note that your license is an organization wide license, thus you do not need to assign licenses to individual users.

## Appendix F: Upgrading

### New DataTrim Dupe Alerts Parameters

Each Release may include the addition of new Fields on the Page Layout of the DataTrim Objects. To have these visible you will have to edit the Page layout manually. Use Appendix C + D + E as reference for the final layout

### Clickjack protection (Spring 2014, Deprecated Winter 2021)

The Review Wizard which combines a list of records on the top part of the screen and the actual merge facility in the bottom part of the screen utilizes a feature where multiple pages are presented on one single page (Mash-up)

While salesforce has introduced a Session setting to enable clickjack protection, then protection also prevents the use of page in page views (mash-up).

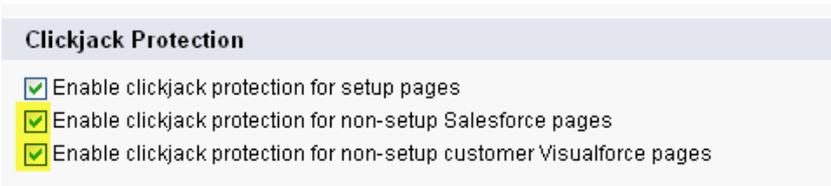
Check out your clickjack protection settings in the salesforce setup user Session settings. With settings like this, you will be able to use the Review Wizard as originally designed with a minimum of clicks.



**Clickjack Protection**

- Enable clickjack protection for setup pages
- Enable clickjack protection for non-setup Salesforce pages
- Enable clickjack protection for non-setup customer Visualforce pages

With the 2<sup>nd</sup> lever or even 3<sup>rd</sup> level of clickjack protection enabled, the merge facilities will open in separate windows/tabs.



**Clickjack Protection**

- Enable clickjack protection for setup pages
- Enable clickjack protection for non-setup Salesforce pages
- Enable clickjack protection for non-setup customer Visualforce pages

If you enable: **Enable clickjack protection for non-setup Salesforce pages**, the Quick Merge will become your default Merge wizard. To use the standard salesforce merge facility, click the Open Wizard button and the wizard will open in a new window/tab. The same apply for Details, the Details will display in a new window/tab.

If you also enable: **Enable clickjack protection for non-setup customer Visualforce pages**, you will also have to click the button in order to open the Quick Merge wizard.

To configure DataTrim Dupe Alerts to respect your Session Setting, make sure that you have aligned the clickjack protection settings in the DataTrim Dupe Alerts settings too.

# DataTrim

## Dupe Alerts

### Default Wizard

Save

This App, provides multiple options for choosing your favorite Merge facility when working with the Review Wizard

- 1) the standard salesforce merge facility (Classic Only)
- 2) The Datatrim Merge Wizard (Lightning Only)
- 3) the Quick Merge facility (Classic and Lightning)

LIGHTNING you can choose between the DataTrim Merge Wizard and the Quick Merge, by default the Merge Wizard is selected.

Use Merge Wizard as Default ⓘ

CLASSIC; The Quick Merge facility is the default merge facility, due to limitations set by the Click-Jack protection settings which is part of the salesforce security settings.

Use Quick Merge as Default ⓘ

If you have enabled clickjack these protection settings, please replicate your setting here, and our App will adopt.

Enable clickjack protection-salesforce ⓘ

Enable clickjack protection-Visualforce ⓘ

### Appendix G: Review duplicates in Excel – Step by Step

In principle the process is as follows:

**1. Extract the data into Excel**

- a. Edit or create a report which includes data from the DataTrim Matched Records and e.g. any relevant details from the surviving Account, then export the data into Excel
- b. Edit or create a report which includes data from the DataTrim Matched Records and e.g. any relevant details from the dupe Account. Make sure that it has exactly the same fields in the same order as the report above. Then export the data into Excel.

**2. Organize the data in Excel**

- a. In Excel add a column to the exported data e.g. Record Type and populate this column with the value "Dupe" for the records you exported using the dupe report and "Survivor" for the records you exported using the survivor report.
- b. Now consolidate the data from the 2 Excel sheets into one Sheet, and sort the data by **DataTrim Matched Record ID** (make sure you sort with case sensitivity turned on – see the option button on the screen when setting up the sorting) and **Record Type** (descending), and your pairs will now be listed pair by pair underneath each other.

**3. Review the Duplicates.**

- a. You can now review the duplicates by comparing any field from the 2 records. For each Pair you need to decide; a) Merge to Survivor, b) Merge to Dupe or c) False Dupe.
- b. Add a separate column (Review Outcome) in which you enter your decision.

	D	M	N	O	P	Q	R
1	Record Ty	Review Outcome	Account (Survivor): Account Ni	Account (Survivor): Billing Str	Account (Survivor): Billi	Account (t	Account (Surv
2	Survivor	Merge to Survivor	Buchhandel Schmidt	Ingolstädter Straße 5a	MÜNCHEN	80939	Germany
3	Dupe	Merge to Survivor	Schmidt Buch Gesellschaft mbh.	Ingolstädter Straße 5a	Munich	80930	Germany
4	Survivor	Merge to Survivor	Dickenson & son plc	1301 Hoch Drive	Lawrence	66040	USA
5	Dupe	Merge to Survivor	Dickenson plc	1301 Hoch Dr.	Lawrence	66045	USA
6	Survivor	Merge to Survivor	Bip-Bop	Gottlieb-Daimler-Straße 7-9	ERDMANNHAUSEN	71729	Germany
7	Dupe	Merge to Survivor	BipBop KG	Gottlieb Daimler Strasse 7	ERDMANNHAUSEN	71729	Germany
8	Survivor	Merge to Dupe	Mister GmbH & Co KG	Dr.-Karl-Lueger-Ring 4	Vienna	1015	Austria
9	Dupe	Merge to Dupe	Mister GmbH	Ring 4	Vienna	1015	Austria
10	Survivor	Merge to Dupe	Reinhold BV	Mortel 2-4 Born	SITTARD	6121 JT	The Netherlands
11	Dupe	Merge to Dupe	Reinhold BV	Mortel 2	SITTARD	6121	The Netherlands
12	Survivor		Linz AG	Fichtenstraße 7	Linz	4020	Austria
13	Dupe		Lins AG	Fichtenstrasse 7	WIEN	4000	Austria
14	Survivor		DUNKER	Casterstraat 8	MOESKROEN	7700	Belgium
15	Dupe		DUNKER SA	Casterstraat 8	MOESKROEN	7700	Belgium
16	Survivor		Hildur	Skipholt 51	REYKJAVIK	105	Iceland
17	Dupe		Hildur Íslands hf	Skipholt 51	REYKJAVIK	105	Iceland
18	Survivor		Bayenische Motor Werke (BMW)				
19	Dupe	Merge to Dupe	BMW	Autobahn 320	Munich		Germany
20	Survivor		Edge Communications	312 Constitution Place	Austin	78600	US
21	Dupe		Edge Comm.	312 Constitution Pl.	Austin	78600	US
22	Survivor	False Dupe	Vauxal BV	De Beverspijken 9	D'BOSCH	5221 EE	The Netherlands
23	Dupe	False Dupe	Vauxal (Netherlands)	De Beverspijken 9	D'BOSCH	5221 EE	The Netherlands
24	Survivor		Walter Koerner GmbH	Schichtstraße 10, hildesheim	WALDKRAIBURG	84478	Germany
25	Dupe		Walter Körner & Co GmbH	Schichtstraße 10	WALDKRAIBURG	84478	Germany
26	Survivor		Business Document Service	44 Eastgate	LEEDS	LS2 7LY	United Kingdom
27	Dupe		(BDS) Business Document Servi	44 Eastgate Manor	LEEDS	LS2 7LY	United Kingdom
28	Survivor		Express Logistics and Transport	620 SW 5th Avenue Suite 400	Portland	97204	United States
29	Dupe		Express Logistics	620 SW 5th Avenue	Portland	97204	United States

**4. Apply your review outcome to salesforce**

- a. Once you have reviewed all the pairs (or even parts of them) you can update the DataTrim Matched Record with the outcome from your external review. For this purpose you can use the Data Loader or the Excel connector to update the Field called Review Outcome on the DataTrim Matched Record Detail using the DataTrim Matched Record ID as the link for the update.

**5. Merge data using the Mass merge facility**

- a. In the DataTrim Matched Record Tab you will find a View called Review Accounts (reviewed). You can use this View as a template for creating your own more specific views.

- b. This view has the Review Outcome field included, so after the update you can use this view to quickly get a listing of the records which you have reviewed externally and you will easily be able to perform the mass merge according to your review codes.



While you have the data in Excel, you might find that there are a few spelling errors you want to change, or it could be that you choose one record to be the survivor but you would like the name from the 'dupe' record.

You can easily perform these changes in Excel and then use the Data Loader or the Excel Connector to update the records directly in salesforce, as the exported records also contain the ID of e.g. the Account records, which you should use for the update.

### STEP-by-STEP:

#### 1. Extract the data into Excel

- a) Edit or create a report which includes data from the DataTrim Matched Records and e.g. any relevant details from the surviving Account, then export the data into Excel.
- b) Edit or create a report which includes data from the DataTrim Matched Records and e.g. any relevant details from the dupe Account. Make sure that it has exactly the same fields in the same order as the report above. Then export the data into Excel.

The screenshot shows the 'Report Folders' interface in Salesforce. The 'Folder' dropdown is set to 'DataTrim Dupe Alerts'. Under the 'All Reports' tab, a list of reports is displayed. A red box highlights the following reports:

Report Name	Description
Account Dupes (Dupe)	DataTrim Matched Records w/ Details from the Account (Dupe)
Account Dupes (Survivor)	DataTrim Matched Records w/ Details from the Account (Survivor)
Contact Dupes (Dupe)	DataTrim Matched Records w/ Details from the Contact (Dupe)

#### 2. Organize the data in Excel

In Excel add a column to the exported data e.g. Record Type, and populate this column with the value "Survivor" for the records you exported using the survivor report (a) and "Dupe" for the records you exported using the dupe report (b).

# DataTrim

# Dupe Alerts

A	B	C	D	E	F	G	H	I	J	K
DataTrim Matched Record ID	Account (Survivor)	Match Level	Record Type	Match Level	Id of Survivor	Score	Score Compas	Score Address	Score Location	Score Country
2	a017000000CSNMk	001700000MQxR	Tight	Survivor	3	99	100	96	100	100
3	a017000000CSNMi	001700000MQxG	SuperTight	Survivor	2	100	100	99	100	100
4	a017000000CSNMm	001700000MQxGN	SuperTight	Survivor	2	100	100	99	100	100
5	a017000000CSNOS	001700000MQxL	SuperTight	Survivor	2	99	98	96	100	100
6	a017000000CSNPH	001700000MQxFv	SuperTight	Survivor	2	99	100	97	100	100
7	a017000000CSNPb	001700000MQxR	Tight	Survivor	3	96	100	65	0	0
8	a017000000CSNMG	001700000MQxFz	Tight	Survivor	3	97	95	100	97	100
9	a017000000CSNMK	001700000MQxGP	SuperTight	Survivor	2	99	98	99	100	100
10	a017000000CSNPB	001700000MQxFE	Tight	Survivor	3	97	100	89	100	100
11	a017000000CSNPC	001700000MQxGR	SuperTight	Survivor	2	99	100	97	100	100
12	a017000000CSNPD	001700000MQxGS	Tight	Survivor	3	98	93	100	100	100
13	a017000000CSNPR	001700000MQxM	Tight	Survivor	3	96	100	53	0	0
14	a017000000CSNPe	001700000MQxFs	Tight	Survivor	3	96	100	0	100	100
15	a017000000CSNPS	001700000MQxG5	Tight	Survivor	3	97	100	88	100	0
16	a017000000CSNPF	001700000MQxGj	Tight	Survivor	3	96	100	88	100	100
17	a017000000CSNNz	001700000MQxG2	Tight	Survivor	3	96	100	88	100	100
18	a017000000CSNNZ	001700000MQxFq	SuperTight	Survivor	2	100	100	99	100	100
19	a017000000CSNNE	001700000MQxGT	Exact	Survivor	1	100	100	100	100	100
20	a017000000CSNNd	001700000MQxG1	Exact	Survivor	1	100	100	100	100	100
21	a017000000CSNOG	001700000MQxFz	SuperTight	Survivor	2	100	100	99	100	100
22	a017000000CSNOd	001700000MQxT	SuperTight	Survivor	2	99	100	96	100	100
23	a017000000CSNNT	001700000MQxU	SuperTight	Survivor	2	99	100	98	100	100
24	a017000000CSNOe	001700000MQxUJ	Tight	Survivor	3	98	100	91	100	0
25	a017000000CSNPM	001700000MQxV	Tight	Survivor	3	98	95	99	100	100
26	a017000000CSNNU	001700000MQxGM	Exact	Survivor	1	100	100	100	100	100
27	a017000000CSNNG	001700000MQxFF	SuperTight	Survivor	2	100	100	0	0	0
28	a017000000CSNMP	001700000MQxFG	SuperTight	Survivor	2	100	100	99	100	100
29	a017000000CSNPN	001700000MQxFN	SuperTight	Survivor	2	100	100	99	100	100
30	a017000000CSNPD	001700000MQxGV	Tight	Survivor	3	96	100	98	100	100
31	a017000000CSNPM	001700000MQxGN	SuperTight	Survivor	2	99	98	100	100	100
32	a017000000CSNOi	001700000MQxP	SuperTight	Survivor	2	100	100	96	100	100
33	a017000000CSNOj	001700000MQxQ	SuperTight	Survivor	2	100	100	96	100	100
34	a017000000CSNOk	001700000MQxV	SuperTight	Survivor	2	99	100	96	100	0

Now append the data from the 2 Excel sheets into one sheet, and sort the data by DataTrim Matched Record ID and Record Type (descending), and your pairs will now be listed pair by pair underneath each other.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
DataTrim Matched Record ID	Account ID	Match Lev	Record Ty	Review Outcome	Account (Survivor)	Account N	Account (Survivor)	Billing Str	Account (Survivor)	Billi	Account (Survivor)						
1	a017000000CSNMk	001700000MQxFz	Tight	Survivor	Buchhandel Schmidt		Ingolstädter Straße 5a	MÜNCHEN			89339	Germany					
2	a017000000CSNMG	001700000MQxFO	Tight	Dupe	Schmidt Buch Gesellschaft mbh		Ingolstädter Straße 5a	Munich			89330	Germany					
3	a017000000CSNMk	001700000MQxR	Tight	Survivor	Dickenson & son plc		1301 Hoch Drive	Lawrence			66040	USA					
4	a017000000CSNMk	001700000PLED7	Tight	Dupe	Dickenson plc		1301 Hoch Dr	Lawrence			66045	USA					
5	a017000000CSNMk	001700000MQxGP	SuperTight	Survivor	BigBop KG		Gottlieb-Daimler-Straße 7-9	ERDMANNHAUSEN			71729	Germany					
6	a017000000CSNMK	001700000PLECw	SuperTight	Dupe	ErpBop KG		Gottlieb Daimler Strasse 7	ERDMANNHAUSEN			71729	Germany					
7	a017000000CSNMI	001700000MQxG0	SuperTight	Survivor	Mister GmbH & Co KG		Dr.-Karl-Lueger-Ring 4	Vienna			1015	Austria					
8	a017000000CSNMI	001700000PLED6	SuperTight	Dupe	Mister GmbH		Ring 4	Vienna			1015	Austria					
9	a017000000CSNMM	001700000MQxGN	SuperTight	Survivor	Reinhold BV		Mortel 2-4 Born	SITTARD			6121	The Netherlands					
10	a017000000CSNMM	001700000PLEC0	SuperTight	Dupe	Reinhold BV		Mortel 2	SITTARD			6121	The Netherlands					
11	a017000000CSNMP	001700000MQxFG	SuperTight	Survivor	Linz AG		Fichtenstraße 7	Linz			4020	Austria					
12	a017000000CSNNE	001700000PLED5	SuperTight	Dupe	Linz AG		Fichtenstrasse 7	WIEN			4020	Austria					
13	a017000000CSNND	001700000MQxG1	Exact	Survivor	DUNKER SA		Casterstraat 8	MOESKROEN			7700	Belgium					
14	a017000000CSNND	001700000PLECt	Exact	Survivor	DUNKER SA		Casterstraat 8	MOESKROEN			7700	Belgium					
15	a017000000CSNNE	001700000MQxGT	Exact	Survivor	Hildur		Skipholt 51	REYKJAVIK			105	Iceland					
16	a017000000CSNNE	001700000PLED3	Exact	Dupe	Hildur Islands hf		Skipholt 51	REYKJAVIK			105	Iceland					
17	a017000000CSNNG	001700000MQxFF	SuperTight	Survivor	Bayerische Motor Werke (BMW)												
18	a017000000CSNNG	001700000PLEDT	SuperTight	Dupe	BMW		Autobahn 320	Munich				Germany					
19	a017000000CSNNT	001700000MQxU	SuperTight	Survivor	Edge Communications		312 Constitution Place	Austin			78600	US					
20	a017000000CSNNT	001700000PLEDL	SuperTight	Dupe	Edge Comm.		312 Constitution Pl	Austin			78600	US					
21	a017000000CSNNU	001700000MQxGM	Exact	Survivor	Vauxal BV		De Beverspijken 9	DBOSCH			5221	EE	The Netherlands				
22	a017000000CSNNU	001700000PLECm	Exact	Dupe	Vauxal (Netherlands)		De Beverspijken 9	DBOSCH			5221	EE	The Netherlands				
23	a017000000CSNNz	001700000MQxG2	Tight	Survivor	Walter Körner GmbH		Schichtstraße 10, hildesheim	WALDKRAIBURG			84478	Germany					
24	a017000000CSNNZ	001700000PLECy	Tight	Dupe	Walter Körner & Co GmbH		Schichtstraße 10	WALDKRAIBURG			84478	Germany					
25	a017000000CSNNz	001700000MQxFq	SuperTight	Survivor	Business Document Service		44 Eastgate	LEEDS			LS2 7LY	United Kingdom					
26	a017000000CSNNZ	001700000PLECp	SuperTight	Dupe	(BDS) Business Document Servi		44 Eastgate Manor	LEEDS			LS2 7LY	United Kingdom					
27	a017000000CSNNZ	001700000PLECp	SuperTight	Dupe	(BDS) Business Document Servi		44 Eastgate Manor	LEEDS			LS2 7LY	United Kingdom					

### 3. Review the Duplicates.

You can now review the duplicates by comparing any field from the 2 records. For each Pair you need to decide: a) Merge to Survivor, b) Merge to Dupe or c) False Dupe. Add a separate column (Review Outcome) in which you enter your decision.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
DataTrim Matched Record ID	Account (Survivor)	Ad	Match Lev	Record Ty	Review Outcome	Account (Survivor)	Account N	Account (Survivor)	Billing Str	Account (Survivor)	Billi	Account (Survivor)					
1	a017000000CSNMk	001700000MQxFz	Tight	Survivor		Buchhandel Schmidt		Ingolstädter Straße 5a	MÜNCHEN			89339	Germany				
2	a017000000CSNMG	001700000MQxFO	Tight	Dupe	Merge to Survivor	Schmidt Buch Gesellschaft mbh		Ingolstädter Straße 5a	Munich			89330	Germany				
3	a017000000CSNMk	001700000MQxR	Tight	Survivor	Merge to Survivor	Dickenson & son plc		1301 Hoch Drive	Lawrence			66040	USA				
4	a017000000CSNMk	001700000PLED7	Tight	Dupe	Merge to Survivor	Dickenson plc		1301 Hoch Dr	Lawrence			66045	USA				
5	a017000000CSNMk	001700000MQxGP	SuperTight	Survivor	Merge to Survivor	BigBop KG		Gottlieb-Daimler-Straße 7-9	ERDMANNHAUSEN			71729	Germany				
6	a017000000CSNMK	001700000PLECw	SuperTight	Dupe	Merge to Dupe	ErpBop KG		Gottlieb Daimler Strasse 7	ERDMANNHAUSEN			71729	Germany				
7	a017000000CSNMI	001700000MQxG0	SuperTight	Survivor	Merge to Dupe	Mister GmbH & Co KG		Dr.-Karl-Lueger-Ring 4	Vienna			1015	Austria				
8	a017000000CSNMI	001700000PLED6	SuperTight	Dupe	Merge to Dupe	Mister GmbH		Ring 4	Vienna			1015	Austria				
9	a017000000CSNMM	001700000MQxGN	SuperTight	Survivor	Merge to Dupe	Reinhold BV		Mortel 2-4 Born	SITTARD			6121	The Netherlands				
10	a017000000CSNMM	001700000PLEC0	SuperTight	Dupe	Merge to Dupe	Reinhold BV		Mortel 2	SITTARD			6121	The Netherlands				
11	a017000000CSNMP	001700000MQxFG	SuperTight	Survivor	Merge to Dupe	Linz AG		Fichtenstraße 7	Linz			4020	Austria				
12	a017000000CSNNE	001700000PLED5	SuperTight	Dupe	Merge to Dupe	Linz AG		Fichtenstrasse 7	WIEN			4020	Austria				
13	a017000000CSNND	001700000MQxG1	Exact	Survivor	Merge to Dupe	DUNKER SA		Casterstraat 8	MOESKROEN			7700	Belgium				
14	a017000000CSNND	001700000PLECt	Exact	Survivor	Merge to Dupe	DUNKER SA		Casterstraat 8	MOESKROEN			7700	Belgium				
15	a017000000CSNNE	001700000MQxGT	Exact	Survivor	Merge to Dupe	Hildur		Skipholt 51	REYKJAVIK			105	Iceland				
16	a017000000CSNNE	001700000PLED3	Exact	Survivor	Merge to Dupe	Hildur Islands hf		Skipholt 51	REYKJAVIK			105	Iceland				
17	a017000000CSNNG	001700000MQxFF	SuperTight	Survivor	Merge to Dupe	Bayerische Motor Werke (BMW)											
18	a017000000CSNNG	001700000PLEDT	SuperTight	Dupe	Merge to Dupe	BMW		Autobahn 320	Munich				Germany				
19	a017000000CSNNT	001700000MQxU	SuperTight	Survivor	Merge to Dupe	Edge Communications		312 Constitution Place	Austin			78600	US				
20	a017000000CSNNT	001700000PLEDL	SuperTight	Dupe	Merge to Dupe	Edge Comm.		312 Constitution Pl	Austin			78600	US				
21	a017000000CSNNU	001700000MQxGM	Exact	Survivor	Merge to Dupe	Vauxal BV		De Beverspijken 9	DBOSCH			5221	EE	The Netherlands			
22	a017000000CSNNU	001700000PLECm	Exact	Dupe	Merge to Dupe	Vauxal (Netherlands)		De Beverspijken 9	DBOSCH			5221	EE	The Netherlands			
23	a017000000CSNNz	001700000MQxG2	Tight	Survivor	Merge to Dupe	Walter Körner GmbH		Schichtstraße 10, hildesheim	WALDKRAIBURG			84478	Germany				
24	a017000000CSNNZ	001700000PLECy	Tight	Dupe	Merge to Dupe	Walter Körner & Co GmbH		Schichtstraße 10	WALDKRAIBURG			84478	Germany				
25	a017000000CSNNz	001700000MQxFq	SuperTight	Survivor	Merge to Dupe	Business Document Service		44 Eastgate	LEEDS			LS2 7LY	United Kingdom				
26	a017000000CSNNZ	001700000PLECp	SuperTight	Dupe	Merge to Dupe	(BDS) Business Document Servi		44 Eastgate Manor	LEEDS			LS2 7LY	United Kingdom				
27	a017000000CSNNZ	001700000PLECp	SuperTight	Dupe	Merge to Dupe	(BDS) Business Document Servi		44 Eastgate Manor	LEEDS			LS2 7LY	United Kingdom				

### 4. Apply your review result to salesforce

Once you have reviewed all the pairs (or even parts of them) you can update the DataTrim Matched Record with the outcome from your external review. For this purpose you can use the Data Loader or the Excel connector to update the Field called Review Outcome on the Matched Record detail using the DataTrim Matched Record ID as the link for the update.

# DataTrim

# Dupe Alerts

A	B	C	D	E	F	G	H	I	J	K
DataTrim Matched Record ID	Account (Survivor) Account ID	Match Level	Record Type	Match Level Priority	Id of Survivor	Score	Score Company	Score Address	Score Location	Score Count
2	a017000000CSNMk	0017000000MQxR	Tight	Survivor	3	99	100	96	100	100
3	a017000000CSNMl	0017000000MQxG0	SuperTight	Survivor	2	100	100	99	100	100
4	a017000000CSNMm	0017000000MQxGN	SuperTight	Survivor	2	100	100	99	100	100
5	a017000000CSNOS	0017000000MQxL	SuperTight	Survivor	2	99	98	96	100	100
6	a017000000CSNPH	0017000000MQxFv	SuperTight	Survivor	2	99	100	97	100	100
7	a017000000CSNPb	0017000000MQxM	Tight	Survivor	3	96	100	65	0	0
8	a017000000CSNMG	0017000000MQxFz	Tight	Survivor	3	97	95	100	97	100
9	a017000000CSNMK	0017000000MQxGP	SuperTight	Survivor	2	99	98	99	100	100
10	a017000000CSNPB	0017000000MQxFE	Tight	Survivor	3	97	100	89	100	100
11	a017000000CSNPC	0017000000MQxGR	SuperTight	Survivor	2	99	100	97	100	100
12	a017000000CSNPD	0017000000MQxGS	Tight	Survivor	3	98	93	100	100	100
13	a017000000CSNPR	0017000000MQxM	Tight	Survivor	3	96	100	53	0	0
14	a017000000CSNPe	0017000000MQxFs	Tight	Survivor	3	96	100	0	100	100
15	a017000000CSNPS	0017000000MQxG5	Tight	Survivor	3	97	100	88	100	0
16	a017000000CSNPF	0017000000MQxGj	Tight	Survivor	3	96	100	88	100	100
17	a017000000CSNNz	0017000000MQxG2	Tight	Survivor	3	96	100	88	100	100
18	a017000000CSNNZ	0017000000MQxFq	SuperTight	Survivor	2	100	100	98	100	100
19	a017000000CSNNE	0017000000MQxGT	Exact	Survivor	1	100	100	100	100	100
20	a017000000CSNNe	0017000000MQxG1	Exact	Survivor	1	100	100	100	100	100
21	a017000000CSNOQ	0017000000MQxFz	SuperTight	Survivor	2	100	100	99	100	100
22	a017000000CSNOd	0017000000MQxT	SuperTight	Survivor	2	99	100	96	100	100
23	a017000000CSNNT	0017000000MQxO	SuperTight	Survivor	2	99	100	98	100	100
24	a017000000CSNOe	0017000000MQxU	Tight	Survivor	3	90	100	91	100	0
25	a017000000CSNOF	0017000000MQxFy	Tight	Survivor	3	98	95	99	100	100
26	a017000000CSNNU	0017000000MQxGM	Exact	Survivor	1	100	100	100	100	100
27	a017000000CSNNQ	0017000000MQxFF	SuperTight	Survivor	2	100	100	0	0	0
28	a017000000CSNMP	0017000000MQxFG	SuperTight	Survivor	2	100	100	99	100	100
29	a017000000CSNPN	0017000000MQxFN	SuperTight	Survivor	2	100	100	99	100	100
30	a017000000CSNPO	0017000000MQxGV	Tight	Survivor	3	96	100	88	100	100
31	a017000000CSNPM	0017000000MQxW	Tight	Survivor	3	98	94	98	100	100
32	a017000000CSNOi	0017000000MQxP	SuperTight	Survivor	2	100	100	98	100	100
33	a017000000CSNOj	0017000000MQxG	SuperTight	Survivor	2	100	100	95	100	100
34	a017000000CSNOk	0017000000MQxV	SuperTight	Survivor	2	99	100	98	100	0

## 5. Merge data using the Mass Merge facility

In the DataTrim Matched Record Tab you will find a View called Review Accounts (reviewed), which you can use as a template for creating your own more specific views.

This view has the Review Outcome field included, so after the update you can use this view to quickly get a listing of the records which you have reviewed externally, and you will easily be able to perform the mass merge according to your review codes.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
DataTrim Matched Record ID	Account ID	Match Level	Record Type	Review Outcome	Account (Survivor) Account No	Account (Survivor) Billing Str	Account (Survivor) Billi	Account (Survivor) Billing Str	Account (Survivor) Billi	Account (Survivor) Billing Str	Account (Survivor) Billi	Account (Survivor) Billing Str	Account (Survivor) Billi	Account (Survivor) Billing Str	Account (Survivor) Billi	Account (Survivor) Billing Str	Account (Survivor) Billi
2	a017000000CSNMG	0017000000MQxFz	Tight	Survivor	Buchhandel Schmidt	Ingolstädter Straße 5a	MÜNCHEN	90939	Germany								
3	a017000000CSNMG	0017000000MQxFz	Tight	Dupe	Schmidt Buch Gesellschaft mbh	Ingolstädter Straße 5a	Munich	80630	Germany								
4	a017000000CSNMk	0017000000MQxR	Tight	Survivor	Dickenson & son plc	1301 Hoch Drive	Lawrence	86040	USA								
5	a017000000CSNMk	0017000000PLED7	Tight	Dupe	Dickenson plc	1301 Hoch Dr.	Lawrence	86045	USA								
6	a017000000CSNMk	0017000000MQxGP	SuperTight	Survivor	Big-Edp	Gottlieb-Damilar-Straße 7-9	ERDMANNHAUSEN	71729	Germany								
7	a017000000CSNMk	0017000000PLECw	SuperTight	Dupe	Big-Edp KG	Gottlieb Damilar Strasse 7	ERDMANNHAUSEN	71729	Germany								
8	a017000000CSNMl	0017000000MQxG0	SuperTight	Survivor	Mister GmbH & Co KG	Dr.-Karl-Lueger-Ring 4	Vienna	1015	Austria								
9	a017000000CSNMl	0017000000PLED6	SuperTight	Dupe	Mister GmbH	Ring 4	Vienna	1015	Austria								
10	a017000000CSNMm	0017000000MQxGN	SuperTight	Survivor	Renhold BV	Mortel 2-4 Born	SITTARD	6121 JT	The Netherlands								
11	a017000000CSNMm	0017000000PLECv	SuperTight	Dupe	Renhold BV	Mortel 2	SITTARD	6121	The Netherlands								
12	a017000000CSNMP	0017000000MQxFG	SuperTight	Survivor	Linz AG	Fichtenstraße 7	Linz	4020	Austria								
13	a017000000CSNMP	0017000000PLEDS	SuperTight	Dupe	Lins AG	Fichtenstrasse 7	WIEN	4000	Austria								
14	a017000000CSNNH	0017000000MQxG1	Exact	Survivor	DUNKER	Casterstraat 8	MOESKROEN	7700	Belgium								
15	a017000000CSNNH	0017000000PLECv	Exact	Dupe	DUNKER SA	Casterstraat 8	MOESKROEN	7700	Belgium								
16	a017000000CSNNE	0017000000MQxGT	Exact	Survivor	Hildur	Skipholt 51	REYKJAVIK	105	Iceland								
17	a017000000CSNNE	0017000000PLED3	Exact	Dupe	Hildur Islands hf	Skipholt 51	REYKJAVIK	105	Iceland								
18	a017000000CSNNQ	0017000000MQxFF	SuperTight	Survivor	Bayensche Motor Werke (BMW)												
19	a017000000CSNNQ	0017000000PLEDT	SuperTight	Dupe	BMW	Autobahn 320	Munich		Germany								
20	a017000000CSNNT	0017000000MQxO	SuperTight	Survivor	Edge Communications	312 Constitution Place	Austin	78600	US								
21	a017000000CSNNT	0017000000PLEDL	SuperTight	Dupe	Edge Comm.	312 Constitution Pl.	Austin	78600	US								
22	a017000000CSNNU	0017000000MQxM	Exact	Survivor	Yvaal BV	De Beverspijken 9	D BOSCH	5221 EE	The Netherlands								
23	a017000000CSNNU	0017000000PLECm	Exact	Dupe	Yvaal (Netherlands)	De Beverspijken 9	D BOSCH	5221 EE	The Netherlands								
24	a017000000CSNNZ	0017000000MQxG2	Tight	Survivor	Walter Koenner GmbH	Schichtstraße 10, hildesheim	WALDKRABURG	84470	Germany								
25	a017000000CSNNZ	0017000000PLECy	Tight	Dupe	Walter Koenner & Co GmbH	Schichtstraße 10	WALDKRABURG	84478	Germany								
26	a017000000CSNNZ	0017000000MQxFq	SuperTight	Survivor	Business Document Service	44 Eastgate	LEEDS	LS2 7LY	United Kingdom								
27	a017000000CSNNZ	0017000000PLECp	SuperTight	Dupe	(BDS) Business Document Servi	44 Eastgate Manor	LEEDS	LS2 7LY	United Kingdom								