DataTrim Entry Check - Installation, Setup and Users Guide

List of Content

1 Introduction

1.1 About this Document

Thank you for registering for the DataTrim Entry Check solution.

Although we have tried to make our solution 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 and particular with regards to the setup that makes this solution unique and therefore needs further explanation.

In this document you will find the instruction for how to install and setup the solution.

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

1.1.1 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.

2   Using the Entry Check Solution

*"DataTrim Entry Check is a solution which by means of a few simple principles provides you with functionality to **Detect**, **Identify**, **Prevent** and even **Block** duplicates going in to your salesforce database"*

The Entry Check Tab intercepting the creation of new records (Classic View).
For Screenshot of Main tab in Lighting please see: **Error! Reference source not found. Error! Reference source not found.**

The figure above illustrates the main page for Entry Check, a simple "search screen" which is injected into the record creation process, forcing a comprehensive search for duplicates BEFORE the record is created. Performing the search that most users never do!

The Dupe Status Field, is a field on Account, Contact and Lead which will be updated once a record identifies itself as a duplicate. The Dupe Status Field, enables you to create list of duplicates, Merge/Convert, and e.g. prevent auto-replies going out multiple times to entries coming from web-to-lead.

The Dynamic Dupe Status provides you with a dynamic check of each record each time the record is displayed, giving an immediate warning if your current record is a potential duplicate, and offers short-cut links to quickly Merge/Convert or View All Dupes,

Note that certain functionality features are not available unless you actively go through the installation/setup of the particular feature. In the setup chapter we will explain each setup in detail.

The DataTrim Entry Check solution 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 DataTrim Entry Check protects you from new duplicates being introduced into your salesforce database. In order to find and manage duplicates ALREADY in your salesforce database please have a look at our other AppExchange solution: DataTrim Dupe Alerts.

2.1 Checking the new record upon entry (User Entry)

Our solution forces this search no matter where the user initiates the creation of a new Account, Contact or Lead record. When a user selects the "New" button on the Contact tab to create a Tab, the creation of the new record is intercepted by our solution making sure that a proper search is performed.

Our search is based on fuzzy logic, which means that spelling errors use of nicknames etc. is addressed and that records with similar names (not only the exact matches) are listed.

The possible matching records are presented to the user with options to continue with the insertion or stop the insertion and continue working on the records which are already in salesforce. The list will rank the found records based on a matching process where the entered data is being compared with the data already in salesforce.

The solution even works of fragments of a full record (First Name, Last Name, or e.g. only a phone number etc.) The users do therefore not have to enter the full record and then perform a search just to realize that all the details entered are already in the salesforce database, thus waste of careful keystrokes.

To speed up the creation of records we have included a Quick Entry Check component which you can put in the Sidebar of your salesforce app (Classic) to allow users to quickly create/search for records using basic information as name, company and email.
The Quick Entry Check component can in Lightning be places in the right most column of the Home Page, or in the toolbar at the bottom of the screen.

2.1.1 Finding and existing company for an new contact

When a company name and/or the website is entered as one of the Entry Values the search is also performed on the Account table, thus giving the user with the option to create new Contacts on and existing Account. This is of course relevant in those cases where the contact isn't found, but the company for whom the contact works is already in the Account table.

2.1.2 Auto Complete = No double Entry of Data

Should the user choose to insert a new record, the already entered details (First Name, Last Name etc.) will automatically be transferred to the new records screen and pre-populated into the relevant fields thus preventing any double entry.

2.1.3 Forcing users to use the Entry Check Solution

Volunteering to use the solution is positive and will improve the quality of your database but forcing the users to use it is better.
By overriding the „**New**" Buttons of Leads, Accounts and Contacts you can re-direct the users from the multiple places in salesforce, from where the users can create new records, to the Entry Check solution.

Salesforce does not currently allow you to control who (by Profile) should be affected by the override function. It is therefore all users or no users. Before you enforce the use of the Entry Check solution by overriding the New buttons make sure you have Entry Check Licenses enough for everyone.

2.1.4 **The Quick Entry Check**

By adding the Quick Entry Check to the Sidebar of your home page, you enable the users to enter new records in a quick process. You might even find this feature handy for searching the database, as the intelligent search function will be able to find records even if your spelling isn't 100% correct.
Image: Lightning View

You can also add the Quick Entry Check to your Utility Bar. This way the Entry Check function is always available with a single click.

Lightning View, Utility Bar Item

Image: Classic view:

d2b International ApS– Kostskolevej 5-7 - 2880 Bagsværd – Denmark
Updated: 19. April 2023

2.2 **Dupe Status Field (Non-User Entry)**

New records aren't always entered by users, and so the interactive Entry Check Page can't be used in all situations.
Many salesforce clients are using the web-to-lead functionality to collect new leads from their website, marketing automation solutions to pass qualified leads into the leads and or account and contact table etc.

The DataTrim Entry Check solution contains a Dupe Detection functionality which once activated will detect the duplicate when it is created e.g. via web-to-lead or entered via the API or other integrations.

The Dupe Detection process for Leads can be configured to block the new lead, but we recommend that you let the new records into your database but that you allow our solution to indicate by changing the status of the lead that the new records is a duplicate of an existing lead or of a contact.

The Dupe Detection process for Accounts and Contact only allow for an update of the Dupe Status Field.

With the Dupe Detection active, a quick look at the list of new leads (for a Lead Management person) may look like the screenshot below.
This Screenshot show a number of new leads, ready to be contacted, but the DataTrim entry check has set the status of some of them to Dupe Lead, or Dupe Contact.

By means of the 2 buttons (added on top of the list view) the user can easily select the duplicate and launch the merge/convert wizard and make sure that all the information received in the lead records (product, interest, notes etc.) are kept for further processing.

2.2.1 Merge and Convert Button in the list views

Once the duplicate records are selected in the list view, the records can be **merged** or **converted** (leads).

For your convenience you can make a simple (Standard) List view on your account, contact and lead tab to display the list of duplicates, see below:

Classic View

The Merge button has 2 functions:

1) If 2 records are selected in the view, the user will be taken directly to the Datatrim Merge Wizard for merging the selected records.

2) If the user only selects 1 record the user is taken to the View All page, which will display the selected records (Current) together with all potential duplicates.

See 2.4 Merge / Convert / View All for more details.
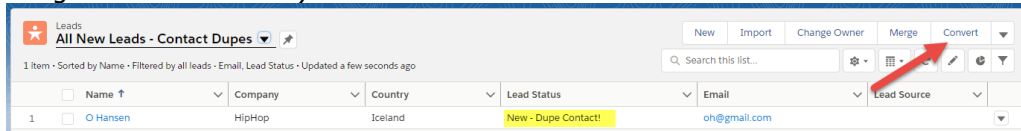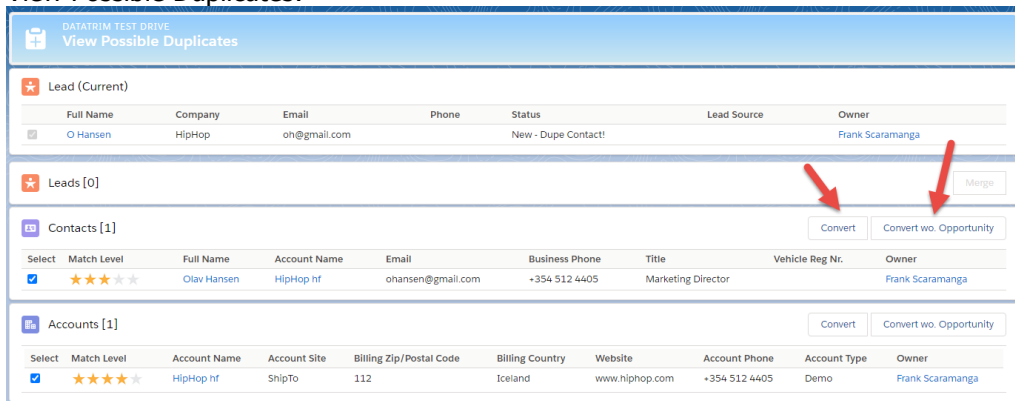

DataTrim Merge Wizard

Convert

If the Lead is a potential dupe of a Contact, you must convert the Lead (and it will be merged with the Contact).

View Possible Duplicates:

You can now chose to convert the Lead into the Contact, or convert the Lead into a NEW contact in an existing Account.

In this example we want to convert into the Contact.

The *1-Click Convert* Button gives you the possibility to do a 1-click conversion, without creating an Opportunity.

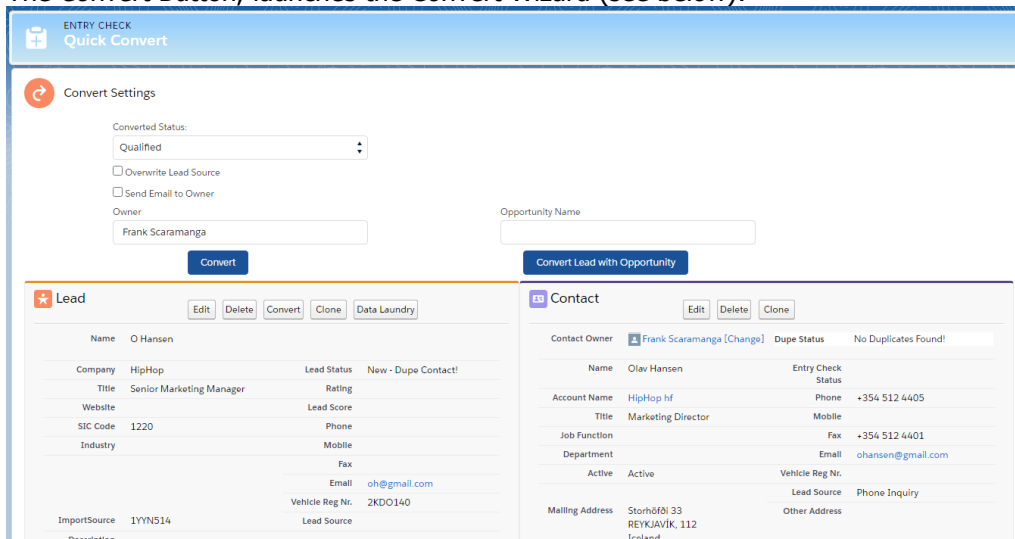The *Convert* Button, launches the Convert Wizard (see below):

Image: Convert Wizard

The Convert Wizard gives you the opportunity to compare the 2 records and select the options for the conversion.

2.2.2 **Dupe Detection on the fly... dupes in search results[1].**

Entry Check not only provides you with functionality which actively prevents duplicates from getting into your Salesforce org. Duplicate records may enter your system from many different sources, and your Salesforce org may already contain records and thus potential duplicates. DataTrim Entry Check provides you with 2 options for cleaning up duplicates which are already stored in your org.

Most likely the first time you come across duplicates is when you do a search. As in the example screenshots below you may be searching for a lead: John Taylor, and in the search result you realize that the lead is there twice. By adding the 2 Entry Check Buttons to the search layout, you will allow yourself and your users to merge the records right there, when the dupes appear. – or convert the lead if you consider it a duplicate of an existing contact.
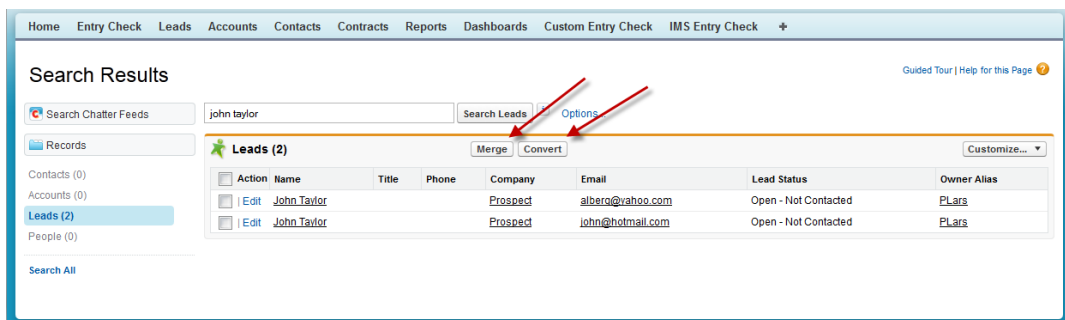
It even works for Contacts and Accounts (Merge only)!

---
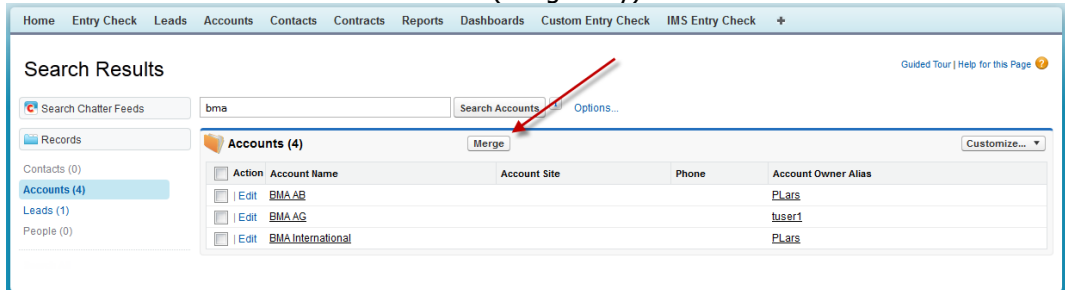
[1] Classic Only, Lightning does not support Custom buttons in search results.

2.3 Dynamic Dupe Status Display (Instant Check)

For existing records or records entered though imports etc., our solution also offers a possibility to have the dupe status being presented directly on the page layout of the new record.

This allows the user (lead management) to quickly identify the new records as a duplicate and perform the necessary merge/convert based on the information available, without losing any valuable information from either of the 2 dupe records.

The dynamic Dupe Status, identifies duplicates directly on the Detail Page layout, and is available for Leads, Contacts and Accounts.

Lightning View: On Detail Page

Lightning View: Sidebar position.

Should there be more than 2 records in the match group then the user can choose to **View All** the matches in an overview screen, from where the merge/convert can be initiated.

Classic

Classic View – Dynamic Dupe Status:

Classic View – View All:

2.4 **Merge / Convert / View All**

The Entry Check View All page is another main component of the Entry check Package.
This page will show you all potential duplicates for a given record (lead, contact and account), and will provide you with the functionality to, merge, convert and even link accounts together as parent and child accounts.

You can get to this page:
1) From the List buttons, selecting a single record and click the Merge Button
2) From the Dupe Status, select the View link (visible if there is more than one potential dupe)

Image: View All

2.4.1 **Dynamic Dupe Status, Parent-Child linking of Accounts**

DataTrim Entry Check also introduces the Dupe Status for Contacts and Accounts.
For organizations storing enterprise accounts in their database often realize that 2 accounts which may look like duplicates in reality are accounts which are related through organizational relationships.
In salesforce you can reflect this relationship through the Parent reference of the account.
We have enhanced the Dupe Status View for Accounts to include a feature where you will be able to set the relationships with a single click.

Note: Accounts, which already are linked though the Parent field will not be considered duplicates by the DataTrim Entry Check dynamic Dupe Status.

Classic View

2.5   Search/Check with or without sharing (Advanced)

Salesforce facilitates the use of roles and assignment of permissions to your records. This means that not every user on your system have access to all records.

If a user with limited access, is about to create a new record he/she will, based on the permissions only be able to search within their own set of records. This means that if another user assigned with another role already created the new contact, the user searching for the records will not find it and will therefore create the records as a new contact, and thus in principle create a duplicate.

To prevent this type of duplicates the search needs to be performed without the sharing rules applied. DataTrim Entry Check provides a possibility to disable the sharing rules while the Entry Check search is performed. Entry Check will therefore be able to look across the entire database for a potential matching record and present this to the user.

As the Sharing rules prevent the user from editing the records found outside his/hers permission set, DataTrim Entry Check facilitates a process where the user can request the account/contact/lead to be shared, and thus gaining access.

How the permission process is implemented may depend on company policies, in DataTrim Entry Check we provide default functionality where an email can be sent to an internal support function, which then decides if/when and how the user is provided with access to the requested record.

The landing page for requesting permission can be customized by modifying the link in the setup section (e.g. defining your own target email address for the request).

To facilitate other processes this feature also supports the use of 100% custom Visualforce Pages (which you develop).

3 Installation

3.1 Package Installation

You can **start the installation of the most recent version** directly from the AppExchange:
http://sites.force.com/appexchange/listingDetail?listingId=a0N300000016cvfEAA

Click the **Get it Now** button, to start the installation.
If you are not already logged into the AppExchange you will be asked to log in. Use your salesforce credentials to login and start the installation again by clicking the **Get it Now** button.
If you have a sandbox, you will be asked where to install the package, choose sandbox or production environment.
The installation of a Trial license will now begin.

3.1.1 Package Installation

Follow the setups below to complete the installation. Once done make sure you make package available to your users and that the different components are properly setup.

Choose security level (this step is not applicable for salesforce Professional Edition)
If you choose **Install for admins only**, you will later have to update the profiles of your users to enable them to have access.
If you choose **Install for all users (recommended)**, the installation will automatically update all profiles, but you will still have to assign a license to each user before he/she can use the application.

Click Install/Upgrade.

5. Step4: Installation processing

Depending on the workload on the Salesforce servers you will either received a message indicating that the installation is processing, or a confirmation that the installation is complete.
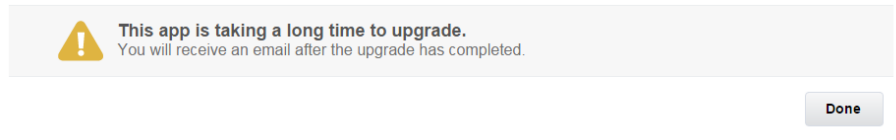
In this case wait until the Package installation is competed and proceed with the deployment and License Management.

Once the Installation is completed you will need to deploy the Object, assign licenses to users and make sure that their profile is updated with the appropriate permissions.

3.2 Deployment and License Management

3.2.1 Deploying the Entry Check Setup Object

Once the package is installed, you will need to make sure the package is deployed.
Un-deployed packages are by default only visible to System Admins.

You will also need to assign the purchased number of license to names users in order for the individual user to be able to use the solution.

3.2.2 Managing Licenses

The Trial License contains 15 licenses, and you will therefore during the Trail be allowed to make the solution available to 15 users.
Please see the DataTrim website for license information: www.datatrim.com

Select the Button/Link: Manage Licenses, and add the Users from the list of active users:

Adding Users:

You are now ready to use the application, but before the different features are activated you must setup each feature individually by following the instructions in the setup section of this document.

Note that each time you add a new user you will need to manually assign a license to the new user. You can remove a license from a user who is inactivated e.g. as they leave your company.

3.2.3 Salesforce Professional Edition

This Application is also available to salesforce clients with Professional Edition, but as our application contains components which are not normally available to Professional Edition users, the Installation procedure will fail when the Apex tests are performed.
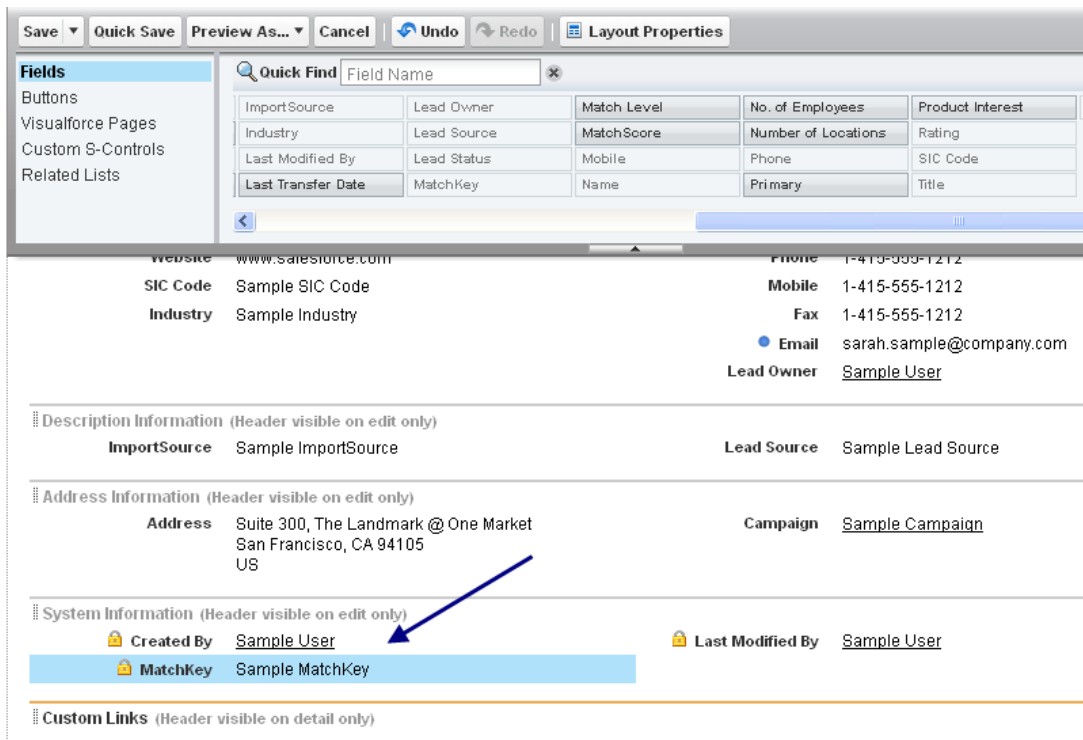
Once the installation is complete you will need to perform one extra item (which is only needed for installations in Professional Edition of salesforce.

Our solution makes use of a formula field which is added to each of the 3 objects Account, Contact and Lead. In professional Edition this field has to be added to a page Layout in order for it to be visible to our solutions, so this extra set is needed.

So, for each of the 3 Tables: **Account**, **Contact** and **Lead**, go to the Page Layout Editor for each of them and add the Formula Field: **MatchKey** to each page layout.
You can e.g. put it into the System Information Section as this is not something you normally would need to look at.

4 Setup

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 Entry Check components into your salesforce solution and all you need in order to use the solution will be available from within salesforce.

Once the installation and the deployment is complete there is a little setup to be done in order to optimally benefit from the functionality:

The setup consists of 5 Steps

1. Adding the Entry Check tab to your Apps
To facilitate an easy way to find the DataTrim Entry Check tab you can make the Tab visible to the users in their default Apps.

2. Adding the Quick Entry Check Component to the Sidebar:
To use the Quick Entry Check the Component has to be added to the Home page sidebar.

3. Overriding the default New Buttons to force users to use Entry Check:
Forcing the users to use the Entry Check for entering new records requires that you override the new buttons with the new functionality so that the users are navigated to the Entry Check module each time they want to enter a new Lead, Account and/or Contact.

4. Adding the Dynamic Dupe Status/Status Field component to the Page Layouts
The 3 dynamic Dupe Status Visualforce components need to be added manually to the page layout for Leads, Contacts and accounts. For the Status Field, the Lead Status is used, and 2 new fields are provided for Contacts and Accounts.

5. Adding the Merge and Convert list buttons to the Search Layout
The Convert and Merge buttons which facilitate a way to convert and merge duplicates whenever the users come across then should be added to the list layout and the search layout.

4.1 Adding the Entry Check Tab to your Apps

In order to make the Entry Check Tab visible to users you must Edit their Profile and make the Entry Check Tab Default On.

4.3 **Adding the Quick Entry Check Module to the Sidebar (Lightning)**

Adding the Quick Entry Check Module to the right-side column / sidebar is done by adding a Visualforce component to the right most column on the Hope page and insert the Visualforce page into it.
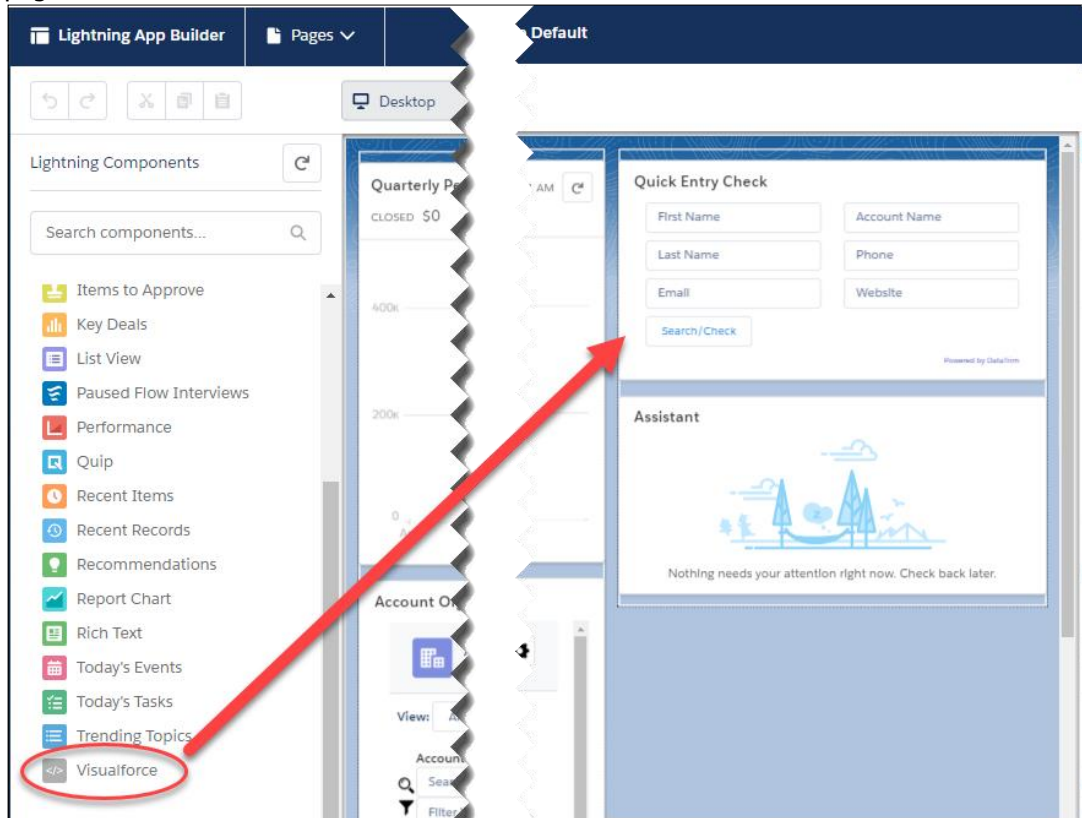
Once the Visualforce component is in place, configure it as illustrated here:
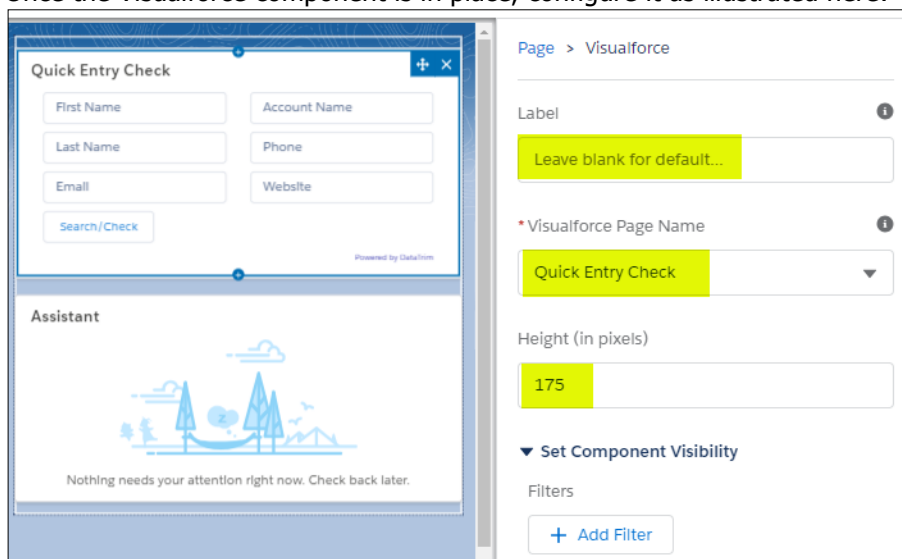
Adding the Quick Entry Check Module Utility Bar (Lightning Only)
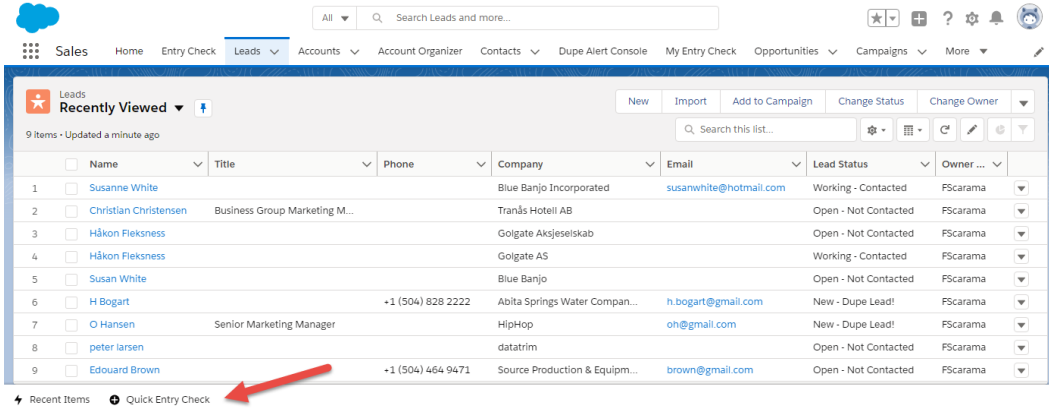
The Utility Bar in salesforce, is a way to have shortcuts handy at any page within salesforce. It is useful for frequent operations, like navigating back to recent items, or quickly create a new Lead, Contact and/or Account.

To create a Utility Bar for your App, or add the Quick Entry Check module to an existing Utility Bar perform these simple steps.
From Setup go into your App Manager, and Edit your App (e.g. Sales).
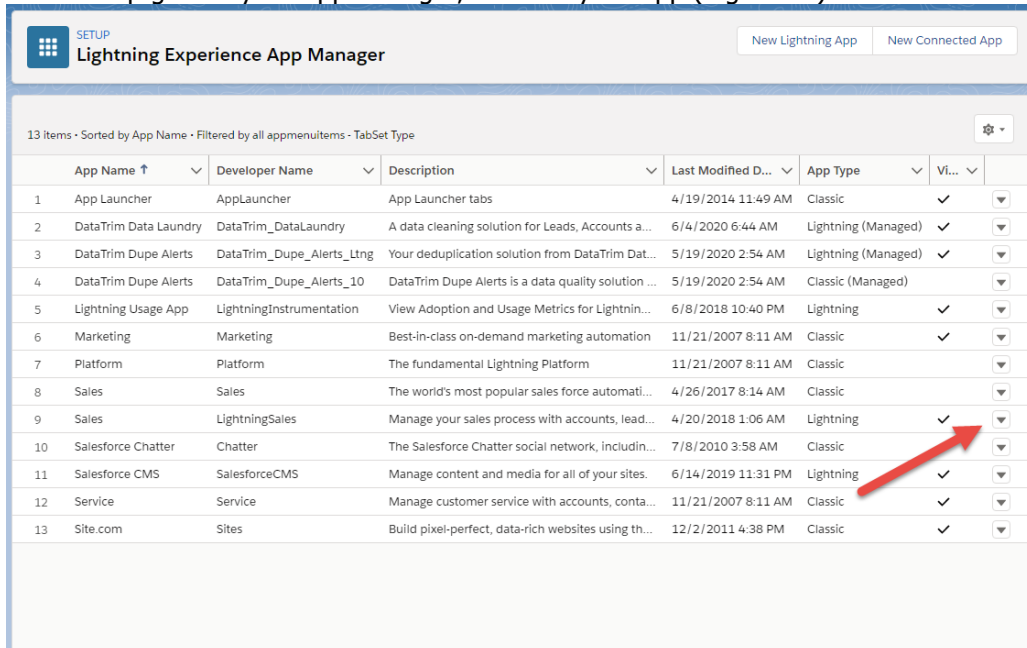
Note that you might need to add the Quick Entry Check component to multiple Apps.

Add the Quick Entry Check component to the list of Utility Items.
On the Screenshot on the next page you can see out suggested default values for the component.

4.5 Adding the Quick Entry Check Module to the Sidebar (Classic Only)

To add the Quick Entry Check to the Sidebar you would need to perform 4 steps:

Quick Entry Check

First Name: Mark
Last Name: Benyhoff
Company: salesforce.com
Email:
Phone:
Website:

Check

Powered by DataTrim

1. Add the Component to one, all or selected Home Page Layouts.

App Setup
⊟ Customize
  ⊞ Tab Names and Labels
  ⊟ Home
    Home Page Components
    Home Page Layouts
    Custom Links

2. Edit the Page Layout and Select the Quick Entry Check Component.

Step 2. Order the componen
Arrange the components on you
Narrow (Left) Column
Search
Quick Entry Check
Create New
Tags
Recent Items
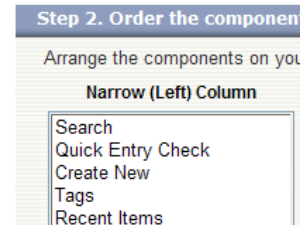
3. Set the Position/Order of the components

4. Make sure that the Custom Sidebar is displayed on all Pages

Go to Setup…User Interface

App Setup
⊟ Customize
  ⊞ Tab Names and Labels
  ⊞ Tags
  Reports
  Search
  User Interface
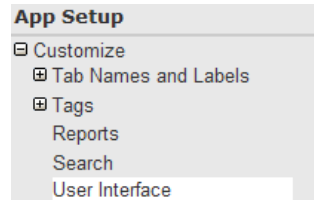
5. Enable the Custom Sidebar on all Pages

User Interface

Modify your organization's user interface with the following settings:

User Interface

☑ Enable Collapsible Sections
☑ Show Quick Create
☑ Enable Hover Details
☑ Enable Related List Hover Links
☐ Enable Separate Loading of Related Lists
☑ Enable Inline Editing
☑ Enable Enhanced Lists
☑ Enable New User Interface Theme
☑ Enable Printable List Views
☐ Enable Spell Checker
  ☐ Enable Spell Checker on Tasks and Events

Sidebar

☑ Enable Collapsible Sidebar
☑ Show Custom Sidebar Components on All Pages

4.6 Forcing the use by overriding the New Buttons

The Steps above supports the process of users voluntarily to use the Entry Check solution for checking new entries. The users will still have the ability to click on the **New** Button on e.g. the Lead tab or Select Create New… Account from the Quick Create Dropdown list in the Sidebar.

To force the users to use the Entry Check, you would need to override the **New** Button for Lead, Account and/or Contact with the Entry Check functionality.

Note! When overriding the **New** Buttons this applies to **ALL** users, so in order to fully benefit from this you would have to have sufficient licenses so that all your users follow the same process for entering new records.

Repeat the following 3 steps for Leads, Accounts and Contacts:
1. Go to the Object Manager and locate the Buttons and Links section.
2. Click on the Edit button.
3. Select the DataTrim Entry Check Visualforce Page as the override option.

4.7 New Contact button from Account Detail

When creating a new contact using the New Contact button on the Contact related list, in the Account Detail view. It is obvious that the user wants to create a new contact and associate this new contact with the current Account.

The Default Override function will not be able to carry this extra information across so in order to automatically pre-populate the Account Field on the Entry Check screen, you will need to replace the default New Contact button with a New Contact button which passes the reference of the Account to the entry Check function.
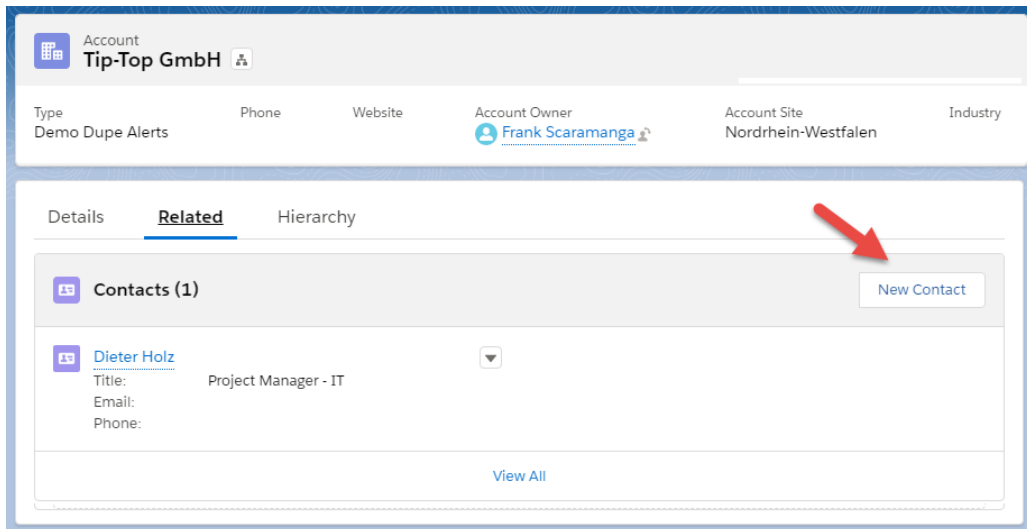
Edit the Page Layout for the Account
Add the New Button to the Contact Related List
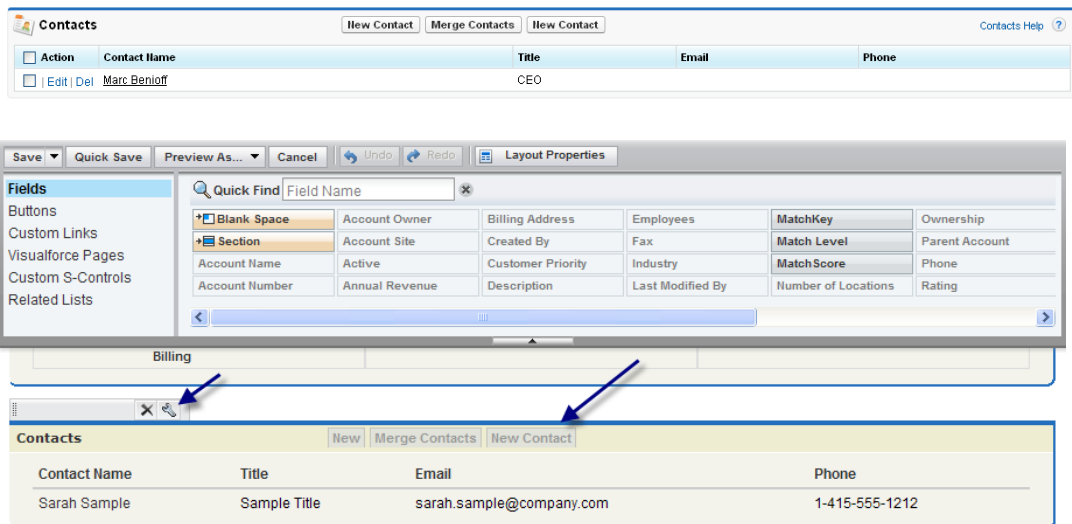
And remove the "Original" New button.

d2b International ApS– Kostskolevej 5-7 - 2880 Bagsværd – Denmark
Updated: 19. April 2023
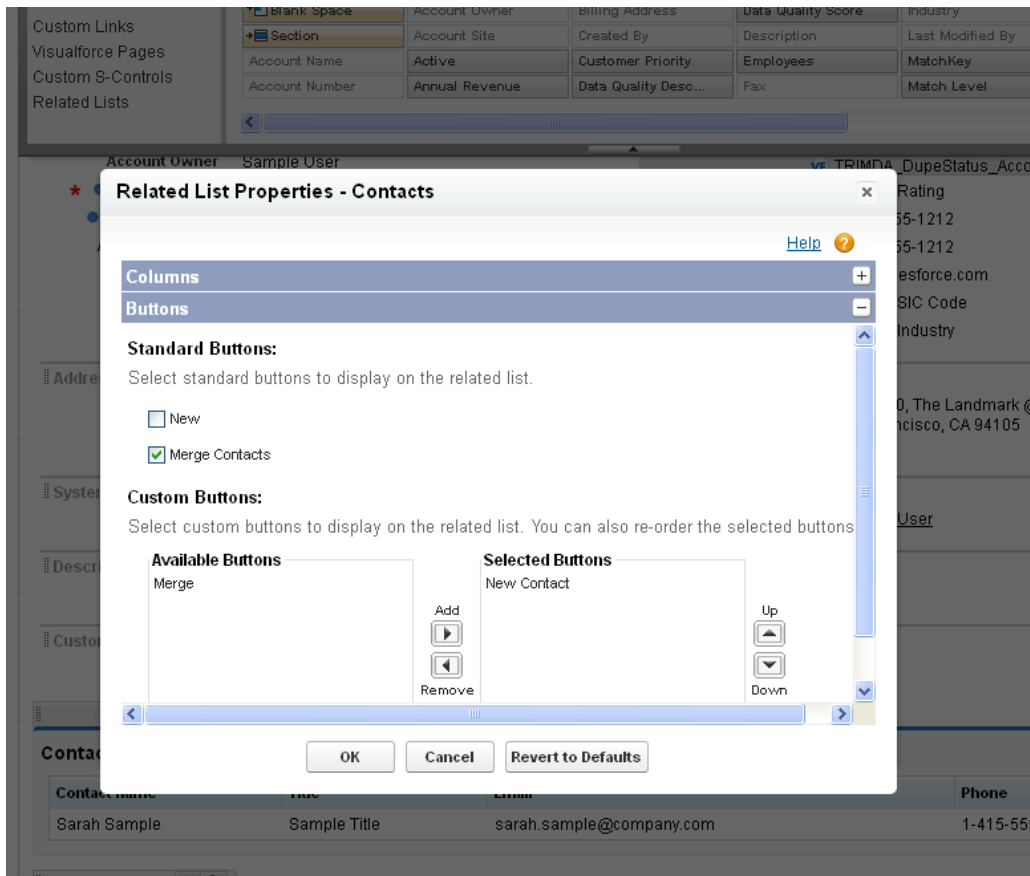
Result:
Once you now select to create a new contact from the Account View, the Account Name and the Account Id (hidden) is transferred to the Entry Check Page.
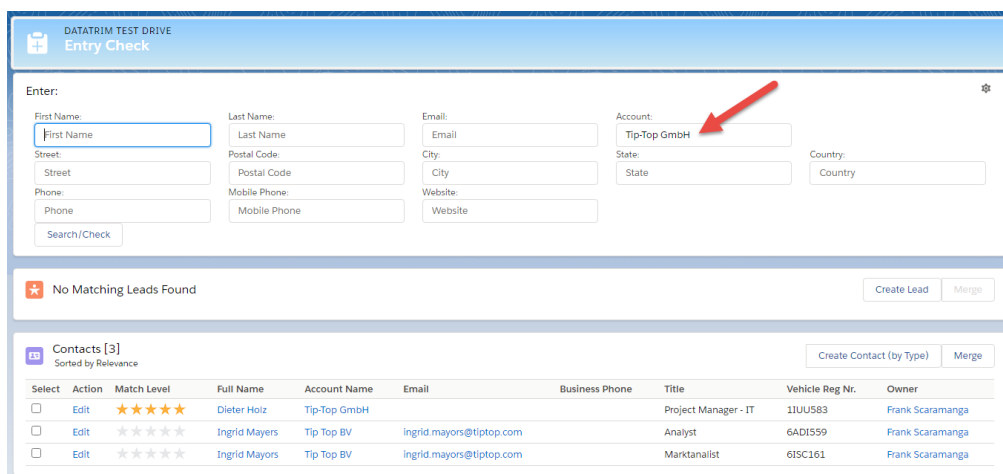
Enter the Name of the "new contact" and select Check:

To create the new contact (which wasn't found to be in the system), click the New Contact link. The new contact will be created and automatically linked to the Account (Tip-Top GmbH) – see below.

4.8   Dynamic Dupe Status / Field – Page Layout Components.

In order to add the Dupe Status and Dupe Status Field component to the Page Layout, all you have to do is to edit you page layout.
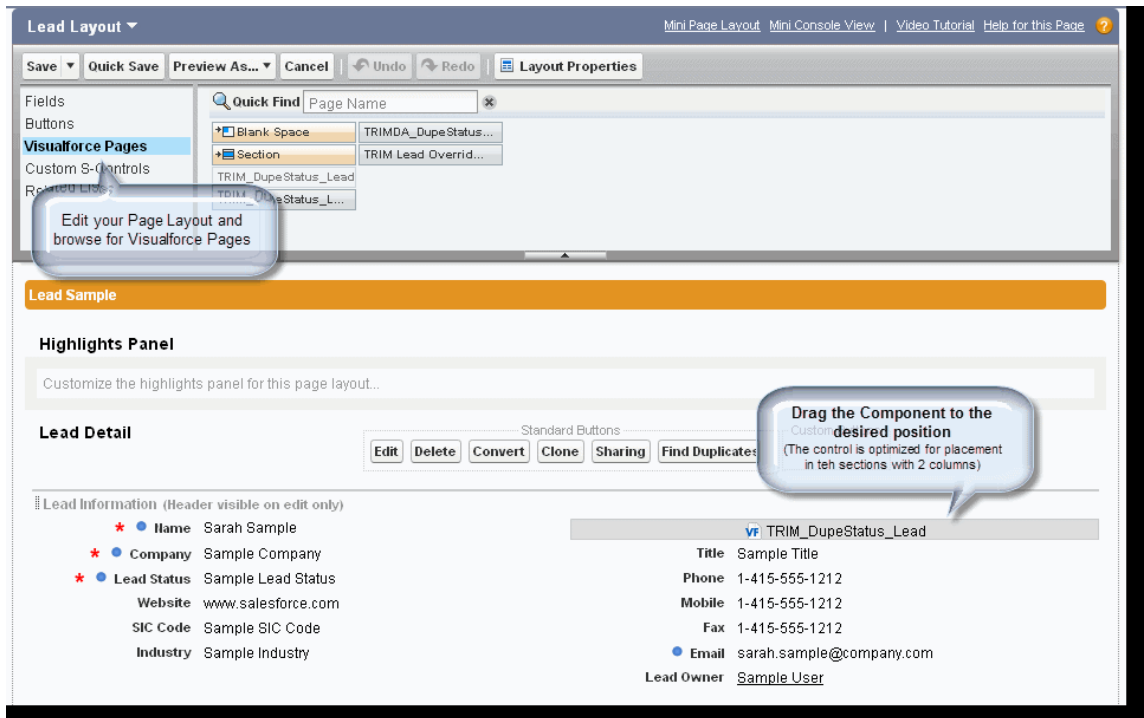
For Lightning Experience, we recommend to set the height of the Component to 32
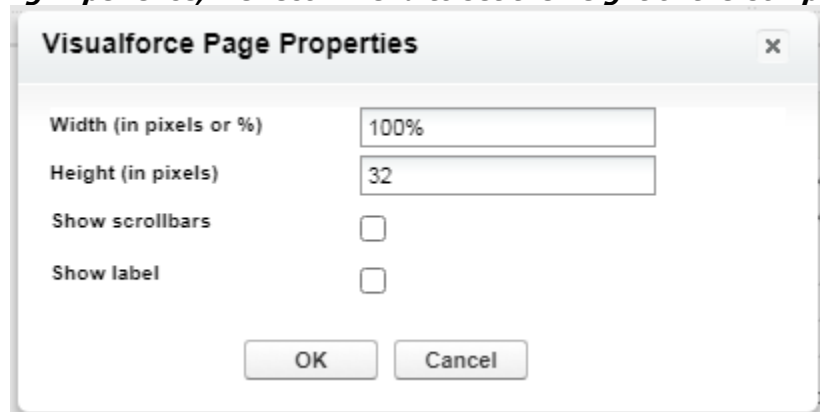
Classic View

Remember to set the height of the Component to 16 in order to make it fit nicely into the layout (by default salesforce sets the height to 200).

4.9 **Dynamic Dupe Status / Field – Lightning Component.**

To Add the Dupe Status to the Right-side column / sidebar. You simply add a Visualforce element to the column, and then include the Dupe Status page into it.
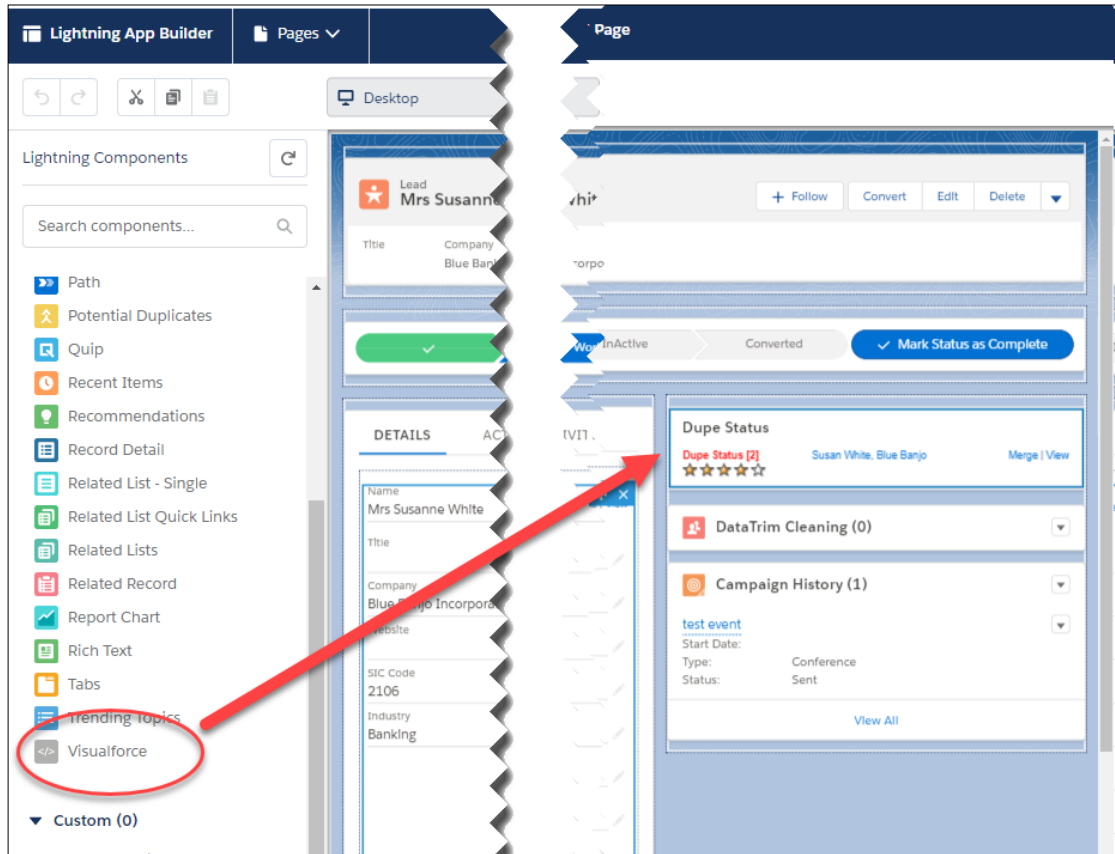
Once you have the Visualforce element in place, configure it as illustrated here:
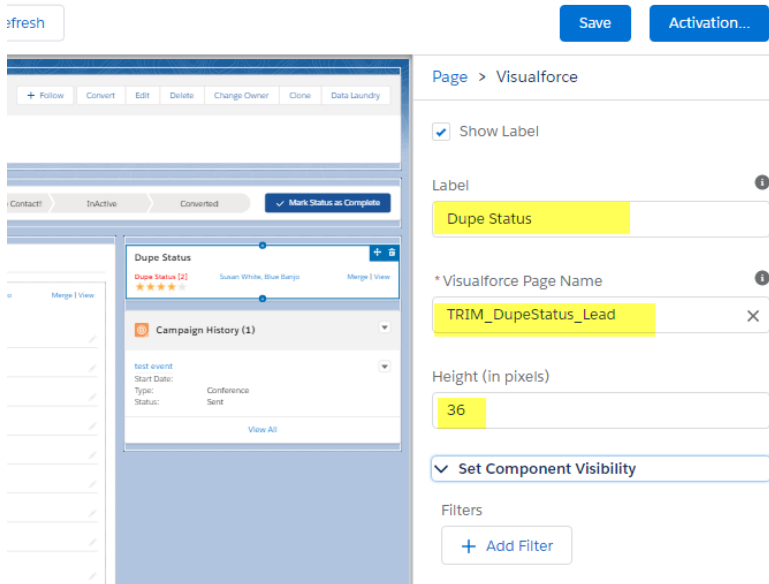
4.10   Merge and Convert List buttons

4.10.1 List Buttons

Adding the Merge and Convert List buttons is done though the List Layout for **Leads**, **Contacts** and **Accounts**:

Add the 2 custom buttons to the list of Selected Buttons.
(The Convert Button only exists for the Lead List View)

Repeat the 2 steps above for Contacts and Accounts.

4.11 Search Result Buttons (Classic Only)

Note that the buttons only appear once you click the details link on the right side of the search result.
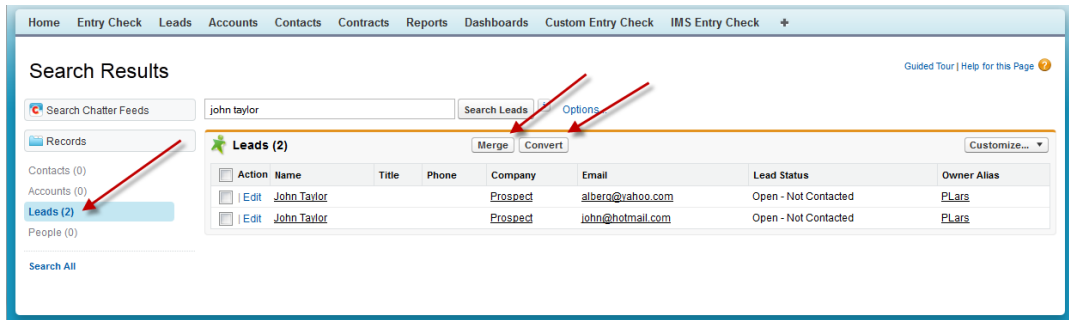
Adding the Merge and Convert List buttons is done though the Search Layout for **Leads**, **Contacts** and **Accounts**:

From a Search Result screen, open the **Customize...** drop-down list and select: **Columns and Buttons for All Users**.
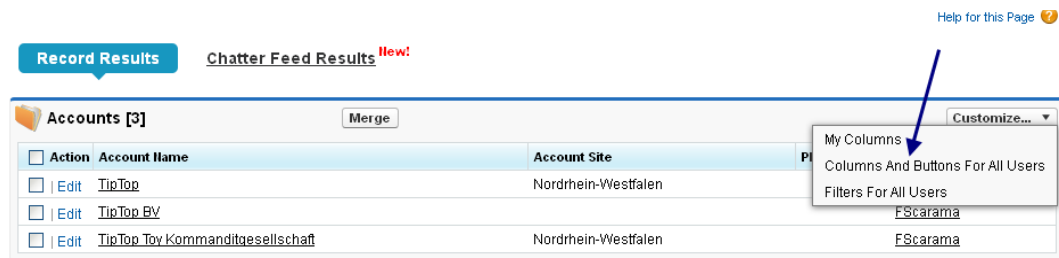
In the custom buttons section select the button(s), and save.
(The Convert Button only exists for the Lead Search Layout)
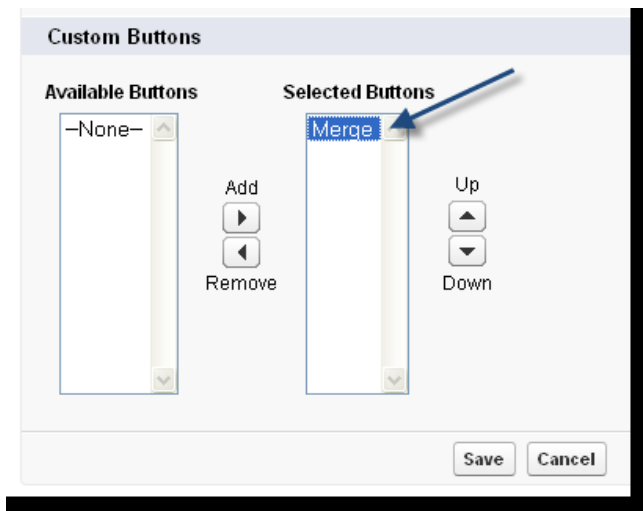
5 DataTrim Entry Check Settings

DataTrim Entry Check is predefined with default settings, and will be able to function immediately after the installation. But as your way o fusing salesforce may be slightly different from other salesforce client we try to provide flexibility through a number of setup parameters.

Only **System Administrators** will see the Setup Link in the top-right corner of the DataTrim Entry Check Page.

Note: The Setup pages are in English only.

From the setup page you have direct access to the latest version of the setup and user guide and our video tutorials.

5.1 Entry Check Basic Settings

5.1.1 What to Search/Check

In your instance of salesforce you may not be using all 3 objects (Leads, Contacts and Accounts). –Or the users for which you have licensed the Entry Check solution only have access to e.g. Leads.
In this case, you might want to disable the search on the irrelevant objects, and thereby increase performance and remove the Entry Check Result for that Object on the DataTrim Entry Check Tab.

Check Leads	Check Box (Default: Enabled) Use this check box to enable/disable the check on Leads
Check Accounts	Check Box (Default: Enabled) Use this check box to enable/disable the check on Accounts
Check Contacts	Check Box (Default: Enabled) Use this check box to enable/disable the check on Contacts
Check Person Accounts	Check Box (Default: Enabled) Use this check box to enable/disable the check on Person Accounts

5.1.2 Enable Person Accounts

To include or exclusively search the Person Account Record types, check the checkbox. Person Accounts found during the Check will be listed in the section together with the Contacts.

5.1.3 Score Threshold

Once the DataTrim Entry Check has performed a search in your database, many records may be matching the search criteria. To filter away "unlikely" matches and thereby provide you

with a "likely" selection a threshold apply. Meaning that matching records which doesn't receive a significantly high enough score will not be displayed.

Lead Score Threshold	Numeric value 0-100 (Default: 95) Change the threshold to include more or less results in the Entry Check Result section for Leads
Account Score Threshold	Numeric value 0-100 (Default: 95) Change the threshold to include more or less results in the Entry Check Result section for Accounts
Contact Score Threshold	Numeric value 0-100 (Default: 95) Change the threshold to include more or less results in the Entry Check Result section for Contacts

5.2 Advanced Settings

5.2.1 Using Record Types with DataTrim Entry Check

DataTrim Entry Check also supports the use of Records Types (feature not available in salesforce's Professional Edition). By activating this feature, the user will be presented with the standards Records type selection screen when the user is creating the new records.

Use Record Types for Leads	Check Box (Default: Disabled) Use this Check box to enable/disable the use of record types for leads
Use Record Types for Accounts	Check Box (Default: Disabled) Use this Check box to enable/disable the use of record types for accounts
Use Record Types for Contacts	Check Box (Default: Disabled) Use this Check box to enable/disable the use of record types for contacts
Use Record Types for Person Accounts	Check Box (Default: Disabled) Use this Check box to enable/disable the use of record types for person accounts and add the Record Type ID for the person account for correct creation of new records.

5.2.2 Disable Sharing Rules

By default, DataTrim Entry Check uses the sharing permissions which you have defined for your end users, meaning that a user will only be able to search/check within the scope of his

personal permissions. This limitation can de disabled by disabling the sharing rules for the objects: Account, Lead, Contact and Person Account.

Our solution comes with a proposed Action Page for the request to share the record: /apex/TRIMEC__TRIM_ActionInsufficientPrivileges.
This URL takes 4 parameters:
1) id: The ID of the records for which the request is made (auto populated by the controller)
2) owner: The ID of the owner of the records for which the request is made (auto populated by the controller)
3) source: (acc, lead, con)
4) appr: email address of the services that will be in charge of assigning access.

To modify the action, i.e. customize the parameters for the landing page, or to use your own landing page for alternative permission approval processes set the reference to the Action Page.

Examples:
/apex/TRIMEC__TRIM_ActionInsufficientPriviliges?source=con&appr=support@datatrim.com
/apex/TRIMEC__TRIM_ActionInsufficientPriviliges?source=acc&appr=helpdesk@mycompany.com
/apex/TRIMEC__TRIM_ActionInsufficientPriviliges?source=lead&appr=sfadmin@mycompany.com

I

IIf you want to develop you own Action Landing page, do not hesitate to ask us for the source code to us as a sample.

5.2.3 Other Advanced Setup

Other

Default values for creating new records
When a new record (lead, account or contact) is created, you can pre-populate a number of fields with a default value.

Default Company Name ⓘ

Default Email ⓘ

Default First Name ⓘ

Default Last Name ⓘ

Exclusion List
The exclusion list, is a way for you to create a list of common words (sparated by comma) which will be removed from the fields when searching and comparing.
Use this to eliminate workds like: Construction, Hospital, [Not Provided], etc. if these occur frequently in your database, and improve your search results.

Exclusion List ⓘ

construction, unknown@unknown.com, unbekannt, none, usd

Other Advanced Settings
If you have developed a Custom Entry Check page in order to e.g. have a custom look and feel, change the navigation below to navigate to your custom page
(Default value: /apex/TRIMEC__DataTrim_EntryCheck)

Entry Check VF Page ⓘ

Query Limit ⓘ
25

Default values for creating new records

The information entered by the user in the Entry Check screen is automatically carried across to the actual records when the user selects to create a new record. For some organization some of the main fields are either mandatory, or they contain normalized values (e.g. in a recruitment application all contacts are linked to one and the same account, so the account name is always the same.

For these scenarios you can define the default value in the setup, so that your new records are always pre-populated with this "Default" value.

Exclusion List

The search algorithms already include the screening of certain words to prevent too many potential dupes to be presented. But if you have a database where certain words are quite frequent (like: Hotpital, Construction, Services etc.) or represents 'dummy' values (like none@none.com etc.), then you can create a list of these words to make sure that our algorithm excludes these words in the search/matching and thus improve the accuracy of the list of potential dupes being presented.

The list of words should be separated with comma (,).
Example: Hospital, Construction, Services

Query Limit

As a part of DataTrim Entry Check our solution is making a number of searches into the database to try to find matching records, but the search is restricted through Salesforce governor rules which e.g. defies a limit for how many records/script statements a solution make perform in a single process.

For some databases where the searches may return many potential matching records there is always a risk of reaching these limits.

You can use this setting to lower the number of returned records for each search, and thereby improve performance, or increase the number to get more results for matching.

Note: the default limit of 50 is from our experience the maximum value when all 3 objects (Leads, Contacts and Accounts) are being searched, but if you e.g. only use the Lead Object it should be possible to increase the Limit.

Query Limit	Numeric (Default: 50)
	Adjust the Query limit to reduce/increase the number of records being matched

5.3 User Interface

5.3.1 Dynamic Dupe Status - Display Options

The Dynamic Dupe Status component, which you can add to the Contact and the Account Page layout, will by default match contacts against contacts and accounts against accounts. With this setting you can make these components cross check the Lead table, to look for matching leads.

When this is enabled and a matching lead is identified the Dynamic Dupe Status will provide you with the option to convert the Lead.

Contact Dupe Status: Include Leads	Check Box (Default: Disabled) Use this check box to enable/disable the cross-object check on leads for leads which may be duplicates of the current Contact
Account Dupe Status: Include Leads	Check Box (Default: Disabled) Use this check box to enable/disable the cross-object check on leads for leads which may be duplicates of the current Account (same company details)
Lead Dupe Status: Include Accounts	Check Box (Default: Disabled) Use this check box to enable/disable the cross-object check on leads for Accounts which may be duplicates of the current Lead (same company details)

5.3.2 Classify Match Result

Each matching record is classified with a score and a visual 5-level classification, -represented as starts in the Entry Check Result section.

Use this setting to skip the classification and e.g. gain performance.

Classify Match Result	Check Box (Default: Enabled) Use this check box to enable/disable the classification function

5.3.3 **Entry Check Page Layout**

Just like you may not use all 3 basic objects (Lead, Contact and Account) in salesforce, you may not find all the Entry Check relevant.

With the Page Layout check boxes, you can choose to hide certain field, and thus make the entry for your users simpler.

Hide First Name	Check Box (Default: Disabled) Use this Check box to hide/show the First Name Entry field
Hide Last Name	Check Box (Default: Disabled) Use this Check box to hide/show the Last Name Entry field
Hide Email	Check Box (Default: Disabled) Use this Check box to hide/show the Email Entry field
Hide Company	Check Box (Default: Disabled) Use this Check box to hide/show the Company Entry field
Hide Website	Check Box (Default: Disabled) Use this Check box to hide/show the Website Entry field
Hide Street	Check Box (Default: Disabled) Use this Check box to hide/show the Street Entry field
Hide Postal Code	Check Box (Default: Disabled) Use this Check box to hide/show the Postal Code Entry field
Hide City	Check Box (Default: Disabled) Use this Check box to hide/show the City Entry field
Hide State	Check Box (Default: Disabled) Use this Check box to hide/show the State Entry field
Hide Country	Check Box (Default: Disabled) Use this Check box to hide/show the Country Entry field
Hide Phone	Check Box (Default: Disabled) Use this Check box to hide/show the Phone Entry field
Hide Fax	Check Box (Default: Disabled) Use this Check box to hide/show the Fax Entry field
Hide Mobile	Check Box (Default: Disabled) Use this Check box to hide/show the Mobile Entry field

5.3.1 **Theme and Other UI Settings buttons**

Just like you may not use all 3 basic objects (Lead, Contact and Account) in salesforce, you may not find all the visual elements relevant.

Enable DataTrim Info	Enable information from DataTrim to display on the App, Tips, Tricks, and references to other Data Quality sources
Enable DataTrim Theme	salesforce Lightning is great, but for productivity there are room for improvements. enable the DataTrim theme to enable our productivity improvements on the user interface
Enable Lightning Theme	While in Classic you can still get the Lightning theme buttons etc.
Hide Merge Button	When set to true, the Merge buttons on the Entry Check Main page as well as on the Entry Check View All Page will be hidden (Default: False)
Hide Convert Button	When set to true, the Convert buttons on the Entry Check Main page as well as on the Entry Check View All Page will be hidden (Default: False)
Show Labels	The Entry Check Main page is using 'placeholder' to illustrate to the user what to put into each of the input fields. To add a more visual label set this value to True (Default: False)

5.4 Dupe Status Fields Updates - Early Dupe Detection

5.4.1 Dupe Lead Detection

The Dupe Lead Detector is a mechanism, which automatically detect duplicate as they are entered, regardless of how they are entering.

With the Dupe Lead Detector, you can choose to block the records from entering into your database, by returning an error, or set the status of the new lead, to indicate to the Lead Management organization that the new lead is a potential dupe.

You control whether to modify the status of the lead or to block the new lead, by choosing applying the rule to different lead sources. You can e.g. therefore choose to change the status on your incoming web-to-lead leads, and block new leads from Partner Referrals, or imports[2].

Note: If the same lead source is chosen for both the Blocking and the Status Change, the Blocking will take priority.

When using the Status Change option, you can even define what the Status should be, and the Dupe Lead Detector will be able to separate between new leads which are duplicates of other leads, or new leads which are duplicates of contacts.

The matching performed upon the creation of a new lead, is controlled by selecting one or more Match Types. The selected set of Match types applies to both the Status Change and the Blocking.

---

[2] In order to respect the salesforce Governor Limits the Dupe Leads Detector only applies to import batched of max. 10 records. To perform deduplications on larger volume of imports please refer to the DataTrim Dupe Alerts solution on the AppExchange.

Active (DLD)	Check Box (Default: Disabled) Use this check box to activate/deactivate the Dupe Lead Detector (DLD)
Match Types	Multi Pick list (Default: Blank) Select one or more Match types. If DLD is active, at least one match type must be selected
Lead Sources for Status Change	Multi Pick list (Default: Blank) Select one or more Lead Sources from the list. Use the Option "All" to enabled the Status Change Option for all lead sources; even leads without a Lead Source will be included. Use the Option "<None>" to enabled the Status Change Option for leads without a Lead Source. You can amend this list to include your custom Lead sources by editing the Pick list values of the Custom field in the Entry Check Setup Object
Dupe Status (Lead)	Text (Default: New – Dupe Lead!) Modify this value, to change the status being set when the new lead is a duplicate of another lead
Dupe Status (Contact)	Text (Default: New – Dupe Contact!) Modify this value, to change the status being set when the new lead is a duplicate of an existing contact
Lead Sources for Blocking	Multi Pick list (Default: Blank) Select one or more Lead Sources from the list. Use the Option "All" to enabled the Blocking Option for all lead sources; even leads without a Lead Source will be included. Use the Option "<None>" to enabled the Blocking Option for leads without a Lead Source. You can amend this list to include your custom Lead sources by editing the Pick list values of the Custom field in the Entry Check Setup Object

5.4.2 Dupe Contact Detection

The Dupe Contact Detector (DCD) is a mechanism, which automatically detect duplicate as they are entered, regardless of how they are entering.

With the Dupe Contact Detector, you set the status of the new Contact, to indicate to the Contact owner that the new Contact is a potential dupe.

Combining this with a list view showing the list of New Duplicate Contact and the List Button Merge, and you will have an effective way of cleaning out your duplicates.

Active (DCD)	Check Box (Default: Disabled) Use this check box to activate/deactivate the Dupe Contact Detector (DCD)
Match Types	Multi Pick list (Default: Blank) Select one or more Match types. If DCD is active, at least one match type must be selected
Dupe Status (Contact)	Text (Default: New – Dupe Contact!) Modify this value, to change the status being set when the new contact is a duplicate of an existing contact
Dupe Status Field (Contact)	Text (Default: EC_Status__c) Modify this value to apply the status value to another field on the Contact Record.

The change of the status field on the Contact Record can also be utilized to leverage other standards salesforce functions like:
-Triggering an email being sent to the contact owner when the dupe is created.
-Running reports to list (potential dupes)
Etc.

5.4.3 **Dupe Account Detection**

The Dupe Account Detector (DAD) is a mechanism, which automatically detect duplicate as they are entered, regardless of how they are entering.

With the Dupe Account Detector, you set the status of the new Account, to indicate to the Account owner that the new Account is a potential dupe.

Combining this with a list view showing the list of New Duplicate Accounts and the List Button Merge, and you will have an effective way of cleaning out your duplicates.

Active (DAD)	Check Box (Default: Disabled) Use this check box to activate/deactivate the Dupe Account Detector (DAD)
Match Types	Multi Pick list (Default: Blank) Select one or more Match types. If DAD is active, at least one match type must be selected
Dupe Status (Account)	Text (Default: New – Dupe Account!) Modify this value, to change the status being set when the new Account is a duplicate of an existing Account
Dupe Status Field (Account)	Text (Default: EC_Status__c) Modify this value to apply the status value to another field on the Account Record.

The change of the status field on the Account Record can also be utilized to leverage other standards salesforce functions like:
-Triggering an email being sent to the account owner when the dupe is created.
-Running reports to list (potential dupes)
Etc.

5.5 Changing the Fields (Field Sets) in the Search Result

By default, Entry Check presents the Search Result with a number of predefined fields.
These fields are defined by Field Sets on the Lead, Contact and Account Object.
If you want to change the list of fields, simply modify the Field Sets to suit your needs.

If your Query Scope Filter, Dynamic Query Scope Filter, or if your Custom Search includes references to other (standard or custom) fields than the default fields you must manually add the fields to the list of fields in the Field Set to be queried when searching for records in the database.
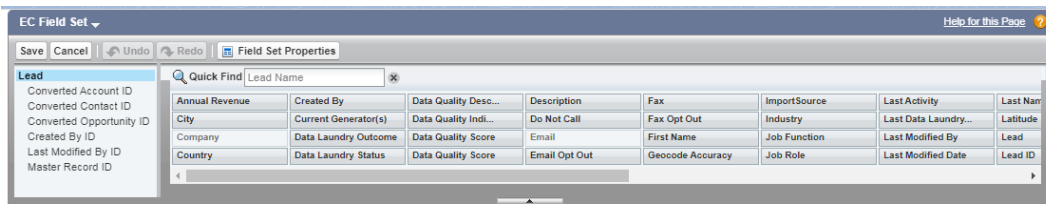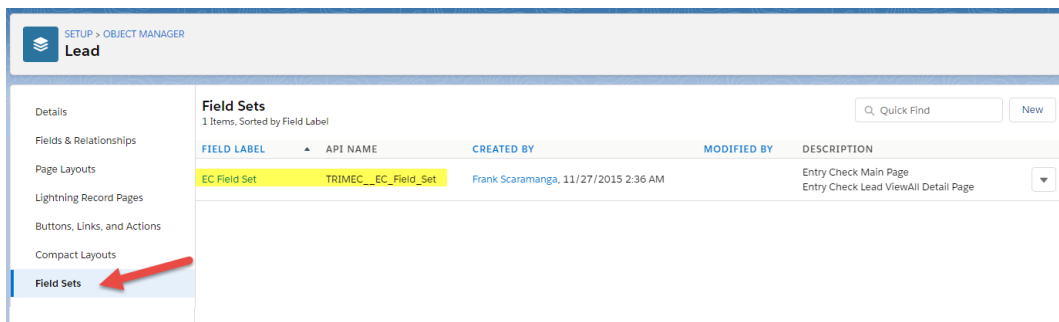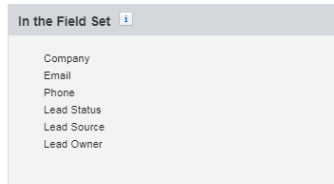
Use the Field List parameters (in versions prior to November 2015) is now Obsolete, and should no longer be used.

Lead Field List	Deprecated
Account Field List	Deprecated
Contact Field List	Deprecated

5.6 Custom Labels and Multi-Language support

In your instance of Salesforce, you may have renamed the Tabs Leads, Accounts and Contacts to meet your specific business terminology and uses labels as Organizations, Candidates, and Hospitals etc.
-Or your organization is an international organization where users are using local language for the labels and text on the Salesforce user interface
-Or maybe you just want to change a few labels to make the user interface more coherent with the terminology which you are using in your org.

This is now all possible using Custom Labels.

The DataTrim Entry Check user interface can be customized to support your own personal label texts, and supports currently English, German, French and Spanish.

See the DataTrim Entry Check Settings section for more details.

5.6.1 How to....

To Enable multi-language support, you must enable the Salesforce language **Translation Workbench** (see your Salesforce documentation for guidelines). Once enables, users will see the labels in their own language (set in their personal Information section). Users with German, French or Spanish language will see the labels in their local language, everyone else will see the labels in English.

If you use other languages, you can add your own translations directly on the Custom Labels.

The use of Custom Labels not only let you set text in different languages, but by changing the value of the Custom label, you can also change the labels to personalize the user interface of the Entry Check Page.

Example: a few clients have asked if it would be possible to change the title: DataTrim Entry Check in the Title to a value which is more coherent with their own company branding.

With the Custom Labels this is now possible in a few simple steps:
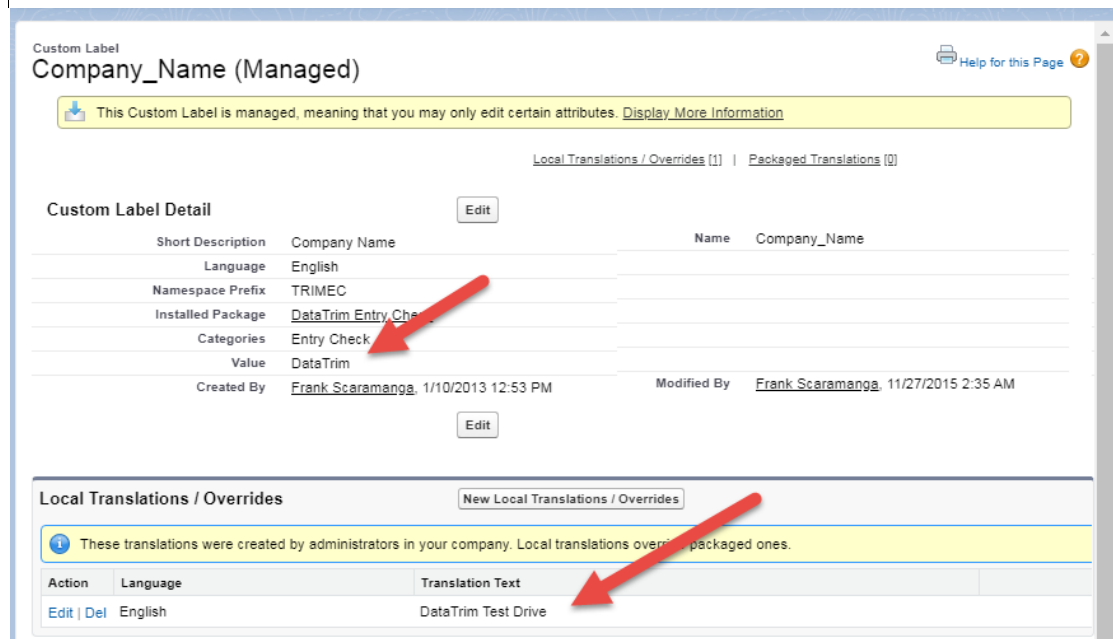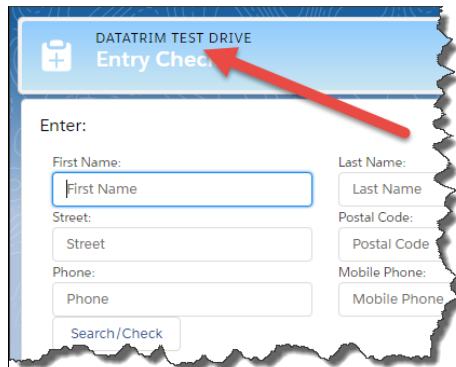
Note that the Quick Entry Check is not customizable though Custom Labels and not via the language support, and the setup functionality of Entry Check as well as this user guide is available in English only.

6 Advanced Searching Options

6.1 Custom Searching in Standard and Custom Fields

As described further below you can now customize the list of fields being queried by Entry Check, this also allows for you to add your own search fields to the Entry Check Page.
Imagine that you have a Vehicle registration number for your contacts, an Account number for your accounts and maybe you store Social Security IDs for your leads and contacts.
The Entry Check search will of cause most likely find your records by means of the normal search algorithms, but given a "unique" value might help the search process.

DataTrim Entry Check Now supports up to 3 custom search fields.

Imagine as above that you would like to add a search for a Vehicle Registration number to your Entry check Screen. To do this you need to perform 3 changes to your system:
1) Add the Apex:Intputfield to the screen (Visualforce Page)
2) Include the Target search field in the Field Set (list) of field to be searched (note this can be different fields for Lead, Contact and Accounts)
3) Define the Search Criteria

Changing the Visualforce Page
In your custom Visualforce page (see section below for more details on creating your custom Visualforce page) which will replace the Standard Entry check page, add a *Apex:InputText* field. Make sure that Id and Value are set correctly as below:

```
<div class="slds-col--padded slds-size--1-of-5" >
   <div class="slds-form-element"  >
       <label class="slds-form-element__label" for="srcCustomField1">Vehicle
               No.:</label>
       <div class="slds-form-element__control">
          <apex:inputText id="srcCustomField1" value="{!cf1}" title="Vehicle No."
               html-placeholder="Vehicle No" onkeypress="handleKeyPress(event);"
               styleclass="slds-input" />
       </div>
   </div>
</div>
```

3 Variables are available to support 3 different field searches: *cf1*, *cf2* and *cf3*

Define your Custom Search Method
The Custom Search will be performed as a separate search on the database. The content of the Custom Search Fields represents the WHERE CLAUSE of this search. You can make this as complex as you want within the limits of salesforce's SOQL language, including wildcards, logic and comparison operators like: AND, OR, LIKE, IN, <=, >=, != etc..

During the execution of the search the tag **cf1, cf2, cf3** will be replaced with the value entered by the user for the respective fields.

In the example above the Custom Search method is: VRN__c LIKE '%cf1%'

If the user enters 666BEV06 in the search field the search is performed with:

SELECT <FieldList> WHERE VRN__c LIKE '%666BEV06%'

Add Custom Fields to the Field Set.

In order for Entry Check to include the search field in the queries, you must :
   a) Add the field to the Field Sets for the relevant object (Lead, Contact, Account), and your field will be shown on the search result sections (<u>See section below for more details on Changing fields in the Search Result)</u>, or
   b) Add the field(s), to the Field List parameter in the setup.

Failure to do so, may result in the following error:
SObject row was retrieved via SOQL without querying the requested field…

6.1   **Query Scope Filter**

Your database may contain records which are records of a certain record type, archived, inactive or otherwise identifiable as a subset of records in which you do not want Entry check to search.

You may in these situations want to reduce the scope of the search to a subset of your record, i.e. by excluding records with certain statuses, records types etc. from the check and thus from the search result.

Use the Query Scope Filter to add a Filter to the search performed by Entry Check

Lead Query Scope Filter	Text (Default: Empty) Specify SOQL WHERE clause to define which records to include in the search on Leads
Account Query Scope Filter	Text (Default: Empty) Specify SOQL WHERE clause to define which records to include in the search on Accounts
Contact Query Scope Filter	Text (Default: Empty) Specify SOQL WHERE clause to define which records to include in the search on Contacts and Person Accounts

Note that the field supports the full SOQL Language of salesforce which means that you can make very complex filters using logic operators like AND, OR, LIKE, IN etc. Note also that special characters like the single-quote must be preceded by a \ (backslash).
For more details please check out the salesforce documentation for the SOQL language.

Example:

Without this Scope filter a result may look like this:

With the Query Scope Filter applied the scope of the search is reduced and the result is refined:

DataTrim
Entry Check

Enter:

David	Baden	Email	Merlin	
Street	Postal Code	City	State	Country
Phone	Fax	Mobile Phone	Website	

Search/Check

Leads [3]   Create Lead

Action	Match Level	Full Name	Company	Email	Phone	Status	Lead Source	Owner
Edit	★★★★☆	D Baden	Merlin			Open - Not Contacted	Other	Entry Check User
Edit	★★★★☆	D Baden	Merlin			Open - Not Contacted	Other	Entry Check User
Edit	★★★☆☆	Bernd Baden	Merlin Ltd			New - Not Contacted		Entry Check User

6.2 Query Scope Filter - Dynamic

The Query Scope filter above provides you the ability to exclude a certain set of records from the Entry Check search process similar to the Query Scope filter above.

But with the Dynamic Query Scope Filter, the filter can be applied dynamically, by user input or directly from the URL.

Example of standard search for a company called *Hilton*

Applying the Dynamic Scope Filter, the result only returns accounts with *Site like 'HQ'*

As for the Standard Custom Search feature above you need to perform 3 changes to your system:

1) Add an Apex:Intputfield to the screen to capture the dynamic variable (Visualforce Page)
2) Include the Target search field in the Custom Field List of field to be searched (note this can be different fields for Lead, Contact and Accounts)
3) Define the Filter Criteria

Changing the Visualforce Page

In your custom Visualforce page (see section below for more details on creating your custom Visualforce page) which will replace the Standard Entry check page, add a *Apex:InputText* field. Make sure that Id and Value are set correctly as in the example below:

```
<div class="slds-col--padded slds-size--1-of-5" >
   <div class="slds-form-element"  >
      <label class="slds-form-element__label" for="srcQueryScopeField1">Site:</label>
      <div class="slds-form-element__control">
            <apex:inputText id="srcQueryScopeField1" value="{!qsa}" title="Site" html-
               placeholder="Site" onkeypress="handleKeyPress(event);" styleclass="slds-
               input"/>
      </div>
   </div>
</div>
```

3 Variables are available to support a different filter for Accounts (*qsa)*, Contacts (*qsc)* and Leads (*qsl)* searches.

Note: The field can be hidden (styleclass="display:none;"), and you can prepopulate the field using the URL if you navigate to the Entry Check page from somewhere other than the standard tab: */apex/Custom_Entry_Check?qsa=prospects*

Define your Custom Search Method

The Dynamic Query Scope Filter is a criteria added to all the Entry Check searches:
SELECT <FieldList> from Account WHERE (<Default Entry Check Search>) AND (<Query Scope Filter Account>)
The content of the Dynamic Query Scope Filter represents a part of a WHERE CLAUSE of this search. You can make this as complex as you want within the limits of salesforce's SOQL language, including wildcards, logic and comparison operators like: AND, OR, LIKE, IN, <=, >=, != etc..
During the execution of the search the tag **qsa**, **qsc**, **qsl** will be replaced with the value entered by the user for the respective fields.
In the example above the Dynamic Query Scope Filter is: Account_Type__c = 'qsa'
If the user enters 'Prospect' in the search field the search is performed with:
SELECT <FieldList> *WHERE (<Default Entry Check Search>) AND (*Account_Type__c = 'prospect'*)*

Add Custom Fields to the Field Set.

In order for Entry Check to include the search field in the queries, you must :
   a) Add the field to the Field Sets for the relevant object (Lead, Contact, Account), and your field will be shown on the search result sections (See section below for more details on Changing fields in the Search Result), or
   b) Add the field(s), to the Field List parameter in the setup.

Failure to do so, may result in the following error:
SObject row was retrieved via SOQL without querying the requested field...

6.3 100% Custom Entry Check Page

6.3.1 Changing the Layout on the Entry Check Page

In the text above we have documented how you can make simple changes to the user interface by means of a few simple clicks. If you want to go even further you can create your own Visualforce Page and link it up to the Entry Check Package.

This will e.g. allow you to:
- Reorder the results: E.g. present the result of the Account search on top of the Lead results,
- Facilitate a custom search process as explained above
- Color-Code the results, as illustrated below.
- Changing labels, adding action links etc.

If you are not familiar with creating Visualforce pages then we are ready to help, or we can point you to one of our partners who will be happy to help you.

7 Troubleshooting

7.1 User Profile Permissions

A typical problem is related to the profile of each user and the permissions assigned.
In order to work, 4 things must be checked:
1. Check that the Entry Check Setup Object is deployed (um deployed objects are only available to System Administrators)
2. Check that the profile of you users have FULL access to the Entry Check Setup Object
3. Check that the profile of you users have permissions to access ALL Entry Check Apex Classes
4. Check that the profile of you users have permissions to access ALL Entry Check Visualforce pages

7.1.1 Deployment of Entry Check Setup Object

7.1.2 Assigning the Permission Set

For a User to use Entry Check and its functions and features, the user must:
1) Have a license assigned.
2) Have permissions to access ALL TRIMEC Visualforce pages
3) Have Permissions to Access ALL TRIMEC Apex Classes
4) Have Full Access to the Entry Check Setup Object

You can modify this manually, or assign the **Entry Check User** Permission set to the individual users.