

# Spring '17 Hot Topics: Dive into Duplicate Management

January 31, 2017

Dan McGarry (Salesforce)



# First, some logistics

Questions, answers, and staying in touch.

- How do you ask a question?

Please ask in the Release Readiness & Feature Adoption Group and use the hashtag **#DupeDive**

- Will this be recorded?

Yes!

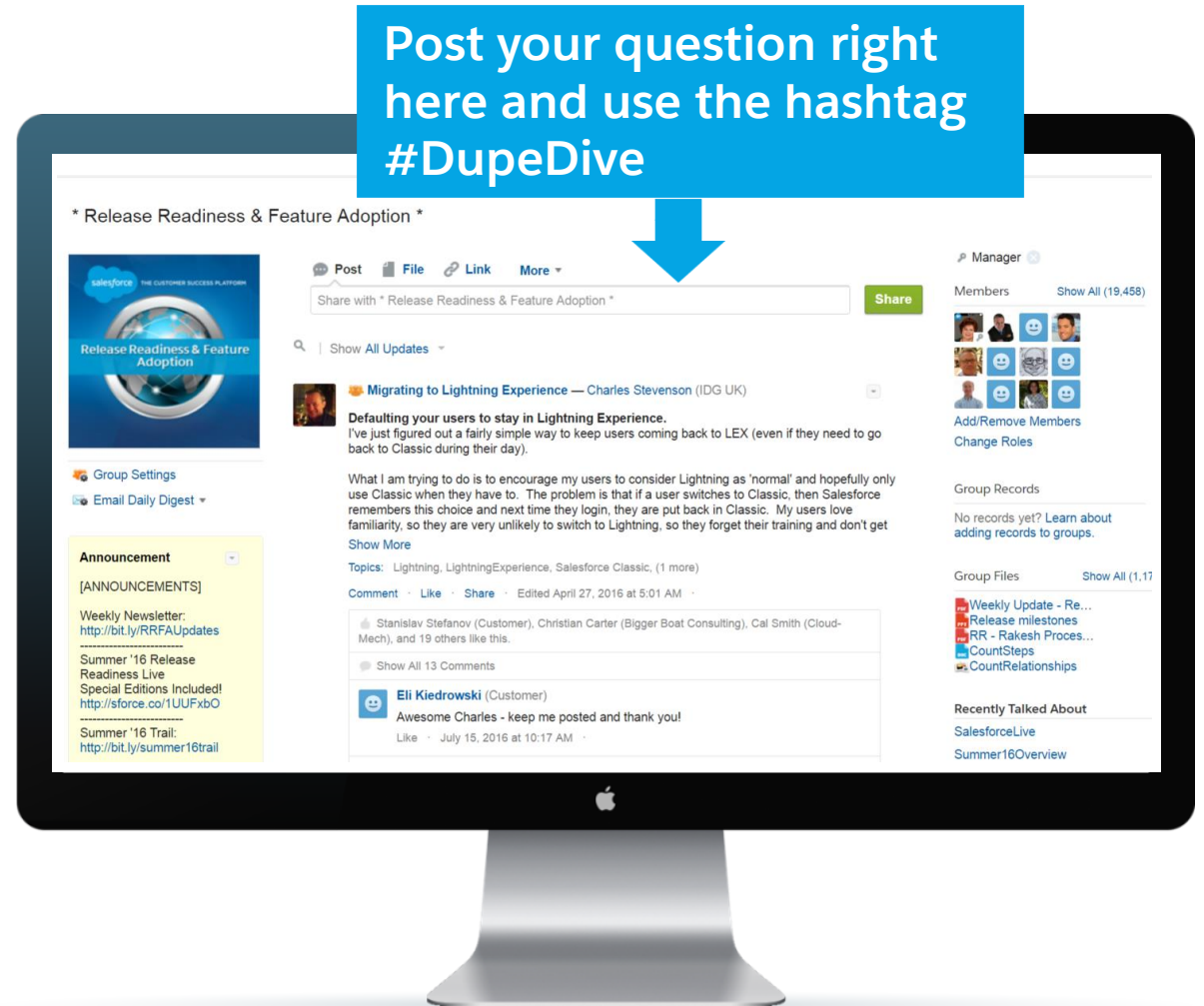
- Where can you get the presentation?

See the chat widget.

- Where can you go to get more information?

Use the Release Readiness group

[www.salesforce.com/success-releasereadiness](http://www.salesforce.com/success-releasereadiness)



# Forward-Looking Statements

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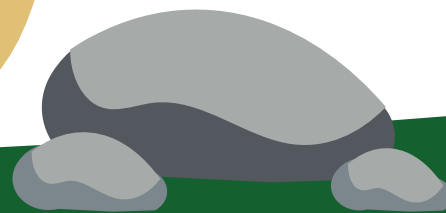
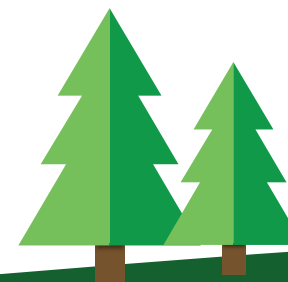




Dan McGarry (Salesforce)  
Product Management Director

Today's Speaker

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# Dive into Duplicate Management

## Agenda

- Prevent duplicates in Lightning
- Find and merge duplicates in Lightning
- Demo
- Future roadmap and ideas
- Q&A

# Duplicate Management in Lightning

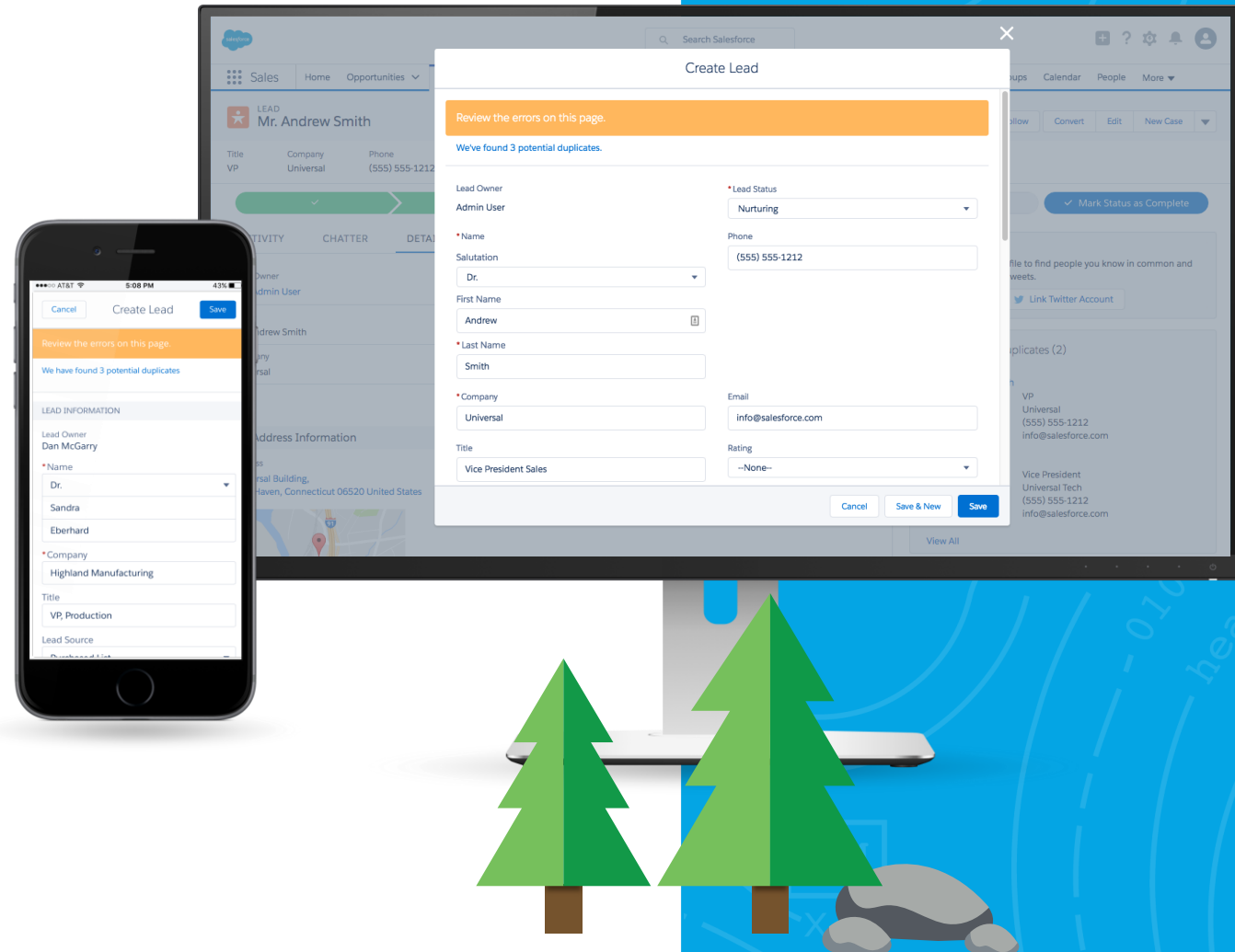
Prevent duplicate records from entering Salesforce

Alerts on any device

Highly configurable

Powerful detection logic

Available to all Salesforce customers, Professional Edition and above



# Duplicate alerts & prevention

What's available today?

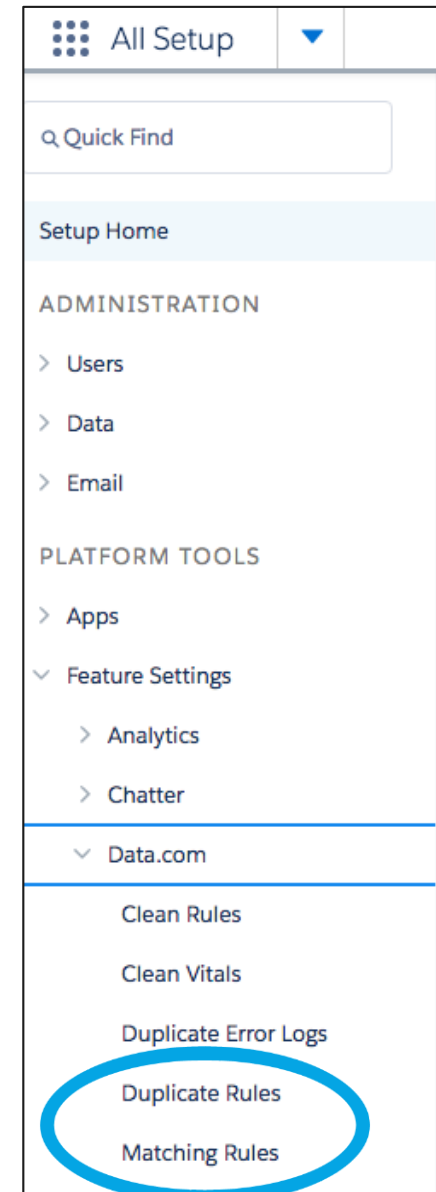
For use with accounts, contacts, leads & custom objects

Two types of rules are used to implement duplicate alerts

**Matching rules** define the criteria that identifies duplicate records.

**Duplicate rules** define when the system should use Matching Rules, and what action to take when duplicates are identified.

Both types of rules are found in Setup within *Feature Settings*  
(no *Data.com* license required)



# Find and merge duplicates records in Lightning

For leads, contacts, and accounts

## Powered by Duplicate Management

Surface potential duplicates based on your own matching rules.

## Flexible alerts

Position list via Lightning App Builder.

Choose to show card, toast, or both.

The screenshot displays the Salesforce Lightning interface. On the left, a lead record for 'Dr. Andy Smith' is shown with fields for Title (VP), Company (Universal Tech), and Address Information. A green checkmark button is visible. On the right, a 'Potential Duplicates (3)' overlay is shown, listing three potential duplicates: Andy Smith (VP, Universal Technology, info@salesforce.com) and Andrew Smith (Vice President, Universal Technologies, (555) 555-1212, info@salesforce.com). A 'View All' link is at the bottom of the overlay. In the background, a 'Mark Status as Complete' button is visible.

Lead	Title	Company	Phone	Email
Dr. Andy Smith	VP	Universal Tech		

Potential Duplicates (3)	Title	Company	Phone	Email
Andy Smith	VP	Universal Technology		info@salesforce.com
Andy Smith	VP	Universal Technology		info@salesforce.com
Andrew Smith	Vice President	Universal Technologies	(555) 555-1212	info@salesforce.com



# Demo

# What's coming in the future?

Surface cross-object matches in Potential Duplicates

Merge person accounts in Lightning

Merge from list views

Matching rule enhancements

Bulk duplicate detection (pilot)



Q&A

# Resources

# Key Resources



Duplicate Management  
features in Spring '17



[Main duplicate management help doc](#)

[Duplicate Management Success Community](#)

[findDuplicates API doc](#)

[merge API doc](#)

Trailhead scheduled to be available in February!



**CIRCLES of SUCCESS**  
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# Accelerator: Prevent Duplicate Records

*“**Accelerators** are fast, focused engagements with certified experts, that speed up business results”*



## Outcomes

- Duplicate rules configured and created
- Review steps to getting started with duplicate management
- Three duplicate management reports configured

[Learn More](#)



**\*HOT\*  
TOPICS!**

## Spring '17 Hot Topics: “Re-imagining” Accounts & Contacts Features

### Dive into Duplicate Management



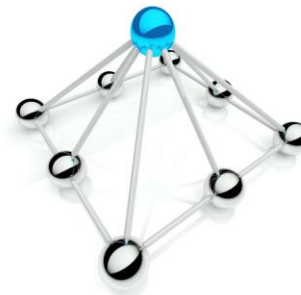
Join one of our “People” Product Managers, **Daniel McGarry**, to hear about the Spring '17 enhancements to duplicate management and understand the differences between how it works in Lightning vs. Classic.

Tuesday, January 31

10:00 AM Pacific

**REGISTER**

### Account Hierarchy in Lightning Experience



Account Hierarchy is coming to Lightning Experience in Spring '17 with a bonus! Join "People" product manager **Julia Zhang** to hear about the new enhancements and understand the differences between how this feature works in Lightning vs. Classic.

Tuesday, February 14

10:00 AM Pacific

**REGISTER**

**LIVE DEMOS!**





# Get Ready for TLS 1.0 Disablement!

Ensure your connection to Salesforce won't drop on **March 4, 2017**

## IMPORTANT!

Many Salesforce customers are still making connections to Salesforce with TLS 1.0. Are you one of them? Join one of our **live weekly webinars** to find out what you need to do to be ready. Register TODAY!!



TLS 1.0 will be disabled across **all Salesforce orgs** on March 4, 2017. TLS 1.1 or higher is required after that date.

Connections to Salesforce using TLS 1.0 will no longer work!

This applies to all **browsers, mobile devices**, and *any* **integrations connecting with Salesforce**

### Take Action Now:

- [Watch this short video](#)
- [Register for the webinar](#)
- [Follow our best practices](#)
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Your central location for questions, answers, sharing and staying in touch.

## Lightning Now!

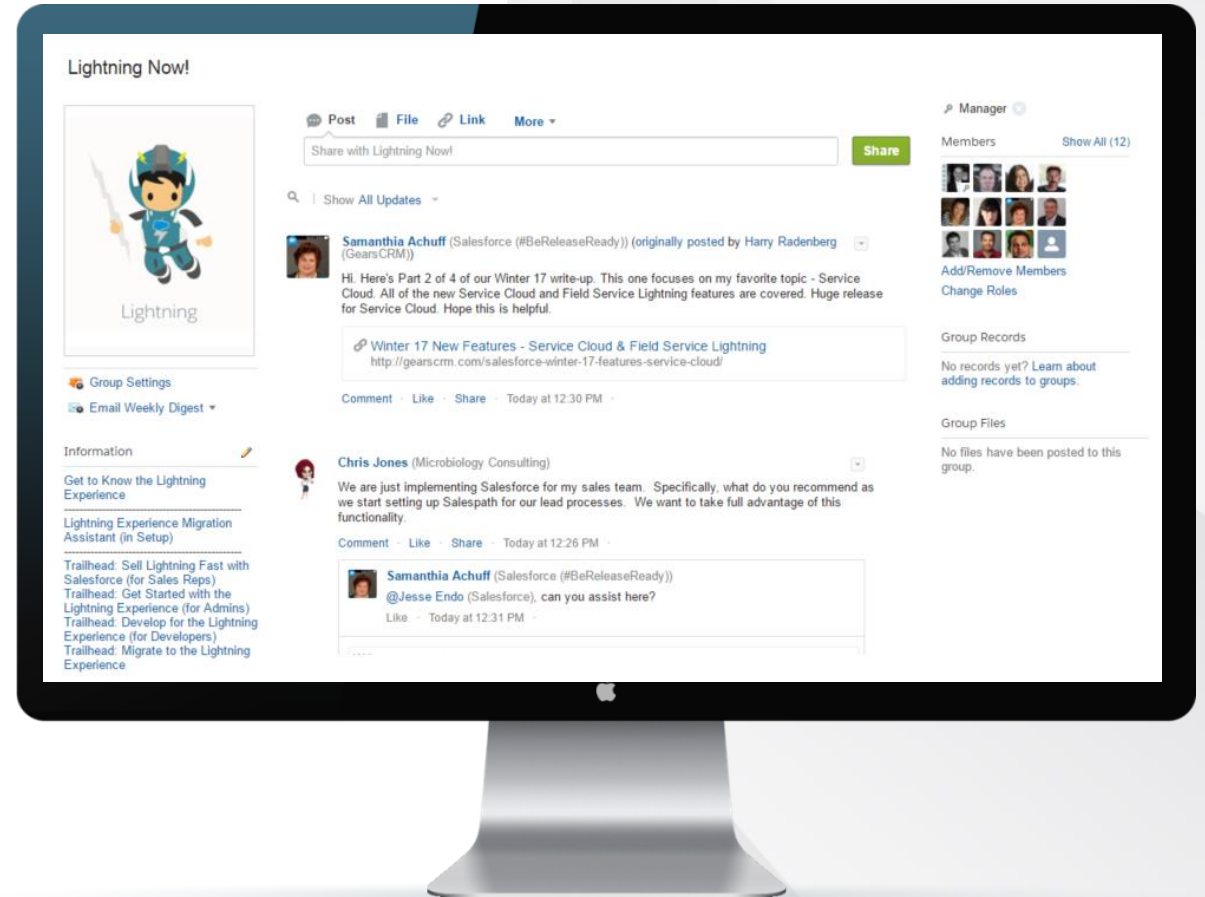
Engage directly with salesforce experts!

Hear from our MVP's, other customers and salesforce resources!

Access resources, webinars, people, all designed to help you achieve success!

JOIN TODAY

[www.salesforce.com/success-lightning](http://www.salesforce.com/success-lightning)



Q&A

Thank You