



## Abstract

One of the critical needs of a sales team is to maintain a clean and up to date database. Having duplicate leads is a constant source of worry for any Sales team.

The Lead Look-Alike Finder feature by Compro is a simple, easy and quick way to locate duplicate leads on the basis of selected data fields. It also provides the facility for the user to edit any duplicate lead by opening up the lead information page.

## Description

The Lead Look-Alike Finder provides the user the ability to search and retrieve duplicate leads on the basis of fields listed below.

- Name (First Name and Last Name)
- Phone
- Email
- Other (select any one):
  - City
  - Company
  - Country
  - Description
  - Fax
  - MobilePhone
  - PostalCode
  - State
  - Street
  - Title

The user is required to select the field(s) for which duplicate leads are to be searched for, and the duplicate leads are retrieved accordingly.

The search results help users to identify duplicate leads on the basis of repeated occurrences of the selected key field's.

- The user interface is intuitive and easy to use.
- The functionality provides the ability to look for the leads in specific Queues or Across All Leads, giving flexibility to the user to narrow or broaden the scope of finding duplicate leads.
- Besides the standard search fields, a list of 'Other' Lead related fields is available via a drop down selection. This allows the user to specify an additional field to be used in the search criteria.

- The "View Results" section shows all the duplicate fields in Red, thereby increasing the readability and identification of duplicate records.
- The results are present in pagination format thereby allowing the user to easily manage viewing a large set of leads.

## Features & Benefits

- Allows mass searching of Leads; by specifying a set of source leads (Lead Queue) to search against the Lead database.
- Flexibility to search for duplicate leads assigned to either a specific queue or across all the Leads.
- The search method uses the logical 'OR' operator functionality.
- Provides hyperlink on the First Name & Last Name of the duplicate records. This allows drilling down to the Lead Record(s) to perform the necessary updates/edits.

## Key Reports & Dashboards

N/A

## Requirements

Salesforce.com Edition: Developer, Enterprise, Unlimited

## Specifications

<b>Publisher</b>	Compro Technologies Pvt. Ltd
<b>Type</b>	Native
<b>Salesforce.com Certification</b>	Not Required
<b>Pricing</b>	Free



Screenshot

Home

Leads

Lead Look-Alike Finder ▶

### Search for Duplicate Leads

[Help for this Page](#) ?

#### Step 1. Select Lead Owner

Lead Owner:  ▼

#### Step 2. Select Criteria(s)

Name:  ( First Name:  Last Name:  )

Phone:

Email:

Other:   ▼

#### Step 3. View Results - 39 record(s) with duplicates found:

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No.	First Name	Last Name	Owner	Email	State
1	LARRY	SAWH	International Leads	LARRY__SAWH@KIEDEN.COM	
	LARRY	RADI	International Leads	LARRY__SAWH@KIEDEN.COM	