Keep your users from creating duplicate records.

Improve the quality of your CRM data by learning how to set alerts and prevent users from creating duplicate records. In just 2 hours, this Accelerator we will help Sales Operations and Administrators find effective ways to prevent users from entering duplicate records.

What it can do for you.

- Increase Data Quality
- Reduce Administrative Time/Cost
- Increase Sales Rep Efficiency

How it works.

A Certified Specialist will guide you through this Accelerator, a 2-hour 1-on-1 virtual consultation.

Discovery

- Review your current lead, account and contact creation process
- Review your current customer fields
- Identify key profiles and roles of individuals entering this data

Delivery

- Show you how to find and merge duplicate records
- Show you how to create customized duplicate management rules, reports and alerts
- Demo examples of Duplicate Reports to help you track how your rules are working
- Introduce you to Salesforce Optimizer and its recommendations around custom fields

Outcomes

- Ability to create a de-duplicate rule
- Understanding matching de-duplicate logic
- Learning about reporting options