Duplicate Management Fast Start

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

ADDITIONAL INFORMATION

Premier or Signature

Time you will spend on this Accelerator: 2 hours

GOAL

Minimize Operating Costs

INTENDED USER

You want to improve the quality of your data but are unsure how to keep users from creating duplicate records.

PREREQUISITES

- Must have Premier or Signature Success Plan
- Salesforce Professional Edition licenses purchased and assigned
- No code or customization needed
- No data migration required
- Willingness to complete a customer satisfaction survey at the conclusion of the Accelerator

To schedule your 1-on-1 Accelerator, visit our Help Portal, or contact your account executive or success team today!

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