



DupeCatcher

Quick Start Guide

FREE APP!

CONGRATULATIONS!

You're one step closer to working more efficiently, increasing performance, and preventing duplicates from taking over your database.

You'll find that DupeCatcher is easy to setup, simple to use, and great at doing its job. In just a few steps tell DupeCatcher what, when, and how you want to block duplicates. Then sit back and let DupeCatcher do the work.

If you get stuck or need help, an award-winning support team is standing by to guide you.



USER MANUAL

A more detailed users manual is built-in to DupeCatcher.

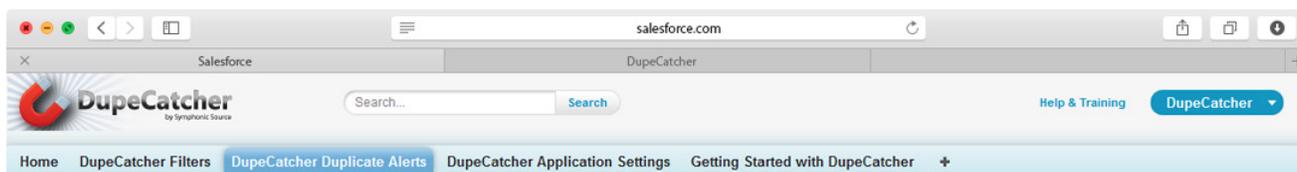


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GETTING STARTED

DupeCatcher functions based on Filters and Rules set by a Salesforce administrator. Once installed, admins will see a DupeCatcher option in the Salesforce dropdown menu on the top right. Selecting the DupeCatcher option will display DupeCatcher tabs in the Salesforce window. Your options will be as follows:



DUPECATCHER FILTERS

Select to set and activate Filters and Rules.

DUPECATCHER DUPLICATE ALERTS

If you set filters to create an alert when a duplicate is identified, those alerts will be viewable from this tab. (Note: Alerts are also viewable from within the individual Filter details view.) Via alerts, you also have access to DupeCatcher's Merge and Convert functions.

DUPECATCHER APPLICATION SETTINGS

For some lead sources (for instance, web-to-lead) you may want the record created even if it duplicates an existing record. DupeCatcher Application Settings give admins the ability to list certain lead sources (web, web-to-lead, etc.) that DupeCatcher will ignore. From this tab, you can also enable DupeCatcher's Override function, or also exempt specific users from DupeCatcher filtering.

GETTING STARTED WITH DUPECATCHER

Learn how to use DupeCatcher and get help with troubleshooting from within the app using included documentation.



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STEP 01

Creating Filters

The first step in identifying, blocking, merging, or converting duplicates is to set Filters and Rules. Click on **DupeCatcher Filters** from the DupeCatcher home page, then click **New** in the Recent DupeCatcher Filters area.

The Filters setup screen is very easy to use. Set the following parameters by either entering information, or by making selections from the drop down menus:

FILTER NAME

Create your own unique name for the filter. We recommend using something descriptive.

FILTER TYPE

Select the type of record for which you want to block duplicates.

MATCH ON INSERT ACTION

Select the action you want DupeCatcher to take when it identifies a duplicate that is being inserted into the Salesforce org.

MATCH ON UPDATE ACTION

Select the action you want DupeCatcher to take when it identifies a duplicate record that is being updated in the Salesforce org.

ERROR MESSAGE

Create an optional customized error message to display when DupeCatcher identifies a duplicate based on the filter.

SEARCH ALL RECORDS

Checking this box directs DupeCatcher to check for matches against ALL records within the Salesforce org. Leaving this box unchecked directs DupeCatcher to check for matches ONLY against the records visible to the individual user entering new data.

ACTIVE

This box must be checked in order for the filter to function. Note: you can toggle this box to turn filters on and off as needed without deleting them.

CREATE TASKS FOR ALERTS

(Note: this feature only applies when using "Report Duplicate" as a Match on Insert or Update action.) Select an option if you want a Salesforce task to be created when a duplicate is identified. Alerts can also be set for tasks from the DupeCatcher Application Settings tab.



Once all of your options have been set, click **Save** to create the filter. You will be redirected to the Filter Details page, which shows the settings you made, metrics on duplicates, Rules that apply to this Filter, and any alerts that have been triggered when a duplicate is identified.





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STEP 02

Creating Rules

From the Filter Details page, click **New DupeCatcher Filter Rule** in the DupeCatcher Filter Rules section.

From the Filter Rule Edit page, you can select fields (either standard or custom) you want DupeCatcher to check to identify duplicates, and the matching approach. Your options will vary slightly depending on the type of Filter created in Step 1.

FIELD

Select from the standard Salesforce fields or custom fields.

MATCHING APPROACH

Allows you to select the kind and degree of match for which DupeCatcher checks. Matching Approach options include Exact, First N Letters/Numbers, Domain, etc., and will vary based on the fields you've selected.

MATCH BLANKS

If selected, DupeCatcher will block duplicates based on the fields defined in the Rules users set if those fields are left blank. For example, if the Rule checks the email field, and the email field is left blank, DupeCatcher will return a list of records whose email field is also blank.



You can have multiple Filters and multiple Rules within individual Filters running at the same time, but please note that **Filters operate on an OR logic**, and **Rules operate on an AND logic**. That is, only one filter out of multiple Filters needs to identify a duplicate. All Rules within an individual Filter must match for that Filter to block the duplicate.



DEFINITIONS

Filter Types

LEAD

Identifies duplicates by matching selected fields from a new lead record being entered and the same fields within lead records existing in Salesforce.

LEAD TO CONTACT

Identifies duplicate records by matching selected fields from a new lead record being created and the same fields within a contact record.

LEAD TO ACCOUNT

Identifies duplicate records by matching selected fields from a new lead record being created and the same fields within an account record.

CONTACT

Identifies duplicates by matching selected fields from a new contact record being entered and the same fields within contact records existing in Salesforce. Filter Rules also apply when an existing lead record is being converted to a new contact.

ACCOUNT

Identifies duplicates by matching selected fields from a new account record being entered and the same fields within account records existing in Salesforce. Filter Rules also apply when an existing lead record is being converted and creates a new account.

ACCOUNT (PERSON)

Identifies duplicates by matching selected fields from a new person account record being entered and the same fields within person account records existing in Salesforce. Filter Rules also apply when an existing lead record is being converted and creates a new person account.

LEAD TO ACCOUNT (PERSON)

Identifies duplicate records by matching selected fields from a new person account lead record (a lead without a company) being created and the same fields within a person account record.

LEAD (PERSON)

Identifies duplicates by matching selected fields from a new person account lead record (a lead without a company) being entered and the same fields within person account lead records existing in Salesforce.

Match on Insert Action

DO NOTHING

The rule is ignored for Insert, but the related Update rule is enforced.

DISPLAY MATCHING RECORDS

Displays a hyperlinked table of duplicate leads.

DO NOT INSERT

Duplicate record is not created and an alert message is displayed on the edit page with hyperlinks to the matched record(s). This

matching action also includes one of the two available Override functions if enabled.

REPORT DUPLICATE

Duplicate record is allowed, but an alert is triggered for the Salesforce admin. Alerts are viewable from the DupeCatcher Duplicate Alerts tab, or from the individual Filter Details pages. This matching action also enables the Merge and Convert functions of DupeCatcher.

Match on Update Action

DO NOTHING

The rule is ignored for Update, but the related Insert rule is enforced.

REPORT DUPLICATE

Duplicate record is allowed, but an alert is triggered for the Salesforce admin. Alerts are viewable from the DupeCatcher Duplicate Alerts tab, or from the individual Filter Details pages. This matching action also enables the Merge and Convert functions of DupeCatcher.

DO NOT UPDATE

Record is not updated, and an alert message is displayed on the edit page with hyperlinks to the matched record(s). This matching action also includes one of the two available Override functions if enabled.

