Dedupely

Salesforce + Dedupely auto merge checklist

A step-by-step checklist to set up your first automated Salesforce deduplication job with **Dedupely.**

The go-list: your first automated job checklist

1. The Setup

☐ Choose the object (Leads, Contacts, or Accounts)

☐ Create a Search Pad with high-certainty match options:
- Leads: Email = Exact match
- Contacts: First Name + Last Name + Email = Exact match
- Accounts: Account Name + Billing Postal Code = Exact match

☐ Add filters to the Search Pad:
- Created Date ≥ 90 days
- Owner = Test User or unassigned

☐ Exclude records linked to Opportunities, Campaigns, or Cases

☐ Set merge rules on winning values:
- Created Date/Last Modified Date: Most recent record
- Custom priority fields: Most complete record

2. Scan and Review

☐ Run a scan with the Search Pad

☐ Spot-check 10–20 duplicate records

☐ Verify field winners are correct

☐ Confirm Opportunities and Campaigns remain linked

☐ Mark edge cases as "Skip"

3. Enable Auto Merge

- ☐ Open scan results and toggle auto merge on
- ☐ Choose frequency (ASAP, minutes, hours, days, months, or specific days of month)
- ☐ Click Start Auto Merge

4. Expand gradually

- ☐ Add one new match setup at a time
- ☐ Re-run scan → review → schedule
- ☐ Repeat until all safe duplicates are covered

5. Expand gradually

- ☐ Web-to-lead form duplicates
- ☐ Integration syncs
- ☐ Contacts added from field/mobile apps
- ☐ Recurring maintenance jobs

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