Dedupely

Salesforce inherited data cleanup plan using Dedupely

A step-by-step plan for Salesforce admins inheriting an org, using Dedupely to identify duplicates, merge safely, and keep data quality stable over time.

Use this checklist to clean an inherited Salesforce org with Dedupely.

- Create Search Pads for high-certainty duplicates (e.g., Email = Exact on Leads).
- Run bulk merges to process larger groups.
- Set up auto merge and recurring scans to maintain data quality over time.

Phase 1: Identify obvious duplicates

- ☐ Step 1: Choose your first object
  - Start with Contacts or Leads before moving to Accounts
- ☐ Step 2: Create a high-certainty Search Pad in Dedupely
  - Contacts. First Name + Last Name + Email: Exact match
  - Accounts. Website = Exact match
- ☐ Step 3: Add filters to reduce risk
  - Created Date ≥ 90 days ago
  - Exclude records linked to Opportunities
  - Owner: Test User or unassigned
- ☐ Step 4: Run the scan and review matched duplicates
  - Confirm matches are obvious (email, domain, or exact website)
  - Skip anything that looks uncertain
- ☐ Step 5: Share results with leadership
  - Show a sample of matched duplicates
  - Demonstrate immediate progress before merging

Phase 2: Run bulk merge jobs

- ☐ Step 1: Choose your object in Dedupely
  - Leads → Often duplicated by imports or events
  - Contacts → Often duplicated through Outreach or Sales activity
  - Accounts → Often duplicated by different owners entering the same company
- ☐ Step 2: Create a Search Pad with broader match logic
  - Examples:
    - Contacts → First Name + Last Name: Similar match + Email = Exact match
    - Leads → Email: Exact match + Phone: Fuzzy match
    - Accounts → Account Name: Similar Word match + Website = Domain Root match
- ☐ Step 3: Define merge rules for key fields
  - Examples:
    - Keep Owner from the record linked to an Opportunity
    - Keep Last Modified Date from the most recent record
- ☐ Step 4: Run the scan in Dedupely
  - Review at least 20 duplicate records before merging
  - Confirm that merge rules are working as intended
  - Skip records that look uncertain
- ☐ Step 5: Execute the bulk merge
  - Merge thousands of duplicates in one job
  - Save skipped records for follow-up review
- ☐ Step 6: Document your setup
  - Record which match options and merge rules you used
  - Share the logic with your team for visibility and future consistency

Phase 3: Maintain Salesforce data quality

- [ ] Step 1: Enable auto merge for new records
    - Use Dedupely to schedule auto merge jobs
    - Start with high-certainty Search Pads to match obvious duplicates
- [ ] Step 2: Schedule recurring scans
    - Weekly for high-volume objects like Leads
    - Monthly for Contacts and Accounts
    - Use Search Pads to track new duplicate patterns
- [ ] Step 3: Assign data ownership
    - Assign responsibility for duplicate review
    - Make reviewing skipped records part of the routine
- [ ] Step 4: Monitor results with reports
    - Use Dedupely's reporting to track duplicate reduction over time
    - Share hygiene metrics with leadership (e.g., duplicates merged, records skipped, trends spotted)
- [ ] Step 5: Adjust and expand rules as needed
    - Add new Search Pads as patterns emerge
    - Refine merge rules if your team starts using fields differently

By the end of this process, you'll have:

- Search Pads saved for each object (Leads, Contacts, Accounts)
- Merge rules defined for key fields (Owner, Lead Source, Created Date)
- Scheduled scans and automation running in Dedupely

Dedupely

Start your trial!

Book a Zoom

Send us an email