Dedupely

The Salesforce Deduplication Playbook

Templates, proven setups, and step-by-step processes to keep Salesforce data clean with **Dedupely.**

Duplicates in Salesforce are inevitable: They come from imports, integrations, form fills, and manual entry. Left unmanaged, they slow down your team, break reports, and cause missed opportunities.

This playbook is your step-by-step guide to finding, matching, and merging duplicates in Salesforce with Dedupely. Inside, you'll find:

- Clear explanations of matching types and when to use them
- Ready-to-use Search Pad configurations for Leads, Contacts, and Accounts
- A pre-merge checklist to reduce errors
- A decision path for choosing the right merge type every time
- Templates for Search Pads and Merge Rules
- A weekly and monthly maintenance plan

Follow the steps, use the templates, and adapt them to your Salesforce environment, you'll have a repeatable process for keeping your Salesforce free from duplicates.

1. Define your Match Options

Match options let you define what Dedupely will consider a duplicate. You can use different match options for different fields to make your duplicate logic precise and adaptable.

Choosing the right match type is the first step in building accurate Search Pads. Use this as a guide to pick the right match type for each field, understand trade-offs, and avoid common mistakes:

Match option	Definition	When to use it	Why it works	Limitations of using alone:
Exact	Only matches identical values and ignores capitalization	When you need absolute accuracy	Eliminates doubt; only merges identical values	Misses duplicates with typos or formatting differences
Fuzzy	Matches values with 1–2 character differences and similar phonetics	When catching typos or minor errors	Finds close matches without overmatching	Merges unrelated records on short or generic fields
Similar	Matches nearly identical values	When slight spelling changes are common	Finds matches without exact character match	Merges different records if field data is generic
Similar Word (Any Order) First or Last Words	Matches words in any order, with options for first or last words	When word order is inconsistent	Accounts for naming variations with Similar match logic	Overmatches if used without unique secondary field
Domain Root	Matches by base email domain	When matching by organization	Matches related records despite email differences	Overmatches with common domains like Gmail

2. Build a Search Pad

A Search Pad is a saved set of match logic for a specific object (Lead, Contact, or Account). It defines which fields are matched, what match options are used, and any filters applied. Search Pads can be reused, run anytime, cloned, and refined over time.

The easiest way to start is with proven configurations and then adapt them to your Salesforce. Here are some examples:

	Leads	Contacts	Accounts
Level 1	**Identify leads from the same company with consistent names** First Name: Exact match Last Name: Exact match Email: Domain Root match	**Find contacts with consistent emails but different phone number formatting** Email: Exact match Phone: Similar match	**Match companies with different name formatting but identical websites** Company Name: Similar Word match Email: Exact match
Level 2	**Catch typos in names + formatting differences in companies** First Name: Fuzzy match Last name: Fuzzy match Company Name: Similar Word match	**Capture name variations tied to the same contact** First Name: Fuzzy match Last Name: Similar match Email: Similar match	**Find location-specific duplicates with minor company name variations** Company Name: Fuzzy match City: Exact match
Level 3	**Broader capture for variations across multiple fields** First Name: Fuzzy match Last Name: Fuzzy match Email: Similar match	**Expand matching to multiple identifiers** Last Name: Fuzzy match Email: Fuzzy match Phone: Similar match	**Broader detection for multi-location or re-branded companies** Company Name: Similar match Email: Similar match

Search Pad setup worksheet:

Object type	Field 1 + Match type	Field 2 + Match type	Field 3 + Match type	Filters	Notes

3. Pre-merge checklist

Before merging, confirm your matches, coordinate with your team, and take precautions if merging could affect important records or workflows.

Following this short list before every merge helps you avoid combining unrelated records and keeps your Salesforce consistent:

- ☐ Run your Search Pad and review results
- ☐ Spot-check 5–10 matches
- ☐ Merge one duplicate record and review in your CRM
- ☐ Avoid merging during peak CRM usage hours
- ☐ Back up high-value records if necessary
- ☐ Communicate with your team

4. Choose a type of merge

Dedupely offers three merge methods: In bulk, automatic, and manual. The right choice depends on how you match, record volume, and whether human review is needed before merging.

Use this guide to choose your merge type:

If this is you...	This is your merge type...	Because...
You want to merge many duplicates in one go, but still review them before confirming	**Bulk merge**	It allows you to merge hundreds -or thousands- of duplicates in one action, while letting you review matches
You want an ongoing merge that runs in the background without reviewing each time	**Auto merge**	It runs automatically on matches you've already tested, keeping duplicates from piling up
You need specific data fields to win when merging certain records	**Manual merge**	You can review and approve one group at a time for maximum precision

5. Set your Merge Rules

When you use bulk or auto merge, Dedupely follows Salesforce's default merge behavior, but sometimes you need more control over which values are kept or discarded. Merge Rules let you define this behavior in detail so merges happen the way you need them to.

With Merge Rules you can:

- Set rules for any record type (Lead, Contact, Account).
- Choose which values should win (kept) or lose (discarded).
- Apply conditions based on record content or origin.
- Apply rules to one Search Pad or to all Search Pads.
- Stack multiple rules and preview results before running the merge.

How each part of a Merge Rule works:

- **Record Type:** Choose whether the rule applies to Leads, Contacts, or Accounts.
- **Field:** The specific field you want to control (e.g., First Name, City, Contact Owner).
- **Win/Lose:** Decide whether this field keeps the value (Win) or discards it (Lose).
- **Condition:** Set criteria for when the rule applies (e.g., keep if created date is newest).
- **Filter by Field:** Add a secondary condition based on another field (e.g., Owner = Sales Team).
- **Operator:** How that filter is evaluated (e.g., Is Oldest, Is Completely Uppercase).
- **Duplicate Search:** Choose which Search Pad this rule applies to, or set it to apply globally.

Examples:

Record type	Field	Win/Lose	Condition	Filter by Field	Operator
Contact	First Name	Win	If or When	Created Date	Latest
Lead	Email	Win	If or When	Status	Qualified

Merge rules template:

Object type	Field	Win/Lose	Condition	Filter	Notes

6. Ongoing Deduplication Plan

Deduplication is an ongoing process. Without regular action, duplicates return through imports, integrations, and manual entry. This plan focuses on running recurring merges so duplicates never pile up, with a monthly review to handle more complex matches:

Weekly:

- [ ] Run automatic merges on tested Search Pads with high-reliability matches, to prevents duplicates from building up in day-to-day workflows.
- [ ] Review merge logs for unexpected results to identify issues early before they affect reporting or integrations.

Monthly:

- [ ] Bulk merge duplicate records after a quick review, to handle duplicates that need some human oversight but don't require daily attention.
- [ ] Test one new Search Pad configuration to expand matching coverage and adapt to changes in data patterns.

If skipped:

Skipping weekly merges allows new duplicates to accumulate quickly.

Skipping monthly merges makes later cleanups slower, more complex, and higher risk.

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