Dedupely

Dedupely's matching cheat sheet for Salesforce admins

Practical match setups for Salesforce duplicates, with ready-to-use configurations for both simple and advanced cases.

Basic matching for everyday cases

- Leads created with the same email address
  - First Name + Last Name + Email: Exact match
- Contacts entered twice with the same first and last name
  - First Name + Last Name: Exact match
- Leads created from web-to-lead with nickname variations
  - First Name: Similar match + Last Name: Exact match + Email: Exact match
- Contacts with inconsistent phone number formats
  - First Name + Last Name: Exact match + Phone: Similar match
- Accounts created with identical company names by different users
  - Account Name: Exact match

Advanced matching for complex cases

- Accounts entered with legal suffix differences
  - Account Name: Similar Word match + Website: Domain Root match
- Contacts enriched by integrations with slight variations in email address
  - First Name + Last Name: Exact match + Email: Fuzzy match
- Leads created with job title and phone variations from different campaign imports
  - First Name + Last Name: Exact match + Phone: Similar match + Company: Similar match
- Accounts created with different spacing or punctuation
  - Account Name = Similar Word match
- Contacts with name variations and partial data
  - First Name + Last Name + Email: Similar match + Phone: Similar Match

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