Duplicate Management (Beta) Q&A

Will duplicate management work when a prospect is added to salesforce via Pardot?
Duplicates are blocked regardless of the method of input, we will be working with the Pardot team to enhance the experience

It is possible to translate Alert text for those who use translation workbench?
Not presently but it will be when we go GA

With the duplicate blocker, will it be possible to say what field is causing the block?
In the desktop UI we highlight all the fields used in the matching rule used to identify the duplicate

Will you deliver some preconfigured standard duplicate management rules?
There are standard pre-configured matching rules in the beta, we may add standard duplicate rules as well in a future release

Do these rules work on data import?
Duplicate rules are enforced at the API level, the user experience will be more or less the same as with a validation error

Will dupe mgmt be free or paid for?
The features available for duplicate management in the beta will be included with CRM licenses PE and above at no extra charge

Is SF competing now with all the suppliers on the Appexchange who also deliver de-dup tools?
We're simply trying to address our customer's needs, this has been one of the most popular ideas ever on the IdeaExchange

Are there plans to extend the duplicate functionality to custom objects and opportunities?
We will support custom objects with our GA release; opportunities may come later

Have you purchased DupeCatcher for this?
This capability was built natively by Salesforce developers

Is the duplicate management only on Data.com? will there be a similar one for Force.com?
This functionality was developed by the Data.com team but no Data.com license is required to use it

How are the duplicate rules be applied to API record updates?
That's where they're applied

Can this feature override the contact duplicate error or assigning the same contact to multiple accounts?
This works independently from those capabilities

Can you vary the duplicate management rules, based on profiles/roles etc?
Yes. There are conditions you can specify on duplicate rules for this purpose.

Is the duplicate feature available for all licenses? Do you need a feature license?
It’s available for CRM licenses Professional Edition and above

Do duplicate rules respect sharing settings?
By default they do, but there is an option to bypass sharing rules if desired.

Can rules work across objects (e.g. identify a duplicate lead, when an account already exists)?
Not presently, but we plan to support that for our GA release

Does the current version support person accounts?
No. We hope to add support for that in a future release.

Does the de-dupe feature only work on insert, or evaluate on edit?
It can be configured to work on either or both

What if you create contacts from the Outlook sidepanel? Will the alerts work there or what will happen?
We're working with the Salesforce for Outlook team to improve that experience.

How does fuzzy matching work, and what are the other options besides this?
In general we offer fuzzy and exact matching options for each field. Our fuzzy logic is explained in our documentation

What happens with external integration inserting records (e.g. Web to Lead)?
Unless you've created a condition to exclude it from the rule, this will be blocked the same as any other API insert.

Can you use AND/OR logic in the filters? (Matching criteria)?
Yes.

Will this be enforced from API when we upload using data loader?
Yes.

Is there a limit on the number of rules we can create?
You can create as many rules as you like, but can only have 5 active at a time per object.

Can we identify duplicates in mass? thinking of a clean up of existing duplicates.
That's something we're looking at for a future release

The duplicate block sounds wonderful but can't wait for the duplicate find for legacy records.
No capabilities exist at this time to identify all of your legacy duplicates in bulk. This is a feature we're considering to add to Data.com Clean sometime next year. (safe harbor)

Do you have to have Data.com licenses to use the dupe blocker?
We have Salesforce license, does that mean we will get the data.com dedupe beta feature? or does it need a different data.com license?
Duplicate Management is included with CRM and doesn't require a Data.com license. A Data.com license isn't required for the Duplicate Management features described here. Data.com Clean is a terrific way to extend your data quality efforts, however.

Will Duplicate Management be a separate feature with an additional cost?
No additional cost for the features offered this release.

Can you dedupe Contacts to Leads?
Goal is to support that next release.

Can you find Lead to Contact or Lead to Account duplicates?
Goal is to support that next release

Does fuzzy logic also include upper and lower case, ie john steel and John steel?
Currently we ignore case regardless of exact or fuzzy matching.

Will duplicate check function for acct/cont/lead that are owned by other users?
I've seen other presentations that indicate that ownership isn't looked at...
just the information that could cause duplicate accounts/leads/contacts although you can customize the match logic and add ownership to the criteria if you'd like.

Does duplicate check work on custom objects?
Is the duplicate feature for standard and custom objects ???
Will the duplicates feature work for all objects in Salesforce? Even custom objects?
Currently its just accounts, contacts and leads. We are targeting support for custom objects next release and likely other objects in subsequent releases.

How different is it from CRM DupeBlocker product? Can we switch to this new solution from Data.com?
There are a number of popular solutions for duplicate management on the AppExchange. We'd encourage you to evaluate the available capabilities of each alongside what we are offering as part of CRM and make your own decisions about

whether Data.com Duplicate Management native to Salesforce.com will work well for your needs.

For the duplicate blocking, is it possible for authorized users to override a block?
To do that you'd set up two duplicate rules -- one block and one allow with different conditions set up on each based on user profile.

Do de-duping rules work for contacts imported from mobile device
Duplicate rules are applied at the API level and so they 'work' for insert regardless of how they are entered. We've done work in the current release to make a great experience for inserting records via Salesforce1 mobile UX.

With Duplicate check can we scan cross fields? (ex. New Lead Email field. Look at all existing Leads Custom_Email__c field to find a match) (Currently no dedupe tool does this...)
So you're looking for a match across multiple fields? Say email to email AND email to c_email? We don't do that today but may have support for something like that with field mapping next release.

How are dupe leads managed (alerted/blocked) if synced to SFDC from Marketo or other automation tool?
With the beta, if your administrator sets up duplicate rules to block or alert - the duplicate records will fail with a validation style error on insert from these other systems.
Some options here are to A) set up conditional logic to not run duplicate checks for these systems or B) set up your duplicate rule to 'report only' which flags the records as duplicates without interrupting the save.

Would users be notified of duplicates if they don't have access to the duplicate via hierarchies or sharing rules?
By default they would not. The administrator has an option in duplicate rules, however, to bypass this and notify the user of existing duplicates without showing them the specific records themselves.

Why do duplicate rules behave differently through the UI vs. the API? It would be nice to alert for edits in the UI, but allow edits using the API.
Fundamentally everything is treated the same at the API layer. However, application developers (including those here at Salesforce) will make decisions about how to best use the information provided by the API to deliver good experiences to their users.

Will the initiation of Duplicate Alerts only be on newly created accounts/leads/contacts or will there be an ability to scan our current system to identify them?

No capabilities exist at this time to identify all of your legacy duplicates in bulk. This is a feature we're considering to add to Data.com Clean sometime next year. (safe harbor)

How are duplicates handled in a web-to-lead situation?
I have the same question ...Duplicate record handling in web-to-lead situation
Would need a little more information to answer the question. What do you mean by 'how are they handled'? If you do nothing special to your duplicate rule it is applied universally on insert - but you can set up conditions if you want to limit if/how duplicate rules are applied.
Web-to-lead comes in and is a duplicate. This is automatic process. Will it notify that a lead is there that is a duplicate for whomever handles the lead(s)?
This depends on how your rule is set up. If block or alert is selected, the save will be blocked (unless you've set up a condition to bypass it for selected lead sources) -- alternatively you can select report as an action if you don't want to interrupt the save but want to review the duplicates later.

Is this duplicate feature available for Cases?
Not at this time. We may add support for this next year. Votes on the IdeaExchange are your best bet to promote this idea.

Will it be possible to select the fields that are visible to the users when a duplicate is identified?
The fields displayed in the list of duplicates is based on the fields you specify in your match rule.

Do we have the ability to report on records that were flagged duplicates and then were edited to either be inserted/updated to catch end users trying to trick the system? ie changing phone number by a digit.
Duplicate rules can be set up to apply to create, edit or both. So I believe the answer to your question is yes.

On Duplicates check - Will it display the records even if the user has no access to the records?
Visibility rules are always applied, i.e. you won't see records you aren't entitled to see. However the administrator has an option on duplicate rules to 'bypass sharing' which would make it so that duplicates are still blocked even if you can't see the duplicates themselves.

The perfect solution would be to present them with the duplicates even though they do not have access. Similar to account owner report. They need to see it exists and who is the owner. This allows them to contact the owner.
We've heard some customers tell us they would like to be able to at least see the record owner which is in line with your suggestion -- however the folks on the security side feel pretty strongly that you should never be able to see a record that your sharing model says you can't see

How can we prevent duplicate leads form being created when you are using a campaign with iContact for Salesforce
Unless you set up special conditions in your rules, they'll be applied at the API level so will be enforced regardless of the application being used to insert a record.

How would dupe alerts work when we have APIs bringing in records automatically?
Until we expose the API for this (goal is to do that next release) an API insert will fail in a way that is very consistent with a validation style error in Salesforce.

How do securities apply when presenting duplicates at the account and lead level? If there are territory based securities in place would it still be noted as a duplicate if the lead is not in the same territory as the user entering?
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Fundamentally everything is treated the same at the API layer. However, application developers (including those here at Salesforce) will make decisions about how to best use the information provided by the API to deliver good experiences to their users.

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Can we do a duplicate check based on custom fields in data.com
With the beta you can set up matching logic using any fields on the account, contact or lead object - both standard and custom fields. So the answer should be yes.

Can administrators limit the ability of users to quick create contacts from the app? we have de-duping apex pages which need to remain enforced.
Not 100% sure but I think your admin can enable or disable the quick create feature. We aren't doing much with it with native Duplicate Alerts either -- so we encourage folks to move off of quick create and insert records through the latest insert flows.