

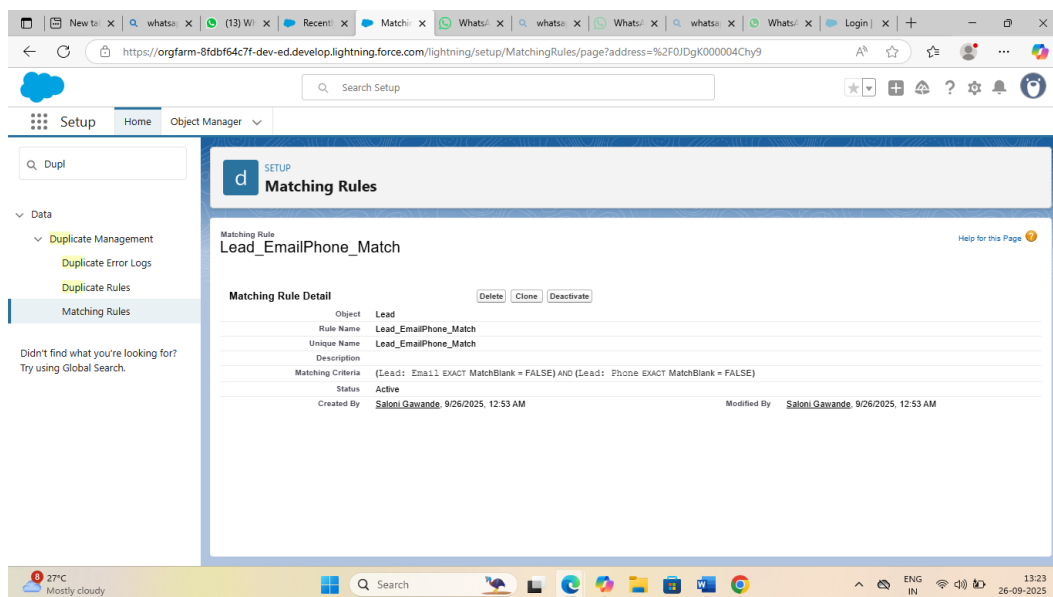
Lead Tracking System - Phase 8

Mandatory Step: Duplicate Rules & Matching Rules

Objective: Prevent duplicate lead records in Salesforce.

A. Create Matching Rule (Leads)

1. Go to Setup → Quick Find → Matching Rules.
2. Click New Rule → Select Object = Lead.
3. Enter Rule Name: Duplicate_Leads_Rule (Unique Name will auto-fill).
4. Add Matching Criteria:
 - Field: Email → Matching Method: Exact
 - Field: Phone → Matching Method: Exact
 - Logic: Email OR Phone
5. Save & Activate the Matching Rule.



B. Create Duplicate Rule (Leads)

1. Go to Setup → Quick Find → Duplicate Rules.
2. Click New Rule → Select Object = Lead.
3. Enter Rule Name: Block_Duplicate_Leads (Unique Name auto-fills).
4. Select the Matching Rule created earlier (Duplicate_Leads_Rule).
5. Define Action:
 - Action On Create: Block or Alert user

- Action On Edit: Allow or Block (as per your requirement) 6. Save & Activate the Duplicate Rule.

Screenshot of the Salesforce Lightning Setup page for Duplicate Rules.

The browser address bar shows the URL: <https://orgfarm-8fdbf64c7f-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmgK0000047ZjV%3Fsetupid%3...>

The page title is "Duplicate Rules". The left sidebar shows the navigation menu with "Duplicate Rules" selected under "Data".

The main content area displays the details for the "Block_Duplicate_Rule".

Duplicate Rule Detail

| Field | Value |
|-----------------------|--|
| Rule Name | Block_Duplicate_Rule |
| Description | |
| Object | Lead |
| Record-Level Security | Enforce sharing rules |
| Action On Create | Allow |
| Action On Edit | Allow |
| Alert Text | Use one of these records? |
| Active | <input checked="" type="checkbox"/> |
| Matching Rule | <input checked="" type="checkbox"/> Standard Lead Matching Rule <input checked="" type="checkbox"/> Mapped |
| Conditions | Lead: Lead Source EQUALS Web |
| Created By | Saloni Gawande, 9/26/2025, 1:09 AM |
| Modified By | Saloni Gawande, 9/26/2025, 1:10 AM |

Buttons: Edit, Delete, Clone, Deactivate

Order: 2 of 2 [Reorder]

Matching Criteria: Matching rule for lead records [More info](#)