Duplicate Detection

Table of Contents

[General Settings 1](#_Toc256000001)

[Accounts with the same Account Name 1](#_Toc256000002)

[Accounts with the same e-mail address 2](#_Toc256000003)

[Accounts with the same phone number 3](#_Toc256000004)

[Accounts with the same website 4](#_Toc256000005)

[Contacts with the same business phone number 5](#_Toc256000006)

[Contacts with the same e-mail address 6](#_Toc256000007)

[Contacts with the same first name and last name 7](#_Toc256000008)

[Leads with the same e-mail address 8](#_Toc256000009)

[Social profiles with same full name and social channel 9](#_Toc256000010)

# General Settings

| **Setting** | **Value** |
| --- | --- |
| Is Duplicate Detection Enabled | Yes |
| Is Duplicate Detection Enabled For Import | Yes |
| Is Duplicate Detection Enabled For Offline Synchronization | Yes |
| Is Duplicate Detection Enabled for Online Create/Update | Yes |

# Accounts with the same Account Name

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects account records that have the same value in the Account Name attribute. |
| Base Record Type | account |
| Matching Record Type | account |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| name | Exact Match | 0 | No |

# Accounts with the same e-mail address

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects account records that have the same value in the email address field. |
| Base Record Type | account |
| Matching Record Type | account |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| emailaddress1 | Exact Match | 0 | No |

# Accounts with the same phone number

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects account records that have the same value in the Phone field. |
| Base Record Type | account |
| Matching Record Type | account |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| telephone1 | Exact Match | 0 | No |

# Accounts with the same website

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects account records that have the same value in the Website field. |
| Base Record Type | account |
| Matching Record Type | account |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| websiteurl | Exact Match | 0 | No |

# Contacts with the same business phone number

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects contact records that have the same value in the Business Phone field. |
| Base Record Type | contact |
| Matching Record Type | contact |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| telephone1 | Exact Match | 0 | No |

# Contacts with the same e-mail address

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects contact records that have the same value in the email address field. |
| Base Record Type | contact |
| Matching Record Type | contact |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| emailaddress1 | Exact Match | 0 | No |

# Contacts with the same first name and last name

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects contact records that have the same values in the First Name and Last Name fields. |
| Base Record Type | contact |
| Matching Record Type | contact |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| firstname | Exact Match | 0 | No |
| lastname | Exact Match | 0 | No |

# Leads with the same e-mail address

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects lead records that have the same value in the email address field. |
| Base Record Type | lead |
| Matching Record Type | lead |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| emailaddress1 | Exact Match |  | No |

# Social profiles with same full name and social channel

| **Setting** | **Value** |
| --- | --- |
| Status | Published |
| Description | Detects social profile records that have the same value in the full name and social channel fields. |
| Base Record Type | socialprofile |
| Matching Record Type | socialprofile |
| Case Sensitive | No |
| Exclude Inactive Records | No |

|  |  |  |  |
| --- | --- | --- | --- |
| **Duplicate Detection Rule Criteria** |  |  |  |
| **Field** | **Criteria** | **No. of Characters** | **Ignore Blank Values** |
| profilefullname | Exact Match | 0 | No |
| community | Exact Match | 0 | No |