Set up duplicate detection rules Dynamics CRM 2015

To maintain the integrity of your data, it's a good idea to have rules in place to reduce duplicate records in the system. Microsoft Dynamics CRM includes default duplicate detection rules for accounts, contacts, and leads, but not for other types of records. If you want the system to detect duplicates for other record types, you'll need to create a new rule.

After you've created duplicate detection rules, you need to turn duplicate detection on.

1. Make sure that you have the System Administrator, System Customizer, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

   › Check your security role

   2.Follow the steps for the app you're using.

   › If using the CRM web application

   › If using CRM for Outlook

3. To create a new duplicate detection rule, click or tap **New**. Type a name and description.

   –OR–

   To edit an unpublished existing duplicate detection rule, click or tap the duplicate detection rule.

   –OR–

   To edit a published duplicate detection rule, select the rule. On the **Actions** menu, click or tap **Unpublish**, and then click or tap the rule.

4. Select the criteria to be used to identify a record as a duplicate.

   0. If you are creating a new rule:

      - In the **Duplicate Detection Rule Criteria** section, in the **Base Record Type** list, click or tap the type of record that this rule applies to. For example, select **Contacts**.
      - In the **Matching Record Type** box, click or tap the type of record to compare. In most cases, you'll probably want to use the same record type for **Base Record Type** and **Matching Record Type**. It's also useful to be able to compare different record types. For example, you might want to compare the **Email** field in Contacts to the **Email** field in Leads.

   1. If you want the rule to consider only active records while detecting duplicates, select the **Exclude inactive matching records** check box. You should also select this check box if your duplicate detection rule criteria are based on a status field.
   2. If you want the rule to be case-sensitive, select the **Case-sensitive** check box.
   3. If you selected different record types for the base and matching record types, for each new criterion, in the **Base Record Field** column, click or tap **Select**, and

then click or tap a field name. In the same row, in the **Matching Record Field** column, click or tap **Select**, and then click or tap a field name.

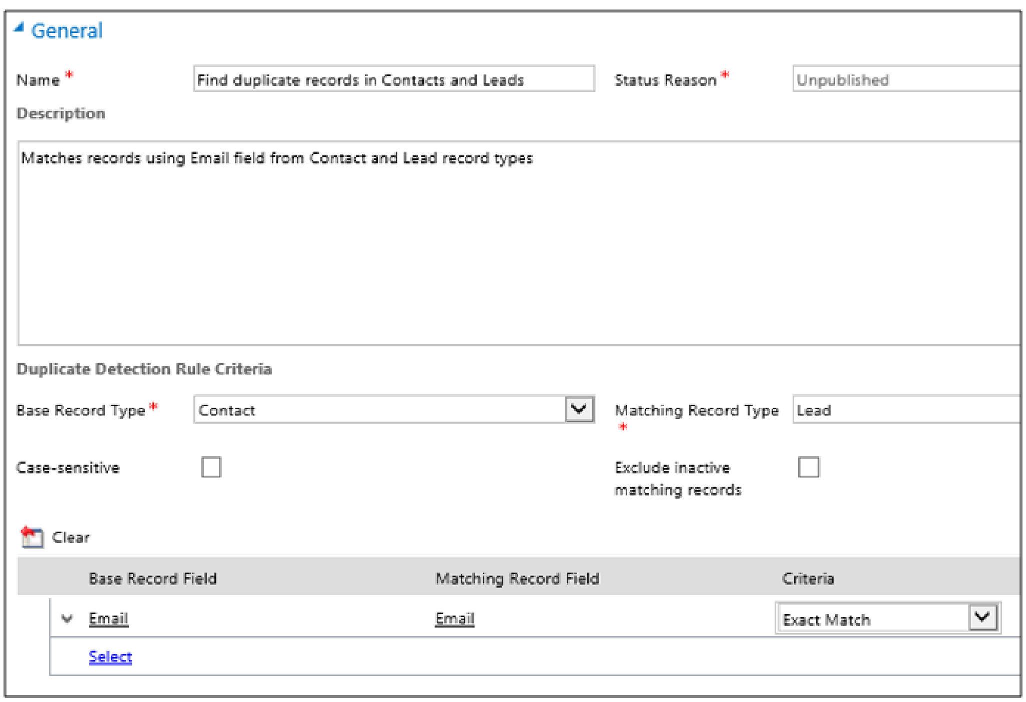
- OR -

If you selected the same record types for the base and matching record types, for each new criterion, in the **Field** column, click or tap **Select**, and then click or tap a field.

4. In the same row, in the **Criteria** column, click or tap **Select**, and then click or tap an operator. For example, select **Exact Match**.
5. If you specified **Same First Characters** or **Same Last Characters**, in the **No. of Characters** column, click or tap **Enter Value**, and then enter the number of characters to compare.
6. If you don't want the rule to consider blank fields (null values) as equal while identifying duplicates, select the **Ignore Blank Values** check box.

Important
If the duplicate detection rule contains only one condition, blank values are ignored during duplicate detection job.

The number of criteria that you can select is limited by the number of characters that can be stored in the matchcode for the record. As you add criteria, watch the **Current matchcode length** value shown at the bottom of the criteria list.



5. When you're finished adding criteria, click or tap **Save and Close**.

6. To make the new or changed duplicate detection rule usable, select the rule, and then click or tap **Publish**.

   When you publish a duplicate detection rule, a matchcode is created for every record in the matching record type for that rule. You can publish only five rules for the same base record type (Account, for example) at a time. You might need to delete or unpublish an existing rule if you bump up against this limit.

Note

- We recommend that you set the duplicate detection criteria on a field that has unique values, for example, **Email**.
- You can have more than one duplicate detection rule for each record type.