

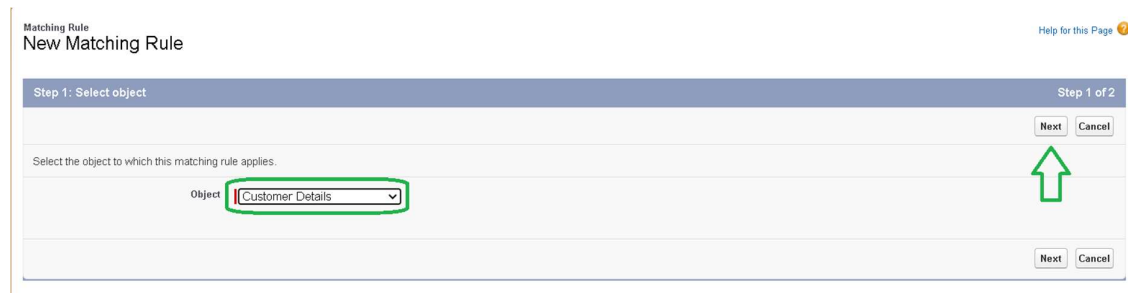
## Duplicate rule

### To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.



3. Select the object as Customer details and click Next.



4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as
7. Field Matching Method
  - 1. Gmail Exact
  - 2. Phone Number Exact
8. Click save.
9. After Saving Click on Activate.

Save Cancel

**Rule Details** ! = Required Information

Object: Customer Details

Rule Name:  ←

Unique Name:  ⓘ

Description:

**Matching Criteria**

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	AND
<input type="text" value="Gmail"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="Phone Number"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="Exact"/>	<input type="checkbox"/>	AND

Add Filter Logic...

Save Cancel

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**Matching Rule** Help for this Page

matching Customer details

**Matching Rule Detail** Edit Delete Clone Activate ←

Object	Customer Details
Rule Name	matching Customer details
Unique Name	matching_Customer_details
Description	
Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone Number EXACT MatchBlank = FALSE)
Status	Inactive
Created By	project_2, 25/09/2023, 10:15 am
Modified By	project_2, 10/10/2023, 3:32 pm

## To create a Duplicate rule to an Customer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.

Q Dupli

▼ Data

▼ Duplicate Management

▼ Duplicate Error Logs

**Duplicate Rules**

Matching Rules

Didn't find what you're looking for? Try using Global Search.

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**SETUP** **Duplicate Rules**

All Duplicate Rules Help for this Page

What Are Duplicate Rules? [ Expand ]

View:

Rule Name	Description	Active	Last Modified By	Last Modified Date
Customer Detail duplicate		<input type="checkbox"/>	g2	10/10/2023
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	<input checked="" type="checkbox"/>	g2	24/09/2023
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	<input checked="" type="checkbox"/>	g2	24/09/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	<input checked="" type="checkbox"/>	g2	24/09/2023

New Rule

- Account
- Appointment
- Billing details and feedback
- Contact
- Customer Details**
- Environment
- Individual
- Laptop
- Lead

3. Give the Rule name as : Customer Detail duplicate
4. Scroll a little in Matching rule section
5. Select the matching rule : Matching customer details

6. And Click on save.
7. After saving the Duplicate Rule, Click on Activate.

Edit Duplicate Rule

Customer Detail duplicate

Help for this Page

Duplicate Rule Edit

Save Save & New Cancel

Rule Details

I = Required Information

Rule Name

Customer Detail duplicat

Description

Object

Customer Details

Record-Level Security

☒ Enforce sharing rules

☐ Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create

Allow

☒ Alert

☐ Report

Action On Edit

Allow

☐ Alert

☐ Report

Alert Text

Use one of these records?

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With

Customer Details

Matching Rule

matching Customer details

Matching Criteria

(Customer Details: Email EXACT MatchBlank = FALSE) AND  
(Customer Details: Phone\_Number EXACT MatchBlank = FALSE)

Field Mapping

Mapping Selected

Add Rule

Remove Rule

Conditions

Optionally, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Save

Save & New

Cancel