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Duplicate records in salesforce report

Keeping data clean and accurate is essential in any CRM system. Salesforce provides tools to manage duplicate records in Salesforce. In Salesforce there are duplicate rules and matching rules to help users prevent or manage duplicate records. Duplicate rules can be created for accounts, contracts, licenses and any custom object. User permissions needed to create and edit duplicate rules are Setup and Display configuration and Customize the application. Steps to create duplicate rules: Step 1:Creating Matching Rules:-Matching The rules define the criteria for which two records can be considered as duplicates. 1. Search for matching rules in Find and select matching rules. 2. To create a new rule click the New Rule and select the object for which the rule should define and click Next. 3. Type the rule you like and specify the Match Policy for the rule. Here you select one or more fields for which records must be compared. There are two matching methods:Exact and Fuzzy. The exact matching method searches for strings that match exactly to a pattern. Fuzzy matching methods look for strings that roughly match a pattern. Specific blurred matching methods are available for standard fields commonly used on accounts, contacts and cables. If the Match Blank Fields check box is selected, if the fields compared on both records are empty, they are considered matched Specify a filter logic of their own if necessary. 4. Click to save and activate the rule. StepRules:- Duplicate rules define which action should be performed when duplicate records are detected. 1. Search Duplicate Rules in Find and select Duplicate Rules. 2. To create a new duplicate rule, click New Rule and select an object. 3. Give the rule a name and choose whether to apply or bypass the sharing rules. If the sharing rules are ignored the corresponding rule compares all records, regardless of user access, but the resulting list of possible duplicates includes only records to which the user has access. If the sharing rules apply the corresponding rule only compares the records to which the user has access, and the resulting list of possible duplicates includes only the records to which the user has access. 4. Specify the actions to take when a duplicate record is created and modified. We can allow or block duplicate records to be saved. If we select Allow and Notice, while a duplicate record is saved, it shows a notice that displays the existing records that are similar and the user can open an existing record. Or the user can create a similar record. If we select Block then the rule will happen the user that a similar record already exists when a duplicate is created. 5. Specify the corresponding rule. Select the object to be compared to and select the matching rule for that object. 6. Optionally specify the filter conditions for the rule execution. Click to save and activate the rule. This presentation requires JavaScript.a look on how the duplicate rule works. click on display duplicates to view duplicate records. duplicate registration sets: when a user creates a duplicate record is saved as an item in duplicate set records. These sets contain duplicate disks for various objects. creating reports on duplicated disks when the report option is selected in duplicate rule users can create reports that display duplicate records for a particular duplicate rule. to create duplicate reports create a custom report type by selecting an object and relativizing duplicate records items to the primary object. now users can create reports based on the type of report. a duplicate record report may include these records. duplicates created when a rule alerts a user of a possible duplicate, but the user still creates the duplicate (to generate this report, select the report option in a duplicate rule.) records were added manually to a duplicate record set. recording in duplicate record sets generated by duplicate jobs. perform duplicate jobs in lightning experience perform duplicate jobs to find duplicate accounts, contracts, steps through your org. duplicate jobs are only available in the performance and unlimited editions. the steps to perform a duplicate job:- 1)Search for duplicate jobs in quick find. 2)Click new work and select an object. 3)Select a corresponding rule available for that object or create a new one. 4)Click run. what's new in Winter '18 release with winter '18 release now we can oare in duplicate recordsalso in Lightning Experience. When the Report option is selected in a duplicate rule, Duplicate Management creates duplicate set of duplicate records found by the rule. You can also create duplicate record sets, adding any record you like as duplicate record items manually. Users also have the option of joining duplicate records in a single record. Steps to join duplicate records:- 1. Open the Duplicate Record Set and click the Compare and join. 2. Select the records you want to join. 3. Select the record you want as the main record and click Next. 4. End by clicking on Join. Now all duplicate records are merged into a single record. The Compare and Join option is only available in Lightning Experience. What's new in winter '19 With the release of Winter '19 we can apply deterministic encryption to the fields used in matching rules. This feature is available as an additional subscription to Enterprise,Performance and Unlimited edition. Avilable in Developer Edition for free for org created in summer '15 or later). First, the administrator must enable deterministic encryption. Before encrypting any field disable any matching rules or duplicate rules that refer to the fields you want to encrypt. Steps to encrypt fields:- 1. From the configuration search for platform encryption and select Encyption Policy. 2. Click Encryption Fields and select the fields you want to encrypt and select Deterministic as the encryption scheme. 3. Click Save.Reactivate your Match Rule and duplicate rule associated with it. The matching rules used in duplicate management now return exact and fuzzy matches on encrypted data. So Duplicate Management helps users easily manage and remove duplicate records from the sales force so save time and confusion. confusion. remove duplicate records in salesforce report

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