



Test Your Knowledge – Dedupe

Use Case 1

DO NOT PROCESS ANY MERGES

Your manager wants you to work on duplicates with account records in the state of Oregon. First, she asked if you could only look at accounts with the account type of “customer” and deduplicate them. After you’ve merged all duplicates with the account type of “customer” she would then like you to deduplicate all accounts, with all account types, in the state of Oregon as well.

Debbie needs to ensure that the oldest record is the winning record. She would also like you to keep all the values from the Products_of_Interest_c field. Otherwise, all fields should update if empty on the winning record.

*Take a screenshot of each step including the results screen.

DO NOT PROCESS ANY MERGES

Use Case 2

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Next your manager would like you to find all duplicate contacts that share accounts in Oregon. In other words, on an account record, she would like you to find all the duplicate contacts (contacts must share the same account). Next, she would like you to find duplicate contacts across all accounts in Oregon. In other words, the contacts do not have to share the same account. She did point out to you that some contacts may not have the main email field populated, so you will have to also look at the alternative email field.

Your manager wants to be sure that the winning record is always the oldest record. She wants to keep the newest home phone field though.

*Take a screenshot of each step including the results screen.

DO NOT PROCESS ANY MERGES



Use Case 3

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Finally, your manager has a project she wants you to work on. She wants to reduce the amount of Prospect duplicate accounts in your company's system for the state of Oregon. She knows that there are a few accounts with the type of Prospect that are duplicates of accounts with the type of customer. She wants you to only identify matches that include at least one account type of prospect. She also wants to be sure that the winning record is the account record with the account type of customer.

DO NOT PROCESS ANY MERGES

*Take a screenshot of each step including the results screen.
