TUTORIAL

Deduping in Salesforce: The complete how-to

Don't be duped by Salesforce.com duplicate records. Deduping seems like one of those routine system maintenance issues, but it's actually very tricky and there's no undo.

By David Taber

CIO |
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When dupe Accounts can't or shouldn't be merged

Thanks to mergers, acquisitions and divestitures, as well as other facets of corporate legal and finance actions, a Fortune 100 enterprise may be represented as dozens or even hundreds of accounts in the CRM system. This is an even more severe issue with the business units of Japanese *keiretsu*. If your CRM is integrated with the accounting, contracts and distribution systems, every new ShipTo and BillTo address might spawn a new account. And you may not be able to do anything about it, so you need to develop a strategy that doesn't involve record merges.

The root cause is a flawed or out-of-date account hierarchy in SFDC. Salesforce's Parent Account and Division features allow for several levels of Account (beware: you really need to read the docs on these features to figure out if they will work for you!). Use these features to group Accounts into a manageable, logical hierarchy. For most U.S.-based companies there are solid solutions for identifying corporate parents. Unfortunately, this information gets sketchy in Europe and quite murky in EMEA, but, generally, here's how to handle the "we can't delete the multiple accounts" problem:

- Create policies and practices around using "official sources" for company names and parent-child relationships.
    - Populate account records from these official sources.
    - Create a new field on the account record to store the "friendly" or "street" name for a company. That way, the system-standard field can be used for the formal corporate entity that nobody will spell correctly (e.g., “E. I. du Pont de Nemours and Company”), and the friendly name (DuPont) that humans will use.
    - Turn off the "create" privilege for Accounts for most users.
    - Train users; explain the method behind the madness.
- Use DUNS, Experian, AM Best, or other corporate entity ID standards as a foreign key for account records. For companies outside the U.S., do your homework to find the best source for corresponding names and ID numbers (this will be different for each country).
- Create new Account records as needed to represent the entire corporate hierarchy using "parent" and "ultimate parent" pointers from DUNS, Experian, AM Best, or others.
- Rework your integrations so they don't create spurious account records.
- Clean up your database, flagging questionable records until they fit the new model. Don't hide the dirty records entirely, as that's an invitation for dupe creation by users.