**DemandTools Module Help**
**for Lead to Account Deduplication**

The Lead to Account Deduplication module is designed to find leads in your salesforce.com database where the Lead's company already exists as an Account. The tool will allow you to convert your Lead into the found Account and create a new Contact for the lead at the same time. You also have the option of creating an Opportunity for the new Contact at the time of the conversion.

Prerequisites

1 You should have already run the primary dedulication tools (Account, Contact, Lead) to ensure that your database is free of primary object duplicates. Although this tool can be used on any database the number of potential merges found will increase exponentially with additional duplicates

2 You should have already run the Lead To Contact Deduplication tool to ensure that the leads you are comparing to accounts have already been compared to your Contacts. If you utilize this tool without previously running the Lead to Contact Deduplication you risk the chance of creating duplicate contacts when you convert the Leads to Contacts in the existing Accounts

Process

As the finding and merging of Leads into existing Accounts is a somewhat complex process it has been divided into 4 steps.

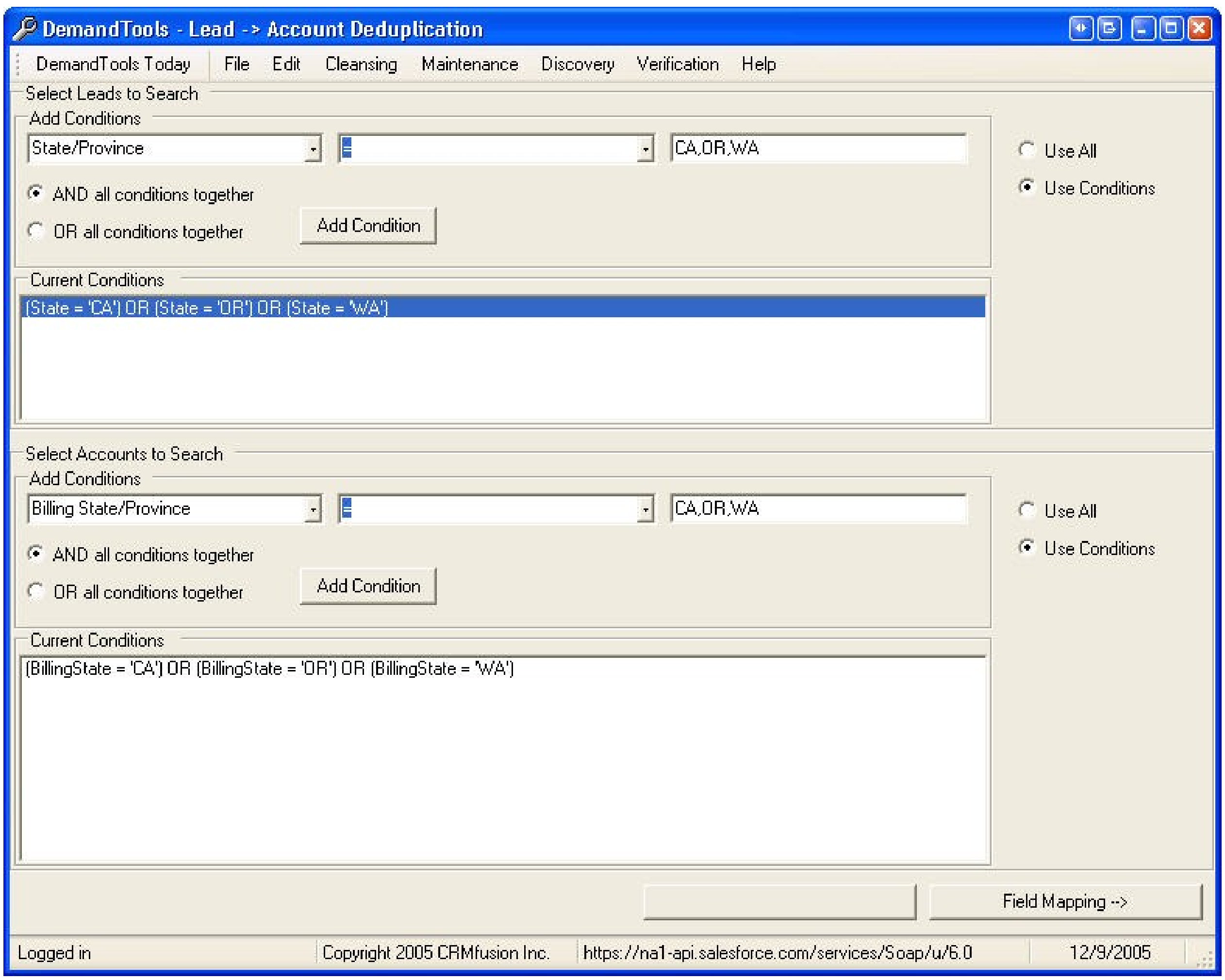
You will most likely run through these steps several times on your salesforce database to maximize the cleaning process.

Step 1- Objects to search

The image below shows the first screen of the Lead to Account Deduplication process. In this screen you have the choice of comparing all of you leads to all of your accounts in order to find duplicates or to reduce the initial query by only comparing specific objects. It is recommended on your first use of this tool that you use a limiting condition so that you do not find too many duplicates and therefore have a more manageable conversion process

In the example below only the Leads and Accounts in the states: CA, OR, and WA will be downloaded and compared. You may also want to reduce the number of search records by name by only looking at Leads and Accounts where the Company or Account Names start with a subset of letters (i.e. Name StartsWith a,b,c,d)

When you are ready to proceed to the next step select the Field Mapping --> button.



Step 2- Field Mapping

This is the most important part of the entire process as in this step you will determine how Leads will Accounts. You can map any of your Lead fields (including custom fields) to your Account fields using various matching types. The number of potential found Lead/Account matches depends on the complexity of your criteria (mapping).

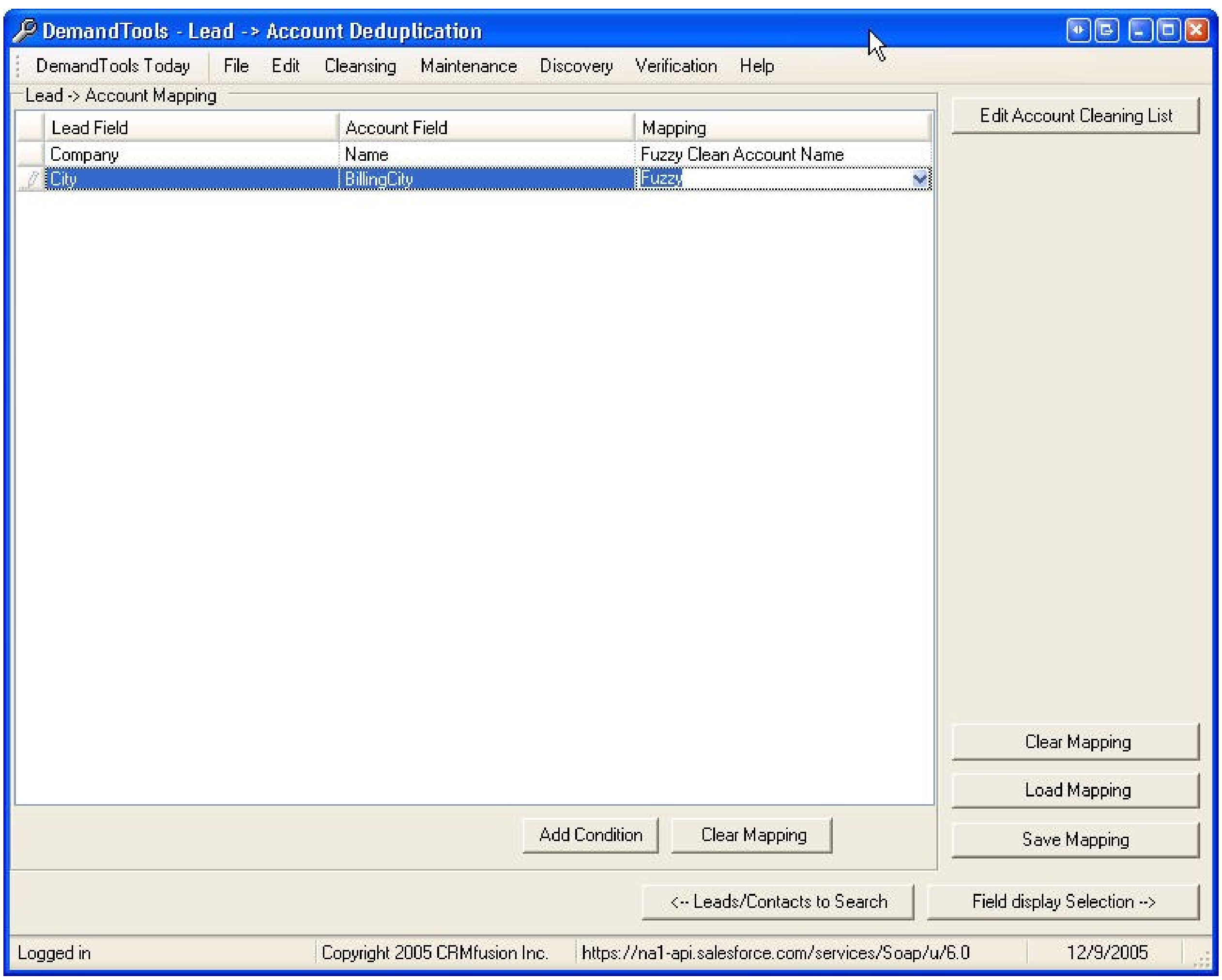
To add a condition simply select the "Add Condition" button. This will add a new row to you Lead->Account mapping grid.

When a Lead field is compared to an Account field you must specify a mapping type. The default type is exact, but, you can select a multitude of types by using the "Mapping" drop down menu. An example of the mapping types and how the function is shows on the right

You can specify as many conditions as you like but as you increase the number of conditions you will reduce the number of found matches. A good starting point is to match the Lead "Company" to the Account "Account Name" using a Cleaned Account Name match and also add in a geographic condition such as Lead "City" matches Account "BillingCity". By using these two conditions you will find similar sounding accounts in a common city.

The image below shows the second stage of this tool with 2 Mappings. To delete a row simple highlight the row and press the DEL key on your keyboard. If you will repeating this mapping in the future you can save it to a file in order to access it later by selecting the Save Mapping button.

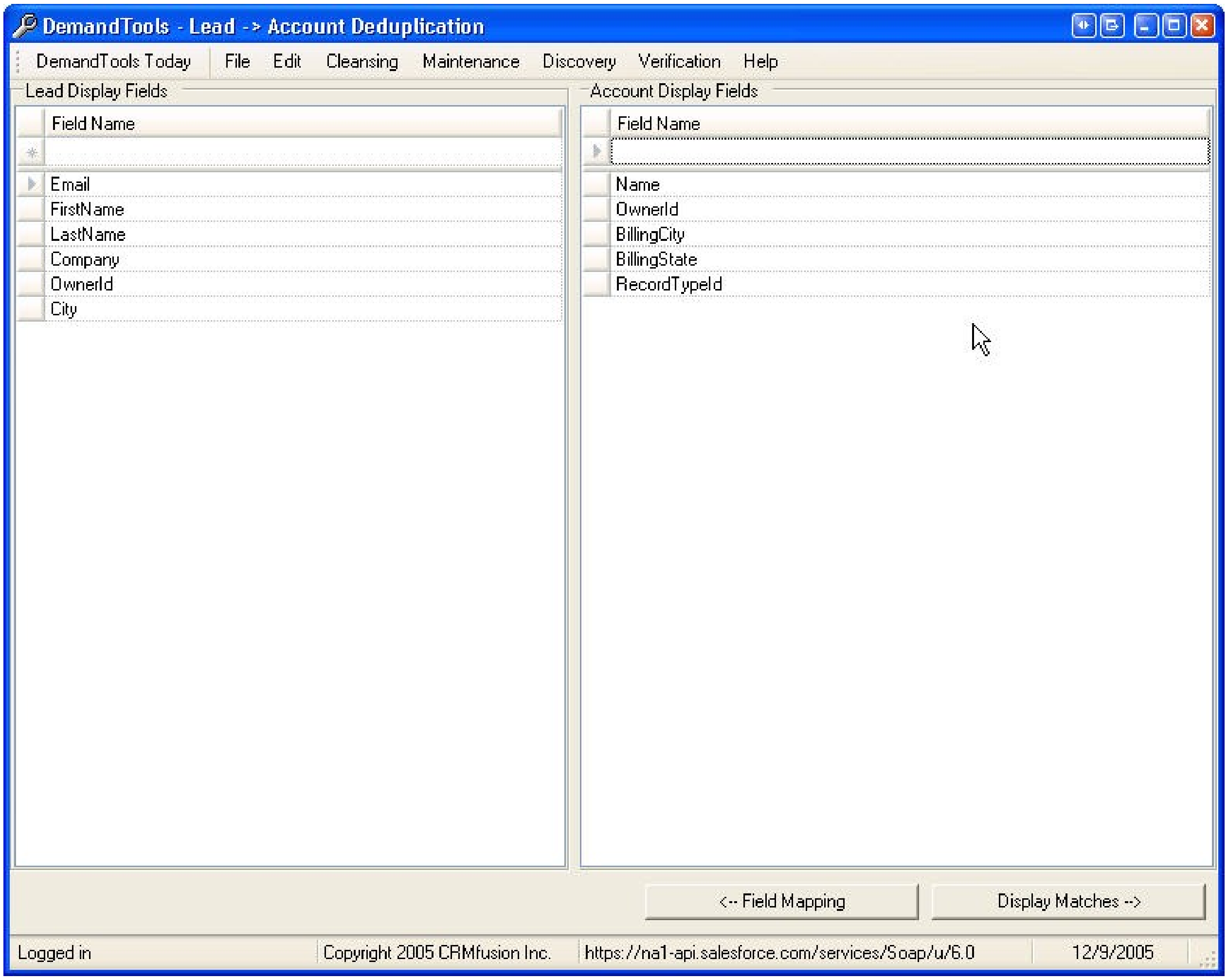
| Mapping Type | Description | Example |
|---|---|---|
| Exact | The fields must match exactly (ignoring case) | HoneyWell matches honeywell but does not match Hoonywul |
| Fuzzy | The fields sound similar using a phonetic match | technicians will match tenfold |
| First Letter | The fist letter of the field matches | IBM will match International Harvester |
| Numeric Match | Only numeric values are compared | ABC123 will match 123 and (123) but will NOT match 1234 or 123B4 |
| First Name | The first name substitution list is used | Bill will match Billy and William |
| Clean Account Name | The fields will be cleaned using the account cleaning list to remove prefixes, suffixes and punctuation | "he IBM Company Ltd" will match "I.B.M. Inc" |
| Fuzzy Clean Account Name | combination of Clean Account Name and Fuzzy | "The Schlosher Company" will match "Schlesser Ltd" |




Step 3- Field display selection

In this step you will decide on the fields that will be displayed on the final screen showing the found potential duplicates. You can select between 1-10 fields for each object type. If you select an ID field for ownership or recordtype the application will display the owner name or recordtype name instead of the id value.

The number of fields will effect the download time and display of the final grid so it is a good practice to keep the number of fields to around 5. A sample of the field display screen is shown below. Once you have selected the required fields to show select the "Display Matches -->" button to start the process of comparing your Leads to Accounts

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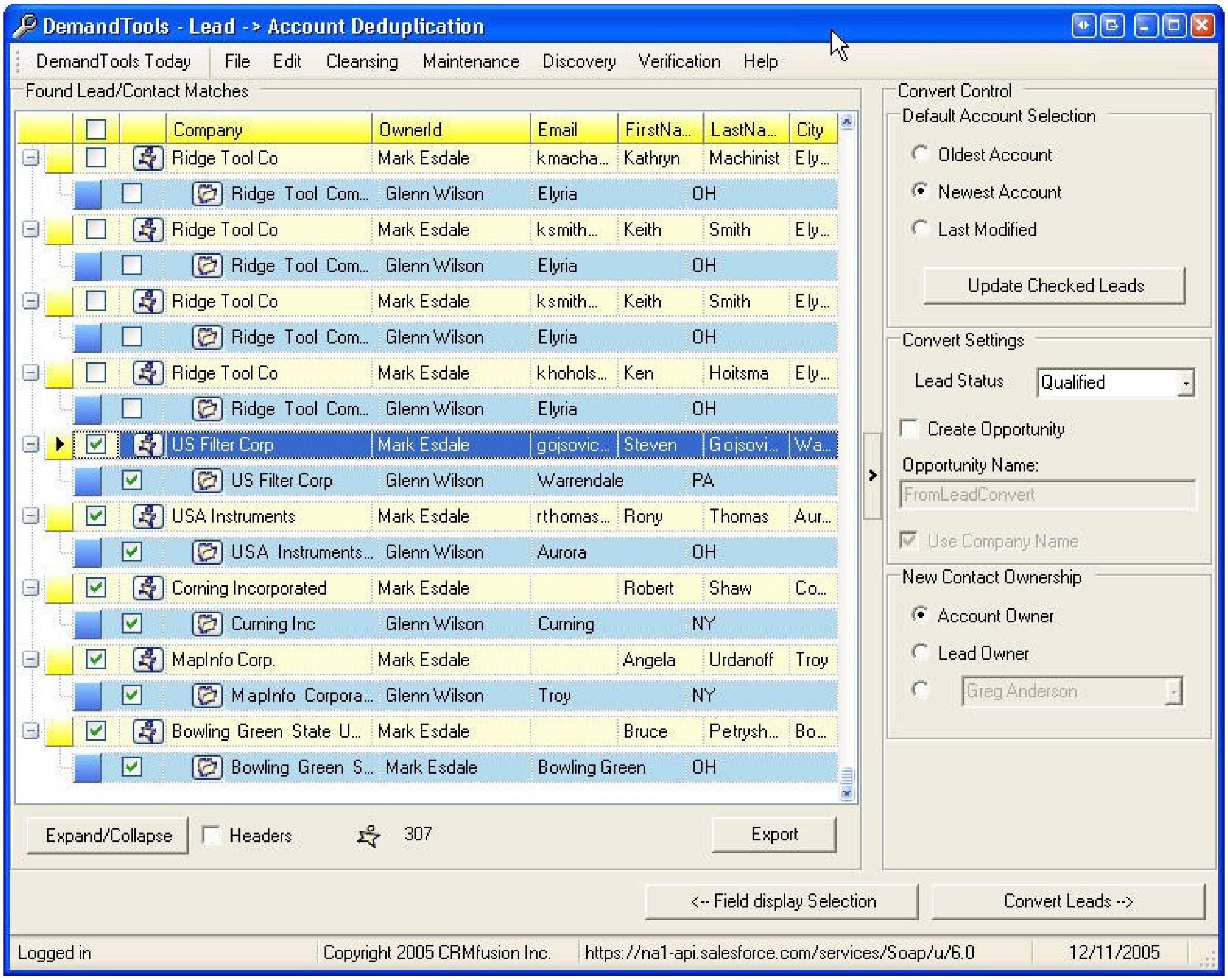
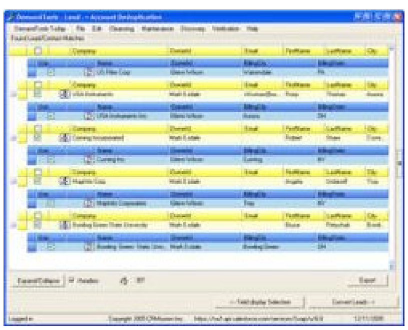
Step 4- Selecting Leads to Convert

In this step you will select the Leads that you want to convert to new Contacts in existing Accounts. The initial display will show all of the Leads that match Accounts based on your matching criteria. In order to view the matched Account for the Lead(s) simply select the (+) beside the Lead and it will expand the treeview to show the Account or Accounts that match that lead. When you select a lead to convert it will automatically select the account below it also (indicating that this is the Account that the Contact will be created on. If more than one Account matches a lead the selection of the Account will be based on the "Default Account Selection" rule set on the left side of the application

A sample of this step is show below with 5 Leads have selected to be merged into the found Accounts.

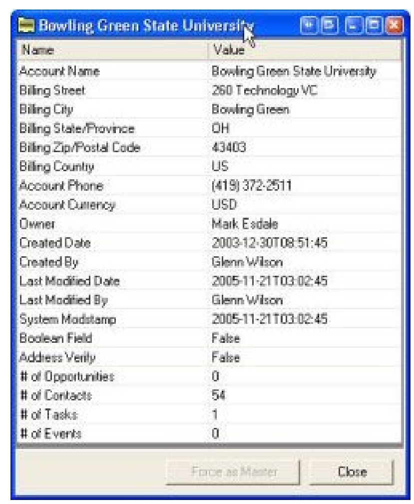



You have several tools at your disposal to assist you in viewing the results as are shown below. These tools are designed to assist you in determining the correct Leads to convert and if a Lead truly matches an Account. You have the option to export the found matches (by selecting the "Export" button at the bottom of the application) so that you can investigate the data in more detail



By selecting the **>** button between the control panel and found members sections you can expand the grid to show more information on the found matches and temporarily hide the control panel. To restore the screen select the **<** button


The "Headers" checkbox will show the field names for the found Accounts. You may find this makes viewing the results easier




By selecting the Account or Lead image button you can view additional details on the Lead/Account without having to search in salesforce.

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Step 5- Converting the Leads

In this step you must first determine what will happened when the selected Leads are converted into new Contacts in the selected Accounts. The details of these settings are described below:

1. Lead Status - This will set the "Status" of the converted lead. When Leads are converted in salesforce it is usually because they are a qualified lead being converted to a contact. In the case of Leads that already have a company inside of salesforce you may want to setup a separate Lead status for Leads that where converted by this tool so that

future analytical analysis will be able to separate the types.

2. Create Opportunity - If you want to create an Opportunity for this newly formed Contact just check the "Create Opportunity" checkbox. When this occurs the "Opportunity Name" text area becomes active and you can give an Opportunity name. Conversely, you can give the opportunity the same name as the Account.
3. Ownership - You can have the new Contact ownership match the owner of it's parent account, be the same as the Lead owner or you can specify a distinct owner. If you use "Lead Owner" and the Lead is owned by a queue the Contact will be assigned you the user that is running the tool


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When you are ready to convert the Leads into new Contacts simply press the "Convert Leads -->" button and the leads will be converted. Once the process is done you will be presented with a dialog box indicating the success of the task and linking you to the log file