DemandTools Module Help
for Lead to Contact Deduplication

The Lead2Contact deduplication tools is designed to find Leads in your salesforce.com database that also exist as Contacts and convert the Leads such that their data is merged into the existing Contacts preserving Campaigns and Activities. The tool uses the LeadConvert API call so the operation is identical to the conversion of a lead from within the salesforce.com interface and will therefore result in the same effect as if you were to manually convert the Lead to a known Contact.

PREREQUISITES

In order to minimize the number of found matches you should have already run an Account, Contact and Lead deduplication. It is important that you do not have any duplicate Leads/Contacts/Accounts in your salesforce database as they will add to the complexity and increase the number of found matches on this step.

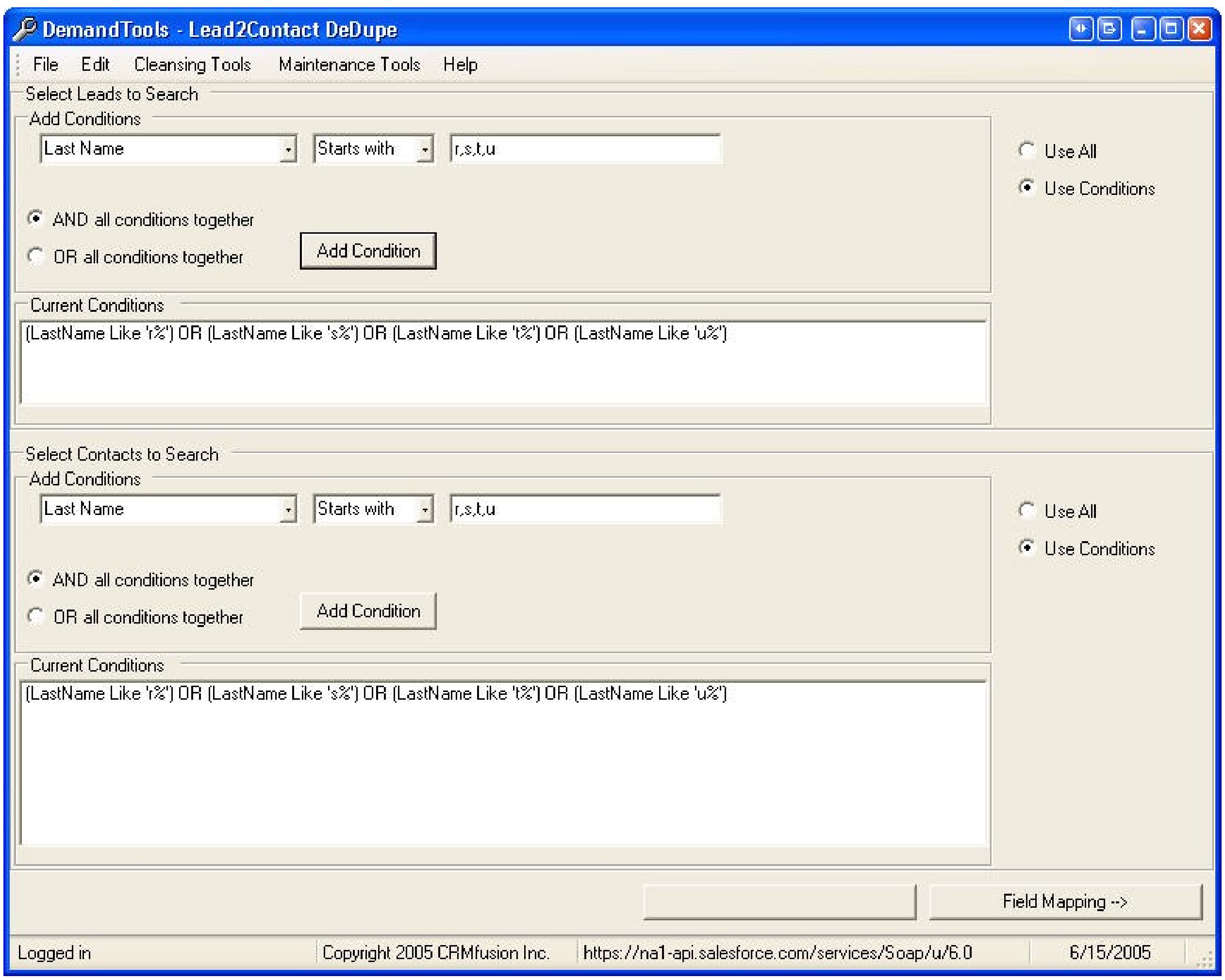
PROCESS

The Lead2Contact Dedupe is a 5 stage process. This process is much more complex than the other deduplication tools as there are 3 salesforce.com object types that we need to analyze against each other.

- The first step is to determine what Leads and Contacts you will be compairing
- The second step is determining what defines a match between a Lead/Contact and optionally a Lead/Account
- The third step is selecting the fields that will be displayed on the viewing page
- The forth step is selecting the Leads that will be "Converted" into the found Contacts
- The fifth step is the actual "Convertion" of the Leads to Contacts

STEP 1 - WHAT LEADS AND CONTACTS TO SEARCH

Select the Cleansing Tools menu and then select Lead -> Contact Deduplication. This will launch the Lead->Contact Deduplication Wizard.



For the first step you will need to determine the following:

- What Leads will be included in the process
- What Contacts will be included in the process

If you have only 5,000 Contacts and 5,000 Leads in your salesforce.com database and only expect to find 200-500 matching Leads/Contacts they you can use all Leads and Contacts in this step. For larger Contact and Lead counts you will want to reduce the number of Leads/Contacts that you are searching on to speed up the process and to make the end result easier to read. The final display of found matches is shown in a grid that has the matching Contacts and Accounts nested inside each found Lead. If you find in excess of 500 matches it can take some time to display this grid.

In the above image we are selecting Leads and Contacts based on the starting letter of the last name. This is a good method to follow that gives you the granular control on finding a limited amount of Leads and Contacts.

When you are ready for the next step press the "Field Mapping -->" button.

STEP 2 - MAPPING LEAD FIELDS TO CONTACT (AND OPTIONAL ACCOUNT FIELDS)

This is the most important part of the process as it is where you will dictate how Leads will match Contacts (and optionally how Leads will match the Contact's Account). The process is to map the Lead fields to the Contact fields and then specify how the fields should match together. Mapping types are shown in the chart to the right.

Depending on your data you will try several different combinations of field selection and mapping in order to find the Leads in your database that match existing contacts.

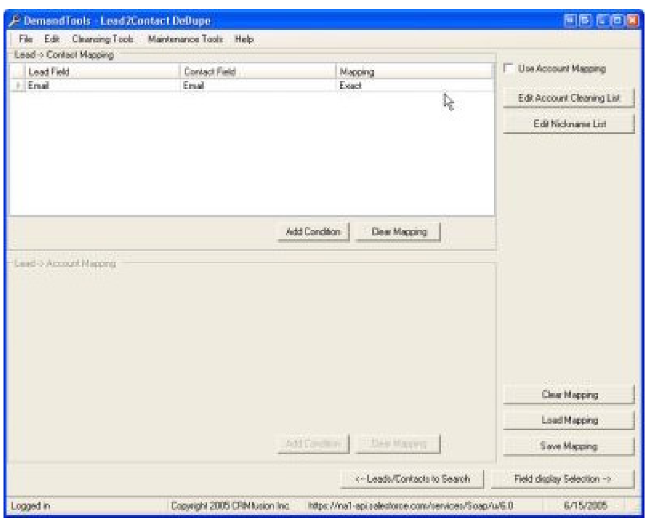
It is important to note that the complexity of your mapping will determine the number of found matches and the confidence that the matches are valid.

For example if you map just email a simple exact match will do but if you are mapping FirstName and LastName you will want additional criteria (such as AccountName/Company) so that you don't find invalid matches such as Bob Smith as IBM and Bob Smith at Windges Ltd.

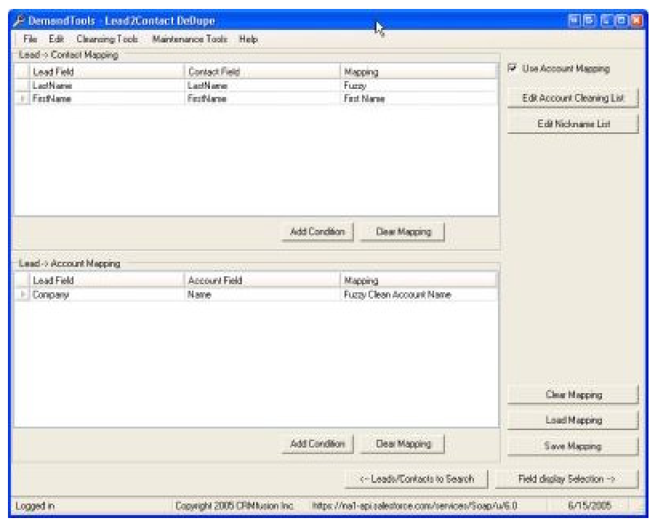
Mapping	Result
Exact:	The two fields must match exactly (non case sensitive). This is good for matching unique fields like email
Fuzzy:	The two fields sound similar (i.e. Smith/Smyth Allaghany/Alagany). This is good from last name or company name matching
First Letter:	Just the first letters are compared. This is good for matching on first names where you sometimes just have the initial
Numeric Match:	Only numeric values are considerd (i.e. "(416) 628-1486" is the same as "4166281486") This is good for phone numbers
First Name:	This will pass the names through the "Nickname" list so names such as Bill, William and Billy all appear the same. This is good for matching Lead/Contact first names
Clean Account Name:	This will take a value and pass it through the "Account Cleaning List" to remove known suffixes, prefixes and punctuation characters. This is good for Account/Company names as I.B.M. Inc and IBM Limited will appear the same
Fuzzy Clean Account Name:	This is similar to the "Clean Account Name" except that the results are matched if they sound similar. Using this method the names "pheen ltd" and "fien inc." will be found as a match

The first item you must look at is if Account Mapping will be used. This is controlled by selecting the ☑ Use Account Mapping checkbox on the upper right corner of the screen. This determines weather you will be using Lead->Account Mapping in your criteria. If you are mapping on very specific items such as email you may not need to map this BUT if you are just mapping on Contact/Lead name it will be important to use Account mapping so that users with common names are only found if they are in similar sounding Accounts

In the images below we are showing two types of standard mapping that you may use to search for matches. In order to add a condition simple press the "Add Condition" button and a blank condition will be added to the form. You can now select the matching fields and mapping type for the two fields. For a more detailed view click on the image to open it in a new window.



In the above example Lead->Contact mapping is the only mapping used. For this case Leads will match Contacts if the email addresses are exact. This is a good first pass and they only problem that could occur is where more then one person shares a common email address (i.e. sales@crmfusion.com). Note that the "Use Account Mapping" checkbox is unchecked for this sample as we are not concerned about any of the Lead fields mapping to the Contact's Accounts fields.



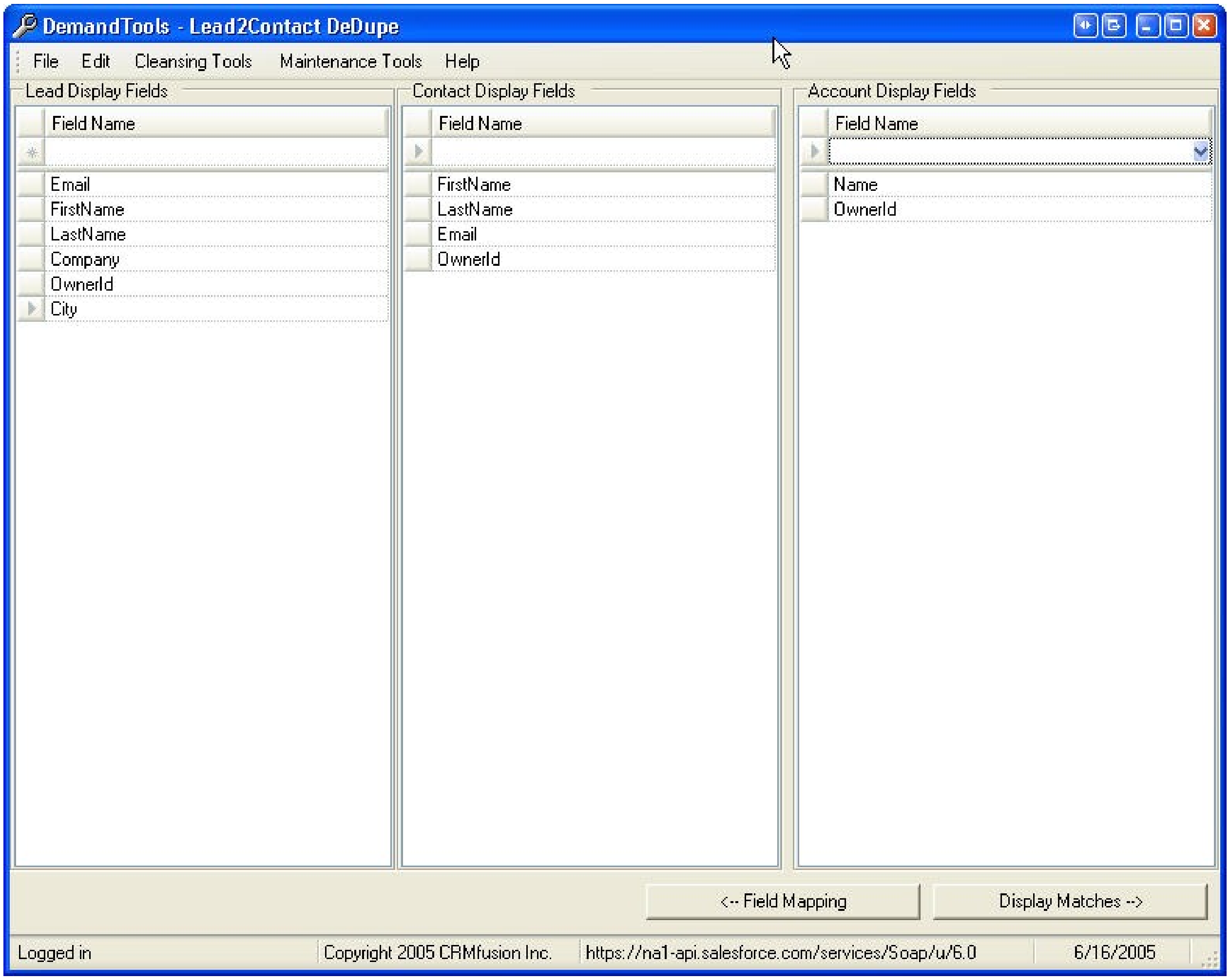
In the sample above both Lead->Contact mapping and Lead->Account mapping are being used. In this case the Lead is mapped to the Contact based on "Fuzzy" LastName match and "First Name" FirstName match. The Lead Company name is being matched to the Contact's Accounts name based on "Fuzzy Clean Account Name". With this criteria the Lead: Bob Johnson from Pheeling Inc would match the Contact: Robert Johanson from Fealing Ltd.

If you are mapping just names in the Lead->Contact mapping it is important to also map additional Contact or Account fields as you will end up matching similar names that work for different companies.

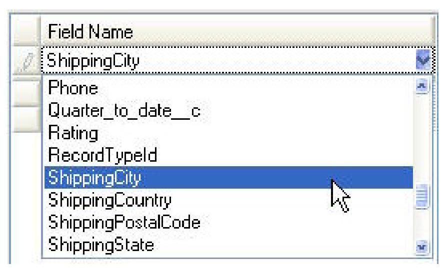
When you have selected your mapping it is a good ideal to save the mapping using the "Save Mapping" button. This way you can reuse the mapping at a later date by simply loading the mapping. Select the "Field Display Selection -->" to proceed to the next step

STEP 3 - SELECTING THE FIELDS TO DISPLAY

On the final screen where you select the Leads that will be Converted into existing Contacts you will want to display enough Lead/Contact/Account information so that you can make an educated decision on what Leads should be converted. To do this you simply select the fields (you can pick 1-10 fields to show) that you want displayed from the pulldown located below the "Field Name" tag.



All of your standard and custom fields are available for the Contact Lead and Account objects. For ID fields that represent users (i.e. OwnerID, LastModifiedByID) the tool will automatically substitute the users full name so that it is easier to view. RecordTypeID's will also be displayed as the RecordType name.

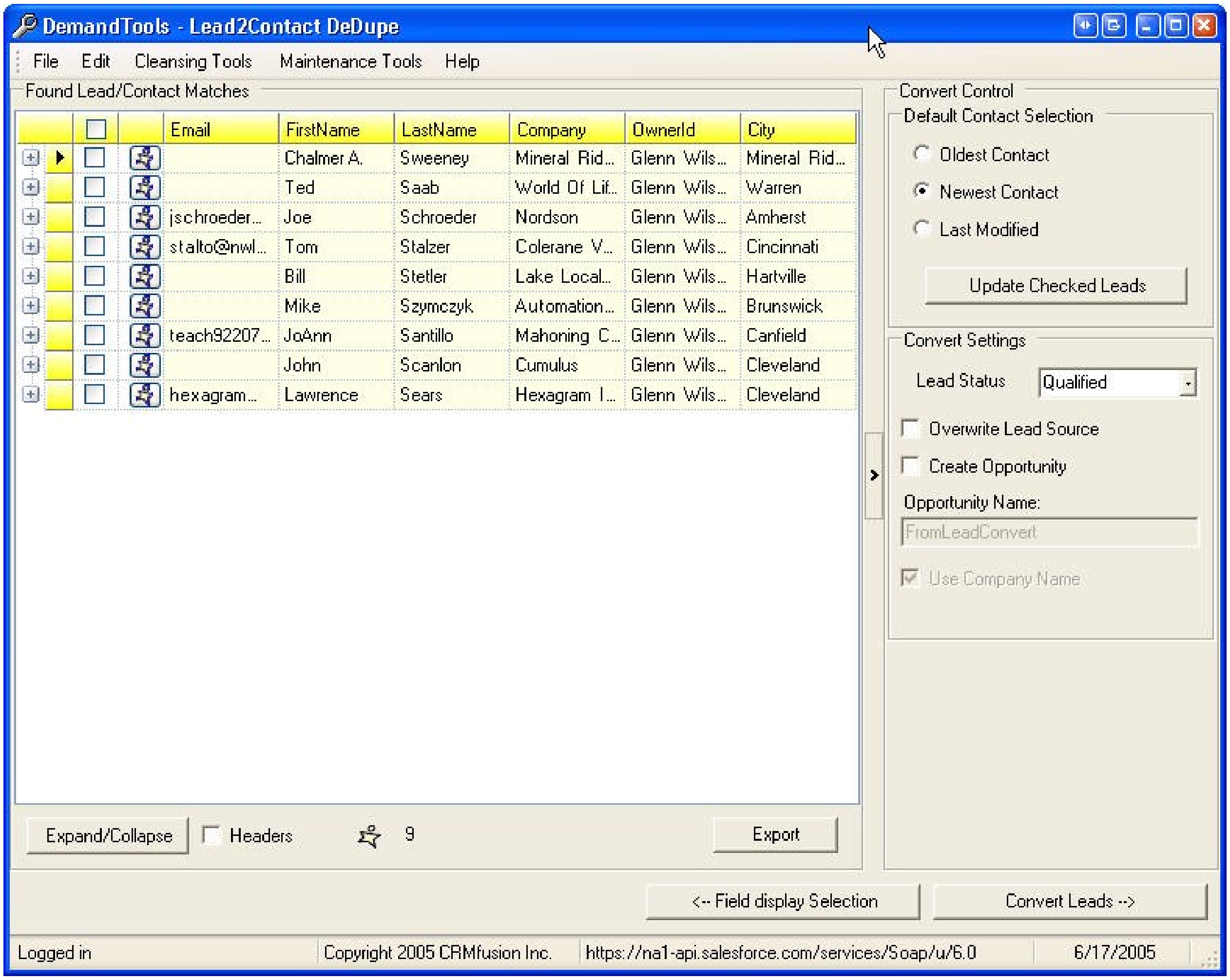


The process of finding and displaying the found matches will take longer if you have a large number of fields selected to show but the importance of selecting the correct record will more than justify a longer processing time.

When you are ready to proceed to the next step in finding potential matches simply select the "Display Matches -->" button and the tool will switch to the next screen and start the primary process of finding common Leads and Contacts.

STEP 4 - SELECTING THE LEADS/CONTACTS TO CONVERT AND PROCESSING THE SELECTED RECORDS

At the beginning of this step the application will download the required objects and start the comparison process. Depending on the number of Leads and Contacts that the tool is searching on this can take a long time. During the processing procedure the application will keep you informed of the current status of the task that it is performing. Once the matches have been found you will be displayed a screen as shown below.



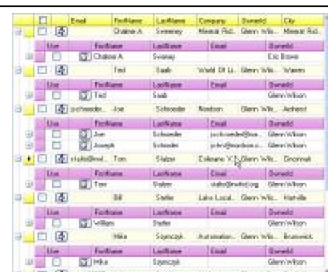
By selecting the + icon beside the Lead name you will show the Contact that has been found to match that Lead. If you select the + icon beside the Contact name you will show details about that Contacts Account.

In order to merge a Lead into a Contact you must select the checkbox beside the Lead and this will automatically seleect the checkbox beside the Contact. You can use the checkbox in the top header of the Lead row and this will select all Leads that have been found by the tool.

Only Leads that have been checked will be merged into the found Contact.

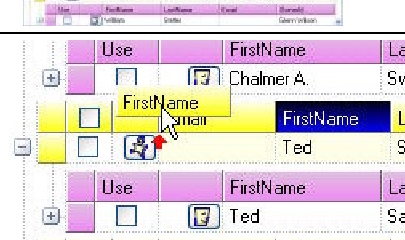
By default the headers for the Lead rows are only shown on the top row (as shown in the first figure on the right). The Contacts and Accounts always have a header row to show the field names for the objects. In some cases it may make the grid more easily read if the row headers are visible for all Lead rows (as shown in the second figure on the right).

In order to toggle the headers on or off simply check the "Headers" checkbox located at the lower left area of the application.



If any of the field names for the Leads, Contacts or Accounts are not in an order you like simply drag and drop the fieldname from the header row to a new location on the header and the fields will update.

You can also view all of the details of the Leads, Contacts and Accounts by pressing the icon button at the beginning of each row ( ). This will bring up the same detail view that is shown on the deduplication wizards.



When more than one Contact match for a lead is found the default selection of the Contact is controlled by the "Default Contact Selection" area.

In most cases where you have 2 or more matching Contacts this is an indication that you have duplicate Contacts in your database and you should stop the Lead -> Contact Dedupe and revisit the Contact Deduplication wizard.

The "Update Checked Leads" button will update any contacts (where 2 or more have been found) so that the selected one below the lead matches the condition set by the "Default Contact Selection"

The conversion of the Lead to a Contact is controlled by the "Convert Settings."

Lead Status is the new status of the Converted Lead and for most cases it is set as Qualified. If you are tracking lead conversions for analysis of campaign success you may want to create your own lead status for converted leads found by the tool. You must ensure that this status is valid for "Converted" Leads.

If the "Overwrite Lead Source" is checked the Lead Source in the Contact will be superseded by the Lead Source in the Lead.

You also have the option of creating an Opportunity for each converted Lead with the option of giving a default Opportunity name or using the Lead company name.

By selecting the "Convert Leads -->" button the process will start and the Leads will be converted to Contacts in batches of 100. This process can take some time depending on the total number of Leads that you are Converting.