

Lead duplicates

Lead duplicate search

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Lead duplicate search

4

Lead duplicate search

PRODUCTS: [MARKETING](#) [SALES CREATIO](#)

The lead duplicate search helps to obtain information about customers with similar needs and to eliminate duplicate leads. In contrast to searching for duplicate contacts and accounts, the duplicate search is not started manually. The results of the lead duplicate search are displayed automatically on the [*Similar leads*] detail of the lead page. Duplicates cannot be merged since several similar needs may arise from one customer.

The lead duplicate search in Creatio is performed according to the pre-configured rules for searching for duplicates grouped as "Similar leads". To enable or disable individual rules:


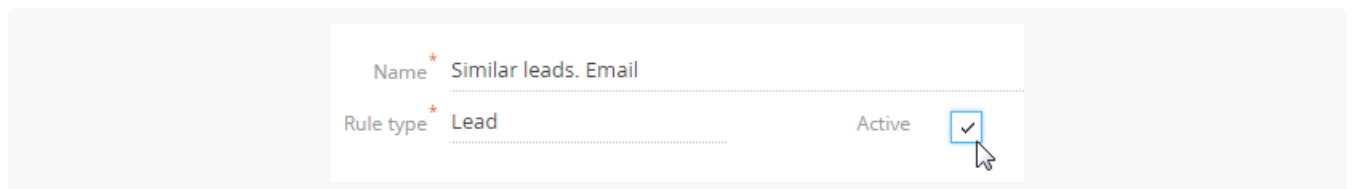
1. Click  to open the System Designer.
2. Open the [*Setup duplicates rules*] link.
3. In the section [*Filter*] menu, select the [*Show folders*] command.
4. In the list of folders, select the "Similar leads" folder. The list will display the pre-configured duplicate search rules.
5. Select a rule from the list and click the [*Open*] button.
6. On the rule page:
 - a. Clear the [*Active*] checkbox to disable the rule.
 - b. Select the [*Active*] checkbox to enable the rule ([Fig. 1](#)).

Fig. 1 Activating lead duplicate search rules



7. Click [*Save*].

The lead duplicate search will be performed based on the rules with the selected [*Active*] checkbox.