

Monitor Account Data Quality

Overview

Who: SBS Support

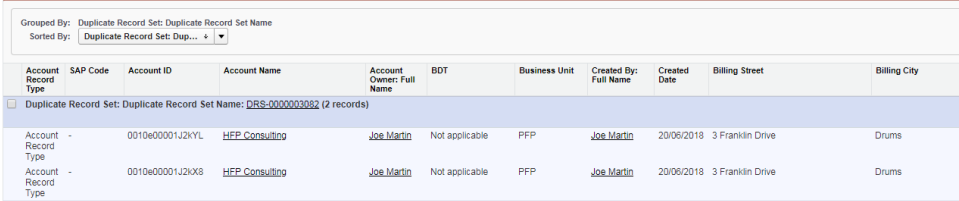
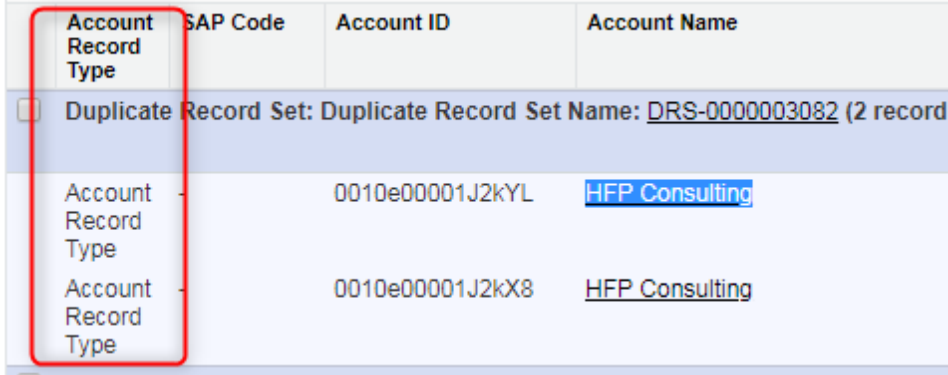
What: Load an Excel template into Salesforce using Data Loader. To complete this process, GBU data steward must give:

- *Salesforce ID of the user to add*
- *Salesforce ID of the accounts*
- *Team member role*
- *Access to accounts : Read OR write*

Table of contents

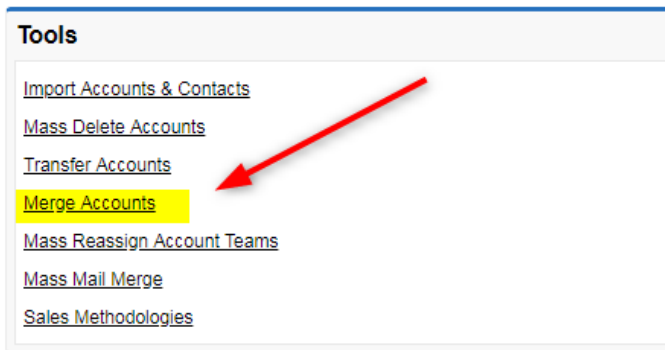
- [Overview](#)
- [Table of contents](#)
- [Step-by-step](#)
 - [I. Check the template](#)
- [Related articles](#)
- [Can't find information?](#)

Step-by-step

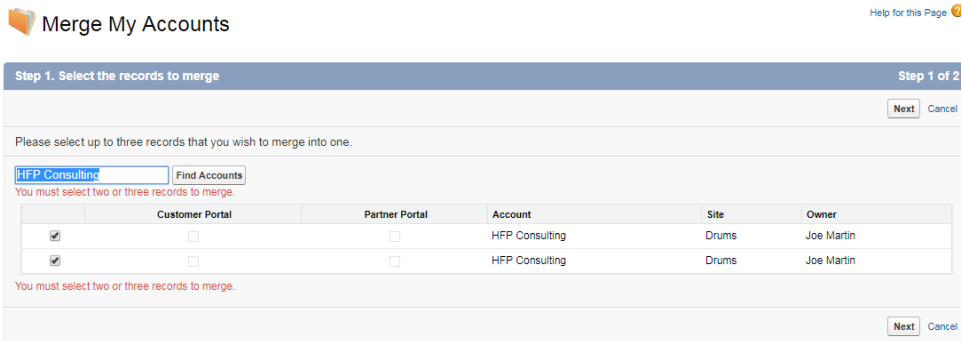
I. Check the template																																														
Sources	<ol style="list-style-type: none"> 1. User request per mail 2. SFDC case 3. SFDC report 																																													
	<p>Open SFDC report</p> <p>Identify "Duplicate Record set"</p>  <table border="1"> <thead> <tr> <th>Account Record Type</th> <th>SAP Code</th> <th>Account ID</th> <th>Account Name</th> <th>Account Owner: Full Name</th> <th>BDT</th> <th>Business Unit</th> <th>Created By: Full Name</th> <th>Created Date</th> <th>Billing Street</th> <th>Billing City</th> </tr> </thead> <tbody> <tr> <td colspan="12"><input type="checkbox"/> Duplicate Record Set: Duplicate Record Set Name: DRS-0000003082 (2 records)</td> </tr> <tr> <td>Account Record Type</td> <td>-</td> <td>0010e00001J2kYL</td> <td>HFP Consulting</td> <td>Joe Martin</td> <td>Not applicable</td> <td>PPF</td> <td>Joe Martin</td> <td>20/06/2018</td> <td>3 Franklin Drive</td> <td>Drums</td> </tr> <tr> <td>Account Record Type</td> <td>-</td> <td>0010e00001J2kX8</td> <td>HFP Consulting</td> <td>Joe Martin</td> <td>Not applicable</td> <td>PPF</td> <td>Joe Martin</td> <td>20/06/2018</td> <td>3 Franklin Drive</td> <td>Drums</td> </tr> </tbody> </table>	Account Record Type	SAP Code	Account ID	Account Name	Account Owner: Full Name	BDT	Business Unit	Created By: Full Name	Created Date	Billing Street	Billing City	<input type="checkbox"/> Duplicate Record Set: Duplicate Record Set Name: DRS-0000003082 (2 records)												Account Record Type	-	0010e00001J2kYL	HFP Consulting	Joe Martin	Not applicable	PPF	Joe Martin	20/06/2018	3 Franklin Drive	Drums	Account Record Type	-	0010e00001J2kX8	HFP Consulting	Joe Martin	Not applicable	PPF	Joe Martin	20/06/2018	3 Franklin Drive	Drums
Account Record Type	SAP Code	Account ID	Account Name	Account Owner: Full Name	BDT	Business Unit	Created By: Full Name	Created Date	Billing Street	Billing City																																				
<input type="checkbox"/> Duplicate Record Set: Duplicate Record Set Name: DRS-0000003082 (2 records)																																														
Account Record Type	-	0010e00001J2kYL	HFP Consulting	Joe Martin	Not applicable	PPF	Joe Martin	20/06/2018	3 Franklin Drive	Drums																																				
Account Record Type	-	0010e00001J2kX8	HFP Consulting	Joe Martin	Not applicable	PPF	Joe Martin	20/06/2018	3 Franklin Drive	Drums																																				
	<p>Compare the following</p> <ol style="list-style-type: none"> 1. Account name 2. Billing Country 3. Billing City 4. Billing Street 																																													
	Appreciate the similarity of these fields between accounts to merge (in the end, it is a personal decision)																																													
	<u>Some typical examples</u>																																													
Case n°1	<p>The content of these fields is equivalent. Record types are "Account Record Type".</p>  <table border="1"> <thead> <tr> <th>Account Record Type</th> <th>SAP Code</th> <th>Account ID</th> <th>Account Name</th> </tr> </thead> <tbody> <tr> <td colspan="4"><input type="checkbox"/> Duplicate Record Set: Duplicate Record Set Name: DRS-0000003082 (2 records)</td> </tr> <tr> <td>Account Record Type</td> <td></td> <td>0010e00001J2kYL</td> <td>HFP Consulting</td> </tr> <tr> <td>Account Record Type</td> <td></td> <td>0010e00001J2kX8</td> <td>HFP Consulting</td> </tr> </tbody> </table>	Account Record Type	SAP Code	Account ID	Account Name	<input type="checkbox"/> Duplicate Record Set: Duplicate Record Set Name: DRS-0000003082 (2 records)				Account Record Type		0010e00001J2kYL	HFP Consulting	Account Record Type		0010e00001J2kX8	HFP Consulting																													
Account Record Type	SAP Code	Account ID	Account Name																																											
<input type="checkbox"/> Duplicate Record Set: Duplicate Record Set Name: DRS-0000003082 (2 records)																																														
Account Record Type		0010e00001J2kYL	HFP Consulting																																											
Account Record Type		0010e00001J2kX8	HFP Consulting																																											
	Proceed to merge as follows																																													

If you are looking to learn how to merge accounts in Salesforce Lightning with different names, you will need to use Salesforce Classic and utilize the Merge Accounts tool.

1. go to SFDC
2. Click the "Accounts" Tab
3. Slide down to "Tools" section and click "Merge Accounts"



click next

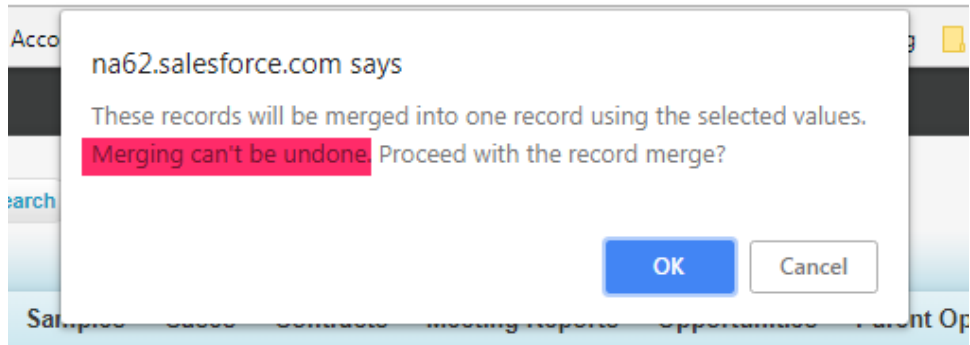


click "Next"



Click "Merge"

accmergewizard.jsp



WARNING : MERGING ACCOUNTS IS IRREVERSIBLE !!!!

Click "OK"

Case #2

Account Record Type	SAP Code	Account ID	Account Name	Account Owner: Full Name	BDT	Business Unit	Created By: Full Name	Created Date	Billing Street	Billing City
Duplicate Record Set: Duplicate Record Set Name: DRS-000003079 (2 records)										
Account Record Type	-	0010e00001J2e42	Grindmaster-Cecilware GMCW	Ahir Mathkar	Consumer & Construction	SULFONE	Ahir Mathkar	14/06/2018	4003 Collins Lane	Louisville
Account Record Type	-	0016000000F3WYT	Grindmaster-Cecilware Corporation	Ahir Mathkar	Not applicable	CRYSTALLINE; SULFONE	Hank Wang	23/11/2011	4003 Collins Lane	Louisville

Step 2. Select the values to retain Step 2 of 2

Select the values that you want to retain. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values.

Note: All related records including notes, attachments, and activities will be associated with the new merged record.

Master Record	Grindmaster-Cecilware Corporation [Select All]	Grindmaster-Cecilware GMCW [Select All]
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Account Name	Grindmaster-Cecilware Corporation	Grindmaster-Cecilware GMCW
Account Owner	Ahir Mathkar	Ahir Mathkar
Account Name (Local Language)	Grindmaster Crathco Systems, Inc.	
Create SAP Account	<input type="checkbox"/>	<input type="checkbox"/>
Type	Converter/Fabricator	Customer
Sub Type	Prospect	OEM
Account Group		
Account Record Type	Account Record Type	Account Record Type
CTD Rep		
SDM Resp.		
Phone	+1 (502) 357-2196	+1-5023572187
Fax		
Email		
Website		
Region	Nafta	Nafta
CSR Region	US (Aromatics)	US (Aromatics)
Account Site	Louisville	Louisville

Business Unit: SULFONE CRYSTALLINE

BDT: Not applicable Electric & Electronic

Business Unit : in the case of two different BU's, choose one, click "Merge", go on merged Account page, Click "Edit" then add the missing BU

Same approach applies to BDT

Case #3

Duplicate Record Set: Duplicate Record Set Name: DRS-000003076 (2 records)

SAP Account Record Type	Account ID	Account Name	Account Owner
Partner	0004402929	0016000000fQjWV	NIPRO CORPORATION
			Hayato Usuda

Partner record type never valid to merge

Case #4

Step 2. Select the values to retain Step 2

Select the values that you want to retain. Highlighted rows indicate fields that contain conflicting data. The Master Record selected will retain read-only and hidden field values.

Note: All related records including notes, attachments, and activities will be associated with the new merged record.

Master Record	SHANGHAI RISOL [Select All]	Shanghai Risol High-Performance Materials Co.,Ltd [Select All]
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Account Owner	Huawei Li	Harry Hu
Account Name	SHANGHAI RISOL	Shanghai Risol High-Performance Materials Co.,Ltd
Account Name (Local Language)	上海巨旭高性能材料科技有限公司	上海巨旭高性能材料科技有限公司
SAP Code	0004006051	
Type	Customer	Customer
Sub Type	OEM	End User
Confidential	<input type="checkbox"/>	<input type="checkbox"/>
Account Record Type	SAP Account Record Type	Account Record Type
CTD Rep		
SDM Resp.		
Phone	+86 21 6767 6432	+8621 67676432
Fax		

Master record should be the one "SAP Account record type"

In case of doubts on the address, ask account owner(s) if relevant to merge

Case #5

Duplicate Record Set: Duplicate Record Set Name: DRS-000003052 (2 records)

SAP Account Record Type	0000169404	0010e00001JYhO	DEVILLE OUEST ELASTIQUE	Eve Patsyn	Automotive	CRYSTALLINE	Eve Patsyn	16/05/2018	DEVILLÉ OUEST PLASTIQUE ZI de Beauregard Avenue de Chandellais Baugé	BAUGÉ EN ANJOU	49150
SAP Account Record Type	0000165007	00132000019MZZZ	DEVILLE TPC SAS	Christophe Germain	Automotive	CRYSTALLINE	Olivier SICARD	26/03/2015	Avenue de Chandellais	BAUGE-EN-ANJOU	49150

After merge require Aurelia Bouvry to update SAP technical table as shown below

External application	Customer	APPL_CUST_ID	Name 1	Group
CRM-SSP	165007	00132000019MZZZ	DEVILLE TPC SAS	Z7F8
CRM-SSP	169404	0010e00001JYhO	DEVILLE OUEST PL	Z7F4
External application	Customer	APPL_CUST_ID	Name 1	Group
CRM-SSP	165007	00132000019MZZZ	DEVILLE TPC SAS	Z7F8
CRM-SSP	169404	00132000019MZZZ	DEVILLE OUEST PL	Z7F4

Related articles

Can't find information?

Related docs

- [Web support contact](#)