Use the following best practices to keep your Salesforce data clean, consistent, and complete.

Validation Rules

Improve the quality of your data using validation rules. Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False". Validation rules also include an error message to display to the user when the rule returns a value of "True" due to an invalid value.

After you have defined validation rules:

1. The user chooses to create a record or edit an existing record.

2. The user clicks **Save**.

3. All validation rules are verified.

   - If all data is valid, the record is saved.

   - If any data is invalid, the associated error message displays without saving the record.

4. The user makes the necessary changes and clicks **Save** again.

   Note: Data.com Prospector and Data.com Clean licenses can no longer be renewed. These products are scheduled for retirement on July 31, 2020. Existing contracts will be honored. For more information, see Data.com Prospector and Clean Retirement.

Mass Update Addresses

- Keep the standard address fields in your records consistent by using the mass update addresses tool.

- From Setup, enter `Mass Update Addresses` in the `Quick Find` box, then select **Mass Update Addresses** to update the country and state/province fields in all of your organization's records.

- Update country fields first to ensure country naming consistency on records with state/province fields. Then update state/province fields.

- Use standard abbreviations such as ISO codes to keep country and state/province data consistent across all records. See International Organization for Standardization for a list of internationally recognized two-digit codes.

- Save time on step two of the mass update address wizard by searching for multiple terms in the `Available Values` box before replacing a value.

   Tip: The mass update addresses function does not search for blank addresses. To replace blank address fields:

   - Run a report that includes addresses and record IDs.

   - Export the report to Excel.

   - Enter data for blank addresses.

- Import the Excel file and select a matching type of "ID" so existing records will be updated.

Search Before You Create

- Avoid creating duplicate records by using search before you create a new record.
- Depending on your organization's sharing model, some users may not be able to use search to find duplicate accounts. To help users find duplicates, allow them to run an account owner report, which displays all of your organization's accounts. This standard report is located in the Accounts and Contacts folder on the Reports tab.
    - If you customize the report to limit which columns it displays, save it as a custom report.
    - Use folders to limit which users can view the report.
    - Create a custom link to the report on the Home tab so users can quickly access it.
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Merge Leads, Accounts, and Contacts

Merge duplicate lead, account, and contact records to reduce redundant data.

- Select a lead record and click **Find Duplicates**. Find duplicate leads before converting them to an account, opportunity, or contact. This will save you time from converting leads which may become duplicates.
- From the Accounts tab, click **Merge Accounts** in the Tools section.
    - Merge accounts on a regular basis to prevent duplicates.
    - When restricting user merge permissions, create a custom field on accounts in which users can note if an account should be merged.
- From the Contacts related list of an account, click **Merge Contacts**.
    - Merge accounts before contacts because accounts may have the same contacts. This will prevent you from merging records twice.
    - Note that you can merge contacts only within the same account.

💡 Tip: To access a contact organization chart, enter the name of each contact's manager in the **Reports To** field of contacts. Then click the **[View Org Chart]** link on any contact in an account to see an organization chart that shows the complete contact hierarchy.

Opportunity-Naming Conventions

Avoid creating duplicate opportunities by including the account name in the opportunity name. For example, if account Vanpool is linked to opportunity Templeton, name the opportunity Vanpool-Templeton so that it is easier to see the account to which it is linked.