Use Case: Create Lead or Update Contact

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Duplicate records can be a common issue when dealing with Leads and Contacts.

How do duplicates happen?

Perhaps you're using a Web-to-Lead form. This type of form only creates Leads and usually does not check to see if a Lead already exists.

Another possible cause for duplicates could be that you've converted a previous Lead to a Contact. In this case, they should not be considered a Lead. Instead of creating a Lead for them, you can add an Event or Task to their Contact record.

But no worries. We can help! You can use the respondent's email address to search Salesforce for an existing record. If the respondent is already a Contact, you'll be able to update their information. If not, you can create a new Lead using dependent steps within the connector.

Update an Existing Contact

First, select to **Update** the **Contact object**. An email address is unique, so base your Lookup on the email address entered in the form. Match your selections with the example below:

- **If no matching record is found:** Skip this object and any dependent. (We'll take care of this in the next step.)
- **If one matching record is found:** Update record (default).
- **If more than one records are found:** This depends on what you need.
  - For example, pick **Create a new record** if you have several contacts sharing the same email address. If you choose **End execution and log an error**, you or the respondent will be notified of an error, but the data won't be pushed to Salesforce.

Create a Lead When No Contact Exists

Now, we need to handle the opposite situation, where no Contact exists. In this case, we want to create a new Lead. To do this, we follow a similar pattern as above **Lookup the Contact**, but apply the opposite logic:

- **If no matching record is found:** Continue with dependent objects.

- **If one matching record is found:** Skip this object and any dependent.
- **If more than one records are found:** Skip this object and any dependent.

Add a step to **Update Lead object** as a dependent object to the Lookup Contact, and match your selections with the above example.

Again, if the Connector doesn't find any matching Leads, or if it discovers multiple Leads, you can set it to update the most recently modified record. If only one matching Lead is found, that record will be updated with the mapped fields.

From here, take it a step further: Add an Event or Task to the Contact as a dependent object to automate more of your unique business process.

That's it. You're set!