USING DATA.COM CLEAN IN SALESFORCE

Data.com Clean Overview

> Available in: **Developer**, **Enterprise**, **Professional**, **Performance**, and **Unlimited** Editions.

> ⚠ **Important:** Jigsaw for Salesforce is no longer available for new organizations and will be retired for existing organizations in Summer '14. If you use Jigsaw for Salesforce, you'll need to uninstall it and migrate to the equivalent Data.com products that are built in to Salesforce (Data.com Corporate Prospector or Data.com Premium Prospector and Data.com Clean). For information about migrating, contact your Salesforce account manager. You should not attempt to migrate to any of the built-in Data.com products without having first purchased them through your Salesforce account manager.

In addition to finding and adding new accounts, contacts, and leads, you can use Data.com to help keep the information about the people and companies that you work with accurate and up to date. It also helps maintain data quality by identifying duplicate records that exist in your organization and by preventing new duplicates from being created.

Data.com's Clean feature keeps your account, contact, and lead data accurate in two ways.

- An automated cleaning scans data twice a day. It compares Salesforce records to those in Data.com, which has over 24 million up-to-date business contacts that are always being refined and updated. Depending on the way Clean is configured for your organization, different or incomplete Salesforce records are automatically updated or you are notified about the differences by Chatter and by the `Data.com Status` field on record detail pages.
- A **Clean with Data.com** button is provided for record detail pages, so you can manually update individual records at any time.

Clean also includes out-of-the-box analytic tools, to show how Data.com is helping you find more leads, build your pipeline, and close more revenue.

Use this guide for help with the Clean feature. See "Jigsaw Overview" in the Salesforce Help for information about Data.com's search and add feature.

Data.com Clean Fields

Your organization's account, contact, and lead record detail pages include a Data.com section, with several fields that are updated each time the automated cleaning runs. You can review the information in these fields to see if a record is up to date or if you should use the **Clean with Data.com** button to refresh the record with Data.com's current data.

The fields in the `Data.com` section are described here.

- `Data.com Status`

  The state of a record after the most recent automated or manual cleaning. One of these status values is assigned.

  ◊ **Matching** (⊘): Clean located a match in Data.com and Data.com is managing the record. Salesforce and Data.com are in sync and the record is up to date.
  ◊ **Different** (⊝): Clean located a match in Data.com and Data.com is managing the record, but Data.com has different information. You should review records with this status to see if some or all of the data should be updated with Data.com's information.
  ◊ **Not Found** (⊙): Either Data.com doesn't include this record or the Salesforce record doesn't include enough information for Clean to find a match in Data.com.
  ◊ **Graveyard** (⊟): The Data.com Community has reported that the record is inactive or invalid. For contact or lead records, this usually means that the person isn't employed at the company anymore, or the phone number or email address is wrong. For account records, the company may be out of business.

  If a record has a Matching or Different status, this field also provides a **Data.com Fresher** or **Salesforce Fresher** link. These links indicate that the record was most recently updated by Data.com's Clean or by a Salesforce user.

- `Last Checked`

  Indicates the last time that the automated cleaning compared the record to Data.com.

- `Update Status`

  Shows if a record is locked (so it can't be updated by the automated cleaning) or unlocked.

- `Duplicate`

  If Clean finds possible duplicates of a record, it adds a link to this field. Click the link to view the list of duplicates.

- `Additional Information`

  Only shown on account records. Lists the outside sources of information that are used for the record.

Manually Cleaning Account, Contact, or Lead Data

If your organization doesn't run the automated cleaning process — or has the automated cleaning configured so that incomplete or out-of-date records aren't automatically updated — you can manually clean your data on a record-by-record basis using the **Clean with Data.com** button.

1. Determine which records need updating in one of these ways.

   - Check the `Data.com Status` field on individual account, contact, and lead record detail pages (see Jigsaw Clean Fields on page 1).
   - Run the prebuilt Data.com reports to evaluate the status values of all Data.com-managed records in Salesforce (see Jigsaw Reports on page 4).

2. Open the detail page of the record that you want to update.
3. Click **Clean with Data.com** or click the link in the `Data.com Status` field, if it's displayed.

4. For each field shown, integrate Data.com data by selecting the radio button in the `Data.com Has` column. To retain the information currently in Salesforce, select the radio button in the `Salesforce Has` column.
5. Click **Update**.

Controlling Which Records are Cleaned

If you have data that shouldn't be modified—for example, you know that your information is up to date or it is specific to your activities—you can disable automatic updates for individual records using the **Lock/Unlock** button. This button is provided for account, contact, and lead record detail pages and is available to all users. You can also use this button to restart automatic updates for records.

Locked records can still be manually updated with the **Clean with Data.com** button.

> **Note:** There is no relationship between Clean locking and Salesforce record-level edit permissions for users. Anyone can disable and enable automatic updates for records, even for records that were previously locked or unlocked by a Salesforce administrator.

1. Open the record detail page.
2. Click **Lock/Unlock**.

The `Update Status` field shows whether the record is locked or unlocked.

Reverting Changes to Account, Contact, or Lead Data

If your Salesforce administrator has enabled field history tracking and has added the history related lists to the account, contact, and lead detail page layouts, you can see all of the fields that change when Data.com's Clean updates a record, including the original information and the new data that replaced it.

> **Note:** A record's history does not show changes that Clean made before history tracking was enabled.

If necessary, you can use field history to manually undo any of the changes that Clean makes to account, contract, or lead records.

1. Find the history related list on the record detail page.
2. Copy the actions for all of the changes that you want to undo to a text editor, such as Notepad.
3. Edit the record and paste the previous version of the record's data into the appropriate fields.
4. Click **Save**.

Using Data.com Clean to Identify Duplicate Records

When Data.com Clean scans your account, contact, and lead data, it looks for duplicates: multiple Salesforce records that match a Data.com record. If duplicates are identified, the record's detail page is updated with a link to a list that shows the duplicate records. You can run Data.com's prebuilt duplicate reports to see all records with duplicates, then use this information to merge or delete the redundant data. See Jigsaw Reports on page 4 for more information.

Clean also prevents duplicates from being imported into Salesforce in the first place.

Data.com Analytic Tools

Data.com includes analytic tools to help you measure your organization's data accuracy and see how Data.com is helping you. These tools include:

- Jigsaw reports
- Jigsaw dashboards

Data.com Reports

Use the prebuilt Data.com reports to analyze data accuracy and view Data.com statistics. These reports are available in the `Jigsaw` folder on the Reports tab.

To help manage your account, contact, or lead data accuracy, you can evaluate:

- Records that are managed by Data.com and kept up to date by Clean
- Records that have been added or updated, by day or by month
- Salesforce records that contain data that differs from matching records in Data.com
- Duplicate records
- Inactive records by their `Graveyard` status
- Locked records that won't be updated by the automated cleaning
- All records categorized by Data.com status
- The number of converted leads that are managed by Data.com (i.e., Salesforce records that were matched in Data.com and are being kept up to date by Clean), as well as those that are sourced from Data.com (i.e., new records that were added to your organization from Data.com)

You can also determine how effective Data.com is for your organization by evaluating these statistics.

- The percentage of converted leads that are managed by or sourced from Data.com
- The percentage of current opportunities in your pipeline associated with accounts that are managed by or sourced from Data.com
- The percentage of expected revenue associated with accounts that are managed by or sourced from Data.com
- Expected revenue from opportunities that are managed by or sourced from Data.com
- Closed revenue from opportunities that are managed by or sourced from Data.com

See "Run a Report" in the Salesforce Help for more information.

Data.com Dashboards

Use the Data.com dashboards for a quick look at your data's accuracy and Data.com statistics. These dashboards are available in the `Data.com` folder on the Dashboard tab.

Useful for administrators, the Analytics dashboard shows snapshots of account, contact, and lead data accuracy, including:

- A summary of Clean's results, including the number of records assigned a Data.com status and the number of duplicate and locked records that exist
- The number of records updated by Clean

- The number of records that are managed by Data.com

Useful for sales managers, the Impact dashboard shows how Data.com is helping you find leads, grow your pipeline, and close deals with snapshots of the following statistics:

- The percentage of converted leads that are managed by Data.com (i.e., Salesforce records that were matched in Data.com and are being kept up to date by Clean), as well as those that are sourced from Data.com (i.e., new records that were added to your organization from Data.com)
- The percentage of current opportunities in your pipeline associated with accounts that are managed by or sourced from Data.com
- The percentage of closed opportunities associated with accounts that are managed by or sourced from Data.com

See "Get Started with Dashboards" in the Salesforce Help for more information.