
Implement Data.com Clean

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IMPLEMENT DATA.COM CLEAN

Data.com Clean

Data.com Clean provides a number of ways to keep your Salesforce CRM records up to date by leveraging company information from D&B and millions of crowd-sourced contacts. There are two versions of the Data.com Clean product: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records.

Clean compares your Salesforce account, contact, and lead records with records from Data.com and creates a link between your Salesforce record and its matching Data.com record. Clean also provides “clean status information for Salesforce accounts, contacts, and leads” in the Salesforce Help.

Users with a Clean license can:

- Manually compare individual Salesforce records side by side with matched Data.com records, and update Salesforce records field by field.
- Select account, contact, and lead records from a list, and clean them all at once.
- Manually refresh D&B Company records linked to accounts (Premium Clean only).

Your organization can also:

- Configure and run automated Clean jobs to flag field value differences on Salesforce records, fill blank fields, overwrite field values.
- Use the [Data.com Match API](#) to create a custom solution for specific business purposes like cleaning leads as they are created and cleaning custom objects.

Data.com Clean does not support person accounts.

There are two versions of Data.com Clean: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records, either manually or via automated jobs.

| Data.com Clean Version | D&B Fields |
|--------------------------|---|
| Data.com Corporate Clean | Basic set of D&B fields. |
| Data.com Premium Clean | Basic set of D&B fields, plus the <code>D&B Company</code> field. This field links to an associated D&B Company record with over 70 more D&B fields that are accessible on the D&B Companies tab. If the Salesforce records's <code>D&B Company</code> field is blank, a link is created, if available, when the record is cleaned. |

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and Unlimited Editions



Note:


- Prospector or Clean Corporate licenses can't be purchased for organizations that already have Prospector or Clean Premium licenses. If you want to purchase Corporate licenses, you'll need to convert your Premium licenses.
- Prospector or Clean Premium licenses can't be purchased for organizations that already have Prospector or Clean Corporate licenses. If you want to purchase Premium licenses, you'll need to convert your Corporate licenses.
- Data.com Clean must be purchased 1:1 for Sales Cloud and Service Cloud seats.

Confirm That Data.com Clean Is Enabled

Learn how to enable Data.com Clean so your organization can start keeping its records up to date.

Data.com Clean ensures that your CRM records are always up to date. You can use Clean with all your account, contact, and lead records—not just those records added from Data.com. When you purchase the Data.com product, Clean is automatically enabled, so you can set up automated Clean jobs and users can clean individual records manually or clean groups of records from a list view.

Enabling Clean makes clean features available to your organization, and it causes the **Preferences** and **Jobs** links to appear in Setup under the Clean section.

 **Note:** Enabling Clean *does not* clean your records immediately, and you can click **Disable** to turn off the feature.

1. From Setup, enter *Clean Settings* in the **Quick Find** box, then select **Clean Settings**.
2. Confirm that Data.com Clean is enabled.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:

Contact Manager (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:

Professional, Enterprise, Performance, and **Unlimited** Editions


USER PERMISSIONS


To enable or disable Data.com Clean:

- “Customize Application”

Configure Page Layouts for Data.com Prospector and Data.com Clean

When you implement Data.com Prospector and Data.com Clean, so that users can use the product, you need to add buttons and fields to your Account, Contact, and Lead page layouts. If you use Data.com Premium Prospector or Data.com Premium Clean, you can add a button to your D&B Companies page layouts so users can refresh linked D&B Company records.

 **Note:** If your organization uses Professional Edition, custom page layouts are not available, so you must add *all* available Data.com fields and buttons to your page layout for each object (accounts, contacts, leads, and D&B Companies).

1. From the object management settings for accounts, go to Page Layouts.
 2. From the list of page layouts, click **Edit** next to the layout(s) your Data.com Prospector or Data.com Clean users will use.
 3. On the Account Layout page, from the list of page element categories, click **Fields**.
 4. Drag the `Clean Status` field into place on the page where you want it to appear.
 5. If you use Data.com Corporate Prospector or Data.com Premium Prospector, add the D&B fields you want users to see. These include `Account Site`, `D-U-N-S Number`, `NAICS Code`, `Tradestyle`, and more. For a complete list of the D&B fields available on account records, see Account Fields.
-  **Tip:** We recommend creating a section for D&B fields and grouping them there. To create a section, from the **Fields** group, just drag the `Section` element into place on the page.
6. If you want your users to be able to refresh D&B Company records, add the **Refresh** button to D&B Company page layouts.
 7. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.
 8. From the list of page element categories, click **Buttons**. Drag the **Clean**, **Get Contacts**, **Prospecting Insights**, and **Company Hierarchy*** buttons into place on the page.

* Available only with a Data.com Premium Prospector license
 9. Click **Save**.
 10. From the object management settings for leads, go to Page Layouts.
 11. Repeat the steps to add the `Clean Status` field and the **Clean** button to your Lead page layouts.
 12. If you use Data.com Corporate Prospector, add the `Company D-U-N-S Number` field. If you use Data.com Premium Prospector, add the `Company D-U-N-S Number` and `D&B Company` fields.
 13. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.
 14. From the object management settings for contacts, go to Page Layouts.
 15. Repeat the steps to add the `Clean Status` field and **Clean** button to your Contact page layouts. (Contacts does not include any D&B fields.)
 16. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:
Contact Manager (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in:
Professional, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To customize page layouts:

- “Customize Application”

To view page layouts:

- “View Setup”

17. If you use Data.com Premium Prospector, from the object management settings for D&B Companies, go to Page Layouts.

18. Add the **Search Global Ultimate D-U-N-S** button.

Set Field-Level Security for Data.com


If your organization uses Data.com Prospector or Data.com Clean, you can view a number of D&B fields on account records, and those fields are included when users manually clean records. To make sure your users can read and edit the fields and their values, and that they appear on the Account Card, you need to set field-level security.

Set field-level security for these fields.

- Account Site
- D&B Company (Data.com Premium Prospector only)
- D-U-N-S Number
- NAICS Code
- NAICS Description
- Ownership
- SIC Code
- Ticker Symbol
- Tradestyle
- Year Started

There are multiple ways to set field-level security (such as by profile or permission set), but because you need to set field-level security for only ten fields, we recommend starting from the fields and choosing the user profiles for users who use Data.com.

1. From the management settings for accounts, go to the fields section.
2. Click the field label to open the detail page for each of the fields.
3. On each field's detail page, click **Set Field-Level Security**. For each profile whose users need to read and edit the fields, select **Visible**. For example, if users in the Standard User profile will use Data.com Clean, select **Visible** for that profile.

 **Note:** Because these fields are maintained by Data.com Clean, making them editable by setting the field-level security to **Visible** could create mismatched data when a Clean job is run.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To set field-level security:

- "Customize Application"

Define Your Preferences and Select an Account Matching Service for Data.com Clean

Clean preferences let you specify which objects' records you want to clean and how you want to clean them. This includes selecting the matching service that's used to clean accounts.

If your organization does not have a Data.com Clean license, you won't be able to select preferences for jobs.

1. Review the [guidelines](#) for selecting a matching service that's used to clean accounts.
2. From Setup, enter *Preferences* in the *Quick Find* box, then select **Preferences** under the Clean section.
3. Select the matching service for cleaning accounts. If you select D&B DUNSRight™ matching service, adjust your confidence code if needed.
D&B's Confidence Code ranks Data.com match candidates based on how similar they are to your record, from 1 (not similar) to 10 (identical or highly similar). We won't *automatically* match any Data.com record below the code you select here, and if we have multiple records at or above your selection, we'll match the best quality record. When you *manually* clean a record, you may be able to select a match between our preset confidence code (5) and the code you select here.
4. Review the [guidelines](#) for selecting job preferences.
5. Make sure the *Enable Clean jobs* checkbox is selected for each object whose records you want to clean. If your organization has a Data.com Premium Clean license and you want to clean D&B Company records, select the *Enable Clean jobs for D&B Companies* checkbox.
6. For each object you've enabled, select your clean preference.
7. Save your preferences.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To implement Data.com:

- "Customize Application"

Guidelines for Selecting Data.com Clean Job Preferences

Before you define your Data.com Clean jobs, it's important to understand the preferences you can set.

- Data.com Clean offers three options for cleaning your data with jobs. Jobs can:
 - Flag all differences per record to *only identify* fields whose values are different from Data.com values
 - Flag differences and auto-fill blank fields to identify fields whose values are different *and fill blank fields* with values from Data.com.
 - Customize settings field by field.
- If you select the *Customize* option for any object, you can:
 - Flag fields on your Salesforce records that have different values from matched Data.com records.
 - Flag different field values on your Salesforce records and automatically fill blank fields with Data.com values.
 - Overwrite different field values on your Salesforce records with Data.com values. If you overwrite Salesforce record values, you should set history tracking for those fields.
- You can set flag-only and flag and auto-fill preferences for entire records or by field. You set overwrite preferences by field.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:
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- If you use Data.com Premium Clean, you can also clean D&B Company records that are linked to accounts and leads. D&B Company clean jobs automatically fill or overwrite field values on D&B company records, but do not change data on linked account or lead records.
- Your preferences take effect when the next scheduled clean job runs, and users will see the flags, as appropriate, when they clean records manually.
- If, after changing matching services, you want to do a one-time rematch using the new matching service, you can manually remove the `D-U-N-S Number` on account records to force the matching service to rematch the records. Be aware that this might affect your match rates.
- We don't recommend mapping a custom field or skipping mapping for either matching service.
- Converted leads are excluded from Lead clean jobs.
- If you select a field to be overwritten by Clean jobs, and a user marks that field as *wrong* on a record, jobs will not overwrite that field on that record.
- Person accounts are excluded from Account and Contact clean jobs.

Guidelines for Selecting an Account Matching Service

If you use Data.com Prospector or Data.com Clean, you can select the matching service your organization uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

The available matching services are:

Data.com matching

Data.com's own matching technology, which matches on the `Account Name`, `Billing Address`, `Website`, and `Phone` fields.

The Data.com matching service is always used when cleaning accounts that have a valid `D-U-N-S Number`, even if the DUNSRight matching service is selected.

D&B DUNSRight™ matching

D&B's proprietary data-quality technology, which uses a rigorous process to normalize data and match D&B company records to your account records. The process also employs the D&B Confidence Code, which ranks Data.com match candidates based on how similar they are to your record, from 1 (not similar) to 10 (identical or highly similar). D&B also provides letter-coded match grades for individual fields. For details about how D&B DUNSRight matching works, see [D&B Entity Matching](#).

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Available with a Data.com Clean license in:
Professional, **Enterprise**, **Performance**, and **Unlimited Editions**

| Attribute | Data.com matching | DUNSRight™ matching |
|--|-------------------|---------------------|
| Default matching service | ✓ | |
| Includes D&B's Confidence Code | | ✓ |
| Supports broad international matching ¹ | | ✓ |
| Supports non-English speaking countries | | ✓ |
| Requires default mapping for <code>D-U-N-S Number</code> | | ✓ |

¹D&B DUNSRight matching provides matching records for over 200 more countries than Data.com matching. DUNSRight matching *does not* support these countries and regions: Admiralty Islands; Åland Islands; Antarctica; Ascension Island; Bonaire; Bouvet Island; British

Indian Ocean Territory; Caroline Islands; Cocos (Keeling) Islands; Cuba; Curaçao; French Southern Territories; Guernsey; Heard Island and McDonald Islands; Isle of Man; Jersey; Korea, Democratic People's Republic of; Mayotte; Micronesia, Federated States of; Midway Islands; Mongolia; Niue; Palau; Palestinian Territory Occupied; Pitcairn; Saint Barthélemy; Saint Eustatius and Saba; Saint Martin (French part); Sint Maarten (Dutch part); South Georgia; South Sandwich Islands; Svalbard and Jan Mayen; Timor Leste; Turkish Cyprus; United States Minor Outlying Islands; Wake Island; Wallis and Futuna; Western Sahara.

Customize Data.com-to-Salesforce Field Mappings

You can create custom mappings to put Data.com values in particular Salesforce fields.





[Walk Through It: Customize Data.com-to-Salesforce Field Mapping](#)

Custom field mappings apply when:

- Data.com records are added to Salesforce
- Salesforce records are matched with Data.com records and cleaned either manually or with automated jobs

Before you change field mappings, it's important to [understand how mapping works, what preparations to make, and what kind of results you should expect](#).

 **Note:** Not all Data.com fields are available for all Salesforce fields. To be mappable, the new Salesforce field must be the same data type as the default field. For example, the `Description` field can be mapped to a long text area field with 1,000 characters or more.

1. From Setup, enter the name of the object you want to map the Data.com fields to, for example, **Accounts**, then select **Fields**.
2. Click **New** next to Custom Fields & Relationships for the object you want to map the fields to, for example, **Accounts Custom Fields & Relationships**.
3.  **Tip:** It's best to create all the fields in the object that you are adding fields to before mapping them from **Data.com Administration**.
Follow the steps in the New Custom Field wizard. When you're finished, be sure to click **Save**.
4. From Setup, enter **Data.com Administration**, then click **Field Mapping**.
5. Find the field you want to map, and select the custom mapping from the list box next to the field.
6. Click **Save**.

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Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:

- "Customize Application"

To enable Data.com users:

- "Manage Internal Users"

To install AppExchange packages:

- "Download AppExchange Packages"

Considerations for Custom Mapping of Data.com and Salesforce Fields

Custom mappings put Data.com values in the Salesforce account, contact, and lead fields where you want those values. Before mapping fields, make sure you understand how mapping works, what preparations to make, and what kind of results you should expect.

Not all Data.com fields are available for all Salesforce fields. To be mappable, the new Salesforce field must be the same data type as the default field. For example, the `Description` field can be mapped to a long text area field with 1,000 characters or more.

Custom field mappings apply when:

- Data.com records are added to Salesforce
- Salesforce records are matched with Data.com records and cleaned either manually or with automated jobs

Before you map fields, make sure you understand these potential outcomes and the related actions you should take.

- Mapping fields or updating mappings forces a full sync with Data.com: all records of enabled CRM objects (accounts, contacts, and leads) are updated, even if no records have changed.
- Data.com field mappings may conflict with any Salesforce field customizations (such as approvals, workflow rules, or Apex triggers) you use for accounts, contacts, leads, or D&B Company records. Review and edit your customizations as needed so they will work with the values supplied by your mappings.
- You can skip mapping individual Data.com fields, but values for skipped fields won't be added, exported, or considered when we calculate a record's clean status.
- Skipping or changing mappings for fields used to match Salesforce and Data.com records may change some records' clean status to `Not Found`.
- For account records, skipping or changing the mapping for the `D-U-N-S Number` field will cause all account jobs to use the Data.com matching service, rather than the `D-U-N-S Number` field, to rematch account records.
- If you map fields and also set Clean job preferences to flag, auto-fill, or overwrite Salesforce fields, you'll see any *custom-mapped* fields when you set those preferences. Default mappings (such as from the Data.com `Phone` field to the Salesforce `Phone` field) do not appear.
- If you export Data.com search results, the column headers in your Excel file will show the mapped field names. For example, if you map the Data.com `Phone` field to the Contact object's `Mobile` field, you'll see a header called "Mobile" for contacts, not "Phone".
- If you map Data.com fields that do not have values, some Salesforce records might revert to `Not Found` clean status.
- If you map a Data.com field to a custom Salesforce field, the custom field's label will appear on the Clean comparison page.
- If you want to track changes to field mappings, you'll find them in the Setup Audit Trail. From Setup, enter *View Setup Audit Trail* in the `Quick Find` box, then select **View Setup Audit Trail**.

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Available with a Data.com Prospector license in:
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Available with a Data.com Clean license in:
Professional, **Enterprise**, **Performance**, and **Unlimited Editions**

Set Up Data.com Clean Jobs

If your organization has a Data.com Clean license, you can set up automated jobs to clean your records.

[Considerations for Scheduling Data.com Clean Jobs](#)

Here's some things to understand before you start keeping your records clean automatically with jobs.

[Schedule Data.com Clean Jobs](#)

To keep your records' clean status up to date, schedule automated jobs to compare your records with Data.com. Jobs are only available to organizations with a Data.com Clean license.

[Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean](#)

If you use the D&B DUNSRight™ Matching service, you can schedule a full sync of your account records with Data.com's the next time your account clean jobs run. The full sync compares all of your account records with records from Data.com, and may find matches for records that were not matched during previous jobs.

[Prevent Data.com Clean Jobs from Updating Records](#)

You can prevent individual account, contact, and lead records from being updated with Data.com data when automated jobs run.

EDITIONS


Available in: Salesforce Classic

Available with a Data.com Clean license in:

Professional, Enterprise, Performance, and Unlimited Editions

Considerations for Scheduling Data.com Clean Jobs

Here's some things to understand before you start keeping your records clean automatically with jobs.

 **Important:** If you have set up triggers to run when account, contact, or lead records are updated, and your triggers perform SOQL queries, the queries may interfere with jobs for those objects. Your Apex triggers (combined) can't exceed 200 SOQL queries per batch. If they do, your job for that object will fail. In addition, if your triggers are @future methods, they are subject to a limit of 10 @future calls per batch.

- Jobs are only available to organizations with a Data.com Clean license.
- You must have jobs scheduled for at least one day in a week them to run.
- Jobs only process records of enabled objects
- In a full sync job, all records are cleaned, regardless of their clean status. In an *incremental sync* job, only records with a `Not Compared` clean status are cleaned.
- When a full sync job runs, it runs instead of an incremental sync job.
- If a full sync job is scheduled to run, it runs even if no records have changed.
- The duration between jobs is counted from the time the previous job finishes to the start of the next job.
- Jobs are queued according to your scheduling settings, and they run independently for accounts, contacts, and leads. If you use Data.com Social Key, jobs also run a process that finds and associates social handles for your contacts and leads.
- How long it takes for a job to complete depends on several things, including which matching service you've selected (for account jobs), how many records your job cleans, and overall Salesforce performance. Using Data.com matching, it takes about a day for jobs to clean 3,000,000 records. Using DUNSRight™ matching, it takes about a day for jobs to clean 750,000 records.
- Use your sandbox environment to try out the automated clean jobs before running them in your production org with live data. After Data.com Clean is provisioned in your production org, refresh your sandbox so it has the same permissions and data. Then follow

EDITIONS

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Professional, Enterprise, Performance, and Unlimited Editions


the steps in [Implementing Data.com Clean](#) to set up Clean in your sandbox. If everything runs smoothly in your sandbox environment, follow the same implementation steps in your production org.

- Jobs scheduled in a sandbox environment expire after 30 days.
- For best results, we recommend including a valid value for the `Country` and `State/Province` fields.
- Before scheduling jobs, we recommend you schedule regular backups of your account, contact, and lead data. It's always a good practice, and if your Salesforce records are ever matched inappropriately, you can revert to previous versions.
- Set up field history tracking for accounts, contacts, and leads. Field history tracking helps you identify changes to field values, and tracks who made changes and when. If you use field history tracking, make sure you add the Account History, Contact History, and Lead History related lists to those objects' respective page layouts.
- Jobs do not process person account records.

Schedule Data.com Clean Jobs

To keep your records' clean status up to date, schedule automated jobs to compare your records with Data.com. Jobs are only available to organizations with a Data.com Clean license.

1. Review the [considerations](#) before scheduling jobs.
2. From Setup, enter `Jobs` in the `Quick Find` box, then select **Jobs** under the Clean section.
3. Select the days of the week when you want jobs to run.
4. Select your preferred start time.

 **Note:** Jobs run independently, so their exact start times may vary.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:

- "Customize Application"

Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean

If you use the D&B DUNSRight™ Matching service, you can schedule a full sync of your account records with Data.com's the next time your account clean jobs run. The full sync compares all of your account records with records from Data.com, and may find matches for records that were not matched during previous jobs.

After the requested full sync has run, the option is turned off. You can turn it back on and schedule another full sync every 30 days. We'll let you know when your full sync is in progress, or how long it's been since your last full sync was run.

1. From Setup, enter *Jobs* in the *Quick Find* box, then select **Jobs** under Data.com.
2. Click the button next to **Full Sync With Next Job** to turn full sync **On**.
After the requested full sync runs, the button changes to **Off**.

EDITIONS

Available in: Salesforce
Classic

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Clean license in:
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Performance, and
Unlimited** Editions

USER PERMISSIONS

To schedule Data.com Clean
jobs and view job history:

- "Customize Application"

Prevent Data.com Clean Jobs from Updating Records

You can prevent individual account, contact, and lead records from being updated with Data.com data when automated jobs run.

[Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records](#)

Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

[Use Skipped Clean Status to Prevent Data.com Clean Jobs from Updating Records](#)

Use the *Skipped records* Data.com Clean job bypass preference, which makes sure records with a *Clean Status* of *Skipped* are not updated by jobs. This is the recommended method of preventing jobs from updating records.

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Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records

Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

Important: If you create a validation rule to prevent auto-updates, keep this best practice in mind.

The validation rule generates entries and related messages in Data.com Clean job logs, but your jobs may generate other entries and errors, as well, so make sure that you examine your job logs carefully.

1. Create a custom field for each object in which there are records you want to prevent Clean jobs from automatically updating.
Here's an example of how to define the custom field.

| Field | Value or Selection |
|---------------|--|
| Field Type | Checkbox |
| Field Label | <i>Data.com Does Not Auto-Update</i> |
| Default Value | Unchecked |
| Description | <i>Prevents automated Clean jobs from updating fields with the matched Data.com record's values.</i> |
| Help Text | <i>Exclude this record from automated field updates from Data.com Clean jobs</i> |

2. To block auto-updates on records that have *Data.com Does Not Auto-Update* (or whatever you've named the custom field) selected, create a validation rule.

Here's an example of how to define the validation rule for each object.

| Field | Value or Selection |
|--|--|
| Rule Name | <i>Block_autoupdate_from_Data_com</i> |
| Description | <i>Record-level prevention of automated Clean jobs from automatically updating field values.</i> |
| Error Condition Formula (for Accounts) | <code>(YOUR_CUSTOM_FIELD_API_NAME) && (\$User.Alias = "autocln") && (ISCHANGED(DunsNumber) ISCHANGED(NumberOfEmployees) ISCHANGED(AnnualRevenue) ISCHANGED(TickerSymbol) ISCHANGED(Website) ISCHANGED(</code> |

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To create or change custom fields:

- "Customize Application"

To define or change field validation rules:

- "Customize Application"

To view field validation rules:

- "View Setup Configuration"

| Field | Value or Selection |
|--|---|
| | <pre> Industry) ISCHANGED(Ownership) ISCHANGED(BillingCity) ISCHANGED(BillingCountry) ISCHANGED(BillingState) ISCHANGED(BillingStreet) ISCHANGED(BillingPostalCode) ISCHANGED(Phone) ISCHANGED(Fax) ISCHANGED(Site) ISCHANGED(Tradestyle) ISCHANGED(YearStarted) ISCHANGED(Sic) ISCHANGED(SicDesc) ISCHANGED(NaicsCode) ISCHANGED(NaicsDesc) ISCHANGED(Description)) </pre> |
| Error Condition Formula (for Contacts) | <pre> (YOUR CUSTOM FIELD API NAME) && (\$User.Alias = "autocln") && (ISCHANGED(Title) ISCHANGED(Email) ISCHANGED(Phone) ISCHANGED(MailingStreet) ISCHANGED(MailingCity) ISCHANGED(MailingState) ISCHANGED(MailingCountry) ISCHANGED(MailingPostalCode))) </pre> |
| Error Condition Formula (for Leads) | <pre> (YOUR CUSTOM FIELD API NAME) && (\$User.Alias = "autocln") && (ISCHANGED(Company) ISCHANGED(Title) ISCHANGED(Email) ISCHANGED(Phone) ISCHANGED(Street) ISCHANGED(City) ISCHANGED(State) ISCHANGED(PostalCode) ISCHANGED(Country) ISCHANGED(NumberOfEmployees) ISCHANGED(AnnualRevenue) ISCHANGED(Industry) ISCHANGED(CompanyDunsNumber)) </pre> |
| Error Message | <p><i>This record has been excluded from automated field updates from Data.com Clean jobs.</i></p> |

- Open each record that you don't want to be auto-updated, and select **Do Not Auto-Update** (or whatever you've named the custom field).

When automated jobs run, for each record that is not updated, you see a message in the job log: "This record has been excluded from automated field updates from Data.com Clean jobs."



Tip: You can use the Data Loader or a custom trigger to select this checkbox for multiple records.

Use **skipped** Clean Status to Prevent Data.com Clean Jobs from Updating Records

Use the `Skipped records` Data.com Clean job bypass preference, which makes sure records with a `Clean Status` of `Skipped` are not updated by jobs. This is the recommended method of preventing jobs from updating records.

1. From Setup, enter *Preferences* in the *Quick Find* box, then select **Preferences** under the *Clean* section.
2. Select `Skipped records` from the Job Bypass Preferences for Accounts, Contacts, and Leads jobs.
3. Save your preferences.
4. Set the `Clean Status` to `Skipped` for records that you don't want jobs to update.



Tip: You can use the Salesforce API, the Data Loader, or an Apex trigger to set the `Clean Status` for multiple records.

5. To make sure the `Clean Status` for `Skipped` records does not change when records are updated, create an Apex trigger. When a record is updated, the trigger sets its `Clean Status` back to `Skipped`. Then, jobs won't update the record.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and
Unlimited Editions

USER PERMISSIONS

To set job preferences:

- "Customize Application"

To create Apex classes and triggers:

- "Author Apex"

Review Triggers and Workflow Rules for Clean Compatibility

If your organization uses triggers or workflow rules on objects enabled for Clean (Account, Contact, Lead, or D&B Company), review the triggers and workflows and consider making adjustments or bypassing them so users don't encounter unexpected results when records are cleaned.

1. If you use triggers on any object that's cleaned manually or by Clean jobs, from the object's management settings, go to Triggers.
2. Open and examine each trigger to make sure that your system or users won't encounter any unexpected results when records are cleaned. If you find that one or two triggers might cause unexpected results, you may be able to adjust those triggers. If you use Clean jobs and find multiple triggers that may cause unexpected results, consider bypassing triggers when jobs are run. You can select that option on the Clean Preferences page: from Setup, enter *Preferences* in the *Quick Find* box, then select **Preferences** under Clean.
3. If you use workflows, from Setup, enter *Workflow Rules* in the *Quick Find* box, then select **Workflow Rules**.
4. Open and examine each workflow rule to make sure that your system or users won't encounter any unexpected results when records are cleaned. If you find that one or two workflow rules might cause unexpected results, you may be able to adjust those rules. If you use Clean jobs and find multiple rules that may cause unexpected results, consider bypassing workflow rules when jobs are run. You can select that option on the Clean Preferences page. You can select that option on the Clean Preferences page: from Setup, enter *Preferences* in the *Quick Find* box, then select **Preferences** under Clean.
5. For all triggers and workflow rules you're using, check results on affected object records after the next Clean job runs for that object.



Example: your organization has a trigger that creates and assigns a task every time a lead record is updated by any means. If you clean leads using Clean jobs, your users could get more tasks than expected, so you might want to adjust the trigger so that tasks are only created and assigned when records are *manually edited or cleaned by Salesforce users*. You can determine who last updated a record by checking the *Last Modified By* field. Records last updated by a Clean job show *Data.com Clean* in that field, and records updated by users show the first and last name of the user.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:
Contact Manager (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com Clean:

- "Customize Application"

To implement Data.com Prospector:

- "Customize Application"

To define triggers:

- "Author Apex"

To define workflow rules:

- "Customize Application"

Configure List Views for Data.com Clean

Before your Data.com Clean users can clean records from a list, you'll need to add the `Clean Status` field to your organization's list views.

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.



Note: If your organization uses DUNSRight matching to clean account records, list view cleaning is not available for account records.

2. Select a view from the drop-down and click **Edit**.
3. Scroll down the Available Fields list to find the `Clean Status` field, then add it to the list of Selected Fields.
The **Clean** button will automatically be added to the list view.
4. If you use Data.com Social Key, you can also add the fields for the social networks you've enabled (LinkedIn®, Twitter, or Facebook) to your contact list views.
The social network fields aren't available on the lead list views.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To create custom list views:

- "Read" on the type of record included in the list

To create, edit, or delete public list views:

- "Manage Public List Views"

Install and Implement Data.com Reports AppExchange Packages

Get access to additional reports that help your users analyze account, contact, and lead data.

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Professional, Enterprise, Performance, and Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance, and Unlimited** Editions

USER PERMISSIONS

To install packages:

- "Download AppExchange Packages"

There are multiple Data.com report packages available on the AppExchange. The reports packages you install depend on what data you're interested in and which Data.com products you use. Here's a list of the different packages, as well as instructions on how to install them.

| Available AppExchange Reports Package | Contents | Considerations |
|---|--|--|
| Data.com Prospector Reports | Dashboard and associated reports used primarily by sales management to see the value Data.com provides in terms of converted leads, sales forecast, and revenue. | To install this package, your organization must use Data.com Prospector. |

| Available AppExchange Reports Package | Contents | Considerations |
|---|---|--|
| Data.com Clean Reports | Dashboard and associated reports used primarily by sales operations and those responsible for keeping Salesforce data clean. | To install this package, your organization must use Data.com Clean. |
| Running Data.com Data Assessments | Dashboard and associated reports utilize the rich set of D&B Company data to give you and your users unparalleled insight into your accounts, to help improve sales planning and business strategy. | To install this package, your organization must use Data.com Premium Prospector or Data.com Premium Clean. |
| | Tells you how Data.com can enrich your data. | Your organization can request one assessment every 30 days. |


1. Go to the Data.com reports package you want to download.
2. Click **Get it Now**.
3. Install the Data.com reports packages you want to use.
4. If your organization uses Professional Edition, add these fields to your page layouts. If you don't, these fields won't be included on your reports.

| Page Layout | Fields |
|-------------|-----------------------|
| Account | Sourced from Data.com |
| Contact | Sourced from Data.com |
| Lead | Sourced from Data.com |
| Opportunity | Sourced from Data.com |

5. Let your users know which Data.com reports and dashboards are available.

Find Out How Clean Your Accounts Are

If you use Data.com Clean, you can review the `Clean Status` on all your accounts by running a simple `Accounts by Clean Status` report.

 **Important:** If your records appear to be matched incorrectly with Data.com records, think carefully before selecting `Flag differences` and `auto-fill blank fields` as a clean preference. If mismatches occur with a large number of your records, contact Salesforce Support.

1. Click the Dashboards tab, then select Data.com Analytics. Run the `Accounts by Clean Status` report.
If your clean jobs have run successfully, you'll find your accounts grouped by their clean status values.
2. On the report, find any Salesforce records with a clean status of `Different`. Open several records and click **Clean** to look at the differences.
3. Repeat the comparison process with records that have a clean status of `Not Found`.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:

Contact Manager (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:

Professional, Enterprise, Performance, and **Unlimited** Editions

USER PERMISSIONS


To implement Data.com Clean:

- "Customize Application"

Determine How Well Data.com Clean Is Working


Data.com Clean metrics and analytics tell you how your organization's accounts, contacts, and leads have been matched and updated with Data.com data, so it's important to check your match and update rates on a regular basis.

1. From Setup, enter *Metrics* in the *Quick Find* box, then select **Metrics & Analytics** under the Clean section.
2. To find out when the last calculation occurred, check the *Last Calculated* field above the table.

 **Note:** The data in the tables is calculated daily, but we store the time and calculate the date based on GMT, so depending on time adjustments, the date shown may be different from the date when the calculations occurred. Also, because this data is calculated once per day, it may differ slightly from the data in Data.com dashboards and reports.

3. View match and update information in the Match and Update Rates section.

The data represents records that have been matched and updated since your organization implemented Data.com. Here are the definitions for the table columns.

| Column | Definition |
|-----------|---|
| Records | <p>The object enabled for Data.com Clean: accounts, contacts, or leads.</p> <p> Note: If your Salesforce organization uses person accounts, the figures in the <i>Total</i> and <i>Processed</i> columns may differ. Person accounts are included in the account total, but are not processed by Data.com Clean jobs.</p> |
| Total | The number of object records (accounts, contacts, or leads) that your organization has in Salesforce. |
| Processed | The number of each type of Salesforce record (accounts, contacts, or leads) processed by Data.com Clean. |
| Matched | The number of each type of processed Salesforce record (accounts, contacts, or leads) that match with Data.com records. |
| Updated | The number of each type of processed Salesforce record (accounts, contacts, or leads) that have been updated. |

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:

Contact Manager (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:

Professional, Enterprise, Performance, and **Unlimited** Editions

USER PERMISSIONS

To view Data.com Clean match rates:

- "Customize Application"

| Column | Definition |
|------------------------------|---|
| Records | The object enabled for Data.com Clean: accounts, contacts, or leads. |
| Match Rate (% of Processed) | The percentage of each type of processed Salesforce record (accounts, contacts, or leads) that match with Data.com records. |
| Update Rate (% of Processed) | The percentage of each type of processed Salesforce record that have been updated. |

Report on Salesforce Records with a Specific Data.com Clean Status

Create a custom report to show Salesforce account, contact, or lead records that have a specific clean status (such as *Different*).

Choose fields to display from the Account, Contact, or Lead objects. Using data from companion Clean Info objects, show Salesforce and Data.com record values side by side. Report results can help you identify consistent reasons records might have a specific clean status. Use what you learn to manage how records are cleaned in your organization.

For example, you can create a report to show all records whose clean status is *Different* side by side with their matched Data.com records. If you identify patterns in your data that cause this status, you might create triggers or API customizations to adjust your data and have more records with *In Sync* status.

Let's create a Contacts by Clean Status report.

- Before you can create the Contacts by Clean Status report, make sure your organization has a custom report type that links the Contact object to the Contact Clean Info object and makes fields from both objects available to report on.
- Create your report: click the Reports tab, then click **New Report**.
- Select *Contacts by Clean Status* as the report type.
- Click **Create**.
- From the parent object, Contacts, select the fields you want to report on. For example, you might choose:
 - Contact ID
 - Clean Status
 - Full Name
 - Mailing Address
 - Phone
 - Email
- From the related object, Contact Clean Info, select fields that correspond to the Contact object fields. For contact clean info, you might choose:
 - Contact Clean Info ID
 - First Name

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:
Contact Manager (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:
Professional, Enterprise, Performance, and **Unlimited** Editions

USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"
- AND
- "Report Builder"

- Last Name
 - Address
 - Phone
 - Email
 - Last Match Date
7. Add a field filter to the report: For the field, select *Clean Status*. For the operator, select *equals*, and for the value, select *Different*.
 8. Define the remaining fields.
 9. Save the report and run it.
 10. Examine the report to see if you can identify patterns in your data that cause certain records to have a clean status of *Different*.