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# Implement Data.com Clean

Salesforce, Spring '17





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# IMPLEMENT DATA.COM CLEAN

## Data.com Clean

Data.com Clean keeps your org up to date using data from Dun & Bradstreet and Data.com. Using Clean jobs, you can clean your records on a regular basis. You can also clean a single record or a list of records.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

Data.com Clean compares your account, contact, and lead records with records from Data.com and creates a link between your records and matching Data.com records. Clean also provides [clean status information for accounts, contacts, and leads](#).

In Salesforce Classic, your users can do the following.

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

As a Salesforce admin, you can also do the following.

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

There are two versions of Data.com Clean: Corporate Clean and Premium Clean. Premium Clean includes more Dun & Bradstreet fields for adding to or manually cleaning account, contact, or lead records. The Salesforce Help refers to Data.com Premium Clean unless otherwise noted. For more information on Premium Clean, contact your Salesforce account manager.

Data.com Clean Version	Dun & Bradstreet (D&B) Fields
Data.com Corporate Clean	Basic set of Dun & Bradstreet fields.
Data.com Premium Clean	Basic set of Dun & Bradstreet fields, plus the <code>D&amp;B Company</code> field. This field links to an associated <code>D&amp;B Company</code> record with over 70 additional Dun & Bradstreet fields that are accessible on the <code>D&amp;B Companies</code> tab.

Data.com Clean doesn't support person accounts.

 **Note:** Data.com Clean must be purchased 1:1 for Sales Cloud and Service Cloud seats.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Confirm That Data.com Clean Is Enabled


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

 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

After you enable Clean, you can set preferences and control Clean jobs. The Preferences and Jobs links appear in Setup in the Clean section.

 **Note:** Enabling Clean does not clean your records immediately. 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, make the features available to your users by adding buttons and fields to your Account, Contact, and Lead page layouts. If you use Data.com Prospector or Data.com Clean, you can add a button to your D&B Companies page layouts so users can refresh linked D&B Company records.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

 **Note:** If you use Professional Edition, add *all* available Data.com fields and buttons to your page layout for each object (accounts, contacts, leads, and D&B Companies). Custom page layouts aren't available in Professional Edition.

1. From the object management settings for accounts, go to Page Layouts.
2. From the list of page layouts, edit each layout to be used by your Data.com Prospector or Data.com Clean users.
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 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, 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 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 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 don't 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.
17. If you use Data.com Prospector, from the object management settings for D&B Companies, go to Page Layouts.

## 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 and Configuration"

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

## Set Field-Level Security for Data.com Clean

If you use Data.com Prospector or Data.com Clean, you can view various D&B fields on account records. Those fields are included when users manually clean records. To make sure that your users can read and edit the fields and their values and that the fields appear on the Account Card, set field-level security.


 **Note:** This information applies to Data.com Clean and not to Data Integration.

Set field-level security for these fields.

- Account Site
- D&B Company (Data.com 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). However, in this case, field-level security is needed for only 10 fields. We therefore 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 read and edit the fields, select **Visible**. For example, if you want users in the Standard User profile to use Data.com Clean, select **Visible** for that profile.

 **Note:** These fields are maintained by Data.com Clean. For that reason, making them editable by setting the field-level security to **Visible** can 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

Data.com Clean preferences control the records you want to update and how you want to update them. The preferences include selecting the matching service used to update accounts.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

If you don't have a Data.com Clean license for your Salesforce org, you can't select preferences for jobs.

1. Review the [guidelines](#) for selecting a matching service used to update accounts.
2. From Setup, enter *Preferences* in the **Quick Find** box, then select **Preferences** under the Clean section.
3. Select the matching service for updating 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 their similarity to your record, from 1 (not similar) to 10 (identical or highly similar). Data.com doesn't automatically match its records if the similarity score is less than the code you select here. If multiple records match with a similarity score at or above your selection, Data.com returns the best match. When you manually update some records, you can select a match between the preset confidence code (5) and the code you select here.
4. Review the [guidelines](#) for selecting job preferences.
5. Make sure that the **Enable Clean jobs** option is selected for each object that you want to update. If you have a Data.com Clean license and you want to update 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. Click **Save** to save your preferences.

## Guidelines for Selecting Data.com Clean Job Preferences

Review the preferences you can set before you define your Data.com Clean jobs.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

- Data.com Clean offers three options for cleaning your data with jobs. Jobs can do the following:
  - 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 do the following:
  - 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Geocode clean rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

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

### USER PERMISSIONS

To implement Data.com:

- "Customize Application"

### EDITIONS

Available in: Salesforce Classic

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

- Overwrite different field values on your Salesforce records with Data.com values. If you overwrite Salesforce record values, 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.
- If you use Data.com 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 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 can 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 don't 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 that your org uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

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](#).

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Attribute	Data.com matching	DUNSRight™ matching
Default matching service		
Includes D&B's Confidence Code		
Supports broad international matching <sup>1</sup>		
Supports non-English speaking countries		

Attribute	Data.com matching	DUNSRight™ matching
Requires default mapping for D-U-N-S Number		✓

<sup>1</sup>D&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](#)

Data.com Clean custom field mappings apply when:

- You add records to Salesforce using Data.com Prospector.
- You clean a single record, clean records in a list, or clean records 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 your 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**.

### 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:

- "Customize Application"

To enable Data.com users:

- "Manage Internal Users"

To install AppExchange packages:

- "Download AppExchange Packages"

## Considerations for Custom Mapping of Data.com Clean and Salesforce Fields

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

 **Note:** This information applies to Data.com Clean and not to Data Integration.

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.

Data.com Clean custom field mappings apply when:

- You add records to Salesforce using Data.com Prospector.
- You clean a single record, clean records in a list, or clean records 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**.


### 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

## Set Up Data.com Clean Jobs

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

 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

Review considerations for scheduling your records to be updated automatically using Data.com Clean 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 and Lightning Experience

Available with a Data.com Clean license

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

## Considerations for Scheduling Data.com Clean Jobs

Review considerations for scheduling your records to be updated automatically using Data.com Clean 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.
- 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 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

Available in: Salesforce Classic and Lightning Experience

Available with a Data.com Clean license in:

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


the steps in [Implementing Data.com Clean](#) to set up Data.com 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, include a valid value for the `Country` and `State/Province` fields.
- Before scheduling jobs, 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.
- The Company Info for Accounts data integration rule conflicts with Clean jobs. To avoid conflicts, see [#data\\_dot\\_com\\_clean\\_company\\_info\\_rules\\_setup\\_considerations\\_\\_data\\_dot\\_com\\_clean\\_company\\_info\\_rules\\_setup\\_considerations](#).

## 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

Available with a Data.com Clean license in:

**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**.

## 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.

### EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:

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

### USER PERMISSIONS

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

- "Customize Application"

### EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in:

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

## 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)	<b>(YOUR_CUSTOM_FIELD_API_NAME ) &amp;&amp; (\$User.Alias = "autocln") &amp;&amp; ( ISCHANGED( DunsNumber )    ISCHANGED( NumberOfEmployees )    ISCHANGED( AnnualRevenue )    ISCHANGED( TickerSymbol )    ISCHANGED( Website )    ISCHANGED(</b>

### 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>(<b>YOUR CUSTOM FIELD API NAME</b>) &amp;&amp; (\$User.Alias = "autocl") &amp;&amp; (ISCHANGED( Title )    ISCHANGED( Email )    ISCHANGED( Phone )    ISCHANGED( MailingStreet )    ISCHANGED( MailingCity )    ISCHANGED( MailingState )    ISCHANGED( MailingCountry )    ISCHANGED( MailingPostalCode ) ) )</pre>
Error Condition Formula (for Leads)	<pre>(<b>YOUR CUSTOM FIELD API NAME</b>) &amp;&amp; (\$User.Alias = "autocl") &amp;&amp; (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 Data.com Compatibility

### USER PERMISSIONS

To implement Data.com Clean:	"Customize Application"
To implement Data.com Prospector:	"Customize Application"
To implement Data Integration:	"Customize Application"
To define triggers:	"Author Apex"
To define workflow rules:	"Customize Application"

If your orgs uses triggers or workflow rules on objects that you update with Data.com, review the triggers and workflows and consider adjusting them or bypassing them so users don't encounter unexpected results when records are updated.

 **Note:** This information applies to Data Integration *and* to Data.com Clean.

1. If you use triggers on any object that's updated by Data.com, from the object's management settings, go to Triggers.
2. Open and examine each trigger to make sure that your system or users don't encounter unexpected results when records are updated.

If you find that one or two triggers cause unexpected results, try adjusting those triggers.

- If you use Clean jobs and find multiple triggers that can cause unexpected results, bypass the triggers when jobs are run. Select that option on the Clean Preferences page. From Setup, enter *Preferences* in the **Quick Find** box, then select **Preferences** under **Clean**.


### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- If you use Data Integration and find multiple triggers that can cause unexpected results, bypass the triggers when data integration rules run. From Setup, enter *Data Integration Rules* in the **Quick Find** box. Select each rule, click **Edit Rule Settings**, select **Bypass triggers**, and then click **Save**.


 **Note:** In data integration rules for custom objects, triggers aren't bypassed even if **Bypass triggers** is selected.

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 don't encounter unexpected results when records are cleaned.

If you find that one or two workflow rules cause unexpected results, try adjusting those rules.


- If you use Clean jobs and find multiple rules that can cause unexpected results, bypass the workflow rules 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.
- If you use Data Integration and find multiple workflow rules that can cause unexpected results, bypass the workflow rules when data integration rules run. From Setup, enter *Data Integration Rules* in the **Quick Find** box. Select each rule, click **Edit Rule Settings**, select **Bypass workflow rules**, and click **Save**.


5. For all triggers and workflow rules you're using, check results on affected object records.

 **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 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.

## Configure List Views for Data.com Clean

Before your Data.com Clean users can clean records from a list, add the **Clean Status** field to your org's list views.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.
  -  **Note:** If your org 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 the Available Fields list to find the **Clean Status** field, then add it to the list of Selected Fields.
 

The **Clean** button is automatically added to the list view.

### 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 to help your users analyze account, contact, and lead data.

Available in: Salesforce ClassicSalesforce Classic and Lightning Experience


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"

 **Note:** These packages are designed for Data.com Clean and Data.com Prospector. If you're using Data Integration, write your own custom reports.

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

Available AppExchange Reports Package	Contents	Considerations
<a href="#">Data.com Prospector Reports</a>	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 company must use Data.com Prospector.
<a href="#">Data.com Clean Reports</a>	Dashboard and associated reports used primarily by sales operations and people responsible for keeping Salesforce data updated.	To install this package, your organization must use Data.com Clean.
<a href="#">Running Data.com Data Assessments</a>	Dashboard and associated reports use the rich set of D&B data to give you and your users unparalleled insight into your accounts. They help improve sales planning and business strategy.	To install this package, your organization must use Data.com Prospector or Data.com Clean.
	Tells you how Data.com can enrich your data.	You can request one assessment for your org 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 company uses Professional Edition, add these fields to your page layouts. If you don't, these fields aren't included on your reports.

### Page Layout

Account

### Fields




Sourced from Data.com

Page Layout	Fields
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 an `Accounts by Clean Status` report.

-  **Note:** This information applies to Data.com Clean and not to Data Integration.
  -  **Note:** This information applies to Data.com Clean and not to Data Integration.
  -  **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 many 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, your accounts are 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 org'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.

 **Note:** This information applies to Data.com Clean and not to Data Integration.

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 org implemented Data.com. Here are the definitions for the table columns.

Column	Definition
Records	The object enabled for Data.com Clean: accounts, contacts, or leads.   <b>Note:</b> If your Salesforce org 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.
Total	The number of object records (accounts, contacts, or leads) that your org 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 and Lightning Experience

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 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`).

 **Note:** This information applies to Data.com Clean and not to Data Integration.

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 that records 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 can 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.

1. Make sure your organization has a custom report type that links the Contact object to the Contact Clean Info object. Also check that fields from both objects are available to report on.
2. Create your report: click the Reports tab, then click **New Report**.
3. Select **Contacts by Clean Status** as the report type.
4. Click **Create**.
5. From the parent object, Contacts, select the fields you want to report on. For example, choose:
  - Contact ID
  - Clean Status
  - Full Name
  - Mailing Address
  - Phone
  - Email
6. From the related object, Contact Clean Info, select fields that correspond to the Contact object fields. For contact clean info, choose:
  - Contact Clean Info ID
  - First Name

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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*.