salesforce

Guide

Integrating Your Salesforce CRM with DataMatch Enterprise

The Importance of Cleaning and Matching Your Salesforce Data

With an average return of $8.71 per dollar invested in CRM software, a CRM is a must-have for any business to help understand their customers and provide a better experience. In fact, 91% of organizations with 10+ employees use a CRM.

And yet, Gartner and Forrester both report that nearly 50% of all CRM initiatives fail.

The leading cause of failure? Bad data.

Here are the top 5 reasons your the ROI on your Salesforce CRM is low:

Note: If you want to jump directly to the step-by-step guide on how to integrate Salesforce with DataMatch Enterprise, please skip to page 5.

1. Contact data decay costs millions each year

What can you do? Verify and update your Salesforce contact data:

- Use data quality software that can automatically verify and update data like addresses using up-to-date libraries.

- In large organizations, more than 65 applications are used on average. Any of these applications could be storing more recent customer data in their databases. If your data quality tool has record linkage capabilities, match your Salesforce database with other, more recently acquired sources of customer information. Merge and purge records as needed to improve CRM health.

- If you've verified contact data but you know that data in some other key fields has decayed for select accounts, reach out to the customer directly.

2. Unstandardized Data Results in Inaccurate Reporting

What can you do? Start with using DataMatch Enterprise to efficiently perform mass standardization operations like standardizing names of accounts, contacts, and addresses:

- Should company names be acronyms like IBM, or spelled out in full?
- Keep salutations (Ms., Mrs., etc.)?
- What about middle name? Include with last name or forgo?
- Abbreviate words in street address like Park, Avenue, Road?
- Etc.

3. Missing and Incorrect Data Breaks Down Processes

What can you do? Start at the source by understanding where and why these issues arose.

Begin by enforcing standardized input in your web-forms, ideally through a combination of:

- custom Salesforce picklists to ensure fields are filled with pre-approved data
- creation of business rules for real-time validation using a data quality API that integrates seamlessly with Salesforce.

Next, you need to work on filling missing information in existing data. DataMatch Enterprise allows you to quickly profile your data so you can see exactly where and how much data is missing or inconsistent in your Salesforce Org.

To fill in the blanks, the software has built-in data dictionaries for items like State names, US and Canadian zip code and geo-location data for bulk address verification, and a host of other information. The address verification module is CASS certified, meaning we offer maximum accuracy up to ZIP+6.

You could also reach out to customers directly and get updated information. Keep this as a last resort – when you need a very specific piece of information and you are unable to get it through automated means. To go about this strategically, generate a Salesforce report for null values in the field of your choice. You now have a list of contacts you need to reach.

4. Duplicates Cause Confusions and Wasted Resources

What can you do? Start by asking the right questions:

- How many people and in which roles create Salesforce records?
- How do the duplicates get into the system in the first place?
- Can the number of duplicate records be determined?
- What are the ways in which duplicates are affecting your business?

Once you have your answers, integrate your Salesforce instance with an industrial-strength solution like DataMatch Enterprise that:

- Provides deduplication, cleansing, matching, enrichment, and governance capabilities under one umbrella – in real-time, through batch loading, and with scheduled automated cleanups.
- Offers real-time validation capabilities and business rule creation that helps you prevent bad data from ever entering the system.

Integrating Salesforce with DataMatch Enterprise

Start improving business opportunities and customer experience across the board by fusing the industry's fastest and most accurate data cleansing software with the industry's leading CRM. DataMatch helps refocus your attention from worrying about data and configuration to driving your core business, enabling your team to identify increased revenue opportunities from Salesforce data.

"My favorite part of DataMatch is how easy and flexible it is to use. I can use data from virtually any data source including ODBC connections, CSV files, and JSON files. It does a great job with data cleansing making the matching process even more powerful."
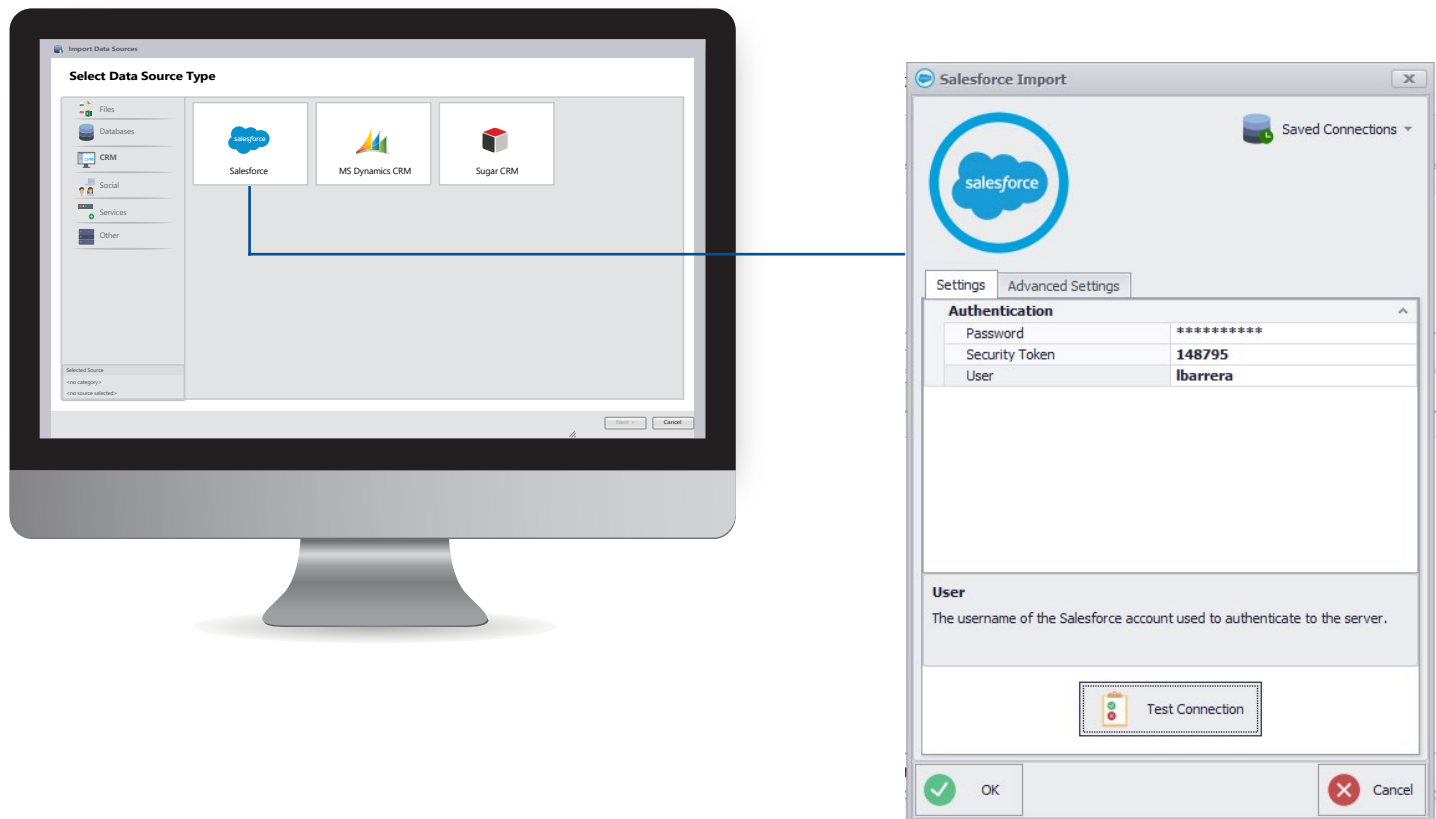
- Nick Corder, Platform Architect

The unrivaled speed, accuracy and low cost of DataMatch Enterprise make matching and linking records from all your data repositories a breeze, thanks to the wide variety of integrations that DataMatch Enterprise provides out-of-the-box.

Enhance your Salesforce data cleansing strategy by leveraging our native integration with the CRM and advanced record linkage features to find data matches across all supported repositories, regardless of whether your data lives in social media platforms and legacy systems or traditional databases and flat files. Data Ladder integrates with virtually all modern systems to help you "Get the Most Out of Your Data".
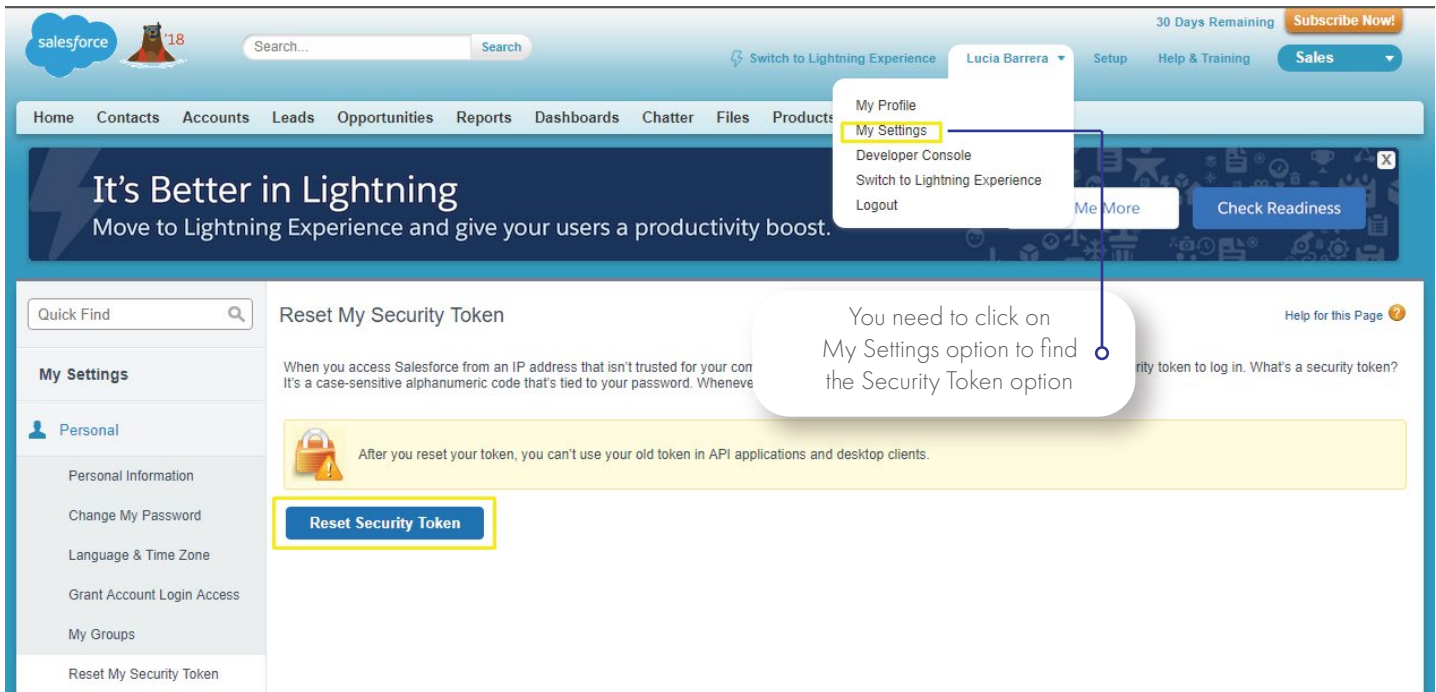
Getting Started

Integrating your Salesforce instance with DataMatch Enterprise is simple. Please see the step-by-step guide below. Feel free to contact Support if you run into any issues.
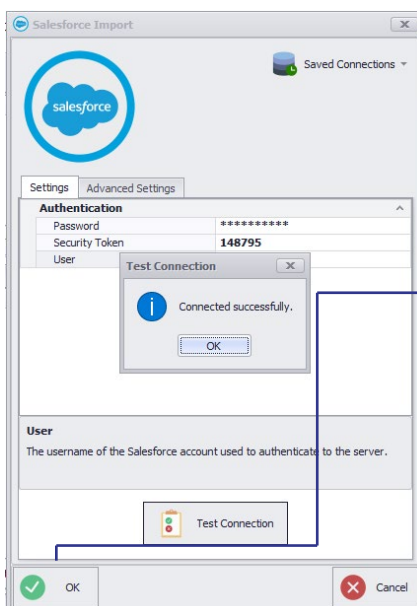
Create a New Connection Profile

• Click the Add Source button and then search for CRM.
• Click the Salesforce option

• Profile (Optional) - This will save the username, password and security token on the user' s local machine in an encrypted manner.
• Username (Required) - This is the email address associated with the Salesforce account.
• Password (Required) - The associated Salesforce account password.
• Security Token (Required) - This is the key that will be generated within the user s Salesforce account.
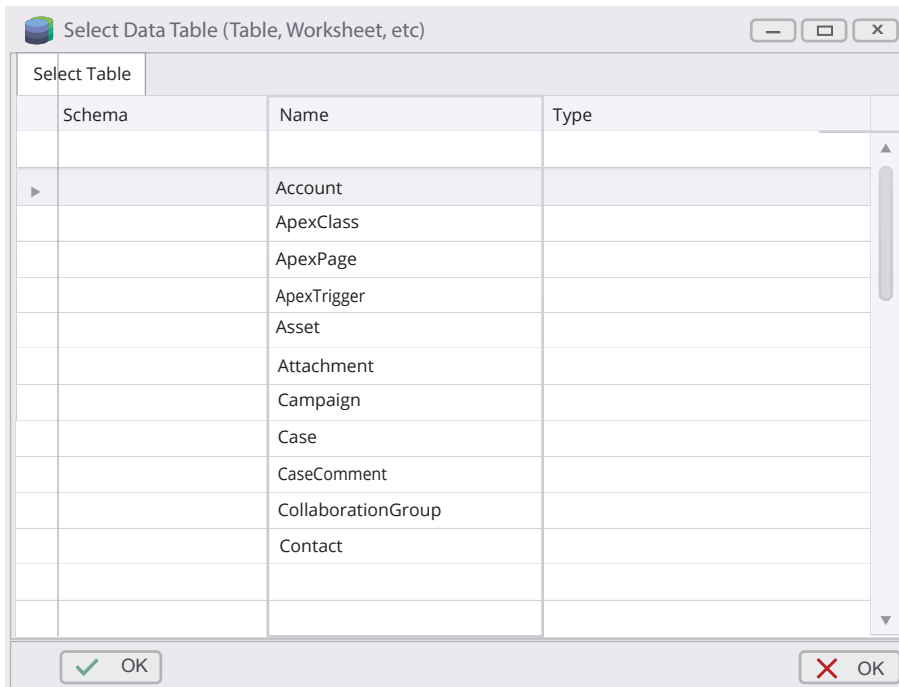
Create a Security Token

Once the user clicks Reset Security Token, the token will be emailed to the user.

Test a Connection

• After a new profile has been created, please click Test Connection to verify credentials.

• Click the OK button with the green check-mark in order to move on to the next step.
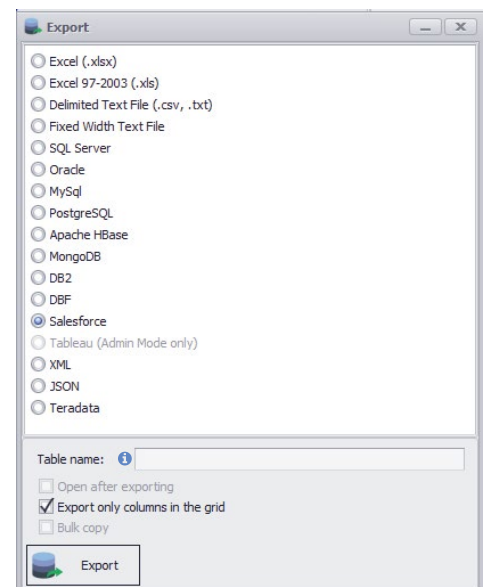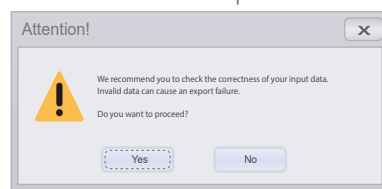
Get the most out of your data

• Select a category that youu would like to work with in DataMatch Enterprise.

• After selecting the category you want to work, please select the field that you will be importing.
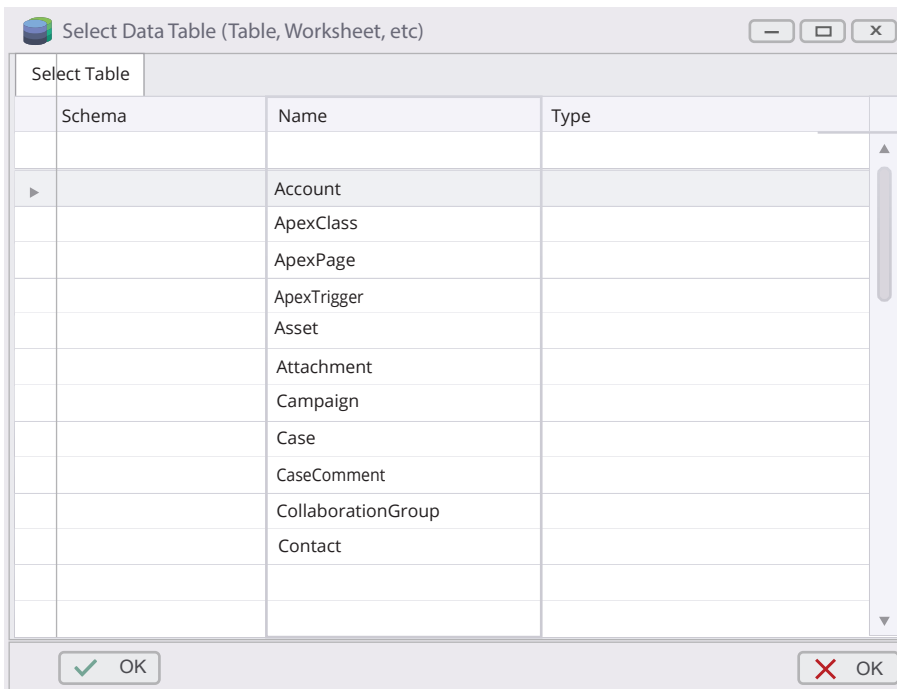
• Now you can proceed to profile, clean, standardize, and match your Salesforce data.

• Once the DataMatch project has been concluded, you can export your clean data back into Salesforce. To do that, select the Salesforce option from the Export dialog box, as shown on the right.

• A warning will appear to inform the user that exporting data to a Salesforce field with a mismatch value will result in export failure.

• Select the destination category where the export will upload the records.

• Once a selection has been made, click OK to proceed.

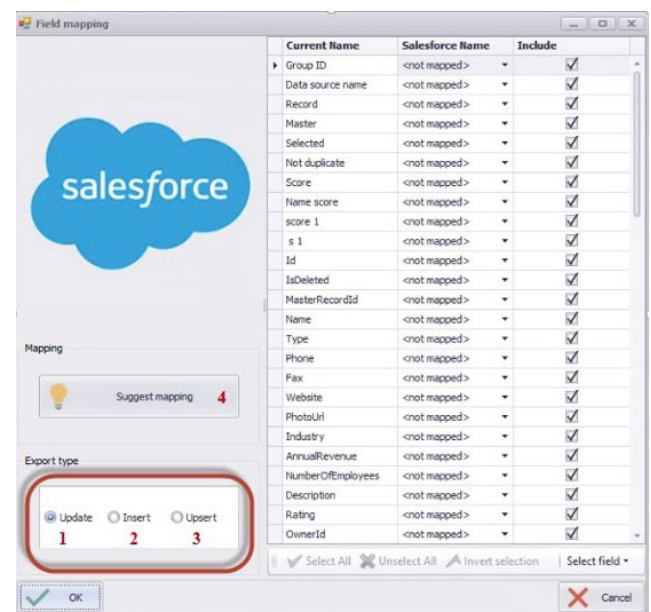1. Update - This option will Update information in the existing records based on their ID.
2. Insert - This option will create new records and new ID's.
3. Upsert - This option will Update existing records if the ID has been provided or will create a new record if an ID is not present.
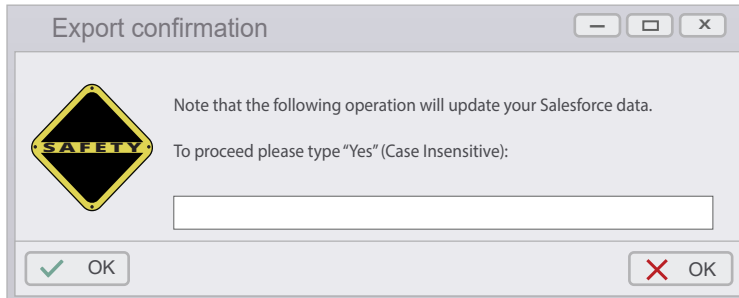4. Suggest Mapping – This will attempt to auto-map the names of the columns from the Datamatch Enterprise project with the internal Salesforce field names.

• Note: You may select or deselect specific fields from being included in the Export process.

Click OK to proceed.

Export confirmation

SAFETY

Note that the following operation will update your Salesforce data.

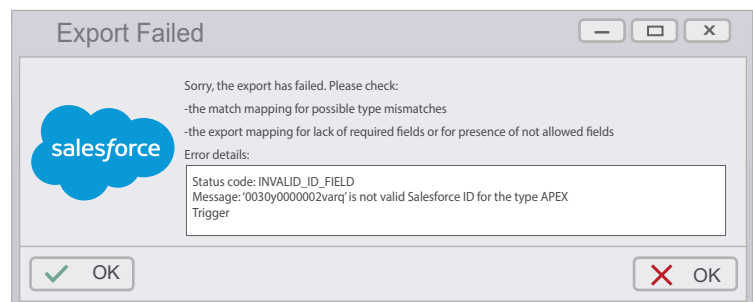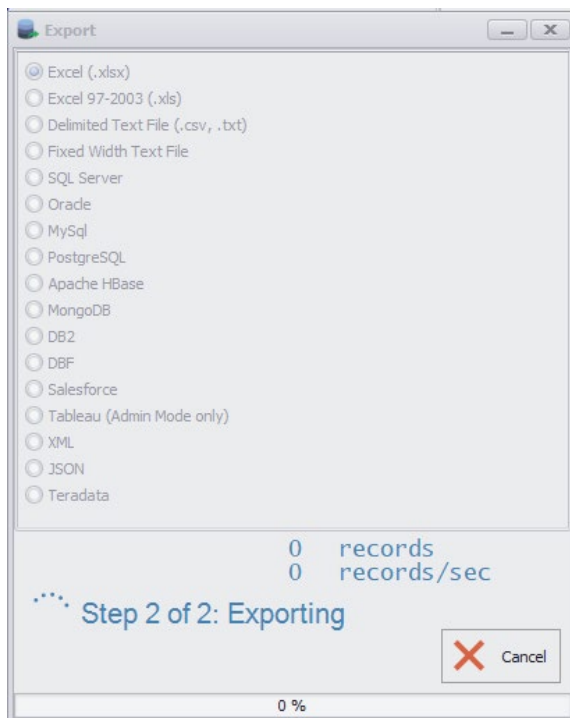To proceed please type "Yes" (Case Insensitive):

OK   OK

- Now you must confirm that if you want to commit all changes to the Salesforce account.

- This is an important step, so you need to think things through in order to avoid irreversible damage, or errors, to the records in the contact category.

- Once the final export is initiated, a confirmation window will appear if the process is completed successfully.

- If an error occurs during the export, you may see a window which will contain the specific error message that will help you fix the issue, or effectively obtain support from us.

Export

- Excel (.xlsx)
- Excel 97-2003 (.xls)
- Delimited Text File (.csv, .txt)
- Fixed Width Text File
- SQL Server
- Oracle
- MySql
- PostgreSQL
- Apache HBase
- MongoDB
- DB2
- DBF
- Salesforce
- Tableau (Admin Mode only)
- XML
- JSON
- Teradata

0   records
0   records/sec

Step 2 of 2: Exporting

Cancel

0 %

Export Failed

salesforce

Sorry, the export has failed. Please check:

-the match mapping for possible type mismatches

-the export mapping for lack of required fields or for presence of not allowed fields

Error details:

Status code: INVALID_ID_FIELD
Message: '0030y0000002varq' is not valid Salesforce ID for the type APEX
Trigger

OK   OK

Summary

- Create a profile to connect to a Salesforce account.

- Select and import data from a contact category.

- Manipulate the records in a DataMatch Enterprice project.

- Export the records into a contact category.

- On Error: Fix any mismatch field values that may exist and try to export again.

Our Customers

ABOUT US

Data Ladder is a data quality software company dedicated to helping business users get the most out of their data through data matching, profiling, deduplication, and enrichment tools. Whether it's matching millions of records through our fuzzy matching algorithms, or transforming complex product data through semantic technology, Data Ladder's data quality tools provide a superior level of service unmatched in the industry.

Why Data Ladder

It's simple: our user-friendly and powerful software helps business users across many industries manage their data more effectively and drive their bottom line. Our powerful software suite, DataMatch Enterprise, was proven to find approximately 5-12% more matches than leading software companies IBM and SAS in 15 different studies.

Free Download