



salesforce MVP

Simplify Your Salesforce Org in 6 Steps

Hosted by:
David Giller, Salesforce MVP

 Panaya

 brainiate

Part 5 | Data Cleanup

Use this workbook to organize your notes while completing this unit

Workbook for Part 5 - Data Cleanup

What do we mean by “dirty” data?

- › Duplicate data
- › Incorrect data - (ex. street address that is outdated)
- › Inaccurate data - (ex. correct street address, but not specifying which floor or office #)
- › Inconsistent data - (ex. NY, N.Y., New York, NY - USA)
- › Violates business rules (all Tier 1 customers must have a primary contact, or all accounts in CA must be owned by John Smith)
- › Improperly punctuated or spelled data (ex. N..Y.)

How does dirty data enter our system?

Dirty data enters the system in various ways:

- › Manual entry
- › Batch entry (imports)
- › System integrations

What can you do to address dirty data within your org?

Step 1

Identify the dirty data that requires attention.

- › Define which data issues are causing the biggest problems
 - Mailing list?
 - Assignment rules?
 - Reports/dashboards aren't showing all of the records that should be appearing
 - Classifications for contacts/accounts/cases are old, outdated, missing
- › Pull reports to identify the problematic records that need cleansing

Step 2

Define the best strategy to address these issues

- › Where can we turn to in order to get the "record of truth"?
 - Who knows what the correct, accurate value SHOULD be?
 - Which external system might have the most accurate information to compare against our internal Salesforce data?
- › How can we scale the resource identified above - to review and update all of the problematic records we identified?
 - Manual stare and compare?
 - Bulk data extract from another system?

Step 3

Update the records

- › Bulk - perform extract from Salesforce showing the problematic records requiring an update. (Always leverage the Salesforce CaseSafe Record ID!)
- › Bulk - perform extract from other external system (if appropriate) to serve as your "reference table"
- › Either perform vlookup in Excel (with the Salesforce CaseSafe Record ID) or manual "stare, compare, review" to perform a side-by-side comparison between your Salesforce data and your reference table - to decide which values should be updated and which should remain untouched...creating your new "update spreadsheet."
- › Using one of the many data import tools, bulk update your Salesforce records with the "update spreadsheet" - using the Salesforce CaseSafe Record ID to find the appropriate record to be updated, with the values contained in your newly created spreadsheet.

Using native Salesforce list views and reports, you can review your data in batches in order to identify which records require attention.

Use this space to write notes from this section.

Links to additional resources to better understand some of the concepts covered in this unit:

- › CaseSafe Record IDs
 - Why are they important? [Proud2Cloud](#)
 - How to leverage them? [Salesforce](#)

Apps to help manage Salesforce data cleanup

- › [Native Salesforce Duplicate Management Tools](#)
- › [Duplicate Check for Salesforce](#)
- › [Insyncle](#)
- › [DupeCatcher](#)
- › [DupeBlocker](#)
- › [DemandTools](#)
- › [Cloudingo](#)
- › [Data Loader for Salesforce](#)
- › [DataLoader.io](#)
- › [Jitterbit](#)
- › [Informatica](#)
- › [Data Quality Analysis Dashboards](#)
- › [Field Trip](#)

Use this space to write notes from this section _____



Release Dynamix for Salesforce.com

You Deserve Salesforce Release Certainty

Resolve potential change delivery risks and ensure quality ahead of time with:

- › A detailed summary of entities impacted by daily modifications, scheduled releases or major projects
- › A list of development and customization tasks, derived from project scope and assigned to team members
- › Test plan scoping according to impacted entry points
- › Continuous risk assessment and multidimensional views of potential risks

Panaya Release Dynamix
The Enterprise Agile Delivery Solution



[Learn more](#)

www.panaya.com/product/rdx-for-salesforce