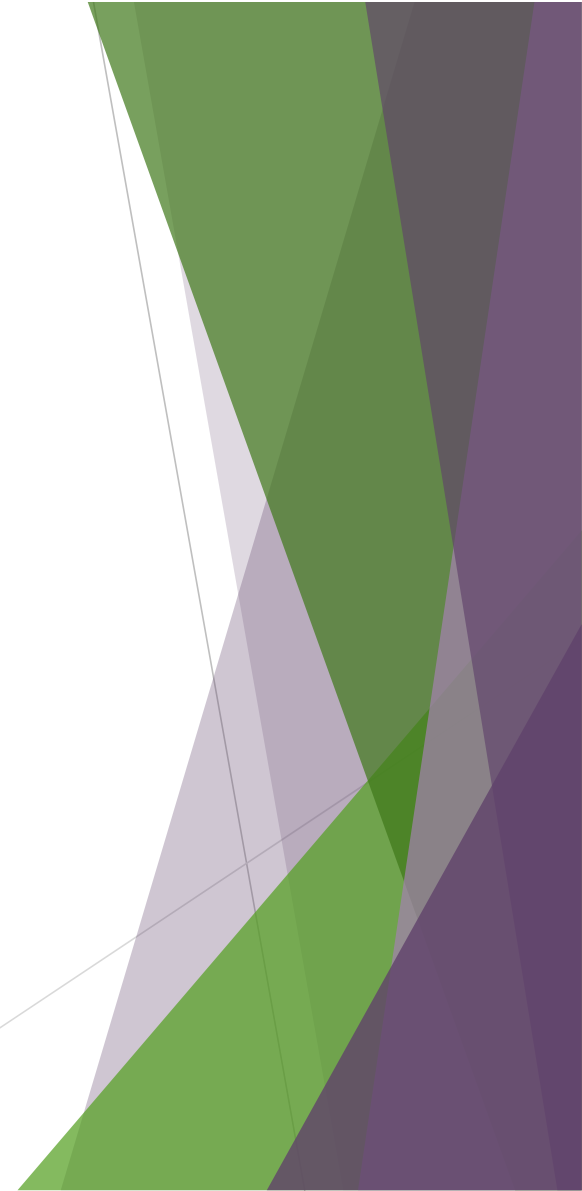


Data Standards

Salesforce

Agenda

- ▶ Welcome
- ▶ Introductions
- ▶ Presentation/Discussion
- ▶ Wrap Up



Stop the Pain...

- ▶ Determine master source of data
- ▶ Integrated tools to minimize duplicative data sets
- ▶ Inventory fields (and values) for redundancy
- ▶ Enable In-Line editing
- ▶ Pick Lists instead of text fields
- ▶ Minimize use of checkbox fields and multi-select picklists when possible
- ▶ Turn off Quick Create



Duplication Prevention Tools

- ▶ CRMfusion – DupeBlocker
- ▶ Validation Rules

Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. Validation rules also include an error message to display to the user due to an invalid value.



Validation Rule - Dates

► Example: Expiration Date Cannot Be Before Close Date

Field	Value
Description:	Validates that a custom field called <code>Expiration Date</code> does not come before <code>Close Date</code> .
Formula:	<code>Expiration_Date__c < CloseDate</code>
Error Message:	Expiration Date cannot be before Close Date.
Error Location:	<code>Expiration Date</code>



Validation Rule – Phones

► Example: Phone in (999) 999-9999 format

Field	Value
Description:	Validates that the Phone number is in (999) 999-9999 format. This works by using the REGEX function to check that the number has ten digits in the (999) 999-9999 format.
Formula:	<input \\d*?(\\d\\d*?){10}"))"="" type="text" value="1 NOT(REGEX(Phone, "/>
Error Message:	US phone numbers should be in this format: (999) 999-9999.
Error Location:	Phone



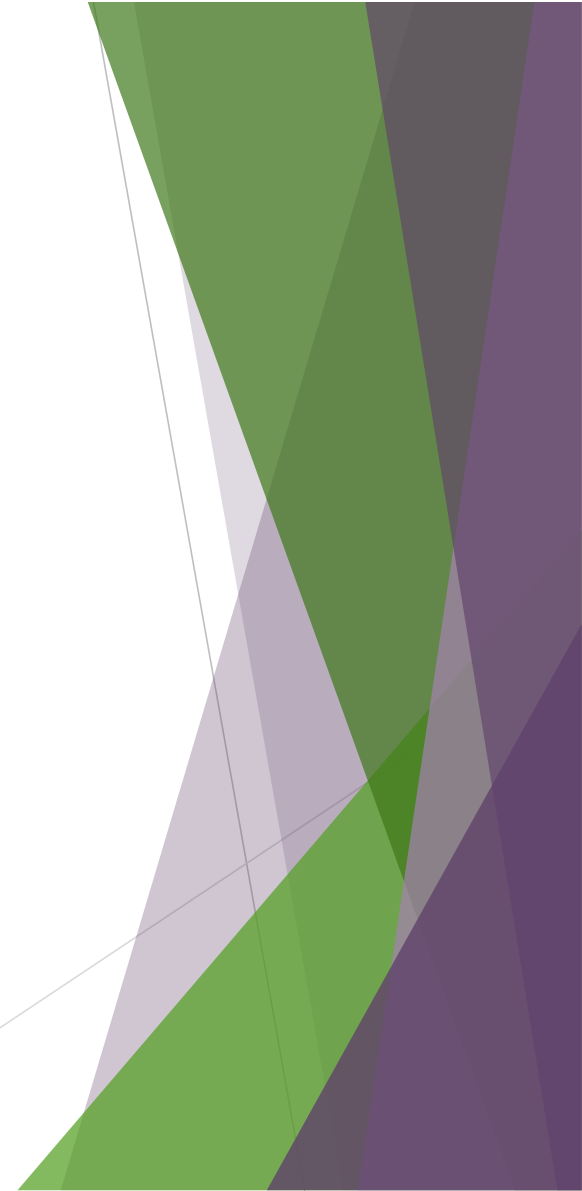
Validation Rule – Opportunity Naming Convention

Field	Value
Description:	Validates that an opportunity contains a hyphen as a way of enforcing an “[Account] - [Amount]” opportunity naming convention.
Formula:	<input ",="")='0"/' -="" name="" type="text" value="1 FIND("/>
Error Message:	Opportunity Name should use “[Account] - [Amount]” format.
Error Location:	Opportunity Name



Field Level Options

- ▶ Required Fields
- ▶ Default Values
- ▶ Help text
- ▶ Character Limitations
- ▶ Read Only Fields



Importing Data

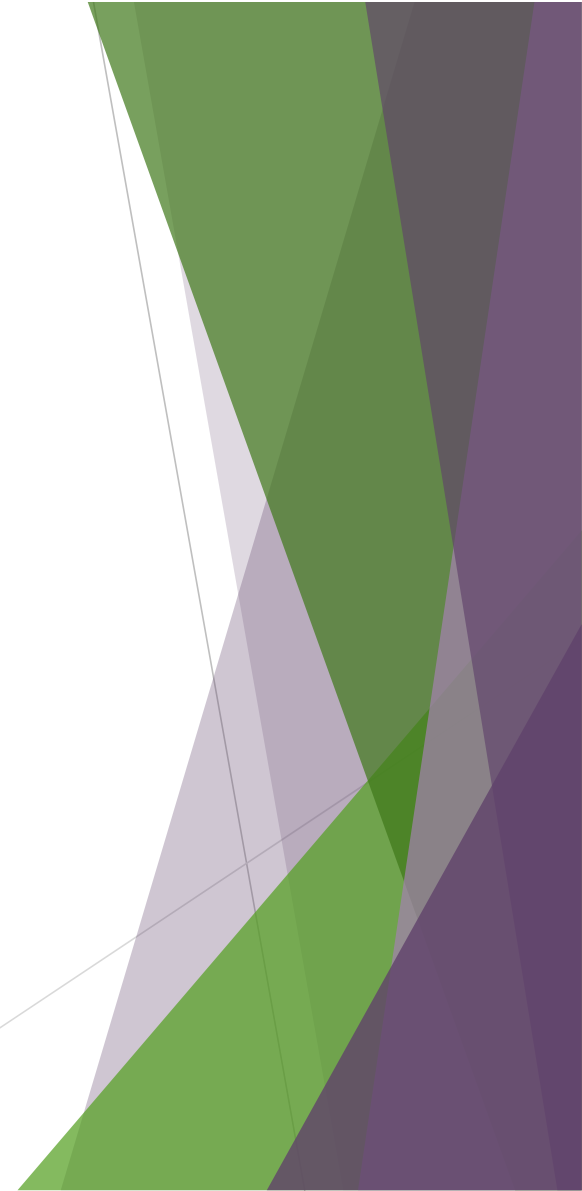
Dataloader	Import Wizard
It supports more than 50000 records.	It supports only up to 50000.
It supports almost all standard and custom objects.	It supports Custom objects but only few Standard objects like Accounts, Solutions, Leads and Contacts.
It doesn't support schedule export.	It supports schedule export.
Delete operation is available.	Delete operation is not available.
It requires installation.	It doesn't require installation.
While importing, duplicates cannot be ignored.	While importing, duplicates can be ignored.

- ▶ Other Options: DemandTools (CRMfusion)



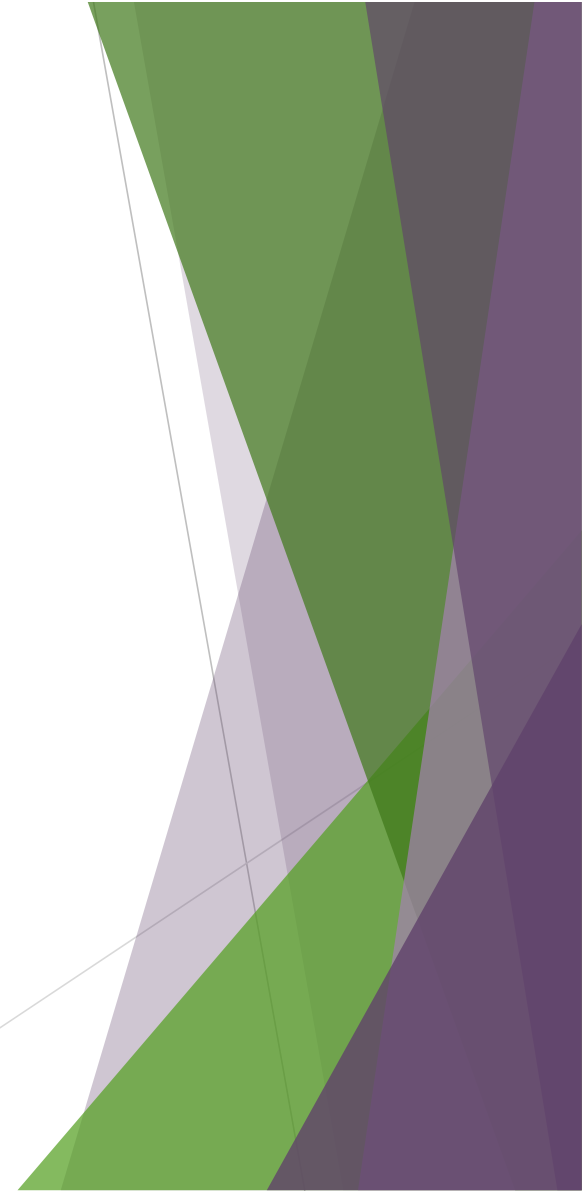
...then Clean Up

- ▶ Determine master source of data
- ▶ Integrated tools to minimize duplicative data sets
- ▶ Inventory fields (and values) for redundancy
- ▶ Use Views
- ▶ De-clutter Page Layouts
- ▶ Optimize Related List Information



De-Duping and Clean Up Tools

- ▶ DemandTools (CRMfusion)
- ▶ ZaapIT
 - ▶ DeDup Manager
 - ▶ Mass Update
 - ▶ Mass Merge



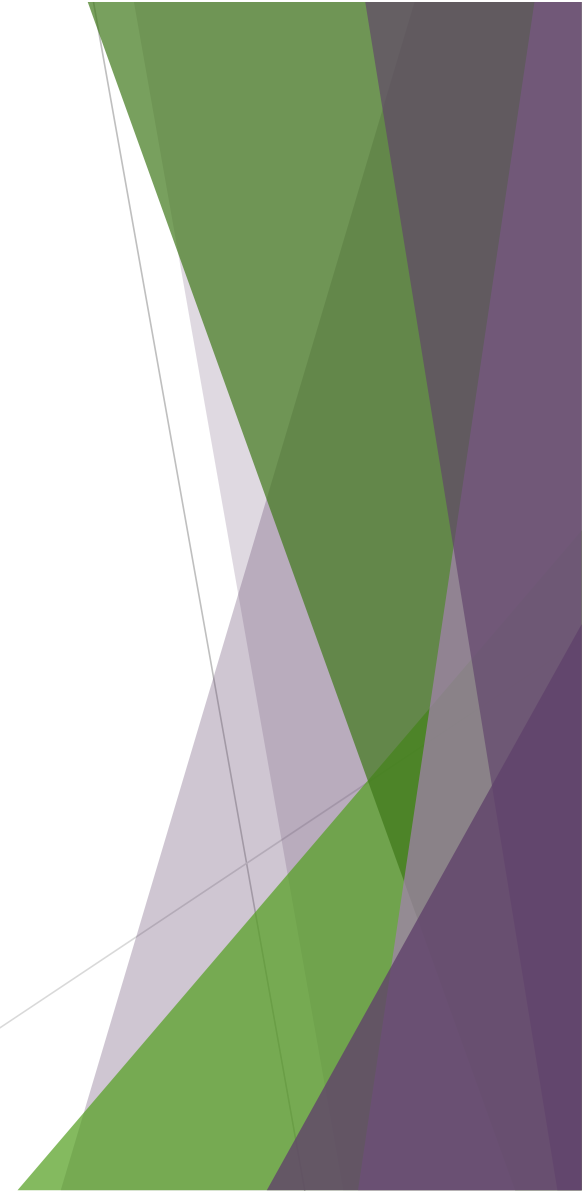
Data Quality Analysis Dashboard

- ▶ <https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016cshEAA>
- ▶ Leveraging custom formula fields on many of the standard objects to record data quality and record completeness, the formulas are then depicted through dashboards to identify deficiencies in record data.



Agenda

- ▶ Welcome
- ▶ Introductions
- ▶ Presentation/Discussion
- ▶ Wrap Up



Online Resources

- ▶ **AppExchange:** <https://appexchange.salesforce.com/>
- ▶ **How to build Validation Rules:**
<https://developer.salesforce.com/forums/?id=906F00000008oMWIAY>
- ▶ **Example Validation Rules:**
https://developer.salesforce.com/docs/atlas.en-us.usefulValidationRules.meta/usefulValidationRules/fields_useful_field_validation_formulas.htm
- ▶ **CRMFusion:** <https://www.crmfusion.com/>



Salesforce Training Courses

- ▶ ADM201: Salesforce Administration
 - ▶ https://www.salesforce.com/assets/pdf/datasheets/DS_ADM201.pdf
- ▶ NPO101: Non Profit Success pack
 - ▶ https://www.salesforce.com/assets/pdf/datasheets/DS_NPO101.pdf

