

DemandTools Module Help for FindContactID

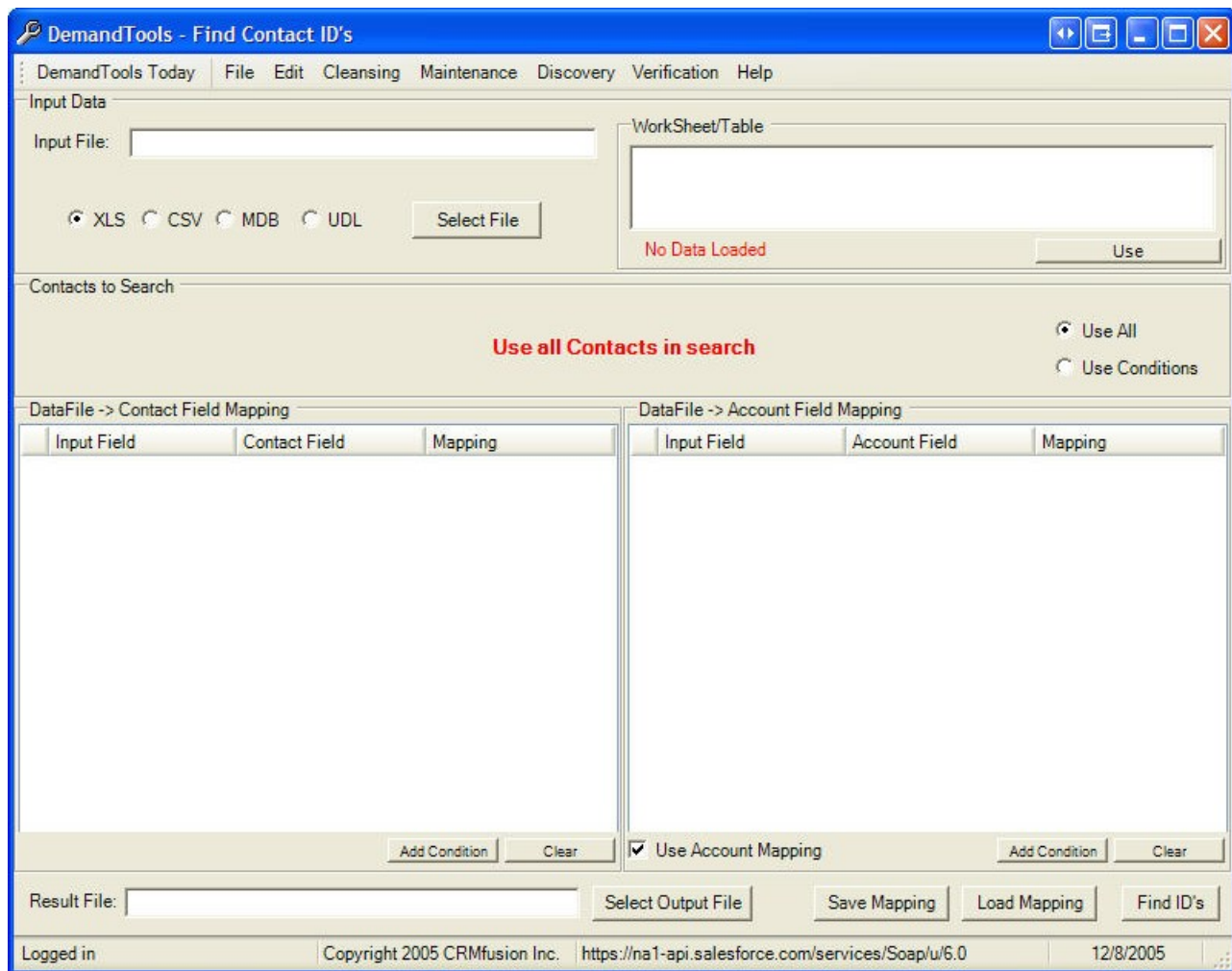
PURPOSE:

The FindContactID's module of DemandTools is designed to allow you to quickly find salesforce.com ContactID and/or AccountID's from a typical marketing or prospect list of contact names, companies, phone numbers or email addresses etc.that you may have in a spreadsheet or database. FindContactID will compare the list of Contact data that you have in an external spreadsheet or database to the contents of your salesforce.com Contact table. In order to be seen as a match the mappings do not have to be exact because DemandTools provides you with a variety of different mapping techniques that will be described later.

The FindContactID tool is most often used for the following type of purposes:

- Determine if a lead list that is to be imported is importing only new Leads (not ones you already have as Contacts). In this case you will match your import data to your salesforce.com data and if you match a Contact you can be confident that the person already exists in your salesforce.com database
- FindContactID's that can be used for an update with the MassEffect tool when you don't already know the ID's. This is often the case where you have a list of contact names and account names and need to update a specific field for this list of contacts.
- Find ID's for creation of Tasks or Opportunities. If you have a list of names and would like to create a task associated to each name but don't currently have the Contact ID field. The tool would be used to gather the ID's that would then be read by the MassEffect tool for insert into your salesforce.com database

Shown below is the DemandTools FindContactID's tool for salesforce.com.



FindContactID Interface Screen Shot

STEP 1:

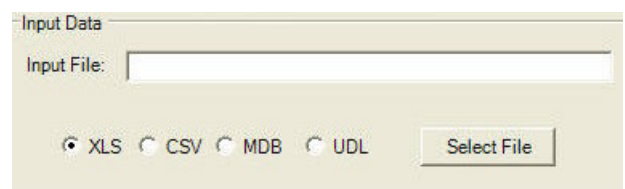
Select the input data file by first selecting the type of file you will be using as the source for the contact and account/company information by setting the type radio buttons. Then select the "Select File" button and choose your file from the standard windows dialog box. If you are loading a CSV or XLS file make sure that the file is not already open in Excel or you may experience a file sharing error.

Also supported are the advanced file types of Microsoft Access (MDB) and the ability to utilize a UDL file to act as a connector to larger database systems such as Oracle, DB2 and SQL Server.

For more information on UDL files please see the knowledge base under the support section of www.crmfusion.com.

STEP 2:

Once a data file has been selected you will see the available tables (or worksheets for an XLS file) in



Selecting the data source file type and location

the "WorkSheet/Table" window. You can select the table that you wish to use and the select the "Use" button or simply double-click on the table name. Once you select a table the fields from that table will appear in the left column of the "Field Mapping" window.

For XLS data sources it is important that the file not use any filtering as this will cause the file to load incorrectly.

After hitting the use button the number of records or rows in the data source should be displayed in red.

STEP 3:

You can now select which Contacts in salesforce.com you would like to compare to your external file. For larger databases or for the sake of performance time you may wish to narrow the search range of the contacts the data source is compared to. For example you may want to narrow the results by country for trade show activities etc.

The FindContactID module will allow you to make a custom search range using any record that is available in the Contact table.

STEP 4:

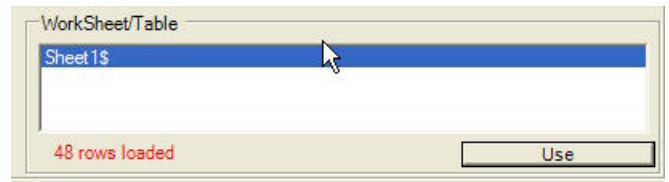
The next step is to map how the external data sources columns map to the Contact record in salesforce.com. This mapping is done in the lower left frame of FindContactID.

By pressing the "Add Conditions" button you can easily see the available columns in your input data source. Simply, select the one you wish to map, and then select the corresponding field in salesforce.com in the next column.

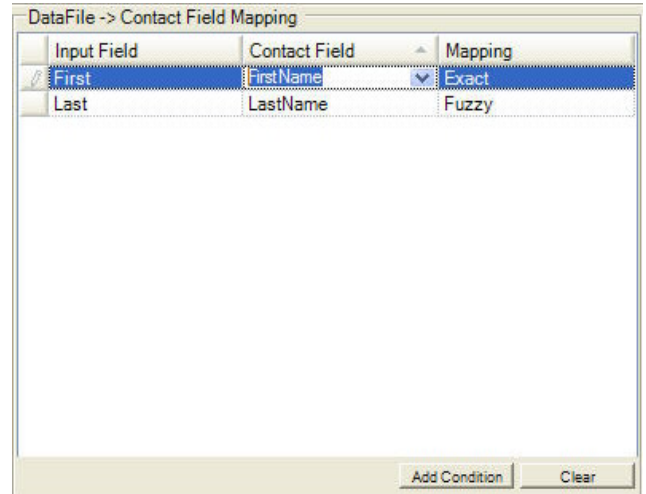
The third column allows you to select the DemandTools proprietary mapping technology that you would like to use for this specific field. Options for mapping techniques include:

- Exact
- Fuzzy - Sounds like
- First Letter
- Numeric
- First Name - Uses the DemandTools nickname list

Continue to map as many fields as required to ensure that the external data file is properly mapped to the Contact table in salesforce.com.



Selecting the worksheet



Mapping the data file to the Contact table in salesforce.com

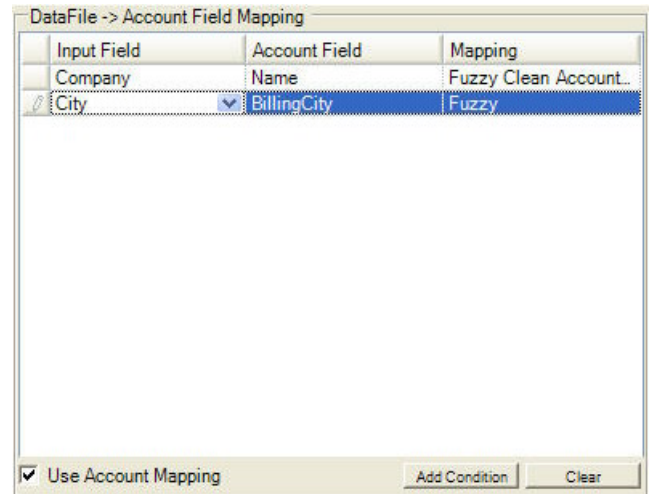
STEP 5:

Although optional, in most cases you will also want to create a mapping between your external data source and the Accounts table in salesforce.com. This will add the additional criteria that the contact in the external data source also has to work for the right Account in order to be seen as a match.

Again, press "Add Conditions" and map between the external data source and your salesforce.com Accounts table.

Additional mapping techniques may be useful including:

- Cleaned name - The account name watered down by removing punctuation and common account name prefixes and suffixes such as "The" and "Ltd" and "Inc"
- Fuzzy Cleaned Account Name - The cleaned name is also put through the phonetic sounds like engine.



Mapping the data file to the Accounts table in salesforce.com

STEP 6:

The FindContactID module in DemandTools does not actually modify any data in either your salesforce.com database or your external data source.

FindContactID will create a CSV file that contains the original external data source values and the 'found' information.

Select a location for your results file.

STEP 7:

Select the "FindID's" button in the lower right hand corner of FindContactID to run the application and find the matching salesforce.com ID's as per your comparison mapping. When complete FindContactID will display a dialogue box with the location of your results file:



Selecting the name and file location for the results file that FindContactID will create



Completion dialogue box showing location and hyperlink for results file

STEP 8:

Looking at the created spreadsheet from FindContactID we see the results of the procedure.

Columns A,B,C,D (shown in yellow for demo purposes) in this example are the original values that we in my external data source.

Column E (blue) is the ContactID in salesforce that matched your external data file using the mapping and techniques you specified.

Column F (Lavender) is the corresponding AccountID that that Contact is currently associated with.

Columns G,H,I,J (Gold) are the values from salesforce.com for the fields that matched using your criteria. If there were multiple matches the additional matches would show in columns further to the right.

For the rows that do not have anything in columns E-J (in this example) we know that they did not match with any existing Contact records in salesforce.com

	A	B	C	D	E	F	G	H	I	J
1	First	Last	Company	City	sf_id_1	sf_accountId_1	sf_LastName_1	sf_FirstName_1	sf_Name	
2	Mike	Schnitz	United Remo Inc	Markle	003300000022f7oAAA	00130000001JPEFAA4	Schnitz	Mike	United Ri	
3	C.R.	Schoepf	Hookaden and Assoc	Columbus	003300000022fA9AAI	00130000001JPFYAAG	Schoepf	C.R.	Hookade	
4	Mike	Lookstadt	Waldro AutoMotive	Ossian						
5	Carl	Seifried	DEC Associates	Mayfield Vill	003300000022emeAAA	00130000001JQyWAAAG	Seifried	Carl	DEC Ass	
6	Mark	Falston	CIM Inc	Columbus						
7	David	Golec	The Impaction Company	Solon	003300000022emgAAA	00130000001JQyWAAAG	Golec	David	Impactio	
8	Valued	Customer	Gencorp Automotive	Akron						
9	Daniel	Whitacre	DCW Associates Ltd.	Massillon	003300000022f0HAAQ	00130000001JP8bAAG	Whitacre	Daniel	DCW As	
10	Dave	Kasper	REFER TO CUSTOMER 54	Columbia St	003300000022f3sAAA	00130000001JPBLAA4	Kasper	Dave	REFER T	
11		Dahl	Dahl Cutshaw	Cleveland						
12	Mark	P	Unity Development Corp	Columbus						
13	John	Brown	John Brown LLC	Oceola	003300000022fEiAAI	00130000001JPIsAAD	Brown	John	John Bro	
14	Fred	Georgeson	Techneglass, Inc.	Columbus	003300000022egUAAQ	00130000001JQvLAAW	Georgeson	Fred	Techneg	
15	John	Lowry	Lowry Cadd and Engineering	Columbus	003300000022eqYAAQ	00130000001JP1uAAG	Lowry	John	Lowry Ca	
16	Mary L.	Ciolczyk	David Round and Sons Inc	Solon	003300000022ev9AAA	00130000001JP57AAG	Ciolczyk	Mary L.	David Ro	
17	John	Jackson	Cad Cam Plus Inc	Carmell						
18	Mark	Whitaker	Xcel Computer Systems Inc	Osceola	003300000022f3HAAQ	00130000001JPAoAAD	Whitaker	Mark	Xcel Cor	
19	Mike	Smith	Oce Bruning	Columbus						
20	Banwo L.	PE	United Consultants and Ass	Columbus	003300000022f4qAAA	00130000001JPC6AAD	PE	Banwo L.	United C	
21	Jim S.	Smithjim	Master Metal Engineering	South Bend	003300000022fBFAY	00130000001JPGpAAD	Smithjim	Jim S.	Master M	
22	Craig	Stewart	Hoffco	Richmond						
23	Judy	Mitchell	Xcel Computer Systems Inc	Osceola	003300000022fBPAY	00130000001JPAoAAD	Mitchell	Judy	Xcel Cor	
24	Valued	Customer	Staber Industries	Columbus	003300000022evNAAQ	00130000001JP5FAAW	Customer	Valued	Staber In	
25	Kevin D.	Jackson	Xcel Computer Systems Inc	Osceola						
26	Phil	McDonald	McDonald Engineering LLC.	Anderson	003300000022fBfAAI	00130000001JPH6AAD	McDonald	Phil	McDona	
27	Glenn	Wilson	M Engineering Inc	Columbus						
28	Jack	MacFarlane	Eng Ind Services	Logansports						
29	Joe	Jackson	M Engineering Inc	Columbus						
30	Samuel	Defenbaugh	High Tech Housing	Bristol	003300000022f14AAA	00130000001JP9AAAW	Defenbaugh	Samuel	High Tec	
31	Ron	Smith	High Tech Housing	Bristol						
32	Jerry	Hill	Ross Laboratories Inc	Columbus	003300000022f1FAAQ	00130000001JP9IAAW	Hill	Jerry	Ross Lab	
33	Jan	Dale	Diecut Products	Cleveland						

Resulting CSV file being shown in Excel with original values, foundID's and matching salesforce.com records

NEXT STEPS WITH DEMANDTOOLS

Your next step will now be to examine the file that is produced, extract the ID files that you would like and then determine:

- ❖ What data will be imported using the salesforce.com tools
- ❖ What data will be updated using the MassEffect tool
- ❖ If any new objects will be created via the MassEffect tool given the found ID's (Tasks, Opportunities, Events etc)