

Salesforce.com®
"Data Cleansing Made Easy"

**The CRMfusion Inc.
NO-DUPES Service**



Proposal and Project
Success Guide



The CRMfusion Inc. NO-DUPES service is a simple methodology that makes the complex task of Salesforce.com data deduplication easy, quick and affordable.

CRMfusion has developed this unique and proprietary methodology for data cleansing the primary objects in Salesforce.com. This proposal outlines the process and it's details as well as acts as the proposal and project sign off documents.

Due to the fact that it contains detailed information about our specific process we ask that you do not make publicly available.

**Developed
for:
ABC
Corporation**

Proposal Developed by:



CRMfusion Incorporated
52 Chartwell Cr, Suite 101, Keswick
Ontario Canada



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SECTION A – UNDERSTANDING THE CRMFUSION NO-DUPES SERVICE

1. Introduction to NO-DUPES

The CRMfusion Inc. NO-DUPES service is the quickest, easiest and most affordable method to cleanse your Salesforce.com CRM system of unwanted duplicate records. Duplicate records are of course one of the primary issues effecting data confidence, adoption rates and ability to properly report and integrate.

The NO-DUPES service is the result of combining the CRMfusion professional data quality experts and our award winning DemandTools data quality software solution that is used by more than 400 organizations in 14 countries.

Our data experts will use the DemandTools product to cleanse your database according to the specifications developed with you. Most projects are completed in 5-7 business days from start to finish and result in duplicate free searches and reports. Of course the DemandTools software allows us not only to find the duplicate records but also merge them directly at the Salesforce.com data centers. We merge the found duplicates into single records while protecting important information and making sure it is incorporated during the merge.

2. The NO-DUPES Process

Later in this document are the pages that outline the specifications on how the DemandTools software will be used to cleanse your salesforce.com database. Included in the No-DUPES service price is a 90 minute consultation with our Data Therapist to complete these specifications so that you obtain maximum results.

After the specifications are jointly completed, our data therapist will program the specifications into the DemandTools software and begin the process of cleaning your database.

Essentially using all of the power of the DemandTools software, as well as the skill and experience of our staff, the following database tables are cleaned:

<u>Object to be Deduped/Task</u>	<u>Number of Passes</u>	<u>Comments</u>
Insert Leads	1	Field Mappings complete and verified by ABC Corporation
Lead Dedupe	3	As defined by Data Therapy Session
Lead to Contact	3	As defined by Data Therapy Session
Lead to Account	3	As defined by Data Therapy Session
Account Dedupe	3	As defined by Data Therapy Session
Contact Dedupe	6	As defined by Data Therapy Session. Contacts can be deduped within an account or between accounts
Delete bad data	2	Criteria to be defined
Data Backup	2	At the beginning and end of project





This project is slated to take 5-7 business days.

3. Project Managers

The Project Managers are ultimately responsible for all activities under this NO-DUPES service and act as a single point of contact within each of the respective organizations.

Customer Contact

Name
Phone
Email

CRMfusion Inc. Contacts

Name	Theresa DeRycke, CRMfusion Data Quality Consultant
Phone	(585) 742-3366
Email	theresa.derycke@crmfusion.com

4. NO-DUPES Price Quotation for ABC Corporation

Based upon ABC Corporation having a total of less than 50 total Salesforce.com licenses the price quotation is:

- No Dupes Service \$50/user + \$500 Data Therapy Session
- DemandTools License for 1 year \$50/user +500 Training/Setup (up to 100 salesforce.com users)
- DemandTools Named Administrator License for 1 year \$5,000, (\$2,500 for each additional), + \$500 Training/Setup

This includes the initial 90 minute data therapist session to develop deduplication scenarios as well as the execution of the scenarios and the merging of the records directly in your salesforce.com database.

Your session with the data therapist will take place as soon as this proposal has been accepted and returned (samples attached).

5. NO-DUPES Project Proposal Acceptance

CRMfusion Inc.:

ABC Corporation

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____





NO-DUPES STANDARD ACCOUNT DEDUPLICATION

Pass	Condition	Field to Match	Match Category	Mapping Type	Fuzzy	Trans- pose	Alpha Clean	Master Rule
1	All	Name BillingStreet BillingCity BillingPostalCode Phone	All All All All All	Cleaned Account Name Street Address Match Exact Zip 5 and 9 Numeric	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Oldest Record <input type="checkbox"/> Newest Record <input type="checkbox"/> Most Opptys and Contacts <input type="checkbox"/> Last Modified
2	Not Delete***	Name BillingStreet BillingCity	All All All	Cleaned Account Name Relaxed Address Match Exact	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Oldest Record <input type="checkbox"/> Newest Record <input type="checkbox"/> Most Opptys and Contacts <input type="checkbox"/> Last Modified
3	Not Delete***	Name BillingStreet Phone	All All All	Cleaned Account Name Relaxed Address Match Numeric	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Oldest Record <input type="checkbox"/> Newest Record <input type="checkbox"/> Most Opptys and Contacts <input type="checkbox"/> Last Modified

UPDATE FIELDS WHERE MASTER EMPTY: All fields
MERGE (CONCATENATE) FIELDS: All multi select pick lists and text area fields
MERGE SALESFORCE CHILD OBJECTS: All

MERGED SUB-OBJECT OWNERSHIP CHANGES:

- No ownership changes
- Contacts
- Future Events
- Past Events
- Open Opportunities
- Closed Opportunities
- Open Tasks
- Closed Tasks

NON-MASTER OBJECTS: Prefix Account Name with DELETE***

DESCRIPTION OF PASSES:

Pass 1 is the most rigid and compares records that are most complete. Pass 2 removes Postal Code and Phone so that those duplicates based upon Name, Billing Street and City where one has a Phone or Zip and the other doesn't will be found. Pass 3 relaxes the Billing Street match criteria but looks for a matching phone number.

PASS 1 SAMPLE DUPLICATES

IBM Corporation 1133 Westchester Avenue White Plains, NY 10604 888-839-9289	I B M Corp. 1133 Westchester White Plains, New York 10605 888-839-9289	International Business Machines Inc. 1133 Westchester Ave. White Plains, NewYork, 10604-0001 888-839-9289
--	---	--

PASS 2 SAMPLE DUPLICATES

IBM Corporation 1133 Westchester Avenue White Plains, NY 10604 888-839-9289	Interantional Bizness Machines 1133 Westchester White Plains, New York 12345 800-IBM-4YOU	I.B.M. Inc. IBM Corporation 1133 Westchester Ave. White Plains, NewYork, 10604-0001
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PASS 3 SAMPLE DUPLICATES

Ibm company 1133 Westchester Avenue White Plains, NY 10604 (888)839-9289	I B M Corp. – The good one IBM Corporation 1133 Westchester New York, New York 10605 8888399289	Intntnl Bsiness Mchines IBM Headquarters 1133 Westchester Ave. New York, 10604-0001 888.839-9289
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NO-DUPES STANDARD CONTACT DEDUPLICATION

Pass	Condition	Field to Match	Match Category	Mapping Type	Fuzzy	Trans- pose	Alpha Clean	Master Rule
1	All	AccountID	All	Salesforce.com ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Newest Record
		FirstName	All	First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Oldest Record
		LastName	All	Exact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Last Modified
		Phone	All	Numeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Email	All	Domain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Not Delete***	AccountID	All	Salesforce.com ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Newest Record
		FirstName	All	First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Oldest Record
		Last Name	All	Exact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Last Modified
		Mailing Street	All	Cleaned Address Match	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Not Delete***	AccountID	All	Salesforce.com ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Newest Record
		FirstName	All	First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Oldest Record
		LastName	All	Exact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Last Modified
		Mailing Street	All	Relaxed Address Match	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

UPDATE FIELDS WHERE MASTER EMPTY: All fields

MERGE (CONCATENATE) FIELDS: All multi select pick lists and text area fields

MERGE SALESFORCE CHILD OBJECTS: All

MERGED SUB-OBJECT OWNERSHIP CHANGES:

Open Cases

NON-MASTER OBJECTS: Prefix Account Name with DELETE***

DESCRIPTION OF PASSES:

Pass 1 is the most rigid and compares records that are most complete. Pass 2 removes Postal Code and Phone so that those duplicates based upon Name, Billing Street and City where one has a Phone or Zip and the other doesn't will be found. Pass 3 relaxes the Billing Street match criteria but looks for a matching phone number. Passes 4 – 6 would be the same without including AccountID as Criteria.

PASS 1 SAMPLE DUPLICATES

IBM Corporation
1133 Westchester Avenue
White Plains, NY 10604
888-839-9289

I B M Corp.
1133 Westchester
White Plains, New York 10605
888-839-9289

International Business Machines Inc.
1133 Westchester Ave.
White Plains, NewYork, 10604-0001
888-839-9289

PASS 2 SAMPLE DUPLICATES

IBM Corporation
1133 Westchester Avenue
White Plains, NY 10604
888-839-9289

Interantional Bizness Machines
1133 Westchester
White Plains, New York 12345
800-IBM-4YOU

I.B.M. Inc.
IBM Corporation 1133 Westchester Ave.
White Plains, NewYork, 10604-0001

PASS 3 SAMPLE DUPLICATES

Ibm company
1133 Westchester Avenue
White Plains, NY 10604
(888)839-9289

I B M Corp. – The good one
IBM Corporation 1133 Westchester
New York, New York 10605
8888399289

Intntnl Bsiness Mchines IBM
Headquarters 1133 Westchester Ave.
New York, 10604-0001
888.839-9289





NO-DUPES STANDARD LEAD DEDUPLICATION

Pass	Conditions	Field to Match	Match Category	Mapping Type	Fuzzy	Trans- pose	Alpha Clean	Master Rule
1	Is Converted	Company FirstName LastName Email Phone	All All All All All	Cleaned Account Name First Name Exact Domain Numeric	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Oldest Record <input type="checkbox"/> Newest Record <input type="checkbox"/> Last Modified <input type="checkbox"/> Status
2	Is Converted != True AND Not Delete***	Company FirstName LastName Email	All All All	Cleaned Account Name First Name Exact Domain	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Oldest Record <input type="checkbox"/> Newest Record <input type="checkbox"/> Last Modified <input type="checkbox"/> Status
2	Is Converted != True AND Not Delete***	Company FirstName LastName Phone	All All All	Cleaned Account Name First Name Exact Numeric	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Oldest Record <input type="checkbox"/> Newest Record <input type="checkbox"/> Last Modified <input type="checkbox"/> Status

UPDATE FIELDS WHERE MASTER EMPTY: All fields

MERGE (CONCATENATE) FIELDS: All multi select pick lists and text area fields

MERGE SALESFORCE CHILD OBJECTS: All

MERGED SUB-OBJECT OWNERSHIP CHANGES:

- Future Events
- Past Events
- Open Tasks
- Closed Tasks

NON-MASTER OBJECTS: Objects will be deleted

Prefix Account Name with DELETE***





NO-DUPES STANDARD LEAD TO CONTACT DEDUPLICATION

Pass	Criteria	Match Blank Values	Lead to Contact	Match Category	Mapping Type	Fuzzy	Transpose	AlphaClean
1	RIGID	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	First Name Last Name Mailing Street Phone Email	All All All All All	Exact Exact Exact Numeric Exact	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2	SEMI LOOSE	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	First Name Last Name Phone	All All All	Exact Exact Relaxed NA Phone	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3	LOOSE	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	First Name Last Name Email	All All All	Exact Exact Domain	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Customer customizations:

- Who owns the contact: Lead Owner or Contact Owner
- Create Opportunity?
- Create Task?
- If duplicate contacts found, use Oldest, Newest or Most Recently Modified





NO-DUPES STANDARD LEAD TO ACCOUNT DEDUPLICATION

Pass	Criteria	Match Blank Values	Lead to Account	Match Category	Mapping Type	Fuzzy	Transpose	AlphaClean
1	RIGID	<input type="checkbox"/>	Company	All	Cleaned Account Name	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="checkbox"/>	City	All	Exact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	State	All	Exact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	Phone	All	Numeric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	Street	All	Exact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	SEMI LOOSE	<input type="checkbox"/>	City	All	Exact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	Company	All	Cleaned Account Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	Phone	All	Relaxed NA Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	LOOSE	<input type="checkbox"/>	Phone	All	Relaxed NA Match	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	Street	All	Relaxed Address Match	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	Company	All	Cleaned Account Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Customer customizations:

- Who owns the contact: Lead Owner or Contact Owner
- Create Opportunity?
- If duplicate Accounts found, use Oldest, Newest or Most Recently Modified



SECTION C – CRMFUSION INC. AND GATEWAY COMPUTERS LTD

1.1 This is a contract for software and/or information to be made available within and for a Customer's Salesforce.com system, and for services for implementing, customizing or supporting the software and/or information, which are collectively called "Services". Subject to the terms and conditions of this Agreement, Service Provider will use reasonable efforts to provide the Services. As part of the registration process for Service Provider's software, if the software is included in this agreement, Customer will identify an administrative user name and password for Customer's Service Provider account ("Account"). Customer may use the administrative user name and password to create standard users (each with a user password) up to the maximum number permitted in the Exhibit(s). Service Provider reserves the right to refuse registration of, or cancel passwords it deems inappropriate.

1.2 Subject to the terms hereof, Service Provider will use reasonable` efforts to provide Customer with support services, through electronic mail or telephone, in accordance with Service Provider's standard practice.

2. RESTRICTIONS AND RESPONSIBILITIES

2.1 The software for the Services will be installed, accessed and maintained only by or for Service Provider and no license is granted thereto. The Services and information are provided for the internal use of the Customer and may not be duplicated, reproduced, or redistributed in hard copy, machine-readable, or any other form without written authorization from the Service Provider's suppliers ("Suppliers"). Customer will not, directly or indirectly: reverse engineer, decompile, disassemble or otherwise attempt to discover the source code, object code or underlying structure, ideas or algorithms of the Services or any software, documentation or data related to the Services ("Software"); modify, translate, or create derivative works based on the Services or any Software; or copy (except for archival purposes), rent, lease, distribute, pledge, assign, or otherwise transfer or encumber rights to the Services or any Software; use the Services or any Software for timesharing or service bureau purposes or otherwise for the benefit of a third party; or remove any proprietary notices or labels.

2.2 As between Service Provider and Customer, all "Customer Data" means all electronic data or information exported from, purchased or licensed to be used with Customer's Salesforce.com system. Customer Data that existed in Customer's Salesforce.com system before this agreement is owned exclusively by Customer. Customer agrees that all information that it receives from Service Provider's Suppliers is licensed for Customer's internal exclusive use and that Customer may retain a copy of such information within Salesforce.com for historical and/or archival purposes only. Customer Data shall be considered Confidential Information subject to the terms of this Agreement. Service Provider may access Customer Data solely to execute or respond to the service obligations of this Agreement.

3. CONFIDENTIALITY

3.1 Each party (the "Receiving Party") understands that the other party (the "Disclosing Party") has disclosed or may disclose information relating to the Disclosing Party's business (hereinafter referred to as "Proprietary Information" of the Disclosing Party).

3.2 The Receiving Party agrees: (i) to protect such Proprietary Information, and (ii) not to divulge to any third person any such Proprietary Information. The Disclosing Party agrees that the foregoing shall not apply with respect to any information after three years following the disclosure thereof except confidential information provided to the Disclosing Party by one of its clients, in which case it will not be disclosed at any time without the prior written consent of the client of the Disclosing Party, or any information that the Receiving Party can document (a) is or becomes generally available to the public, or (b) was in its possession or known by it prior to receipt from the Disclosing Party, or (c) was rightfully disclosed to it without restriction by a third party, or (d) was independently developed without use of any Proprietary Information of the Disclosing Party or (e) is required by law.

3.3 If the Receiving Party or its Representatives becomes legally compelled to disclose the Proprietary Information, the Receiving Party will provide the Disclosing Party prompt written notice so that the Disclosing Party may seek a protective order, seek another appropriate remedy, or waive the Receiving Party's compliance with the Agreement. If the Disclosing Party waives the Receiving Party's compliance with the Agreement or fails to obtain a protective order or other appropriate remedy, the Receiving Party will furnish only that portion of the Proprietary Information that is legally required to be disclosed and will use its diligent efforts to obtain confidential treatment for such Proprietary Information, all at the sole cost and expense of the Disclosing Party. In any event, Service Provider may collect data with respect to and report on the aggregate response rate and other aggregate measures of the Services' performance.

3.4 If the Receiving Party discloses or uses (or threatens to disclose or use) any Confidential Information of the Disclosing Party in breach of this Section 3, the Disclosing Party shall have the right, in addition to any other remedies available to it, to seek injunctive relief to enjoin such acts, it being specifically acknowledged by the parties that any other available remedies are inadequate.

4. PAYMENT OF FEES

4.1 Customer will pay Service Provider the then applicable fees for the Services and for any Professional Services (and any reasonable expenses incurred in the performance of such Professional Services) set forth on any Exhibit (the "Fees

4.2 Service Provider may choose to bill through an invoice, in which case, full payment for invoices issued in any given month must be received by Service Provider thirty (30) days after the mailing date of the invoice, or sooner as specified in the Exhibit(s), or the Services may be terminated.

5. PROFESSIONAL SERVICES

5.1 Subject to the terms and conditions described herein, Service Provider will use reasonable commercial efforts to perform the services requested by Customer from time to time (the "Professional Services") to deliver the deliverables requested by Customer ("Deliverables") as defined in the attached Exhibit(s). For the purposes of this Agreement, Professional Services shall be considered Services.

6. WARRANTY AND DISCLAIMER

Service Provider shall use reasonable commercial efforts consistent with prevailing industry standards to maintain the Services in a manner which minimizes errors and interruptions in the Services. Services may be temporarily unavailable for scheduled maintenance or for unscheduled emergency maintenance, either by Service Provider or by third-party providers, or because of other causes beyond Service Provider's reasonable control, but Service Provider shall use reasonable efforts to provide advance notice in writing or by e-mail of any scheduled service disruption. HOWEVER, SERVICE PROVIDER DOES NOT WARRANT THAT THE SERVICES WILL BE UNINTERRUPTED OR ERROR FREE; NOR DOES IT OR ITS SUPPLIERS MAKE ANY WARRANTY AS TO THE RESULTS THAT MAY BE OBTAINED FROM USE OF THE SERVICES, OR THE ACCURACY, TIMELINESS, COMPLETENESS, OR VALIDITY OF THE DATA PROVIDED BY SERVICE PROVIDER OR ITS SUPPLIERS. THE SERVICES ARE PROVIDED "AS IS" AND SERVICE PROVIDER AND ITS SUPPLIERS DISCLAIM ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT.

7. LIMITATION OF LIABILITY

NOTWITHSTANDING ANYTHING TO THE CONTRARY, SERVICE PROVIDER AND ITS SUPPLIERS (INCLUDING BUT NOT LIMITED TO ALL DATA, INFORMATION, AND INTELLECTUAL PROPERTY SUPPLIERS), OFFICERS, AFFILIATES, REPRESENTATIVES, CONTRACTORS AND EMPLOYEES SHALL NOT BE RESPONSIBLE OR LIABLE WITH RESPECT TO ANY SUBJECT MATTER OF THIS AGREEMENT OR TERMS AND CONDITIONS RELATED THERETO UNDER ANY CONTRACT, NEGLIGENCE, STRICT LIABILITY OR OTHER THEORY: (A) FOR ERROR OR INTERRUPTION OF USE OR FOR LOSS OR INACCURACY OR CORRUPTION OF DATA OR COST OF PROCUREMENT OF SUBSTITUTE GOODS, SERVICES OR TECHNOLOGY OR LOSS OF BUSINESS; (B) FOR ANY INDIRECT, EXEMPLARY, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; (C) FOR ANY MATTER BEYOND SERVICE PROVIDER'S REASONABLE CONTROL, EVEN IF SERVICE PROVIDER HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE; OR (D) FOR ANY AMOUNTS THAT, TOGETHER WITH AMOUNTS ASSOCIATED WITH ALL OTHER CLAIMS, EXCEED THE FEES PAID BY CUSTOMER TO SERVICE PROVIDER FOR THE SERVICES UNDER THIS AGREEMENT IN THE 12 MONTHS PRIOR TO THE ACT THAT GAVE RISE TO THE LIABILITY, AND CUSTOMER COVENANTS AND PROMISES THAT IT WILL NOT SUE SERVICE PROVIDER OR ITS SUPPLIERS FOR A GREATER AMOUNT PROVIDED HOWEVER, THIS LIMITATION OF LIABILITY SHALL NOT APPLY TO ANY BREACH OF THE DUTY BY A PARTY TO PROTECT CONFIDENTIAL INFORMATION FROM DISCLOSURE EXCEPT THAT THE TOTAL AMOUNT OF DAMAGES FOR BREACH OF THIS DUTY SHALL NOT EXCEED FIVE MILLION DOLLARS. Electronic conversion and transmission of textual and numeric data may cause errors and/or omissions in the information provided. Furthermore, the information may not be up-to-date due to a delay between the preparation of data and its inclusion on the Service. For these reasons, the information contained in the Service is provided for research purposes only and not for investment or any other purposes. Service Provider and its Suppliers are not in the business of providing investment advice and shall have no liability whatsoever for any investment decision or the results of any investment made by a user of the Service.

8. MISCELLANEOUS



10.1 If any provision of this Agreement is found to be unenforceable or invalid, that provision will be limited or eliminated to the minimum extent necessary so that this Agreement will otherwise remain in full force and effect and enforceable. This Agreement is not assignable, transferable or sublicensable by Customer except with Service Provider's prior written consent. Service Provider may transfer and assign any of its rights and obligations under this Agreement without consent. Both parties agree that this Agreement is the complete and exclusive statement of the mutual understanding of the parties and supersedes and cancels all previous written and oral agreements, communications and other understandings relating to the subject matter of this Agreement, and that all waivers and modifications must be in writing signed by both parties, except as otherwise provided herein. No agency, partnership, joint venture, or employment is created as a result of this Agreement and Customer does not have any authority of any kind to bind Service Provider in any respect whatsoever. In any action or proceeding to enforce rights under this Agreement, the prevailing party will be entitled to recover costs and attorneys' fees. All notices under this Agreement will be in writing and will be deemed to have been duly given when received, if personally delivered; when receipt is electronically confirmed, if transmitted by facsimile or e-mail; the day after it is sent, if sent for next day delivery by recognized overnight delivery service; and upon receipt, if sent by certified or registered mail, return receipt requested. This Agreement shall be governed by the laws of the State of California without regard to its conflict of laws provisions. Unless otherwise elected by the Service Provider, the sole jurisdiction and venue for actions related to the subject matter hereof shall be the state and U.S. federal courts in the state of California in the county of San Mateo or in the case of federal courts, the county of San Francisco.

10.2 If this Agreement is entered into by a Customer that is an organization and is signed by an organization representative, such representative hereby represents and warrants that it has the proper and legal authority to accept responsibility on behalf of, and to legally bind, the organization.

Agreement for Professional Data Cleansing Services

This agreement ("Agreement") is entered into on this _____ day of _____, 2006, (the "Effective Date") between CRMfusion Inc. with its principal place of business in Keswick, Ontario, Canada ("Service Provider"), and ABC Corporation with its principal place of business at _____ ("Customer").

This Agreement includes and incorporates the attached Exhibits, as well as the accompanying Terms and Conditions and contains, among other things, warranty disclaimers, liability limitations and use limitations. There shall be no force or effect to any different terms of any related purchase order or similar form even if signed by the parties after the date hereof.

Each party's acceptance of this Agreement was and is expressly conditional upon the other's acceptance of the terms contained in the Agreement to the exclusion of all other terms.

CRMfusion Inc.:

ABC Corporation

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____



SECTION D – UNDERSTANDING TERMINOLOGY

Match Categories

All - All Categories

Alpha - Techniques for text

Contact - Techniques specifically for dealing with Contact names

CRM - Techniques specific for CRM Applications

Geo - Techniques for address information

Internet - Techniques for domain information

Numeric - Techniques for dealing with number based matches

Mapping Types

Cleaned Account Name: Uses the built in Account Name Cleaning List. To see the Cleaning list tool select the "Edit Account Cleaning List" button. The cleaning list standardizes punctuation, spaces, removes common business prefixes and suffixes. These lists are customizable to you language(s) and/or line of business.

Country Match: The country mapping type is used to standardize field values for the recognized countries of the world. It makes the long name, 2 digit ISO short form, 3 digit ISO short form and the numeric ISO country value all to appear to be matches of each other.

Domain: The domain mapping type is used when mapping web pages and/or email addresses. It allows for the independent analysis of the domain information contained within the URL or the email address. For email addresses it uses any information to the right of the @ sign. For web pages it parses the XXXXX.com portion. This tool allows for easy comparison of web page field vs web page field or email field vs email field. it also by nature allows for the comparison of email addresses compared to web pages and vice versa.

Exact: The exact mapping type in the Single Table Deduplication tool is exactly that. A 100% match of every character (assuming no options apply).

FirstName: Uses the built in Nickname List. To see the Nickname tool select the "Edit Nickname List" button at the top of the interface.

The Nickname list allows the deduplication tool to see Bill, William, Billy etc as potential duplicates of each other. This list is also customizable by the end user for localization or even in theory for non contact substitution on any field by replacing the nickname list with synonyms.

First XX Letters : Compares only the first XX letters in a field. Text fields are the only applicable field type.

Numeric: Compares only the numeric values in a field. Other characters that the field contains, such as spaces or punctuation, will be ignored and not seen by the deduper. A field with a value of "Apt # 31" is seen to the deduper as only the numeric characters "31" .

Relaxed Address Match: Parses the street address to the lowest common denominator. Based in North American standards, it has also proved effective with most country address formats.

With relaxed address match:

- Apt#4, 123 Pavillion Street →
 - 123 Pavillion, Apt 4 →
 - 4-123 Pavillion Ave NW →
- Are all seen as the deduper in the lowest common denominator of "123 Pavillion"

Salesforce.com ObjectID Match : Used to match any Salesforce.com objects' 15 digit ID to its 18 digit equivalent ID and vice versa.

Street Address Match: The street address match is a slightly more rigid criteria than the relaxed address match tool. It will ignore the differences in street type short forms such as crescent - cres, road - rd, street - st.

Zip 5 and 9 Match : This mapping type will automatically match USPS 5 and 9 digit zip codes together without the need to standardize them first to a common number of digits.

Mapping Options – Type/Description/Applicable Mapping Types

Fuzzy

Phonetics engine capable of analyzing words for how they sound when pronounced. Through a technique of removing vowels and analyzing the remaining consonants the fuzzy engines works very well for matching fields with spelling mistakes.

Cleaned Account Name
Exact
FirstName

Transpose

The transpositional engine allows for fields to appear to be duplicates even if they have differences in their word order. For example Jones, Smith and Jackson will appear to be a duplicate of Jackson, Smith and Jones.

Cleaned Account Name
Exact
FirstName
Street

AlphaClean

The alpha cleaner extends some of the capabilities of the account name cleaner to other fields for matching. The alpha cleaner is used when you know you only have ascii (north american) data and you would like to ensure that the only characters that are analyzed are the 26 characters of the english alphabet and the numbers 0-9. Any other character that the field may contain will be ignored and not seen by the deduplication matching algorithms.

Cleaned Account Name
Exact
FirstName
Numeric
Street
Zip 5 and 9



Master Rule Options

Field	Constraint	Value
Record	Owned by Not Owned by Oldest Newest Most Recently Modified Most Opportunities Most Contacts	Equals Not Equal to Prepopulates with sfdc values
Field Name	Equals Not Equal to Starts With Does Not Start With Ends With Does Not End With Is Populated By Not Populated By Contains Does Not Contain	

