Salesforce.com: Winter '12

Jigsaw for Salesforce Configuration Guide

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Jigsaw for Salesforce Overview

Jigsaw for Salesforce is an AppExchange package built on the Force.com platform. It allows you to gather account and contact data and keep it up to date. In addition to letting you find and add new accounts, contacts, and leads, Jigsaw for Salesforce cleans your existing Salesforce data by:

- Locating outdated information and updating it
- Completing partial records by providing missing information
- Handling inactive or duplicate records

Because it is a managed package, Jigsaw for Salesforce includes components that are locked. Locking prevents you from changing the components after installation, ensuring that you can install upgrades without any data conflicts. When an upgrade becomes available, you will receive an email with an installation link.

This document contains configuration and post-installation information about Jigsaw for Salesforce including Data.com Clean, the set of components that keeps your data accurate and up to date. It assumes the reader has basic knowledge of Salesforce administration and is not intended to be a user guide for performing basic administrator functions or using the Data.com or Jigsaw features built in to Salesforce with the Summer '11 release. For instructions on using Salesforce, see the Salesforce online help.

Understanding Jigsaw for Salesforce

Jigsaw for Salesforce keeps your data fresh by comparing all your Salesforce account, contact, and lead records against records on the Data.com database. The results are displayed in the Data.com section of the record's detail page. For example, a record that changes in Data.com displays a new status in Salesforce, even if the difference between those records is a single field value. View these details in the Data.com section of a record.

- `Data.com Status`

  The results of the most recent automated or manual cleaning.

  ◊ `Different` ( ): Clean located a match in Data.com but Data.com has different information. Review records with this status to see if some or all of the data should be updated with Data.com's information.

  ◊ `Graveyard` ( ): Clean has determined that the record is inactive or invalid. This happens to a contact or lead when it has an invalid email address, bad phone number, or left the company. For account records, the company is out of business.

  ◊ `Matching` ( ): Clean located a match in Data.com, Salesforce and Data.com are in sync, and the record is up to date.

  ◊ `Not Found` ( ): Either Data.com doesn't include this record or the Salesforce record doesn't include enough information for Clean to locate a match in Data.com.

  If a record has a status of `Matching` or `Different`, the `Data.com Status` field also provides a **Data.com Fresher** or **Salesforce Fresher** link. These links indicate that the record was most recently updated by Data.com Clean or by a Salesforce user.

- `Update Status`

  Shows if a record is locked (so it can't be updated by the automated cleaning) or unlocked.

- `Additional Information`

  Only appears on account records. Lists the outside sources of information that are used for the record.

- `Last Checked`

  Indicates the last time the automated cleaning compared the record to Data.com.

- `Duplicate`

  If Clean finds possible duplicates of a record, it adds a link to this field. Click the link to view the list of duplicates.

Data.com offers several different options for keeping your data fresh

- An automated process scans your Salesforce data hourly, comparing it with Data.com data and updating the status.
- Data.com updates your data four times a day: at 6:00 a.m., noon, 6:00 p.m, and midnight PST, depending on your Clean settings. To review your clean settings, see Configuring the Automated Cleaning on page 5. You can also lock individual records that you want excluded from the automated clean process. For instructions on locking records, see Limiting Which Records are Cleaned on page 6.
- Click **Clean with Data.com** on any record detail page to manually sync differences between Salesforce and Data.com on that record alone.

Understanding Matching Methods

Jigsaw for Salesforce updates your account (company), contact, and lead data by comparing fields on those objects with data from the corresponding company, contact, and lead records in the Data.com database. Data.com's complex matching engine uses several methods to get the most closely matching records. It:

- Prioritizes certain fields
- Accommodates for special variations
- Skips suspicious matches

Jigsaw for Salesforce primarily uses the `Website` field for account comparisons and the `Email` field for contact and lead comparisons. Beyond comparing individual fields, it makes special accommodations for superficial differences like "Will Clark" for "Bill Clark." Finally, it bypasses suspect pairings if they are likely to be inaccurate. For more details on matching contacts and leads, see Understanding Contact and Lead Matching on page 2. For detailed information on matching companies, see Understanding Company Matching on page 4.

Note: All examples work in both directions. If "www.salesforce.com" in Salesforce matches "http://www.salesforce.com" in Data.com, then "http://www.salesforce.com" in Data.com will match "www.salesforce.com" in Salesforce, as well.

Understanding Contact and Lead Matching

The Data.com matching engine first compares a record's `Email` primarily because it is the most accurate method for matching contacts and leads. If no match is found for email address, Data.com attempts to match on combinations of other fields, such as the following.

- `Name` + `Account Name`
- `Name` + `Phone`

Regardless of the initial method, Data.com also verifies the match against certain other fields. It matches a lead or contact using values, if available, from the following additional fields: `Name`, `Title`, `Phone`, `Address`, and `Company` on leads or `Account Name` on contacts. This prevents such inaccurate matches on email address like “Ryan Smith” for “rsmith@ibm.com” when “Bob Smith” is the correct match.

Matching by Person Name

To accommodate a variety of naming conventions, Data.com employs a number of heuristics designed to handle variations such as a “Robert” known as “Bob” or an “Andrew” who goes by “Drew.” It evaluates prefixes, suffixes, aliases, shortened names, and some spelling errors.

Variations for first names are far more common than those for last names. So, Data.com is more liberal at matching first names and accommodates more variations. For example, Data.com matches the following first name variations.

- “Bob” for “Robert”
- “Ed” for “Edward”
- “Dr. Mike” for “Mike”
- “Jon” for “John”
- “Donavan” for “Donovan”
- “Nick” for “Nicholas”

Data.com is more conservative at matching last names to avoid highly similar names that are actually different. For example, it would not equate “Johnson” with “Johnston.” However, the following last name variations would be considered matches.

- “Donovan, Jr” for “Donovan”
- “Richardson” for “Richrdson”

Matching by Title

Data.com also considers variations in common terms for titles. For example, it would consider the following titles to be matches.

- “HR Coordinator” for “Human Resources Coordinator”
- “Manager D P Sys” for “Manager of Data Processing Systems”
- “Sysadmin” for “System Administrator”

Furthermore, title matching is not confined to similar text. The following title pairs would also be matches.

- “John Doe, VP of Marketing, SalesPoint”
- “John Doe, Marketing Director, SalesPoint”

Matching by Company Name

Data.com accommodates variations in common company name acronyms, suffixes, misspelled words, superficial differences, and unusual patterns that can occur. For example, Data.com considers the following company names to be matches.

- “Intel” for “Intel Corporation”
- “IBM” for “International Business Machines Corporation”
- “Mid-South IEC” for “Mid-South Independent Electrical Contractors”
- “Bank of Americ Corporation” for “Bank of America Corporation”
- “Charlotte Russe” for “Charlotte Russe Holding, Inc.”
- “Applied Data Entry Systems” for “Applied Data Entry Systems ADES”

Matching by Phone Number

Data.com matches by phone number with consideration for missing international codes, different phone formats, and (for US and Canadian phone numbers) different ending four digits. For example, the following types of phone number pairs will match.

- “(316) 681-0032” and “+1.316.681.0032”
- “225-767-7670” and “225.767.7670”
- “(216) 566-7767” and “+1.216.566.7760”

Rejecting Suspected Mismatches

Data.com can decline to match certain pairs of records based on a number of factors. Since there is a good chance that two different people with the same name work at “IBM,” the matching engine rejects each one as a match for the other. On the other hand, if there are two “John Crawford” records at “John's Crab Corner,” a match is more likely. Finally, if the person names match but contact records are substantially different, the pair is not considered a match.

Understanding Company Matching

The Data.com matching engine primarily relies on values in the `Website` field to compare companies (accounts), but there are exceptions. When website URLs are the same but the cities are different, no match is made. If no match is found for `Website`, the engine searches for matches in phone number, company name, and city. It allows for the same variations in company name and phone number as it does when comparing contacts and leads. For more information on this, see Understanding Contact and Lead Matching on page 2.

Matching By Website

Data.com considers variations in website URL formats when matching by website. For example, the following website formats will match.

- “www.salesforce.com” matches “salesforce.com”
- “www.salesforce.com” matches “http://www.salesforce.com”

Matching By City

When matching by city, Data.com uses the address of the company's headquarters only. It accommodates case differences and common spelling errors. These examples show matches of such differences.

- “New York City” matches “NewYork City”
- “Sacramento” matches “Sacremento”

Note: When two records have the same website URL but different cities, they are not considered to match. However, with identical website URLs, if one of the records' city is blank, the two records *are* considered to match. For the best matching results, leave the city blank when you are not sure of the company's city.

Rejecting Suspect Mismatches

Data.com rejects certain matches based on a number of factors. When the two company names are substantially different, the match is rejected even if other field values are identical or substantially similar. If the cities in the two records are substantially different, the match is rejected.

Exceptions

Data.com does not accommodate some common variations in spelling. For example, “St Louis” is not considered a match for “Saint Louis.” While some variations in phone numbers are considered, the international code must be present in both records before Data.com recognizes them as a match when comparing non-US and non-Canadian phone numbers. For example, the following numbers are not considered a match.

- “+44 20 3948 1624” matches “020 3948 1624”

Configuring the Automated Cleaning

By default, the automated cleaning compares account, contact, and lead records to Data.com and identifies any data that is old or inaccurate but it doesn't make any changes to your records. You can configure the automated process to take different actions when differences are detected.

Important: Wait until the initial cleaning finishes before changing the automated cleaning settings.

1. In Salesforce, select `Data.com`. from the App Menu.
2. Click the Data.com Clean Settings tab.
3. Specify what the automated cleaning should do if there are differences between a Salesforce record and its matching record in Data.com. You can assign different actions for company (i.e., account), contact, and lead records.

   - `Don't automatically update anything`

     Users must manually initiate any changes to Salesforce records. However, Data.com continues to update the status based on comparisons with the data in Data.com.

   - `Automatically fill empty values & flag differences`

     Blank fields are populated with Data.com data but no data is overwritten unless users manually initiate updates to existing Salesforce data.

     Note: Salesforce treats all address-related fields for a record as a single field. If a record's address fields aren't complete (for example, only the state is provided), the automated cleaning doesn't fill in any of the other address fields.

   - `Automatically fill all values`

     Data.com automatically updates all fields selected in the next step for all matched records. By default, all of a record's fields are cleaned and all empty fields (even if they are not selected for automatic update) are filled if Data.com has data, but you can limit this in the next step.

     Important: If you want to be able to undo changes to records, enable history tracking for the fields listed in Enabling Field History Tracking before configuring this option.

   For all of these settings, the automated cleaning always compares your Salesforce data to Data.com, identifies any differences, and updates each record's Data.com status with one of the following: `Matching`, `Different`, `Graveyard` (inactive), or `Not Found`.

4. To limit the fields that are updated, click the **Automatically update** link for each object of the `Automatically fill all values` settings that you activated. Deselect the fields that you don't want updated, then click **Save**.

If you turn off the automated cleaning of certain fields, manually update records to keep the information in these fields accurate. If any of these fields in a record are empty, Clean still automatically populates them with Data.com data.

5. Click **Update** and confirm your settings by clicking **Yes, Continue**.

You can also change the automated cleaning settings at `www.jigsaw.com`. Log in to your Jigsaw.com account and select **My Settings** > **My Account**, then click **Settings** under Data.com for CRM.

Note: Changes to the automated cleaning configuration aren't retroactive. If you need to have your new settings applied to records that were previously processed, send an email to jdfsupport@jigsaw.com requesting a resync. You'll get confirmation by email when the resync has been initiated.

Limiting Which Records are Cleaned

If your organization has data that shouldn't be modified—for example, you know a record is up to date or contains information that is specific to your activities—you can disable automatic updates for those records.

Users can prevent individual records from being automatically cleaned using the **Lock/Unlock** button on account, contact, and lead record detail pages. If you have a large number of records that should not be cleaned, you can lock them en masse. You can also use this process to unlock multiple records so they can once again be updated by the automated cleaning.

Important: If you lock records, keep these guidelines in mind.

- Locking records prevents Data.com from filling blank fields with data or overwriting the current values, but locked records are still viewed by Data.com for Salesforce and Data.com still provides status information for locked records.
- There is no relationship between locking from Data.com and Salesforce record-level edit permissions for users. Any user can lock and unlock records from automatic updates in Data.com, even if they were previously locked or unlocked by a Salesforce administrator.
- Records that are added after you perform these steps aren't automatically locked. Repeat this process to lock those records, as well.

1. Change the field level security settings for the `Locked` field so that it is not hidden or read only.
2. Click the account, contact, or lead tab for the records that you want to lock.
3. Create a list view that contains the records you want to lock. Include the `Locked` field in the list view display.

   Note: If you have record types enabled on the object, include a filter on a single record type because that is the only way to edit multiple records in a list view.

4. Select all or individual records that you want to lock using the checkbox at the right of each record in the list.
5. Double click the `Locked` column.
6. Select `Locked` and select `All x selected records` in the `Apply changes to` section.
7. Click **Save**.

On the record detail pages for records that you locked, the `Locked` field now displays a check mark. For records that you unlocked, this field is empty.

Note: Locking/unlocking records works for all editions, assuming you have **Enable Enhanced Lists** and **Enable Inline Editing** selected in your user interface settings. You can also lock records in bulk by updating the same field using the Data Loader.

Backing Up Account, Contact, and Lead Records in Enterprise and Unlimited Editions

Before installing Jigsaw for Salesforce, back up your account, contact, and lead records.

1. Click ***Your Name*** > **Setup** > **Data Management** > **Data Export**. Then click **Export Now**. This option is only available if enough time has passed since your last export. You can generate backup files manually once every six days (for weekly export) or 28 days (for monthly export).
2. In the Exported Data section, select the `Account`, `Contact`, and `Lead` checkboxes.
3. Click **Start Export**.
   Salesforce creates a `.zip` archive of `.csv` files, and then emails you when the file is ready. Exports typically finish within 48 hours of submission and large exports are broken up into multiple files.
4. Follow the link in the email or click **Data Export** to download the `.zip` file. `.zip` files are deleted 48 hours after the email is sent. The 48-hour time limit doesn't include weekends, which means if your download file is ready on Thursday at 4 p.m., that file isn't deleted until Monday at 4 p.m.

Backing Up Account, Contact, and Lead Records in Professional Edition

Before installing Jigsaw for Salesforce, back up your account, contact, and lead records.

Run this process twice—first to back up account and contact records then again to back up lead records.

1. On the Reports tab, click **Create New Custom Report**.
2. Select the appropriate category and report type, then click **Create**.
   - **For accounts and contacts**: select `Accounts & Contacts` category and `Contacts & Accounts` report type
   - **For leads**: select `Leads` category and `Leads` report type
3. Customize the report in the report builder.
   - Add all of the data fields to the report by dragging each of the folders from the Fields pane to the Preview pane.
   - Set `Show` to display all records.
     - ◊ **For accounts and contacts**: select `All accounts`
     - ◊ **For leads**: select `All leads`
   - Set `Date Field` to `Created Date` and set `Range` to `All Time`.
4. Click **Run Report**.
5. Click **Save As** and name the report.
   - **For accounts and contacts**: enter `Backup: Contacts & Accounts`
   - **For leads**: enter `Backup: Leads`
6. Click **Save & Return to Report**.
7. Click **Export Details**.
8. Set `Export File Encoding` for your language and set `Export File Format` to `Comma Delimited .csv`.

9. Click **Export**. In your browser's File Download dialog, save the file to disk.

Use the resulting `.csv` file to restore data, if necessary.

Edition-Specific Considerations for Jigsaw for Salesforce

Enterprise, Developer, and Unlimited editions contain features like field-level security, profiles, and custom page layouts so that you allow users to see fields that don't appear on the standard page layout, and allow Jigsaw for Salesforce to update all fields, even those that some users don't see on their page layouts.

You need to configure Jigsaw for Salesforce in Professional Edition differently because it does not have those features. For instructions on setting up field-level security, profiles, and custom page layouts in the editions that support them, search the Salesforce help for "Setting Field-Level Security (Enterprise and Unlimited Editions)."

For Professional Edition, you add the fields to the page layouts manually. So, be sure to add all Jigsaw for Salesforce fields to the page layout, as well as the standard account and lead fields that Jigsaw for Salesforce updates. For information on adding these fields, search for "Adding Data.com Clean Components to Page Layouts" in the installation guide titled *Implementing Jigsaw Clean for Accounts, Contacts, and Leads*.

Best Practices

Optimizing Your Data

Merging Duplicate Records

Jigsaw for Salesforce does not automatically merge your duplicate records, but it does include components that make it easy for you to identify and merge duplicate records.

- You can look at the Data.com section of your account, contact, and lead records for information on duplicate records. When the record has a duplicate, a link appears in the `Duplicate` field. Click the `Duplicates Found` link to view a list of these duplicate records.
- You can also run these reports from the Data.com report folder.
  - ◊ Duplicate Account Records
  - ◊ Duplicate Contact Records
  - ◊ Duplicate Lead Records

After identifying your duplicate records, merge them manually. To merge accounts:

1. Run the Duplicate Account Records report.
2. Open a duplicate account in a new window.
3. Copy the account name to use later.
4. Click the Accounts tab and click **Merge Accounts**.
5. Paste the account name.
6. Review the details of the two records, make your selections, and click **Merge** as appropriate.

To merge contacts:

1. Run the Duplicate Contact Records report.
2. Open a contact in a new window and click the account.
3. Click **Merge Contacts** from the Contacts related list.

4. Select the contacts to merge and click **Next**.
5. Review the details of the two records, make your selections, and click **Merge** as appropriate.

To merge leads:

1. Run the Duplicate Lead Records report.
2. Open a duplicate lead in a new window.
3. Click **Find Duplicates**.
4. Review the details of the duplicate records, make your selections, and click **Merge Leads** as appropriate.

To automate merging of duplicate records, search the AppExchange for apps that handle duplicate records. For example, an app called DupeBlocker is available for a fee.

Improving Match Rates

Your records get much higher match rates when they contain more information. To improve your match rates, you have a number of options.

- Review all records with a status of `Not Found` and add any additional information.
- To reduce the number of records that have the `Not Found` status, make the following fields required on the appropriate object page layouts so that users are more likely to enter additional information.
    - ◊ Account Fields
        - `Account Name`
        - `Website`
        - `Billing Address`
    - ◊ Contact Fields
        - `Name`
        - `Email`
        - `Mailing Address`
    - ◊ Lead Fields
        - `Name`
        - `Email`
        - `Address`
- Import records from Data.com to ensure they match 100%.
- Elect to have Jigsaw for Salesforce update all values or select specific fields to update. See Configuring the Automated Cleaning on page 5 to get instructions on making these selections. After changing your clean settings, contact jdfsupport@jigsaw.com and request a re-sync so your records are updated retroactively. After the re-sync, you should see results within 3 hours. You can view records that have been modified by running the following reports in the Data.com report folder:
    - ◊ Accounts Updated by Day or Accounts Updated by Month
    - ◊ Contacts Updated by Month
    - ◊ Leads Updated by Day or Leads Updated by Month

Optimizing Your Clean Settings

Data.com uses the most non-invasive (safest) mode for its initial sync, which simply identifies potential matches and flags them with the appropriate status. For a list of these values, see Understanding Jigsaw for Salesforce on page 1. The initial sync can take 6 to 8 hours. After the initial sync is complete, change your clean settings to allow Data.com to fill in any blank fields and continue to flag fields that are different so that no existing values are overwritten. See Configuring the Automated Cleaning on page 5 to get instructions on making these selections.

Keeping Credentials and Settings in Sync

Your system administrator sets up a dedicated Salesforce username and password in Data.com, which keeps the clean process working. If your Salesforce organization has set passwords to expire, make sure your system administrator updates the credentials in Data.com whenever they change in Salesforce.

If your Salesforce username or password changes in Salesforce and it is not updated in Data.com, Jigsaw for Salesforce will stop processing records. To update your password in Data.com:

1. Go to `www.Data.com` and log in with the password you use on that site.
2. Click **My Account My Settings** and click **Email and Password** under Account Settings.
3. Update your Data.com password to match your Salesforce password.

Important: Make sure you do this every time you change your Salesforce password.

Your system administrator also configures your clean settings. If your system administrator has hidden the Data.com Clean Settings tab, the administrator is the person who will be responsible for updating your clean settings.

Preventing Data Loss

Salesforce records can be locked from Jigsaw for Salesforce, preventing record data from being changed or inserted, regardless of your clean settings. For instructions on locking or unlocking records, see Limiting Which Records are Cleaned on page 6.

Understanding Data.com Status Information

Managing `Different` Status

When a lead, contact, or account record has a *`Different`* status, it means that Jigsaw for Salesforce has identified a record in the Data.com database that has some information that is identical to and some information that is different from a record in Salesforce. To review and resolve these differences, click **Clean with Data.com**, compare the details of the two records, select the values you want to save, and click **Update**. This changes the status to `Matching`, indicating that you've examined the records and judged them to be a match.

If you have a lot of records with *`Different`* status, the differences may simply be blank fields. To minimize the number of records with *`Different`* status, change your clean settings fill in blank fields but not overwrite existing values. To view how many records you have with the *`Different`* status:

- Click the Reports tab, select the Data.com report folder, and run one of the following reports for the type of records you want to view.
  - ◊ Different Account Records
  - ◊ Different Contact Records
  - ◊ Different Lead Records

- Click the Dashboards tab, select the Data.com folder, and view the Analytics dashboard. The top row of this dashboard shows how many records you have in *`Different`* status.

We recommend checking these reports or dashboard frequently because Data.com checks your records and updates their status frequently.

Working with `Graveyard` Status Records

The *`Graveyard`* status indicates the information for that record in Data.com is out of date. This can happen when the email is bouncing or the contact is no longer at the company. Data.com updates the status when the record is updated.

Most likely, the record with *`Graveyard`* status has more up-to-date information in Salesforce. When working with records that have this status:

- Exclude them from email or phone campaigns by filtering on this status value.
- To determine whether you should update the records with valid information on Data.com, review the following reports in the Data.com report folder.
  - ◊ `Graveyard` Account Records
  - ◊ `Graveyard` Contact Records
  - ◊ `Graveyard` Lead Records

Data.com Reports and Dashboards

The Jigsaw for Salesforce package includes reports and dashboard components to help you manage Data.com updates to your records. Review the following descriptions to get the most out of Jigsaw for Salesforce reports and dashboard components.

Reports

The Data.com report folder contains the following reports for you to maximize Jigsaw for Salesforce.

Data.com Added or Updated

Report	Includes
Accounts Updated by Day	What accounts did the clean process update in the last seven days?
Accounts Updated by Month	What accounts did the clean process update in the current and previous quarter?
Added Contacts	What contacts did Data.com add?
Added Leads	What leads did Data.com add?
Contacts Updated by Month	What contacts did the clean process update in the current and previous quarter?
Leads Updated by Day	What leads did the clean process update in the last seven days?
Leads Updated by Month	What leads did the clean process update in the current and previous quarter?

`Different` Reports

Review these reports to see how many of your records differ from matched records in Data.com at a glance.

Report	Includes
Different Account Records	What accounts are different in Data.com?
Different Contact Records	What contacts are different in Data.com?
Different Lead Records	What leads are different in Data.com?

Tip: Customize these reports to segment them further by filtering on rep, territory, or revenue.

Duplicate Reports

Run the following duplicate reports to view a list of your records that may need to be merged.

Report	Includes
Duplicate Account Records	What accounts have duplicates?
Duplicate Contact Records	What contacts have duplicates?
Duplicate Lead Records	What leads have duplicates?

Tip: For suggestions on how to quickly merge duplicate records, see Best Practices on page 8.

`Graveyard` Reports

The following reports include records that Data.com indicates are inactive. Review the records in these reports and update in Data.com if necessary.

Report	Includes
Graveyard Account Records	What accounts are inactive in Data.com?
Graveyard Contact Records	What contacts are inactive in Data.com?
Graveyard Lead Records	What leads are inactive in Data.com?

Status Summary Reports

The following reports illustrate how useful Data.com can be for you. They show how well your data matches the Data.com data.

Report	Includes
Data.com Status Accounts Summary	What status did Data.com send Salesforce for each account?
Data.com Status Contacts Summary	What status did Data.com send Salesforce for each contact?
Data.com Status Leads Summary	What status did Data.com send Salesforce for each lead?

Tip: If your match rates are lower than expected, contact jdfsupport@jigsaw.com so that we can review your data patterns and maximize match rates based on the state of your data.

Locked Record Reports

The following reports list all the records that are locked. Users can lock records by clicking the **Lock/Unlock** button from the account, contact, or lead. Alternatively, you can lock multiple records at once using the bulk locking procedure. See Limiting Which Records are Cleaned on page 6 for instructions on locking records in bulk. Both methods allow you to unlock in the same manner.

Report	Includes
Locked Account Records	What account records were either locked by the **Lock/Unlock** button or bulk locking process?
Locked Contact Records	What contact records were either locked by the **Lock/Unlock** button or bulk locking process?
Locked Lead Records	What lead records were either locked by the **Lock/Unlock** button or bulk locking process?

Data.com Managed Reports

The following reports show the percentages of your records that Data.com matches for accounts, contacts, and leads.

Report	Includes
Managed Accounts	What percentage of my accounts matches records in Data.com?
Managed Contacts	What percentage of my contacts matches records in Data.com?
Managed Leads	What percentage of my converted leads matches records in Data.com?

Lead Management

The converted lead reports are useful for showing Data.com's impact on qualifying leads.

Report	Includes
Count Converted Leads Data.com Managed	What is the total number of converted leads that Data.com matched?
Percent Converted Leads Data.com Managed	What percentage of converted leads did Data.com match?

Revenue and Pipeline Reports

Use the following opportunity reports to estimate the return on your investment with Jigsaw for Salesforce.

Report	Includes
Percent Pipeline Data.com Managed	What percentage of the pipeline comes from Data.com matched records?
Percent Pipeline Data.com Sourced	What percentage of the pipeline comes from Data.com sourced records?
Percent Revenue Data.com Managed	What percentage of revenue came from Data.com matched records?

Report	Includes
Percent Revenue Data.com Sourced	What percentage of revenue came from Data.com sourced records?
Pipeline Dollars Data.com Managed	How much money in the pipeline came from Data.com matched records?
Pipeline Dollars Data.com Sourced	How much money in the pipeline came from Data.com sourced records?
Revenue Dollars Data.com Managed	How much revenue came from Data.com matched records?
Revenue Dollars Data.com Sourced	How much revenue came from Data.com sourced records?

Tip: To customize the reports that Jigsaw for Salesforce provides by default, review the definition of fields included in this package.

Note: If you have questions about reports not listed here, contact jdfsupport@jigsaw.com.

Dashboards

Jigsaw for Salesforce contains two dashboards in a dashboard folder called “Data.com.”

- Analytics—contains dashboard components that help you analyze the data Data.com is affecting in your organization.
- Impact—contains dashboard components for you to see the impact Data.com has made. Use this dashboard to get an idea of the return on your investment.

Data.com Custom Fields

Jigsaw for Salesforce installs several custom fields for you to use when customizing reports or dashboards. To view a definition of these fields, click the link for the appropriate object.

- Account custom fields
- Contact custom fields
- Lead custom fields

Data.com Account Custom Fields

The following is a definition of all the account custom fields included when you install Jigsaw for Salesforce.

Field	Description
`Additional Information`	A formula field that displays linkable images to: • Data.com • Google • LinkedIn • RSS

Field	Description
`Duplicate`	Formula field that uses the `Duplicate Id` field to display a link to any duplicate records Data.com found or "None Found" if Data.com found no duplicate records.
`Duplicate Id`	Unique identifier of the duplicate record.
`Graveyard`	Checkbox that indicates the same record in Data.com is inactive or out of date.
`Data.com CRM Last Modified`	The most recent date the fields were updated, telling Data.com to include it in an incremental sync.
`Fresher`	One character text field containing one of the following values: • "C" if Salesforce changes are more recent • "J" if Data.com changes are more recent • "N" is the default value and indicates neither changed the record recently
`Data.com Id`	Contains the unique identifier for the Data.com record that matches it. For information on how Data.com matches records, see Understanding Matching Methods on page 2.
`Last Checked Backend`	The last time Data.com compared this record to the matched one in Data.com.
`Data.com Last Modified Date`	The most recent date Data.com updated the record.
`Locked`	Checkbox field controlled by the **Lock/Unlock** button. When selected, Data.com will not update the record regardless of your clean settings.
`Managed`	Formula field that displays one of the following values based on the `Data.com Update Status Backend` field: • Managed • Unmanaged **Note:** "Managed" means matched with a record on Data.com. For more information on how Data.com matches records, see Understanding Matching Methods on page 2.
`Managed Backend`	Data.com uses this field to query managed records (1) or unmanaged records (0).
`Silent Update`	Data.com uses this checkbox field to update the record in the next clean process and set the last modified date.
`Data.com Status`	Formula field that displays one of the following values based on the value of several other fields such as `Update Status Backend` on page 16, `Fresher` on page 15, and `Graveyard` on page 15:

Field	Description
	• Graveyard • Matching • Different • Not Found **Note:** For more information on these status values, see Understanding Jigsaw for Salesforce on page 1.
`Update Status Backend`	Text field indicating: • "I" when a record is matched and identical to matched record on Data.com • "O" when a record has different information than the matched record on Data.com • "U" when a record is either unknown or not matched with a record on Data.com
`Update Status Summary`	Displays the same value as `Data.com Status` but does not include images for use in reports and filters.
`Last Checked`	Formula field that displays the most recent date Data.com checked the record against the Data.com database. It uses the value in the `Last Checked Backend` on page 15 field.
`Update Status`	Formula field that displays one of the following values based on the value of the `Locked` on page 15 field: • Locked • Unlocked For details on locking or unlocking records in bulk, see Limiting Which Records are Cleaned on page 6.

Note: If you have questions about fields not listed here, contact jdfsupport@jigsaw.com.

Data.com Contact Custom Fields

The following custom contact fields will be installed along with the Jigsaw for Salesforce package.

Field	Description
`Duplicate`	Formula field that uses the `Duplicate Id` field to display a link to any duplicate records Data.com found or "None Found" if Data.com found no duplicate records.

Field	Description
`Duplicate Id`	Unique identifier of the duplicate record.
`Graveyard`	Checkbox that indicates the same record in Data.com is inactive or out of date.
`Data.com CRM Last Modified`	The most recent date the fields were updated, telling Data.com to include it in an incremental sync.
`Fresher`	One character text field containing one of the following values: • "C" if Salesforce changes are more recent • "J" if Data.com changes are more recent • "N" is the default value and indicates neither changed the record recently
`Data.com Id`	Contains the unique identifier for the Data.com record that matches it. For information on how Data.com matches records, see Understanding Matching Methods on page 2.
`Last Checked Backend`	The last time Data.com compared this record to the matched one in Data.com.
`Data.com Last Modified Date`	The most recent date Data.com updated the record.
`Locked`	Checkbox field controlled by the **Lock/Unlock** button. When selected, Data.com will not update the record regardless of your clean settings.
`Managed`	Formula field that displays one of the following values based on the `Data.com Update Status Backend` field: • Managed • Unmanaged **Note:** "Managed" means matched with a record on Data.com. For more information on how Data.com matches records, see Understanding Matching Methods on page 2.
`Managed Backend`	Data.com uses this field to query managed records (1) or unmanaged records (0).
`Silent Update`	Data.com uses this checkbox field to update the record in the next clean process and set the last modified date.
`Data.com Status`	Formula field that displays one of the following values based on the value of several other fields such as `Update Status Backend` on page 16, `Fresher` on page 15, and `Graveyard` on page 15: • `Graveyard` • `Matching` • `Different`

Field	Description
	• `Not Found` **Note:** For more information on these status values, see Understanding Jigsaw for Salesforce on page 1.
`Update Status Backend`	Text field indicating: • "I" when a record is matched and identical to matched record on Data.com • "O" when a record has different information than the matched record on Data.com • "U" when a record is either unknown or not matched with a record on Data.com
`Update Status Summary`	Displays the same value as `Data.com Status` but does not include images for use in reports and filters.
`Last Checked`	Formula field that displays the most recent date Data.com checked the record against the Data.com database. It uses the value in the `Last Checked Backend` on page 15 field.
`Update Status`	Formula field that displays one of the following values based on the value of the `Locked` on page 15 field: • Locked • Unlocked For details on locking or unlocking records in bulk, see Limiting Which Records are Cleaned on page 6.

Data.com Lead Custom Fields

The following lead custom fields are included in the installed Jigsaw for Salesforce package.

Field	Description
`Duplicate`	Formula field that uses the `Duplicate Id` field to display a link to any duplicate records Data.com found or "None Found" if Data.com found no duplicate records.
`Duplicate Id`	Unique identifier of the duplicate record.
`Graveyard`	Checkbox that indicates the same record in Data.com is inactive or out of date.
`Data.com CRM Last Modified`	The most recent date the fields were updated, telling Data.com to include it in an incremental sync.

Field	Description
`Fresher`	One character text field containing one of the following values: • “C” if Salesforce changes are more recent • “J” if Data.com changes are more recent • “N” is the default value and indicates neither changed the record recently
`Data.com Id`	Contains the unique identifier for the Data.com record that matches it. For information on how Data.com matches records, see Understanding Matching Methods on page 2.
`Last Checked Backend`	The last time Data.com compared this record to the matched one in Data.com.
`Data.com Last Modified Date`	The most recent date Data.com updated the record.
`Locked`	Checkbox field controlled by the **Lock/Unlock** button. When selected, Data.com will not update the record regardless of your clean settings.
`Managed`	Formula field that displays one of the following values based on the `Data.com Update Status Backend` field: • Managed • Unmanaged **Note:** “Managed” means matched with a record on Data.com. For more information on how Data.com matches records, see Understanding Matching Methods on page 2.
`Managed Backend`	Data.com uses this field to query managed records (1) or unmanaged records (0).
`Silent Update`	Data.com uses this checkbox field to update the record in the next clean process and set the last modified date.
`Data.com Status`	Formula field that displays one of the following values based on the value of several other fields such as `Update Status Backend` on page 16, `Fresher` on page 15, and `Graveyard` on page 15: • `Graveyard` • `Matching` • `Different` • `Not Found` **Note:** For more information on these status values, see Understanding Jigsaw for Salesforce on page 1.

Field	Description
`Update Status Backend`	Text field indicating: • "I" when a record is matched and identical to matched record on Data.com • "O" when a record has different information than the matched record on Data.com • "U" when a record is either unknown or not matched with a record on Data.com
`Update Status Summary`	Displays the same value as `Data.com Status` but does not include images for use in reports and filters.
`Last Checked`	Formula field that displays the most recent date Data.com checked the record against the Data.com database. It uses the value in the `Last Checked Backend` on page 15 field.
`Update Status`	Formula field that displays one of the following values based on the value of the `Locked` on page 15 field: • Locked • Unlocked For details on locking or unlocking records in bulk, see Limiting Which Records are Cleaned on page 6.

Frequently Asked Questions

Installing

Who can install Jigsaw for Salesforce?

Only a system administrator or user with the "Customize Application" and "Download AppExchange Packages" permissions can install the Jigsaw for Salesforce package.

Who can modify Jigsaw for Salesforce components after installation?

Only a system administrator in Salesforce or a user with the "Customize Application" permission can change package components. However, since Jigsaw for Salesforce is a managed package, some attributes and components are locked to prevent data conflicts, ensuring successful upgrades.

How can I upgrade?

You will receive an email with an install link when an upgrade is available.

How do I get the Google Maps component?

Google Maps is not part of the Jigsaw for Salesforce package. However, it is freely available from Developer Force. Follow the guidelines on Developer Force.

How many custom fields does Jigsaw for Salesforce install?

The Jigsaw for Salesforce package includes 19 fields across three objects: accounts, contacts, and leads. Salesforce prevents installation of this package if it will cause you to exceed the maximum number of fields allowed for your Salesforce edition.

Note: If you are close to exceeding your limit of custom fields, delete fields before attempting to install Jigsaw for Salesforce. Salesforce stores deleted custom fields until you permanently delete them or 45 days has elapsed so that you can restore them if necessary. These fields count against your maximum limit so permanently erase them after you delete them. For instructions on deleting custom fields, see "Deleting Fields" in the Salesforce online help. For information on permanently erasing custom fields, see "Managing Deleted Custom Fields" in the Salesforce online help.

How many API calls does Jigsaw for Salesforce use?

This depends on a number of factors. However, you can estimate by calculating eight API calls per 1,000 batches of records. For example, a batch including 500 accounts, 1,500 contacts, and 5,000 leads uses approximately eight calls for accounts, 16 calls for contacts, and 40 calls for leads for a total of 64 API calls for the initial clean process.

Important: Avoid running any actions that are API intensive, such as a large data load or import during the initial clean process.

Will Jigsaw for Salesforce conflict with other Salesforce customizations?

The Jigsaw for Salesforce app is designed for the Force.com platform so conflicts should not occur. However, it is impossible to anticipate conflicts caused by code developed by external parties. Review all third-party code for potential issues as well as customizations that can affect lead, account, and contact data, such as workflow rules and lead assignment rules. If you have additional questions about this, contact jdfsupport@jigsaw.com.

Note: If you have installed additional AppExchange apps, they may consume your available API calls. Review usage of those apps and contact your Salesforce Account Executive if you need to extend your limit of daily API calls.

I am receiving this error from Data.com: "CRM test login did not work. Please try again." How do I fix this?

This error appears when the Salesforce credentials do not match your username and password. Do the following:

- Make sure your username and password are correct by logging in to Salesforce directly.
- Check your user profile to make sure you have the "Customize Application" permission.
- Reset your password in Salesforce and try logging in to Data.com again.
- Contact jdfsupport@jigsaw.com if all other suggestions do not work.

What is a "sync user"?

Your sync user is the Salesforce user associated with your Data.com login. It is the user of record that performs all clean actions.

What is a "clean seat"?

A clean seat is a user license for clean functionality only. It does not have any prospecting functionality like import. To upgrade your seat licenses, contact jdfsupport@jigsaw.com.

Automated Clean Process

How frequently does Jigsaw for Salesforce update data?

After data is initially cleaned, Jigsaw for Salesforce scans Salesforce hourly and sends updates four times a day. For more details on these processes, see Understanding Jigsaw for Salesforce on page 1.

How long does Jigsaw for Salesforce take to run the daily clean processes?

The time it takes to run the four daily clean processes depends on the number of records included. On average, the four daily clean processes can take 30 minutes each to finish.

I just changed my clean settings. Why haven't most of my records been updated?

When you change your clean settings, changes are not applied to existing records retroactively. Instead, those changes are only applied to data modified or created after your change takes place. If this is a problem, contact jdfsupport@jigsaw.com and ask to have all your data reprocessed with the new settings.

How does Jigsaw for Salesforce match Salesforce records with the Data.com database?

Jigsaw for Salesforce uses a number of proprietary algorithms to determine with a high degree of certainty whether your Salesforce record matches one in the Data.com database. In short, Jigsaw for Salesforce searches for matches of the following types of records in this order.

- For contacts and leads:
  1. Email address
  2. Name
  3. Company name or phone
- For accounts:
  1. Website
  2. Company phone
  3. Company name

Jigsaw for Salesforce also uses advanced deep matching logic to verify matches and filter false matches. For more information on the matching process, see Understanding Matching Methods on page 2.

Can I view changes Jigsaw for Salesforce made if it overwrites my data?

Yes. The installation guide includes information on enabling field history tracking in Salesforce on all fields that Jigsaw for Salesforce updates. After you enable field history tracking, you can run reports on previous values and the dates they were changed. This means that you can view prior values from the history related list or run history reports of those changes.

Important: If you exceed the limit of fields enabled for field history tracking, contact jdfsupport@jigsaw.com.

Always run a backup of your data before installing Jigsaw for Salesforce so you have that to reference if necessary.

Why does Jigsaw for Salesforce avoid updating parts of the address?

All address fields in Salesforce are a concatenation of several fields such as street, city, and state. When Jigsaw for Salesforce is configured to update blank fields, it bypasses address fields if one or more of those fields is not blank. To update partial addresses, click **Clean with Data.com** from a lead, contact, or account to display differences side by side and choose which address information to save.

Can I change my clean settings in Salesforce?

Yes. Salesforce administrators can update the clean settings from the Data.com Clean Settings tab. This tab is visible to System Administrators from the Data.com tab set.

Note: When you change your clean settings, changes are not applied to existing records retroactively. Instead, those changes are only applied to data modified or created after your change takes place. If this is a problem, contact jdfsupport@jigsaw.com and ask to have all your data reprocessed with the new settings.

What does `Graveyard` status mean?

Records that have a status of *`Graveyard`* are those that have been flagged in Data.com as containing old or inaccurate information. For example, a contact has this status if it has an invalid email address or phone number, or the contact has left the company.

Note: The status value for *`Graveyard`* is "Inactive" in Salesforce.

For best practices on handling records with `Graveyard` status, see Best Practices on page 8.

I haven't configured Jigsaw for Salesforce to update contacts or leads; why is it putting some of them in the graveyard?

It is simply flagging the record for you to see that the Data.com database has identified as already in the graveyard.

Does Jigsaw for Salesforce rematch records that have `Not Found` status?

Yes. A monthly process runs for all records that have a status of `Not Found` to rematch them. If a match is found, this process changes the status to `Matching`, `Different`, or `Graveyard`.

Note: All new records have a status of `Not Found` by default. Click **Clean with Data.com** to match it immediately.

Where can I see all the duplicate records Jigsaw for Salesforce has found?

The Jigsaw for Salesforce package includes a report folder called Data.com that contains the following reports of duplicate records:

- Duplicate Account Records
- Duplicate Contact Records
- Duplicate Lead Records

What are "locked" records?

Salesforce records can be locked from Data.com, meaning that record data will not be changed or inserted, regardless of your clean settings; yet, Data.com still compares locked records and Data.com's fields are still updated.

How do I lock and unlock records?

Add Data.com's **Lock/Unlock** custom button to any page layouts for accounts, contacts, and leads. Use it to toggle between locked and unlocked states of any record. For instructions on locking or unlocking records in bulk, see Limiting Which Records are Cleaned on page 6.

Data.com is only matching headquarter locations. How do I match using a different company location?

Currently, Data.com only matches with company headquarter locations. However, this is a highly requested feature on our product roadmap.

I have a record with `Not Found` status but I can see Data.com information when I click Clean with Data.com. Why is this happening and why won't Data.com match the record?

The **Clean with Data.com** button functions differently from the overall matching processes. The matching algorithms look at all record data, trying to determine the best match whereas the **Clean with Data.com** button simply displays all Data.com data for the matched record or all Data.com data corresponding with the Salesforce record's website or email address if the record is not matched.

Administration

How can I control who uses Jigsaw for Salesforce?

You can assign licenses to the Jigsaw for Salesforce installed app to individual users by going to ***`Your Name`*** > **Setup** > **Installed Packages** and clicking **Manage Licenses** next to the package name.

Where can I find Jigsaw for Salesforce settings in my Data.com account?

Click **My Account** > **My Settings** > **Settings** from the Jigsaw for Salesforce section. This section is only visible to one user per account, usually the account administrator.

Why does Jigsaw for Salesforce lock me out of Salesforce?

Jigsaw for Salesforce relies on one user to link Data.com to Salesforce. Enter this user's password in the test login on the Data.com site. Update the password stored in Data.com whenever you change your password in Salesforce.

Can I share my Jigsaw for Salesforce account with coworkers or friends?

No. Each Jigsaw for Salesforce license is for a single user and only allows one active session open at a time for a single computer. Sharing your license with others violates the Data.com terms of use.

I am not able to access my Data.com settings in Salesforce or use Clean with Data.com. How do I fix this?

Jigsaw for Salesforce uses a special key to communicate between Data.com and Salesforce. When this key is not set during the installation process, some pages will not function correctly. To fix this, follow the instructions in the installation guide and look for the topic “Setting the Data.com Key for your Salesforce Organization.”

What happens with the data I am sharing? Why don't I see it on Data.com?

When data is shared, it goes through a special processor known as PuzzleMaster. PuzzleMaster cleans the data to ensure the records are complete and accurate before posting them to Data.com, which can take at least seven days.

Can I share a subset of Salesforce records with Data.com?

No. You can specify that you want to share companies, people, or both with Data.com but you cannot specify individual records.

Note: Sharing people includes both contact and lead records in Salesforce.

Jigsaw for Salesforce Useful Terms

Graveyard

Status value used to refer to an inactive record. For recommendations on handling records with this status, see Best Practices on page 8.

Hygiene

Obsolete term used to refer to the Jigsaw for Salesforce Clean product. For more information on this process, see Understanding Jigsaw for Salesforce on page 1.

JDF

Acronym for Data.com Data Fusion, an obsolete term that refers to Jigsaw for Salesforce.

JFS

Acronym used to refer to Jigsaw for Salesforce.

Data.com Clean

The set of components included in the Jigsaw for Salesforce package that keeps information about the people and companies that you work with accurate and up to date. Data.com Clean also helps maintain data quality by identifying duplicate records in your organization and by preventing new duplicates from being created. Jigsaw Clean may also be referred to as Data.com Clean.

Jigsaw for Salesforce

A managed package that you can install to gather customer information and keep it updated. For more information on how it works, see Jigsaw for Salesforce on page 1.

Data.com Native

One way to refer to the Jigsaw for Salesforce prospecting functionality that is integrated into Salesforce starting with the Summer '11 release and accessed from the Data.com tab. Note that “Jigsaw Native” is not a product name or tab name.

Managed Package

A managed package is a set of Salesforce components that users can install from the AppExchange. Jigsaw for Salesforce is a managed package that you can install and upgrade when you receive an email that an upgrade is available. Because it is a managed package, some components are locked to ensure upgrades install without any conflicts.

Sync User

Refers to the set of user credentials you enter in Data.com to set all clean settings and the user of record that performs all clean actions.