JobAssist: Contact Data Standardization User Guide

Welcome to JobAssist! This application is designed to help you quickly **standardize** and **enrich** the company names found in raw contact lists. By mapping inconsistent company names (e.g., "Google Inc.," "Googlle") to a single, clean company profile ("Google"), you ensure data consistency for sales, marketing, and reporting.

1. The Contact Dashboard

The Dashboard provides an overview of all standardized company profiles and the enriched data associated with them.

- **Access:** This is the primary landing page of the application (index.html).
- **Purpose:** To quickly review the quality and status of your standardized company data.
- **Key Data Points:** You can view the **Clean Company Name**, **Employee Size**, **Annual Revenue**, and whether the company is flagged as a **Target Interest**.
- **Interaction:** The table is fully sortable by clicking on any column header.
- **NOTE:** You can click on any **Clean Company Name** to take you to the Company Management page for further review and enrichment updates.

2. The Raw Name Mapping/Cleanup Tool

This is the most critical step, where you link messy, raw company names to your clean, standardized profiles. Your goal is to eliminate the list of Unmapped Raw Names.

- **Access:** Navigate to the Cleanup Tool (cleanup.html).
- **Process:** The tool presents one unmapped raw name at a time and allows you to either:
    1. **Map to Existing:** Select an existing standardized company profile.
    2. **Create New:** Create a new standardized company profile using the raw name or a variation.
    3. **Skip & Self-Map:** Automatically create a new standardized profile using the raw name and mark it as a **Target Interest**.
- **Best Practice:** To ensure data integrity, always attempt to map a raw name to an existing **Clean Company Name** before creating a new one.

3. The Company Management Interface

Once a company is standardized, you can use the Management Interface to enrich, manage, and view **all** associated data for a specific clean company profile.

- **Access:** Navigate to the Management Interface (management.html).
- **Step 1: Select a Company:** Use the list on the left to find the standardized company you wish to edit. You can use the search bar to filter the list. Clicking a company loads its

details into the edit form.
- **Step 2: Review and Edit Profile Data:** When a profile is loaded, you can view and interact with three critical sections:
  - **Linked Raw Names:** A list of all unstandardized names (e.g., "Acme Corp L.", "Acme Ltd.") that have been successfully mapped to this single clean profile.
  - **Linked Contacts:** A table showing all individual contacts associated with this company profile. **The contact name is a clickable link that opens the contact's LinkedIn profile in a new tab.** The total count of contacts is displayed here.
  - **Enrichment Data:** Update the following profile fields:
    - **Target Interest:** Check this box to flag the company for sales/marketing priority.
    - **Headquarters:** Specify the primary location (e.g., "London, UK").
    - **Employee Size:** Input the estimated number of employees.
    - **Annual Revenue:** Enter the numeric value and select the scale (K, M, or B).
    - **Internal Notes:** Add any relevant text, history, or contact information.
- **Step 3: Save Changes:** Click **Save Changes** to commit your edits to the standardized company profile. Changes will immediately be reflected in the Dashboard.

4. Best Practices

- **Prioritize Cleanup:** The Cleanup Tool should be your first stop. Consistent data is the foundation for effective enrichment.
- **Be Accurate:** When creating new company profiles, ensure the **Clean Name** is as standardized as possible (e.g., use "IBM" not "I. B. M.").
- **Use Target Interest Judiciously:** The **Target Interest** flag is essential for filtering, so only apply it to companies that are a genuine priority for your organization.

Document Metadata

Detail	Value
Filename	User_Guide.md
Last Edited	2025-10-24