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Data Management

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Data Management

- Duplicate Detection
- Data Import
- Bulk Record Deletion
- Sample Data

What would you like to do?

Duplicate Detection Settings
Select default duplicate detection settings for your organization.

Duplicate Detection Rules
Create, modify and publish duplicate detection rules.

Duplicate Detection Jobs
Create and monitor duplicate detection jobs.

Bulk Record Deletion
Manage bulk record-deletion jobs.

Data Maps
Create, import, and export data maps used during import.

Imports
Import data and view the status of imports in progress.

Templates for Data Import
Download a template for Data import.

Sample Data
Add sample data to the system, or delete existing sample data.

Duplicate Detection

Duplicate Detection

- Allows the comparison of records in CRM based on a defined set of criteria.

- Most entities in CRM are supported
  - Custom Entities are supported
  - Entity Level Setting: "Enable duplicate detection"
  - Enabled at Org Level

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Duplicate Detection

- Integrated with application data entry points
  - Form save (new record / update record)
  - Data import (tools > import data)
  - Microsoft Dynamics Outlook goes from offline to online
  - Promotion of Outlook contact

- Wizard available to schedule recurring duplicate detection

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Duplicate Detection

- Enabling Detection
  - Settings | Data Mgmt | Dup Detection Settings

- Creating Rules
  - Settings | Data Mgmt | Dup Detection Rules
  - Maximum of 5 published rules per base entity
  - Each rule has a base and matching selection
  - Lines in a rule are "and" criteria
  - Separate rules are "or" criteria
  - Cross entity comparison is supported
    - Cross entity rules are a 1 way check

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Duplicate Detection

- How match codes work:
  - A rule compares contact email and zip code
    - user@microsoft.com, 58104

- Entry is made in table:
  - 58104|user@microsoft.com

- Codes are limited to 450 characters in length per rule.
  - Based on schema field lengths
  - Calculated at the bottom of the rule.

- Match codes refreshed every 5 minutes

Duplicate Detection

- Security
  - Rules respect security roles
    - Users in BU1 won't "see" dupes in BU2 without read access.
  - Duplicate Detection Rule permission in security roles is for rule creation only.
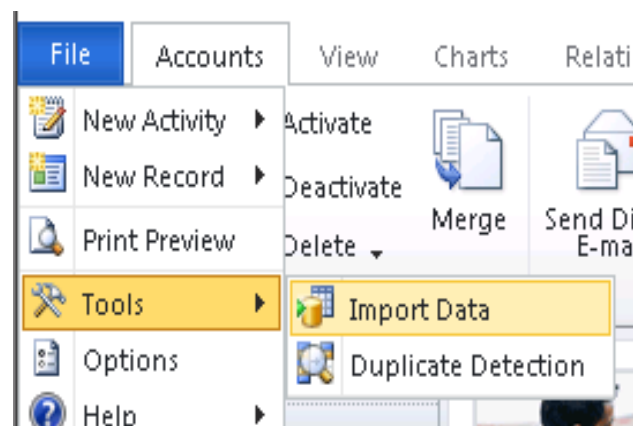
Duplicate Detection

- Outlook client
  - Option in settings on the Sync tab to create or not create duplicates
  - This applies when users are going online from an offline state

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Data Import

- Key features
  - ➢ Most entities are supported
    - System and Custom
  - ➢ Delimiter Settings
  - ➢ Data Import Methods
    - Automatic Mapping
    - Manual
    - Previously created maps
  - ➢ Supported file types:
    - XML Spreadsheet 2003 (.xml), .csv, .txt, and .zip
    - Data Import can accept up to 8 MB unzipped and 32 MB zipped
    - Multiple file imports
    - Multiple entities w/in single file

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Data Import

- Key features
  - ➢ Creation of custom record types and fields
  - ➢ Option Set Mapping
  - ➢ Lookup Mapping
  - ➢ Ability to import note and attachment record types
  - ➢ Duplicate Detection
  - ➢ Choose owner (user or team)
    - ▪ Create new user/team
  - ➢ Email status update upon completion
  - ➢ Create reusable maps

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Data Import

- Map Automatically
  - Uses specific column display names
    - Case sensitive
  - Columns that don't match CRM display names will have to be manually mapped
  - Tip: Use the templates provided in the Templates for Data Import section.
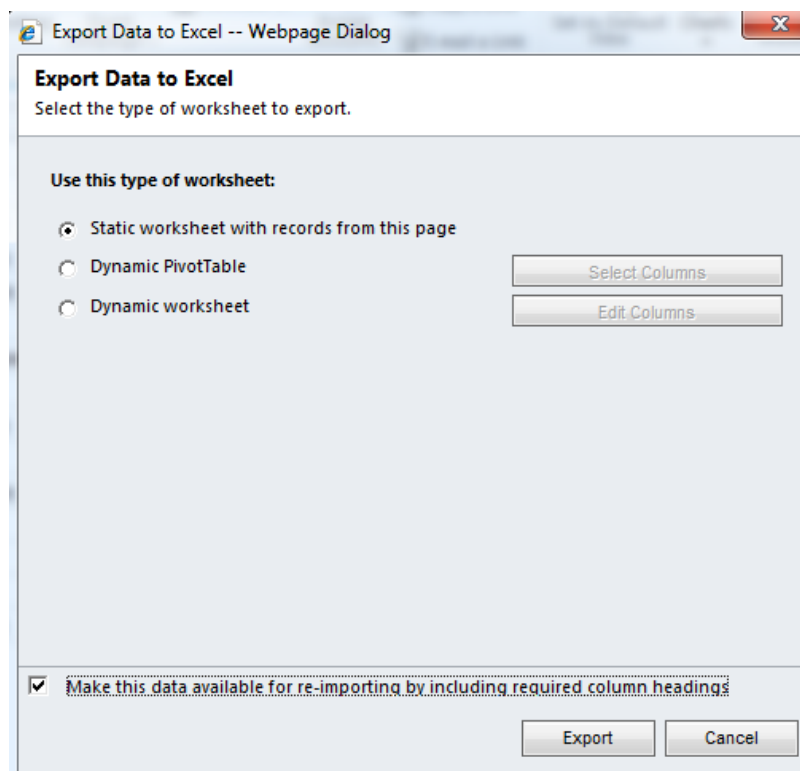
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Data Import

- Data Maps
  - Created from within the Data Import tool
    - Option to create data maps during last step of the import process
  - Import/Export Data Maps feature
    - Available at Settings | Data Management | Data Maps
  - Several other maps as well:
    - Salesforce.com
    - BCM 2010
    - Generic Map for Contact and Account (single source file w/ multiple entities)

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Data Import

- Templates for Data Import
  - ➤ Export to use for importing data
  - ➤ Possible to export from:
    - ▪ Settings – Data Management – Templates for Data Import

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Data Import

- Bulk Update
  - ➢ Export to Excel via static worksheet
  - ➢ Import update via Data Import tool

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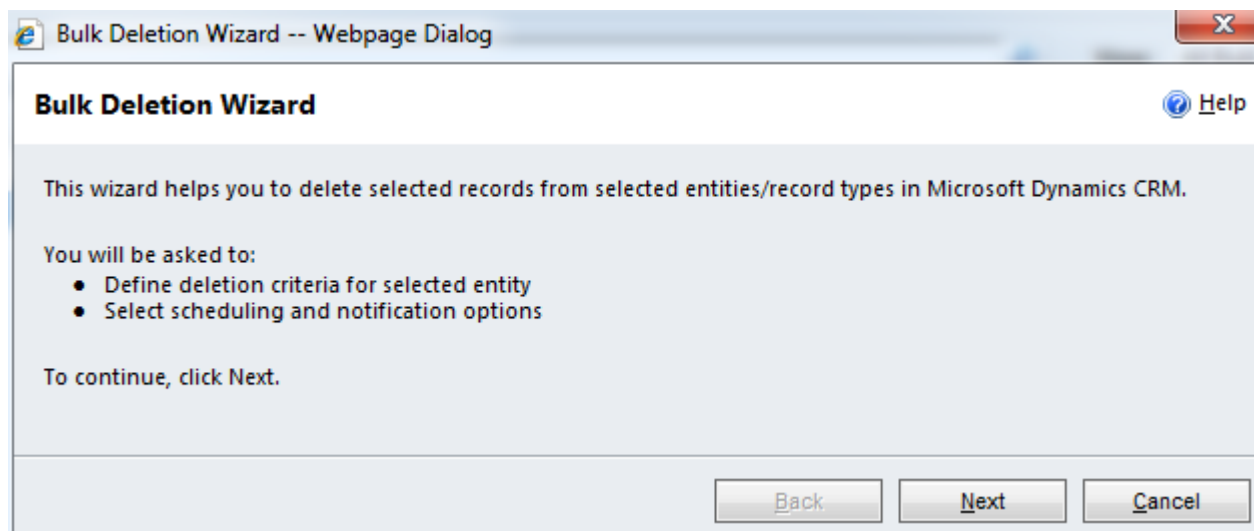**Microsoft** | Services

Data Import

- Monitor Data Imports
  - Workplace | Imports
    - Check the status, see successes and failures with failure reasons
    - Can export the failed rows to fix them and re-import them
  - Settings | System Jobs
    - Type = Import

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Bulk Record Deletion

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Bulk Record Deletion

- Tool that allows you to perform bulk deletions.

    ➢ Ex. You may want to remove Bulk E-mail or Workflow types that have successfully completed.

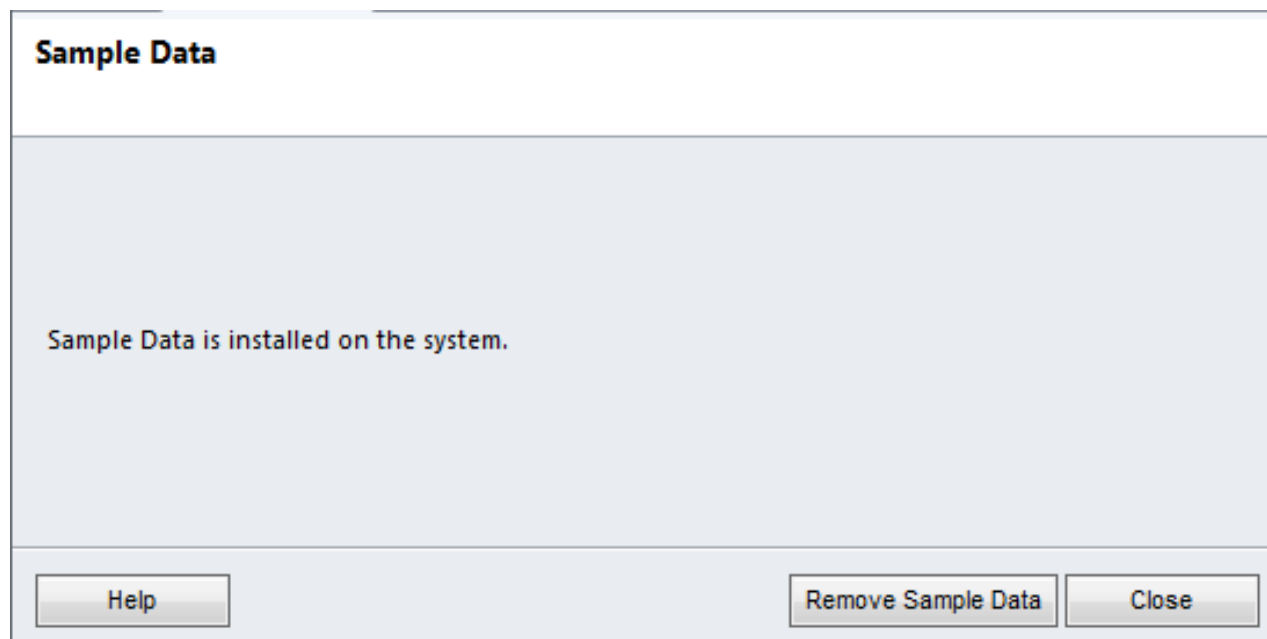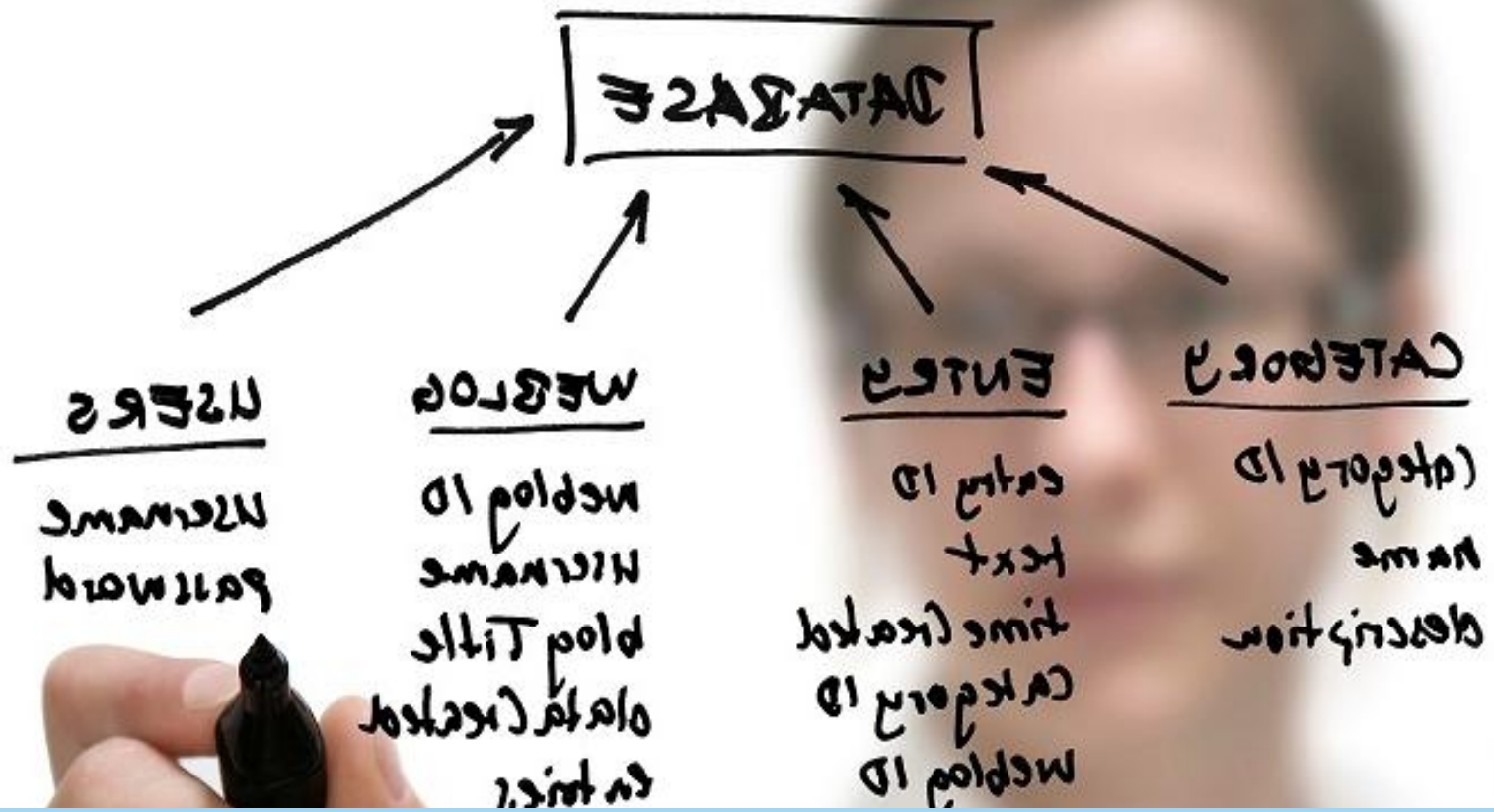- Accessed through Settings – Data Management or through the Tools menu.

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Sample Data

Sample Data

- Add/Remove Sample Data from the system.
  - Settings | Document Management | Sample Data

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Questions?