

DemandTools Module Help for FindAccountID

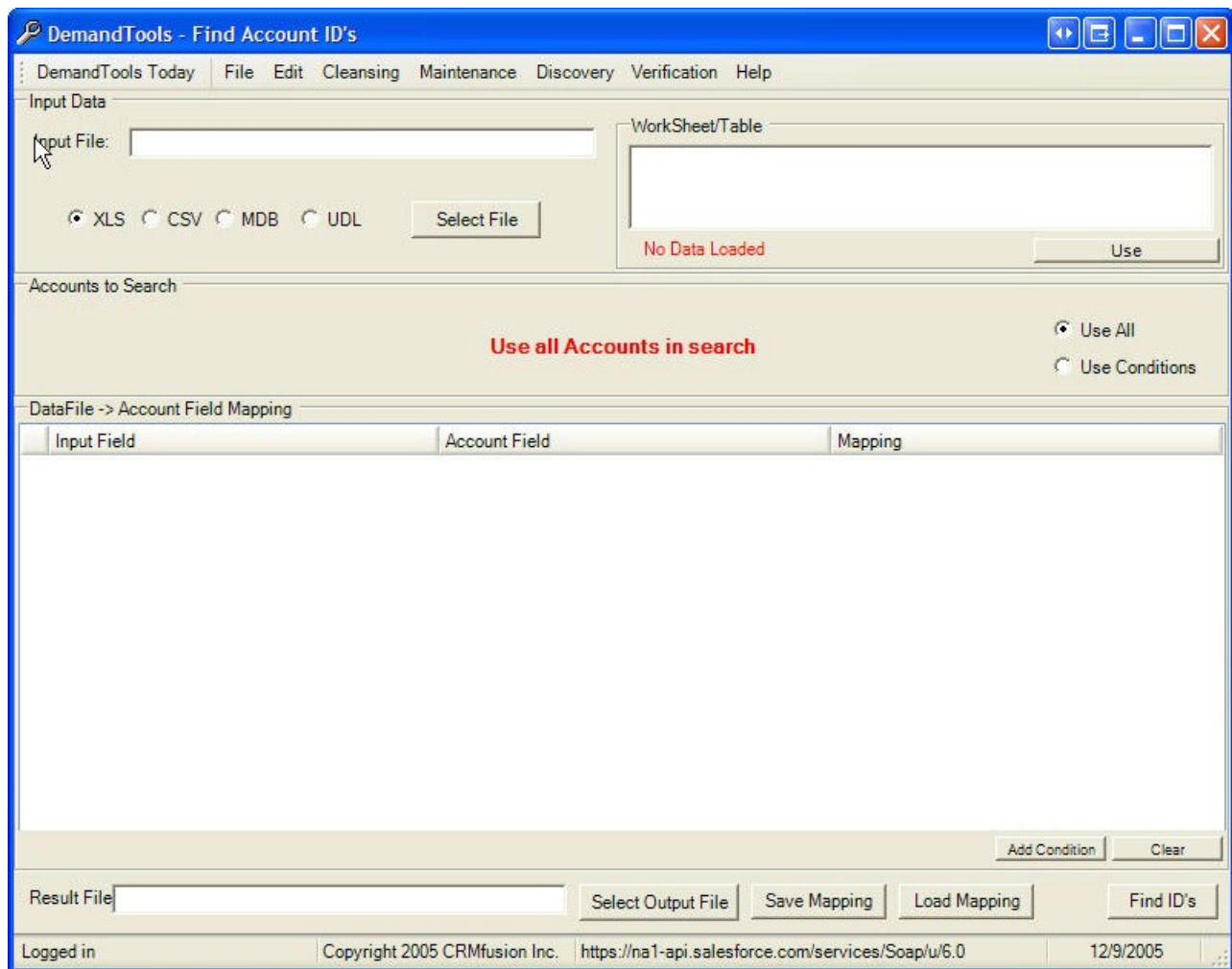
PURPOSE:

The FindAccountID's module of DemandTools is designed to allow you to quickly find salesforce.com AccountID's from a list of account information such as Account name, billing information, unique account numbers etc. that you may have in a spreadsheet or external database. FindAccountID will compare the list of account data that you have in an external spreadsheet or database to the contents of your salesforce.com Account table. In order to be seen as a match the mappings do not have to be exact because DemandTools provides you with a variety of different mapping techniques that will be described later.

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

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

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



FindAccountID Interface Screen Shot

STEP 1:

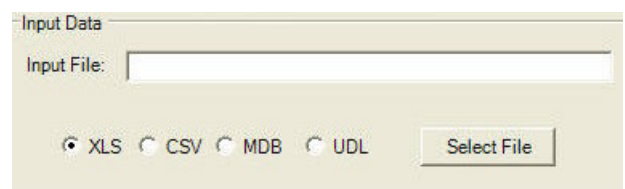
Select the input data file by first selecting the type of file you will be using as the source for the lead information by setting the type radio buttons. Then select the "Select File" button and choose your file from the standard windows dialog box. If you are loading a CSV or XLS file make sure that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

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

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

STEP 2:

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



Selecting the data (lead) source file type and location

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

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

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

STEP 3:

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

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

STEP 4:

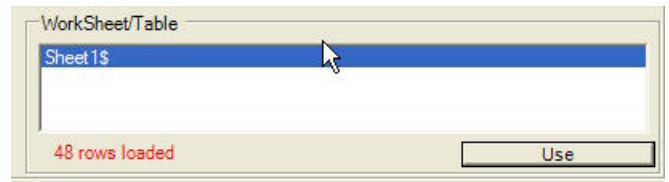
The next step is to map how the external data sources columns map to the Account record in salesforce.com. This mapping is done in the lower frame of FindAccountID.

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

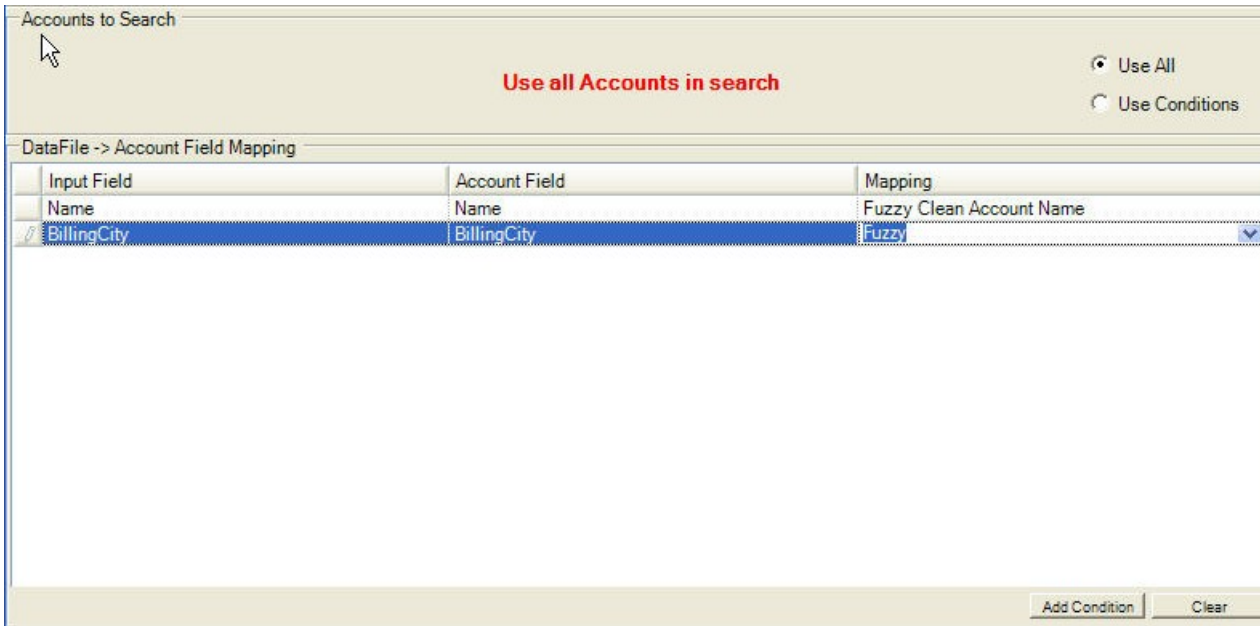
The third column allows you to select the DemandTools proprietary mapping technology that you would like to use for this specific field. Options for mapping techniques include:

- Exact - Exact match
- Fuzzy - a phoenitcs "sounds like" engine
- First Letter - Just first letter
- Numeric
- First Name - Uses the DemandTools nickname list
- Cleaned Account Name - The account name reduced to its lowest denominator by removing punctuation and common prefixes and suffixes.
- Fuzzy Cleaned Account Name - The cleaned account name is also then put through a phoenitcs "sounds like" engine

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



Selecting the worksheet



Mapping the external lead information to the Account table in salesforce.com

STEP 5:

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

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

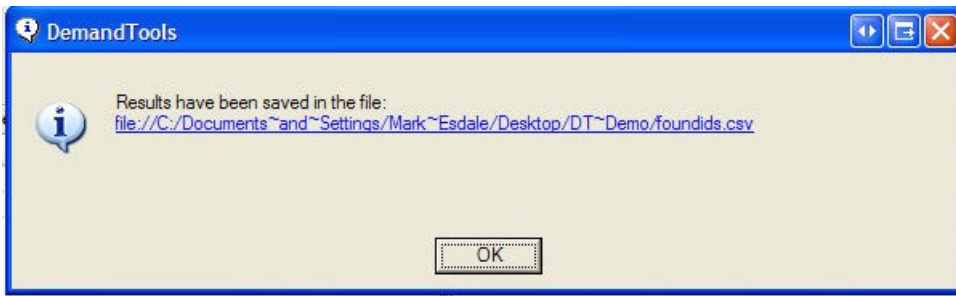
Select a location for your results file.

STEP 6:

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



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



Completion dialogue box showing location and hyperlink for results file

STEP 8:

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

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

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

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

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

	A	B	C	D	E	F	G	H
1	Name	BillingCity	sf_id_1	sf_Name_1	sf_BillingCity_1	sf_id_2	sf_Na	
2	Vacuform Industries Ltd.	Columbus	00130000001JPXXAA4	Vacuform Industries	Columbus			
3	Yatakin Refrigeration	Euclid	00130000001JSWAAA4	Yadakin Refrigeration	Euclid			
4	Vail Industries Limited	Navarre	00130000001JRqFAAW	Vail Industries	Navarre			
5	Valco Valley Tool and Die Inc	N Royalton	00130000001JPZeAAO	Valco Valley Tool and Die Inc	N Royalton			
6	Valen Mfg Co	Cleveland	00130000001JPYIAA4	Valen Mfg Co	Cleveland			
7	Valentine Construction	Alliance	00130000001JPYQAA4	Valentine Construction	Alliance			
8	Valeo Fabrication	Rochester	00130000001JScVAAW	Valeo Fabrication	Rochester			
9	Valerie McCormick LLC	New Galilee	00130000001JPh4AAg	Valerie McCormick	New Galilee			
10	Valiant Powertrain Systems	Windsor	00130000007:6MpAAI	Valiant Powertrain Systems	Windsor			
11	Valley Automation Limited	Chagrin Falls	00130000001JPYeAAO	Valley Automation	Chagrin Falls			
12	Valley Forge High School	Cleveland	00130000001JdwlAAG	Valley Forge High School	Cleveland			
13	Valley Local Schools	Lucasville	00130000001JPZbAAO	Valley Local Schools	Lucasville			
14	Valley Tool And Die Inc	North Royalton	00130000001JRVnAAO	Valley Tool And Die Inc	North Royalton			
15	Valley Video Company	Cleveland	00130000001JPZnAAO	Valley Video	Cleveland			
16	Vallegview Contractors	Cleveland	00130000001JPaQAAW	Vallegview Contractors	Cleveland			
17	Valley View High School	Germantown	00130000001JPa4AAg	Valley View High School	Germantown			
18	Valley View Local Schools	Germantown	00130000001JQZTAA4	Valley View Local Schools	Germantown			
19	Valparaiso High School	Valparaiso	00130000001JSaKAAW	Valparaiso High School	Valparaiso			
20	Valparaiso Univ	Valparaiso	00130000001JS4IAAW	Valparaiso Univ	Valparaiso			
21	Valspar Corporation	Chicago	00130000001JdwlAAG	Valspar	Chicago			
22	Valtronic Technology	Cleveland	00130000001JPbAAA4	Valtronic Technology	Cleveland			
23	Value City Department Stores Inc	Columbus	00130000001JSNLA44	Value City Department Stores Inc	Columbus			
24	Value Structures Inc	Ellwood City	00130000001JRh0AAG	Value Structures Inc	Ellwood City			
25	Vamo Inc	Wadsworth	00130000001JPblAAW	Vamo	Wadsworth			
26	VA Medical Center	Erie	00130000001JPXGAA4	VA Medical Center	Erie			
27	VA Medical Ctr 04B	Brecksville	00130000001JPbEAAW	VA Medical Ctr 04B	Brecksville			
28	Vamosi Associates, Inc.	Cincinnati	00130000001JSivAAG	Vamosi Associates, Inc.	Cincinnati			
29	Van Air Systems Incorporated	Lake City	00130000001JPbUA4W	Van Air Systems	Lake City			
30	Van Atta Engineering Inc	Dayton	00130000001JSTPAA4	Van Atta Engineering Inc	Dayton			
31	Vas... ..	Cleveland	00130000001JPbZAA4	Vas... ..	Cleveland			

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

NEXT STEPS WITH DEMANDTOOLS

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

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