

DemandTools Module Help for FindLeadID

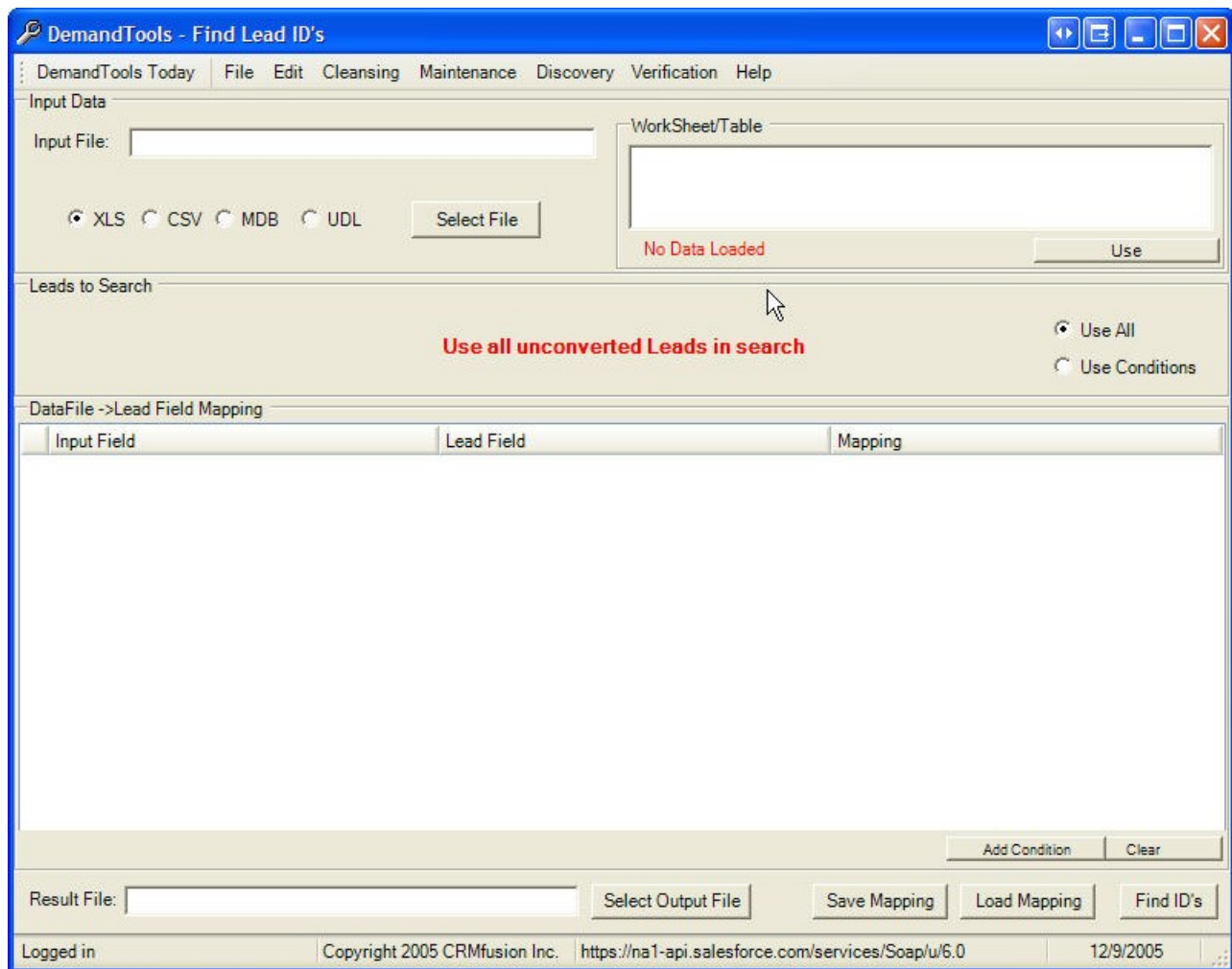
PURPOSE:

The FindLeadID's module of DemandTools is designed to allow you to quickly find salesforce.com LeadID's from a typical marketing or prospect list of contact names, companies, phone numbers or email addresses etc. that you may have in a spreadsheet or database. FindLeadID will compare the list of lead data that you have in an external spreadsheet or database to the contents of your salesforce.com Lead 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 FindLeadID tool is most often used for the following type of purposes:

- ❖ Determine if a lead list that is to be imported is importing only new Leads (not ones that match existing Leads). In this case you will match your import data to your salesforce.com data and if you match a Lead you can be confident that the person already exists as a Lead in your salesforce.com database
- ❖ FindLeadID'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 contact names and account names and need to update a specific field for this list of Leads.
- ❖ Find ID's for creation of Tasks or Opportunities. If you have a list of names and would like to create a task associated to each name but don't currently have the Lead 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 FindLeadID's tool for salesforce.com.



FindLeadID Interface Screen Shot

STEP 1:

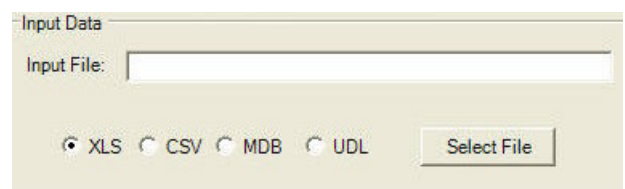
Select the input data file by first selecting the type of file you will be using as the source for the lead information by setting the type radio buttons. Then select the "Select File" button and choose your file from the standard windows dialog box. If you are loading a CSV or XLS file make sure that 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 the 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 Leads 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 for trade show activities etc.

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

STEP 4:

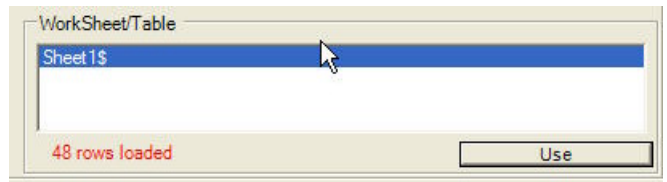
The next step is to map how the external data sources columns map to the Lead record in salesforce.com. This mapping is done in the lower frame of FindLeadID.

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.

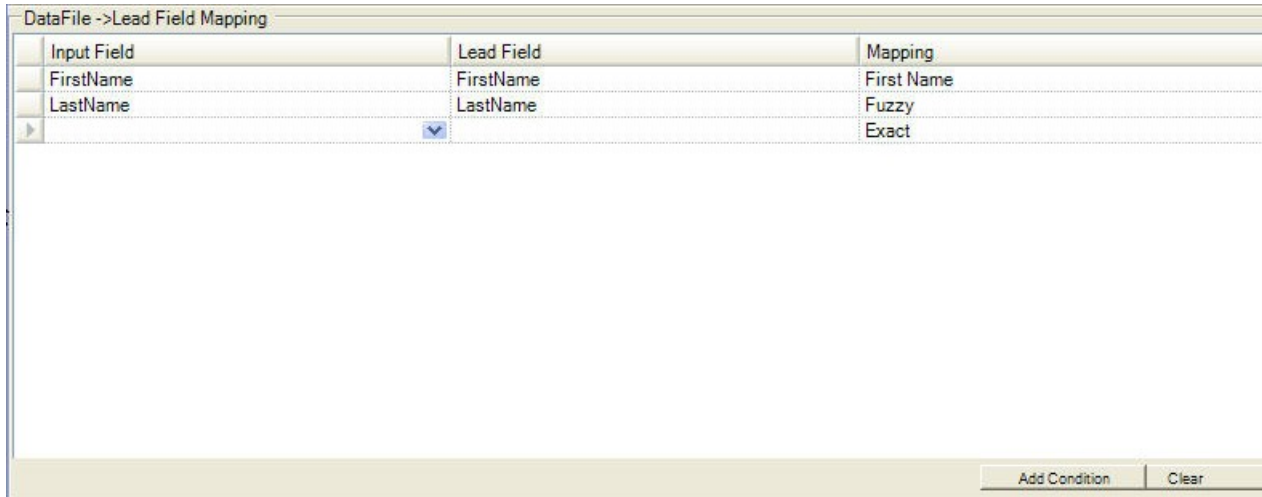
The third column allows you to select the DemandTools proprietary mapping technology that you would like to use for this specific field. Options for mapping techniques include:

- Exact
- Fuzzy - Sounds like
- First Letter
- Numeric
- First Name - Uses the DemandTools nickname list

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



Selecting the worksheet



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

STEP 5:

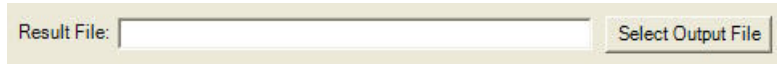
The FindLeadID module in DemandTools does not actually modify any data in either your salesforce.com database or your external data source.

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

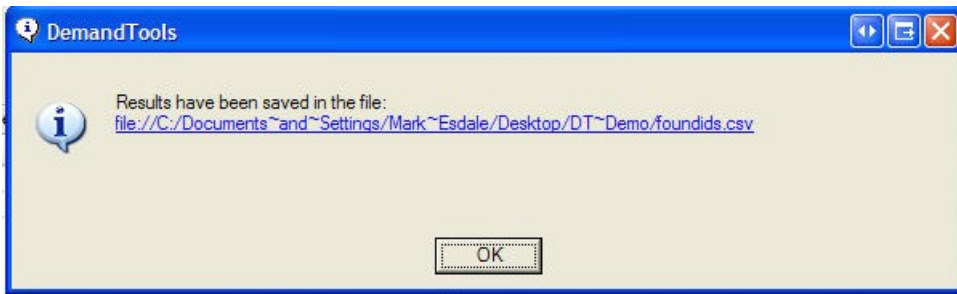
Select a location for your results file.

STEP 6:

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



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



Completion dialogue box showing location and hyperlink for results file

STEP 8:

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

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

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

Columns F,G,H,I,J (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 Lead records in salesforce.com

	A	B	C	D	E	F	G	H	I	J
1	FirstName	LastName	Company	Phone	sf_id_1	sf_FirstName_1	sf_LastName_1	sf_id_2		
2	Dale	Therrien	ROGERS CABLE INC. - Don	(416) 446-8569	00Q30000001d2gTEAU	Dale	Therrien	00Q30000001fGphEAE	Dal	
3	Karen	MacQuarrie	Karen MacQuarrie	(416) 691-2365	00Q30000001d2Z3EAM	Karen	MacQuarrie	00Q30000001fGikEAU	Kan	
4	Bill	Mazieres	LACIE CANADA	(416) 530-2545	00Q30000001d2ZVEA2	Bill	Mazieres	00Q30000001fGimEAE	Bill	
5	Brent	Davies	JACK AND JACK LIMITED	(416) 979-5813	00Q30000001d2a3EAE	Brent	Davies	00Q30000001fGjKEAU	Bre	
6	Chris	Millie	NORTHERN ELEVATOR LIM	(416) 291-2549	00Q30000001d2buEAE	Chris	Millie	00Q30000001fGIBEAU	Chr	
7	Brock	Smith	TORONTO HARBOUR COM	(416) 462-1261						
8	Dale	Therrien	ROGERS CABLE INC. - Don	(416) 446-8569	00Q30000001d2gTEAU	Dale	Therrien	00Q30000001fGphEAE	Dal	
9	Tom	Tsitsopolou	MMH ARCHITECTS INC.	(416) 492-4949						
10	Bob	Macgillivray	READ JONES CHRISTOFFE	(416) 977-5335						
11	Karen	MacQuarrie	Karen MacQuarrie	(416) 691-2365	00Q30000001d2Z3EAM	Karen	MacQuarrie	00Q30000001fGikEAU	Kan	
12	Bernie	Fournier	MORRISON HERSHFIELD L	(416) 499-3110	00Q30000001d2ZGEA2	Bernie	Fournier			
13	Charles	Atienza	M.V. Shore Associates (1993)	(416) 443-1995	00Q30000001d2ZqEAE	Charles	Atienza			
14	Bill	Jackson	LACIE CANADA	(416) 530-2545						
15	Reuven	Friedland	ORC/MBS	(416) 327-1872	00Q30000001d2j8EAE	Reuven	Friedland	00Q30000001fGsMEAU	Reu	
16	Brent	Davies	FAN & DUTRA ARCHITECT	(416) 979-5813	00Q30000001d2a3EAE	Brent	Davies	00Q30000001fGjKEAU	Bre	
17	Adrian	Field	MOUNT PLEASANT GROUP	(416) 696-7866	00Q30000001d2YvEAM	Adrian	Field			
18	Allan	Humphries	Mekinda Snyder Architects Pa	(416) 966-2838	00Q30000001d2VwEAM	Allan	Humphries			
19	E.Ronald	Hershfield	MMH ARCHITECTS INC.	(416) 492-4949	00Q30000001d2XNEA2	E.Ronald	Hershfield	00Q30000001fGgEAE	E.R	
20	Reuven	Friedland	ORC/MBS	(416) 327-1872	00Q30000001d2j8EAE	Reuven	Friedland	00Q30000001fGsMEAU	Reu	
21	Terry De L.	Franier	DLF Consulting	(416) 267-4440						
22	Dave	Brodie	DOMESTIC PRODUCTIONS	(416) 341-2001	00Q30000008RpHJEA0	David	Bird	00Q30000008RnM7EAK	Da	
23	Bill	Brodie	MINISTRY OF MUNICIPAL AI	(416) 235-5036						
24	Helle	Cartier	BRODIE & ASSOCIATES LA	(416) 778-7876						
25	Chris	Comrie	HTS ENGINEERING	(416) 661-3400						
26	Chris	Comrie	HTS ENGINEERING	(416) 661-3400						
27	Terry De L.	Davies	DLF Consulting	(416) 267-4440						
28	Dave	Davies	DOMESTIC PRODUCTIONS	(416) 341-2001						
29	Adam	Franier	CITY OF TORONTO - W&E, TE	(416) 397-0190						
30	Adam	Pierdom	CONTINENTAL POULTRY EC	(416) 292-1921						
31	Bill	Brodie	MINISTRY OF MUNICIPAL AI	(416) 235-5036						

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)