



## Data Quality Process Automation Made Easy

### Schedule Your Jobs with DemandTools JobBuilder

#### Summary

Over the last ten years, we have found that organizations can maintain data quality at a consistently higher level by setting up their core DemandTools jobs to run automatically on a regular schedule.

DemandTools JobBuilder, a process automation tool with an intuitive graphical interface, makes it easy for Salesforce administrators to schedule jobs and develop a comprehensive data quality process. JobBuilder is *free* for all DemandTools customers.

## Introduction

Although it may seem strange to say, when it comes to data quality, Salesforce administrators should try to act more like airline pilots on long-haul flights. That is, administrators should consider adding an “autopilot” component to their data cleansing strategy.

Think about it. Pilots engage the *autopilot* so they can better manage the overall operation of a complex machine (not to mention its passengers and crew). The autopilot handles the routine flying while the pilots monitor the controls, make adjustments, and generally do what is necessary to carry out their flight plan.

Salesforce admins could benefit enormously from installing a data quality autopilot to carry some of the load, but the sad fact is many have never given it a try. Instead of setting up routine jobs to run automatically on a schedule, they run everything *manually*, sometimes on a regular basis, sometimes not. After all, Salesforce admins are busy people who must constantly reprioritize a host of important tasks. (So many fires, so little time!)

But job scheduling—and the broader notion of an automated *data quality process*—is important, too. It is worthy of serious attention, and not just because it frees up admins to do other work. Over the last ten years, we have seen again and again that organizations achieve the greatest success with DemandTools by taking advantage of automation to run more jobs, more frequently, and thus keep data quality at a consistently higher level.

## Automation is hard...or is it?

There’s no denying that process automation can be a real plus. The only problem is, automation’s kind of hard to do, isn’t it? A Salesforce admin would need to have some expertise with batch files and Windows Task Scheduler, right?

Not anymore.

In an effort to help all of our customers get the most value for their DemandTools dollar, we have introduced a *free* process automation tool called DemandTools JobBuilder that Salesforce admins can use to schedule jobs and build effective data quality processes.

JobBuilder’s intuitive drag-and-drop graphical interface is designed to put process automation in the hands of *every* Salesforce admin, not just those with specialized technical knowledge or dedicated IT resources. Setting up a (largely) self-cleaning database is now an achievable goal for Salesforce admins who had previously dismissed the idea as wishful thinking.

## Getting started with JobBuilder

Salesforce administrators typically have a core set of rules that they want to consistently enforce in their database. These are the “rigid” rules, the ones that the admin doesn’t have to selectively apply on a case-by-case basis; these rules always apply, without exception, without condition. As the low-hanging fruit on the data quality tree, these are the rules that admins should automate first.

Take, for example, a Salesforce admin who wants to run a batch of (existing) jobs every 24 hours to standardize the formatting of Billing State, Billing Country, and other such fields.

Here are the steps our admin would follow to schedule these DemandTools jobs with JobBuilder:

### Step 1: Add the jobs to a new batch file

In JobBuilder, click *New Job*; a new Job line appears in the batch. Use the Selection tool to navigate to the jobs folder and choose a job. Repeat this procedure until all jobs (and all required parameters) have been added to JobBuilder.

Depending on how many jobs there are, it may be faster to add them all at once using JobBuilder’s drag-and-drop feature (i.e., open the jobs folder in Windows, select the jobs, drag them over to the JobBuilder window, and drop them there).

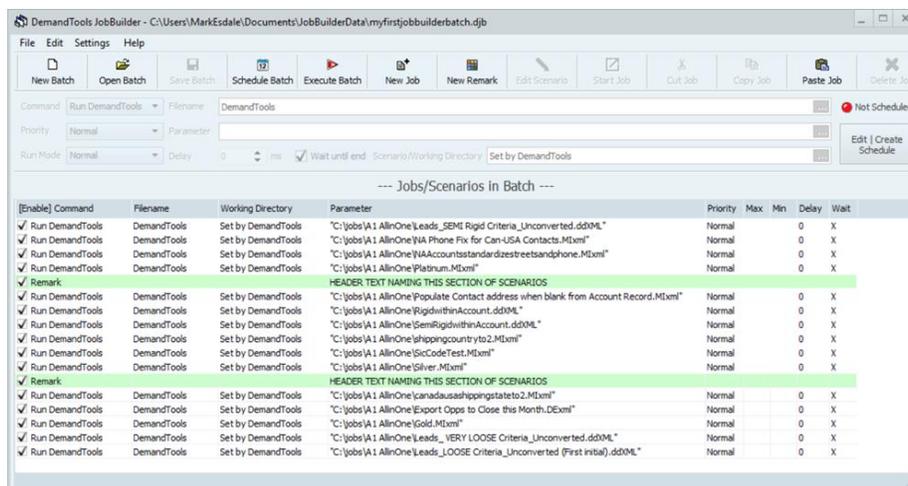
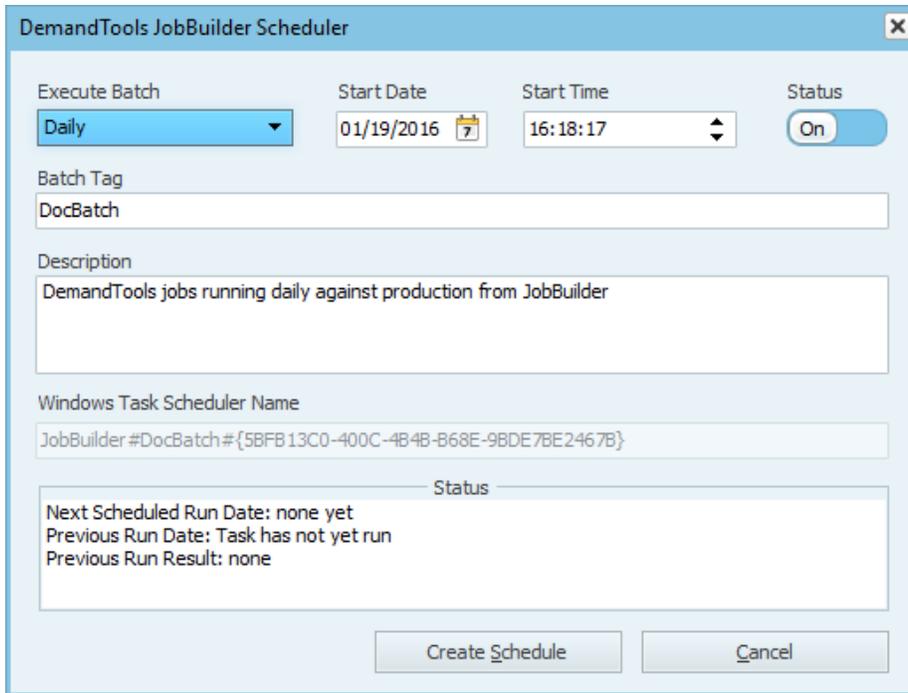


Figure 1: JobBuilder user interface.

## Step 2: Schedule when the batch will run

In JobBuilder, click *Edit | Create Schedule*. In the *Scheduler* window, select when the batch will run and, optionally, assign a unique *Batch Tag* to be embedded inside the Windows Task Scheduler name.



DemandTools JobBuilder Scheduler

Execute Batch: Daily

Start Date: 01/19/2016

Start Time: 16:18:17

Status: On

Batch Tag: DocBatch

Description: DemandTools jobs running daily against production from JobBuilder

Windows Task Scheduler Name: JobBuilder #DocBatch#{5BFB13C0-400C-4B4B-B68E-9BDE7BE2467B}

Status:

Next Scheduled Run Date: none yet  
Previous Run Date: Task has not yet run  
Previous Run Result: none

Create Schedule Cancel

Figure 2: Scheduler window.

## Step 3: Save the batch file

In JobBuilder, click *Save Batch* and enter a file name.

And...that's it. The new batch now appears as a task in the Windows Task Scheduler.

## Building a data quality process

By scheduling this batch of jobs to run on a daily basis, our admin has drawn a proverbial line in the sand dividing clean data from other data. Now the admin can build on this success, creating and scheduling jobs that eliminate duplicates, fill in missing data, and enforce other standardization rules.

With each new scheduled job, the admin fleshes out the data quality process, improving it and shifting ever more data to the clean side of the line. Like the airline pilots in our earlier analogy, this Salesforce admin has engaged the “autopilot,” making it easier to manage the overall quality effort in DemandTools.

## Adding custom workflows

Admins can go even further down the automation road by using JobBuilder to create custom workflows. For example, our admin could build a workflow that automatically copies a database backup file and emails it to the entire Salesforce admin group. Note, however, that to create this kind of custom workflow—i.e., one that features non-DemandTools jobs and numerous file system commands—the admin needs to have a good working knowledge of DOS.

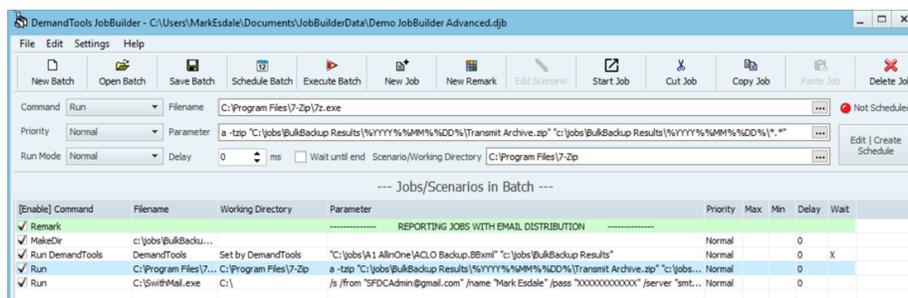


Figure 3: Custom workflow with non-DemandTools jobs.

## 5 key takeaways

JobBuilder is a simple, powerful tool that amplifies what Salesforce administrators can do with DemandTools. In this brief introduction, we have sketched out the essential points.

Key takeaways for Salesforce admins are:

1. Automate the things that can be automated. For best results, schedule core DemandTools jobs to run regularly and often.
2. JobBuilder is a process automation tool with an intuitive graphical interface. It is free for DemandTools customers.
3. JobBuilder offers a fast, easy way to schedule batches of DemandTools jobs. No specialized technical knowledge is required to do this.
4. JobBuilder empowers advanced users to quickly create custom workflows.
5. JobBuilder can help Salesforce admins develop and effortlessly maintain a comprehensive data quality process.

## Learn more

For more details on what you can do with JobBuilder, please check out our video [DemandTools JobBuilder: Build Your Data Quality Process](#).

And remember, JobBuilder is *free of charge* for all DemandTools customers. You can download the program from [www.crmfusion.com/downloads](http://www.crmfusion.com/downloads).