



## DATA MAINTENANCE MODULE

Your data just got even more accurate and meaningful.

Make your data more meaningful and dependable. Don't wait for returned shipments or bounced emails to learn there's a problem with your data. Available as an add-on for both the Basic and Standard licenses, you can be confident in your records with Cloudingo's Data Maintenance Module.

- ✓ Mass Update
- ✓ Mass Delete
- ✓ Address Validation & Standardization
- ✓ Geocoding

**Separate Modules**  
Toggle between the Dedupe or the Data Maintenance dashboard.

**Key Navigation Menus**  
Options and dropdowns work just like the ones found in the Dedupe module.

Task ID	Task Name	Action	Target	Fields	Status	Matches
#1	Mass Update	UPDATE	CONTACT	Last Modified Date	Last ran 3 minutes ago	4845
#2	Mass Delete	DELETE	LEAD	Created Date	Last ran about a minute ago	4854
#3	Address Validation & Standardization	ADDRESS VALIDATE & STANDARDIZE	LEAD	State/Province	Last ran 3 minutes ago	157
#4	Geocoding	GEOCODE	LEAD	State/Province	Last ran 3 minutes ago	147



## NAVIGATION

- 1 **Activity Stream** The icon at the far left opens the Activity Stream. The Activity Stream can be collapsed to make your workspace larger, or it can be pinned open with the tack icon. The Activity Stream provides information on how Salesforce has processed information from Cloudingo.
- 2 **Platform Drop Down** The platform drop down menu lists details about your connected Salesforce platform(s). From the drop down you can see the status of the platform, you can edit the settings for your platform connection, and you can add additional platforms up to the limits of your license.
- 3 **Dashboard Button** Clicking this button always returns you to the main dashboard view.
- 4 **My Account Menu** Provides information to manage and administrator your Cloudingo account.

**My Account** View information and details about your Cloudingo account.

**My Synonyms** Manage and customize the list of synonyms used in Cloudingo's synonym matching algorithms (ex. Bob/Robert, TX/Texas, UK/United Kingdom).

**My Plan** See details about your Cloudingo license and transactions. The lower portion of the page displays your account history and provides an option for updating your payment information.

**My Data Services** Enable the data

maintenance features including address validation, standardization, and geocoding, and lookups on congressional district, time zone, etc. You can also see the count of available maintenance credits and purchase more as needed.

**Change Password** Use to change the password for logging into your Cloudingo account.

**Change User Name** Use to change the user ID for your Cloudingo account.

**Logout** Use to sign out of your Cloudingo account.

- 5 **Help** Provides a fast and easy way to get training and help for Cloudingo and to contact our support department.

**Page Help** - Provides a pop-up window with help text specific to the page you are currently on.

**Cloudingo Overview** - Provides a general overview of Cloudingo and information on how to get started.

**Contact Support** - Generates an email direct to the Cloudingo support team.

**Support Info** - Provides information about your use of the Cloudingo web service for support purposes.



# DASHBOARD

## 1 Actions

**Create New Job** Use to build a new job for validating and standardizing addresses, and obtaining geocodes.

**Re-order Jobs** Customize the order in which your jobs are displayed via drag-and-drop (new jobs are always added to last position on the dashboard until you customize the display).

**Re-Calculate Totals** Re-runs all jobs on the dashboard. Running a job means the job analyzes the data in Salesforce for any changes or new addresses.

## 2 Reports

**Data Maintenance Report** A report showing the records that were modified (by ID number). Useful for counts on the amount of data managed.

**Audit Report** A report similar to the Data Maintenance Report, but with a different layout.

**Automation Report** Monitor an automation job in real time.

## 3 Automation

**Run Window & Throttle** Control the amount of resources allocated to Cloudingo, and when an automation job can run.

**Start Automation** Start automation to manage your data maintenance jobs.

## 4 Imports

Click the Import button to start the Cloudingo import wizard.

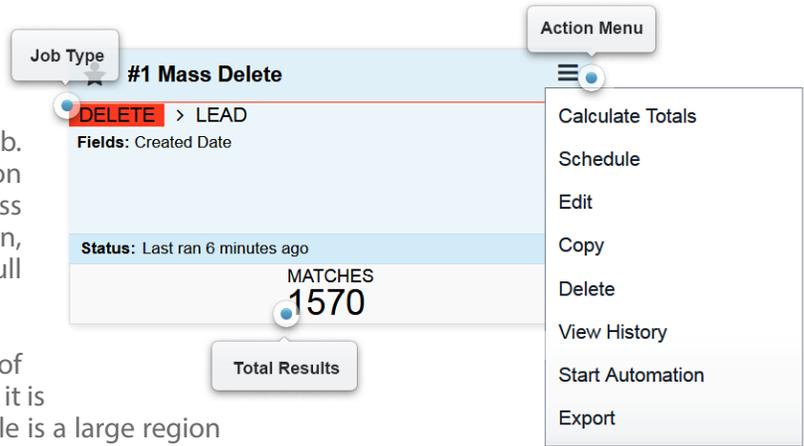
## 5 Dashboard Display

Toggle between Tile View and List View of the filters on the Cloudingo dashboard.

# DATA MAINTENANCE JOBS

The **blue tiles on the dashboard represent individual jobs** that analyze your data in specific ways. At the top of each tile is a title, and a navigational menu for the individual job. Beneath the first row is additional information about the job, whether it is a Mass Delete, Mass Update, Address Validation & Standardization, or a Geocode job, and the fields used to pull records.

The lower portion of each tile lists the status of the job, for example, when it was last run, or if it is re-calculating totals. At the bottom of each tile is a large region hyperlinked to the results page (the page where you can see the records identified by the job and where you can begin working with them). This region also lists the number of records found in job run:



**Matches** Cloudingo displays the total number of records from the database that were found based on the job criteria.

The navigational menu in the upper right corner of the tile has the following options:

**Calculate Totals** Tells the job to analyze data and report any current matches based on the selected fields. Simply calculating totals does not modify anything.

**Schedule** Allows you to schedule when you want the job to run (i.e., every night at 10:00 PM). Optionally, you can start automation as part of the schedule. Using schedules with automation allows you to, for example, find all the matching records every night and auto-update or auto-delete them.

**Edit** Opens the job edit page where changes to job configuration can be made.

**Copy** Creates a copy of the current job that can be used as a template for a new job.

**Delete** Removes the job from the Cloudingo dashboard.

**View History** Opens a historical report on the job—when it was run and what the results were.

**Start Automation** Starts a one-time automation job on the current records that the filter has found. Once a job has been started, it can be stopped from the menu.

**Export** Exports the filter results (record IDs) to a spreadsheet. This is an optional, paid add-on feature to the Cloudingo license.

*NOTE: Scheduling automation from the navigation menu is different from the concept of the Automation Run Window & Throttle. The Automation Run Window (accessed from the Automation menu at the top of the dashboard) allows you to configure when Cloudingo is allowed to perform automation jobs. An example would be that your organization has an external system that does nightly syncing with Salesforce at 2:00 AM. During that time you may want to prevent any automation jobs from running inside Cloudingo. Think of it like a blackout window.*

## BUILDING & EDITING JOBS

### What is a “Job” anyway?

A job allows you to look at a set of records that match user-defined criteria (field values within the records). Cloudingo comes with some standard jobs but it's easy to create your own or edit any of the jobs you see on the Dashboard. Creating or editing a job can be done in three easy steps.

### TAB 1 - DEFINE THE JOB

(The Basics)

Select a maintenance type (Address Validate & Standardize, Delete, Geocode, or Update).

Select an object.

Enter a name for the job (displayed on the dashboard), and optionally, add a description.

**Validate Only** (appears for Address Validate & Standardize jobs) The Validate Only checkbox is deselected by default. If you do not want Cloudingo to standardize the records, check the box and only validation will occur.

**Enable** The Enable checkbox is selected by default. This checkbox must be selected in order for the filter to scan Salesforce data for records meeting the designated criteria.

Click Continue.

### TAB 2 - CHOOSING FIELDS FOR IDENTIFYING RECORDS

(Which Leads/Accounts/Contacts do you want to validate, delete, geocode, or update?)

Select fields to use in searching for matches by dragging the fields from the left panel to the right panel.

From the drop down menus on the left side, select an operator, and then enter a value in the empty cell. Alternatively, you can select the check box “or Has No Value.”

Click Continue.

*Note: For Delete jobs this is the last tab. Click Save or Save & Run.*

### Create a new Maintenance Job

Select a Salesforce object and the fields you want Cloudingo to use for finding records for maintenance (e.g., find all leads that have the same email address and last name).

1 The basics 2 Which Leads do you want to update? 3 What fields do you want to update on your Leads?

Maintenance Type  
Update

Object Type  
Lead

Filter Name  
Update Leads

Description Name

Enable

### TAB 3 - SELECT FIELDS

(What fields do you want to update on your Leads/Accounts/Contacts?)

**For Update Jobs:** Select the field you want to update from the drop down menu on the left, then select an option or enter a value on the right. Alternatively, select the check box at the bottom to clear any values and leave the field empty.

Click the “Add Field +” button to update additional fields.

**For Validate/Standardize Jobs:** Choose the set of address fields you want to validate and standardize from the top drop down menu and Cloudingo will auto-map those fields. Auto-mapping can be overridden with custom selections.

*Note: The last field mapping option (“Field for Cloudingo to update when finished”) is used to mark a record as having been validated. You can leave this mapping set to its default, or you can map to a custom field of your choice.*

Click Save or Save & Run.