



cloudingo™
chases down and eliminates duplicate data

Visit our searchable knowledge base:
help.cloudingo.com

**Self-Training and
Onboarding Toolkit**

Become a data cleansing Cloudingo expert!

Cleaning data with Cloudingo is not rocket science but it does require a bit of training, demonstration, and testing. We've created this checklist as a supplement to our online knowledge base (help.cloudingo.com) to serve as your guide to learning how to setup and use Cloudingo. The articles are strategically ordered in a manner that will help your training process flow as smoothly as possible.

Keep this toolkit handy to use as a reference guide if you need to go back and re-train yourself, or if a new employee needs training on any specific area.

INSTALL & CONNECT

Step 1: Install the Cloudingo Agent

Before you can get started, you must install and deploy the Cloudingo Agent inside salesforce.com. You can find the Cloudingo Agent in the Salesforce AppExchange (<http://appexchange.salesforce.com>)

Step 2: Create an Account

Setup a Cloudingo account by visiting <https://app.cloudingo.com/account/register>.

Step 3: Login to Cloudingo and Connect

From the Cloudingo dashboard, Click **Connect to Salesforce** on the upper left corner. You must use a Salesforce Administrator account with Cloudingo. (You

may have already connected to Salesforce during your initial trial setup.)

Step 4: Initial Profiling

During the initial profile, Cloudingo will search for patterns and clues that will help it to identify duplicate records. When profiling is complete, Cloudingo will run all the standard filters and show you the results. Don't worry; no changes will be made to your data at this point.

Step 5: Use Prebuilt Filters or Create Your Own

Cloudingo comes with standard filters that you can edit or you can create your own. We encourage you to experiment!



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Self-Training and Onboarding Toolkit

BEFORE USING CLOUDINGO



My Account

- How to login**
<https://help.cloudingo.com/article/how-to-login/>
- Managing multiple users**
<https://help.cloudingo.com/article/managing-multiple-users/>
- Change username and password**
<https://help.cloudingo.com/article/change-username-password/>
- Change Salesforce admin ID**
<https://help.cloudingo.com/article/change-salesforce-admin-id/>
- Update credit card info**
<https://help.cloudingo.com/article/updating-credit-card-info/>

Getting Started

-  **Cloudingo overview**
<https://help.cloudingo.com/article/cloudingo-overview/>
-  **Dashboard Overview**
<https://help.cloudingo.com/article/dashboard-overview/>
- How to dedupe and where to start**
<https://help.cloudingo.com/article/how-to-dedupe-and-where-to-start/>
- Grid and List dashboard views**
<https://help.cloudingo.com/article/grid-list-dashboard-views/>
- Confidence levels**
<https://help.cloudingo.com/article/confidence-level/>
- Dashboard**
<https://help.cloudingo.com/article/dashboard/>
- Navigation options**
<https://help.cloudingo.com/article/navigation/>
- Types of merging**
<https://help.cloudingo.com/article/types-of-merging/>

Setting Up Filters and Rules

-  **Building and creating filters**
<https://help.cloudingo.com/article/building-creating-filters/>
-  **Filter library**
<https://help.cloudingo.com/article/filter-library-video/>
- Anatomy of a filter**
<https://help.cloudingo.com/article/anatomy-of-a-filter/>
- Creating and editing filters**
<https://help.cloudingo.com/article/creating-editing-filters/>
- Filter title best practices**
<https://help.cloudingo.com/article/filter-titles-best-practices/>
- Primary vs. secondary fields**
<https://help.cloudingo.com/article/primary-vs-secondary-fields/>
- Cross field matching**
<https://help.cloudingo.com/article/cross-field-matching/>
- Matching styles**
<https://help.cloudingo.com/article/matching-styles/>
- Fuzzy matching**
<https://help.cloudingo.com/article/fuzzy-matching/>
- Match on Empty**
<https://help.cloudingo.com/article/match-on-empty/>
- Using synonyms to find duplicates**
<https://help.cloudingo.com/article/using-synonyms/>
- Deleting filters**
<https://help.cloudingo.com/article/deleting-filters/>



Additional Filter Tips

- Using email username to find duplicates
<https://help.cloudingo.com/article/using-email-username-to-find-duplicates/>
- Excluding email domains in filters
<https://help.cloudingo.com/article/excluding-email-domains-in-filters/>

Setting Up Merge Automation Rules

- Merge automation settings
<https://help.cloudingo.com/article/merge-automation-settings/>
- Automation settings
<https://help.cloudingo.com/article/automation-settings/>
- Choosing the master record
<https://help.cloudingo.com/article/choosing-the-master-record/>
- Handling fields differently from the master record
<https://help.cloudingo.com/article/handling-fields-differently-from-the-master/>
- How to get the most complete record
<https://help.cloudingo.com/article/how-to-get-the-most-complete-record/>
- Field considerations
<https://help.cloudingo.com/article/field-considerations/>
- Specific field values
<https://help.cloudingo.com/article/specific-field-values/>
- Creating notes
<https://help.cloudingo.com/article/creating-notes/>
- Using exceptions
<https://help.cloudingo.com/article/using-exceptions/>
- Automation Rules Library
<https://help.cloudingo.com/article/automation-rules-library/>

Tip: Be sure that you have a solid understanding of the merge filter setup and the merge automation rules prior to moving on to the next section. You may still need to make some adjustments to your settings during testing, but now that you have initially setup the filters & automation rules, it is time to begin viewing the results and testing the merge filters.



LET'S START USING CLOUDINGO

Begin Test Run of Merges

- Manually merging duplicates
<https://help.cloudingo.com/article/manually-merging-duplicates/>
- Previewing and testing merge rules
<https://help.cloudingo.com/article/previewing-testing-merge-rules/>
- Customizing merge grids
<https://help.cloudingo.com/article/customizing-merge-grids/>
- Inline editing
<https://help.cloudingo.com/article/inline-editing/>
- Editing info prior to merging
<https://help.cloudingo.com/article/editing-info-prior-to-merging/>
- Account lookup and creation
<https://help.cloudingo.com/article/account-lookup-creation/>
- Additional merge and convert options (hide and protect records from Cloudingo)
<https://help.cloudingo.com/article/additional-merge-and-convert-options/>
- Manual merge
<https://help.cloudingo.com/article/manual-merge-single-table-filters/>

Tip: Go through the Merge Preview page spot-checking numerous records to make sure your filters and automation rules are giving you the results you want. If you aren't happy with what data is being pulled, change your filter rules. If you aren't happy with how the data is being merged, make changes to your automation rules. Manually merge several records, and view the results of the Salesforce record(s) before and after the merge process to ensure accuracy. Do this thoroughly before attempting to mass merge or before starting an automation job to run the process in bulk.

Post Setup and Test Run of Merge Filters/Rules

- Mass merge and convert
<https://help.cloudingo.com/article/mass-merge-convert/>
- Automation and scheduling tips
<https://help.cloudingo.com/article/automation-settings/>
- Run window and throttle
<https://help.cloudingo.com/article/run-window-throttle/>
- Automatically merge
<https://help.cloudingo.com/article/automatically-merge/>
- Automation report
<https://help.cloudingo.com/article/automation-report/>
- Audit report
<https://help.cloudingo.com/article/audit-report/>
- Merge and convert report
<https://help.cloudingo.com/article/merge-convert-report/>

Tip: Attempt a mass merge from the merge preview page on a "high confidence" filter (mass merge several records to get comfortable with that process). Once you are positive with the results on at least one of your filters, you can then setup the filter to run automatically using an automation job (either immediately or using the scheduler). *Only setup automation jobs to run against high confidence filters.* You will likely have some filters that require manual review of the results once the duplicates are identified.



CONVERT FILTERS & RULES

Now that you have mastered the merge process on single-object tables, it is time to setup, test, and start processing your convert filters and rules. The logic is mostly the same with a few differences.

Setting Up Convert Filters and Rules

- Convert automation rules
<https://help.cloudingo.com/article/convert-automation/>
- Converting objects
<https://help.cloudingo.com/article/converting-objects/>
- Creating and editing convert rules
<https://help.cloudingo.com/article/creating-editing-convert-rules/>
- Managing owner mapping
<https://help.cloudingo.com/article/manage-owner-mapping/>

Tip: By default Salesforce assumes the Contact to be the master record. If you want your Lead record to override the existing Contact, you must edit the Convert Automation Rules to do so. If you want to convert using the standard Salesforce default, Cloudingo is already configured to handle this and no changes to the Convert Automation Rules will be necessary.

Begin Test Run Converts

- Manual merge (multi-table filters)
<https://help.cloudingo.com/article/manual-merge-multi-table-filters/>

Tip: Go through the Merge Preview page spot-checking numerous records to make sure your filters and automation rules are giving you the results you want. If you aren't happy with what data is being pulled, change your filter rules. If you aren't happy with how the data is being merged, make changes to your automation rules.

Keep in mind that the Merge Preview page on Convert filters will not be side-by-side like the merge filters since the fields do not match one-to-one. Manually convert several records, and view the results of the Salesforce record(s) before and after the convert process to ensure accuracy. Do this thoroughly before attempting to mass convert or before starting an automation job to run the process in bulk.

Post Setup and Test Run of Convert Filters/Rules

- Mass merge and convert
<https://help.cloudingo.com/article/mass-merge-convert/>
- Automatically merge
<https://help.cloudingo.com/article/automatically-merge/>





Tip: Attempt a mass convert from the merge preview page on a "high confidence" filter (mass convert several records to get comfortable with that process). Once you are positive with the results on at least one of your filters, you can then setup the filter to run automatically using an automation job (either immediately or using the scheduler). *Only setup automation jobs to run against high confidence filters.* You will likely have some filters that require manual review of the results once the duplicates are identified.



IMPORTING RECORDS

If you would like to use Cloudingo's import tool to scan for duplicates prior to bringing the data into Salesforce, some additional filters and rules may be necessary in order to tell Cloudingo to override existing Salesforce data with the import file data.

Using the Import Wizard



-  **Import Wizard Part I - Filters and Automation Rules**
<https://help.cloudingo.com/article/import-wizard-part-1-filters-automation-rules-video/>
-  **Import Wizard Part II - The Import Process (Full Version)**
<https://help.cloudingo.com/article/import-wizard-part-2-import-process-complete-video/>
-  **Keeping the Import Wizard Clean**
<https://help.cloudingo.com/article/keeping-the-import-wizard-clean/>
-  **Importing Multi-Objects (optional)**
<https://help.cloudingo.com/article/importing-multi-objects-2/>
- Import file limitations**
<https://help.cloudingo.com/article/import-file-limitations/>
- Import create date**
<https://help.cloudingo.com/article/import-create-date/>
- Associating a Salesforce campaign with imports**
<https://help.cloudingo.com/article/associating-a-salesforce-campaign-with-imports/>
- Adding and updating import fields**
<https://help.cloudingo.com/article/adding-updating-import-fields/>
- Inline editing**
<https://help.cloudingo.com/article/inline-editing/>
- Rescanning imports**
<https://help.cloudingo.com/article/rescanning-imports/>
- Exporting Import Wizard results**
<https://help.cloudingo.com/article/exporting-import-wizard-results/>
- Importing records**
<https://help.cloudingo.com/article/importing-records/>
- Importing multi-objects**
<https://help.cloudingo.com/article/importing-multi-objects/>
- Deleting incomplete imports**
<https://help.cloudingo.com/article/deleting-incomplete-imports/>



DATA MAINTENANCE

If you would like to use Cloudingo's Data Maintenance tools to perform Mass Deletions, Mass Updates, or Address Validation & Standardization, new filters may be necessary.

Using the Data Maintenance Module

-  **Mass Update and Mass Delete**
<https://help.cloudingo.com/article/mass-update-mass-delete/>
-  **Address Validation and Standardization**
<https://help.cloudingo.com/article/address-validation-standardization/>
- Anatomy of a job**
<https://help.cloudingo.com/article/jobs/>
- Creating Data Maintenance Jobs**
<https://help.cloudingo.com/article/creating-jobs/>
- Mass update and mass delete**
<https://help.cloudingo.com/article/creating-jobs/>
- Address validation and standardization**
<https://help.cloudingo.com/article/validate-addresses/>

Tip: As with dedupe filters, you will want to view the results in the Merge Preview page after the filter has been calculated. Once you verify the results are accurate, a Mass Delete, Mass Update, or Address Validation & Standardization job can be performed (also through Automation Jobs).

REPORTS

Cloudingo comes with a wide range of reports so you can keep tabs on your data cleansing process, identify trouble areas, and stay ahead of dirty data.

- Types of Reports**
<https://help.cloudingo.com/article/reports/>