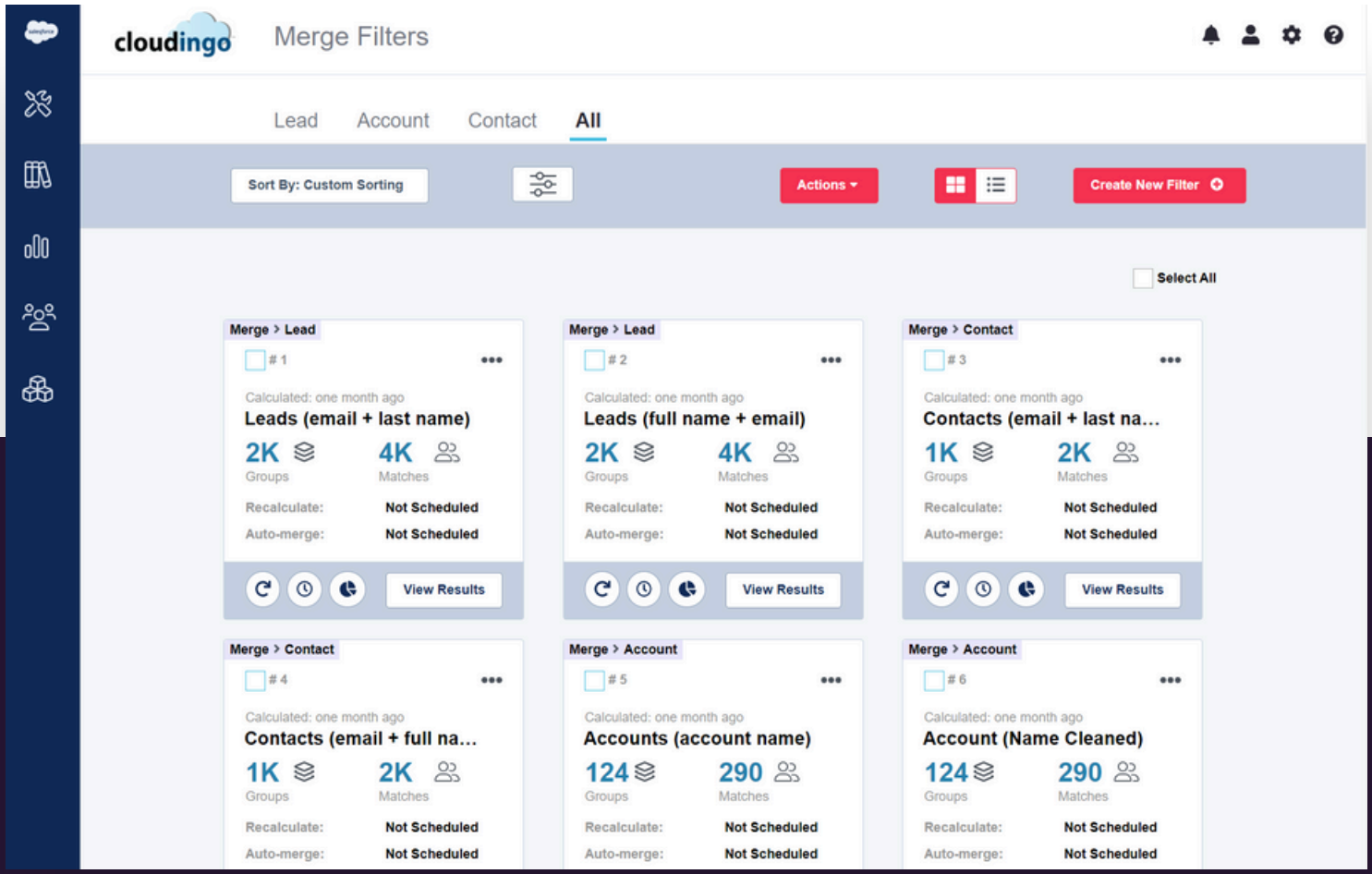
cloudingo™

Clean and manage your data with ease.

Supporting Salesforce and Marketo



From deduping to importing and migrating data, Cloudingo helps you maintain clean, reliable data across Salesforce and Marketo.

Speak to a data expert: contact@cloudingo.com

cloudingo.com

©2024 Symphonic Source, Inc.

cloudingo™ Data cleansing and management for Salesforce and Marketo

Make quality decisions based on quality data

Cloudingo is a cloud-based deduplication and data quality tool. It cleans and helps make sense of your data in Salesforce and Marketo. With Cloudingo you can eliminate redundancies and consolidate data so that business decisions are based on facts, not hunches.

Clean and dedupe records

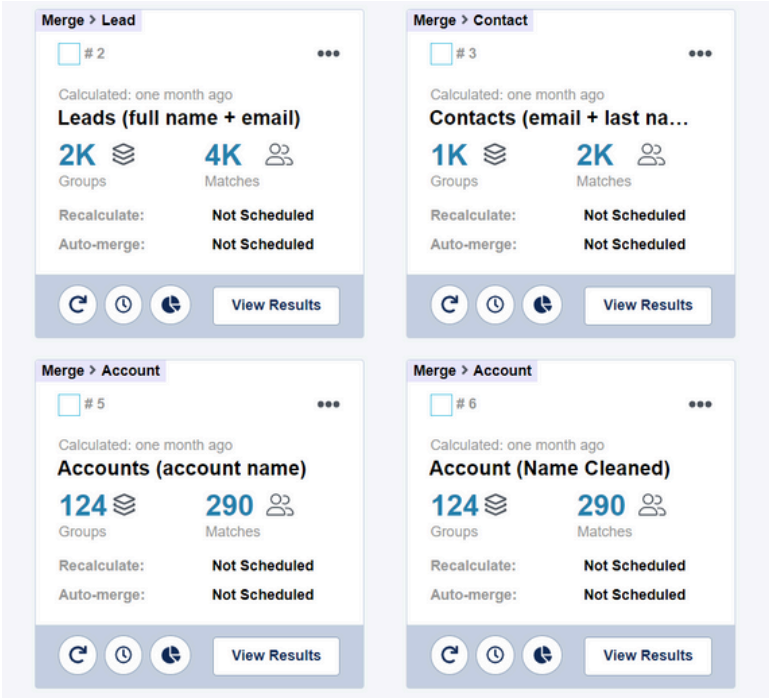
Get rid of duplicate records and spend less time digging to find the right info.

Remove confusion and guesswork

Update, transform, and standardize data making it more reliable and easier to digest.

Create a single source of truth

Tie outside data sources to Salesforce, like ERPs or marketing automation systems.



★★★★★

"We adopted Cloudingo particularly to dedupe list imports. We quickly found many more uses for it. We've grown a lot in the past few years, and Cloudingo has helped us keep our data in line as we grow.

After two years of using Cloudingo we're still finding effective ways to utilize it."

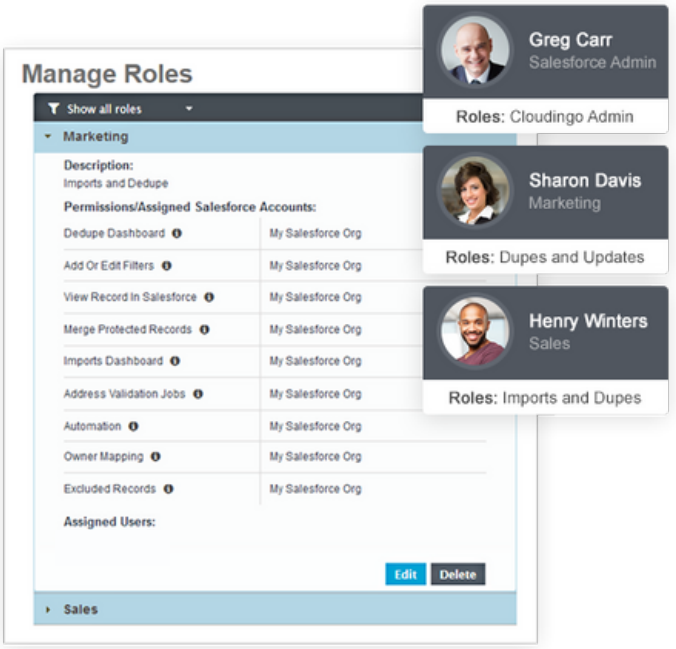
CURRENT CUSTOMER

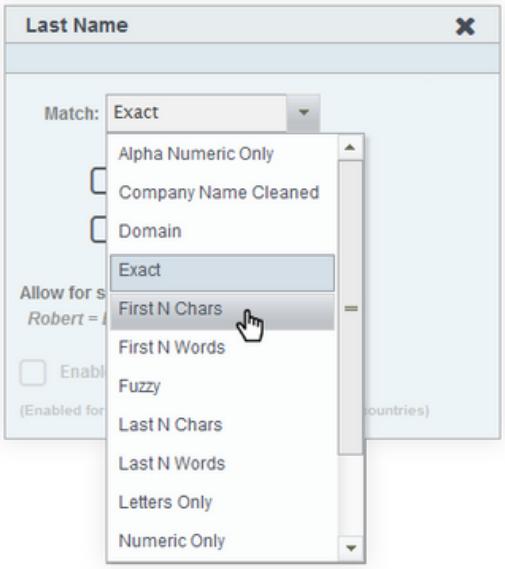
© 2024 Symphonic Source, Inc.

Save time, don't waste it

Check repetitive tasks off your list. From deduplication to importing to transforming, Cloudingo has all the tools you need to win at data management.

- Conquer common hurdles native to Salesforce and Marketo like duplication, inconsistencies, data decay, and human errors
- Schedule Cloudingo to work automatically, even when you're not at your desk
- Share the workload with team members using permissions-based logins so that users only access what you want them to





A platform that's as flexible as you need it to be

No tinkering with complex code or spreadsheets. Cloudingo is powerful yet easy to use and is completely customizable to accommodate the unique, complex nature of your dataset.

- Drop down menu makes it simple to set up and configure Cloudingo
- Templated filters with field-level customizations give you total flexibility and control
- Keep tabs on your data management with detailed reporting for auditing and security

Want an expert to clean your data?

© 2024 Symphonic Source, Inc.

An All-in-One Data Management Platform

Cloudingo has everything you need to clean and manage your data in Salesforce and Marketo.

Merge and convert records

Merge duplicate records without losing data like opportunities, attachments, and history. Convert Leads to Contacts.

Maintain complete control

Control how records are merged using customizable filters, flexible rules, and various matching styles.

Real-time or scheduled merges

Ensure data is always clean by merging duplicates in real-time or scheduling automation to run whenever you want.

Collaborate and track changes

Control access to Cloudingo with permissions-based logins. Stay informed on how data is modified.

Undo and restore merges

Unmerge Salesforce records that were previously merged in Cloudingo and return them to their original state.

Monitor with detailed reporting

Keep tabs on your data cleansing process so you can identify trouble areas and stay ahead of dirty data.

Dedupe import files

Upload .csv files and scan for duplicates, create new records, and update ones that already live in Salesforce or Marketo.

Find and export data

Match data on a .csv file to records in Salesforce and Marketo. Pull back any data points into an exportable report.

Transform and update fields

Update, delete, and manipulate fields for large groups of records using customized rules.

Validate addresses

Stop losing money by mailing to undeliverable addresses by verifying and appending U.S. addresses.

Connect systems via API

Shuttle data from your ERP through Cloudingo to Salesforce to leverage master data management systems.

Start your 10-day free trial!

With a powerful yet easy-to-use platform, cleaning and managing your data has never been easier.

Sign up at cloudingo.com

© 2024 Symphonic Source, Inc.

Licenses & Pricing for Salesforce

	Standard $2,500*/yr	Professional $6,000*/yr	Enterprise $10,000+*/yr
License configuration			
Salesforce instance Cloudingo is licensed per Salesforce org and includes connection to one Production and one Sandbox instance.	1	1	1
Standard Salesforce objects Support for standard Salesforce objects includes Leads, Contacts, Accounts, and Person Accounts.	✓	✓	✓
Custom Salesforce objects Support for custom objects (Opportunities, Cases, Products, etc.) included.	–	3	Unlimited
Clean and dedupe data			
Filter creation Duplicates are found using filters. Create as many filters as you'd like using any Salesforce fields and various matching styles.	Unlimited	Unlimited	Unlimited
Manual merge and convert View duplicates side-by-side and make decisions on how to merge them.	✓	✓	✓
Mass merge and convert Select multiple groups of duplicates and merge them with a click of a button (based on user-defined settings).	✓	✓	✓
Automated merging and converting Run automation jobs to merge all duplicates in a filter automatically (based on user-defined rules).	✓	✓	✓
Schedule dedupe jobs Schedule Cloudingo to calculate filters or automatically merge records daily, weekly, or whenever you'd like.	✓	✓	✓
Undo and restore merges Unmerge Salesforce records that were previously merged in Cloudingo and return them to their original state.	–	✓	✓
Real-time merging Automatically merge duplicates as soon as they are created or updated in Salesforce (based on user-defined rules).	–	✓	✓

Want an expert to clean your data?
We've got you covered.

✓ One-time cleanse ✓ Custom configurations
✓ Reporting ✓ Managed services ✓ Cloudingo license

Continued...

©2024 Symphonic Source, Inc.

	Standard $2,500*/yr	Professional $6,000*/yr	Enterprise $10,000+*/yr
Maintain and manage data			
Mass update records Using customized rules, modify field values for large groups of records with the click of a button.	✓	✓	✓
Mass delete records Clean up data and delete thousands of records at a time by eliminating specific records according to custom conditions.	✓	✓	✓
Find and export data Match data on a .csv file to records in Salesforce and pull back additional data points from Salesforce into an exportable report.	✓	✓	✓
Transform and standardize records Build a cohesive and standardize dataset with various transform options, like letter and number formatting, and spacing options.	✓	✓	✓
Find and replace data Find and replace data in Salesforce fields without any complicated exports, lookups, or manual work.	✓	✓	✓
Field analysis Run reports to get an analysis of the number, type, and usage of fields on your Salesforce data objects.	✓	✓	✓
Mass import records Upload CSV or tab delimited files and let the Import Wizard scan for duplicates, create new records, and update existing ones.	✓	✓	✓
Rapid import wizard Create import templates and use drag-n-drop actions to automate the dedupe of regular import jobs.	–	✓	✓
Address validation Verify and append US addresses using USPS standards. Credits may be purchased for as low as $0.001 per record.	+ Add on	+ Add on	+ Add on
Collaborate with teams			
Seats A seat is a dedicated user login to Cloudingo.	1	3	8
Customizable roles and permissions Control who has access to various Cloudingo functions with unique user accounts, each with its own set of permissions.	–	✓	✓
Share filters and rules Determine which filters and rules users have access to.	–	✓	✓
User auditing All actions performed inside Cloudingo are logged and stored for compliance and accountability in Cloudingo and/or Salesforce.	–	✓	✓

Continued...

©2024 Symphonic Source, Inc.

cloudingo

	Standard $2,500*/yr	Professional $6,000*/yr	Enterprise $10,000+*/yr
Integrate other systems			
Marketo integration Compare records in Marketo and Salesforce and merge duplicates that exist in both systems. Prevent future duplicates too.	–	–	✓
API integration Sync, dedupe, and identify master records between Salesforce and other on-premise or cloud applications.	–	–	1,000 calls/day
Reporting			
Progress and tracking reports	✓	✓	✓
Automated preview report Run a report to apply merge rules and preview results, and share it with data stakeholders before merging.	+ Add on	✓	✓
Exportable filter results Export the results of your filters with a click-of-a-button as often as needed. Record IDs are presented in a .csv file.	+ Add on	✓	✓
Support			
Email support	✓	✓	✓
Documentation and video library	✓	✓	✓
Personal onboarding Get help analyzing your data and receive high-level training.	–	✓	✓
Customer success manager	–	✓	✓
Professional services Our team of in-house developers and data analysts will work with you to carefully evaluate and assess your goals.	–	Contact us	Contact us
Security & Contracting			
OAUTH connection to Salesforce	✓	✓	✓
SOC 2 Type II and GDPR compliant	✓	✓	✓
256-bit SSL encryption	✓	✓	✓
Whitelisted servers	✓	✓	✓
Security audit and custom contracts	–	–	✓

*Pricing is per Salesforce org, billed annually, and not tied to the number of Salesforce users. Organizations with 300,000+ total records (across Leads, Contacts, Accounts, and Person Accounts, and custom objects if applicable) are subject to a record count fee of $100 for every 100,000 records above 300,000.

©2024 Symphonic Source, Inc.

Security

How Cloudingo Works

When records are modified in Salesforce and/or Marketo, those changes are synched to the Cloudingo Web Portal. When filters are recalculated, if the updated records are in the scope of the filters, the filter logic fires and adds the records to a group.

When you click on a group of duplicate records, Cloudingo makes a real-time API call to the data source to show you the records side-by side. Once a merge takes place, the Cloudingo Web Portal calls the native merge command.

The actual data is not cached.

Access to Data

Cloudingo stores some stats, but only raw numbers based on the filters within the application. (This is equivalent to Salesforce or Marketo knowing how much data is stored in the instance.)

Cloudingo's logs can report on the configuration of Cloudingo filters as well as their results in terms of raw numbers (numbers of duplicates identified), but no other details.

Furthermore, Cloudingo team members cannot see your data. The only exception is if you grant our support engineers ®Support Access® to the data source so that they can login and troubleshoot issues.

Data Storage

Cloudingo stores very little data, only field maps and the data from the primary field used to establish matches.

When opening a group of duplicates, Cloudingo makes a real-time API call to the data source to display field data. Once the group is closed in the Cloudingo UI, the data is released.

Data source credentials are stored in Cloudingo. They are fully encrypted. Once saved, they can be updated but never viewed.

Resources and Data Usage

When the merge grid is viewed in the Cloudingo Web Portal, Cloudingo employs a sophisticated algorithm to make a secure Salesforce API call (via either OAuth or with the stored AES 256 encrypted credentials for the user) to pull the data in real-time for user review.

Cloudingo uses the minimum number of resources possible while balancing the actual speed of the responses.

Cloudingo strives to get the most out of every API call so that any other applications or custom codes that may be running also have plenty to work with. This is why the Cloudingo team works hard to performance tune whenever possible including CPU cycles, heap size, message size, DML rows, ®bulkified® triggers, etc.

Cloudingo automatically switches between ®real-time® index mode and ®batch® index mode based on user preferences and available resources. You can also easily apply hard limits on resources.

Highest Standards

Any and all information that you see and interact with inside Cloudingo is protected using industry standard 256-bit SSL encryption.

Every year Cloudingo has passed Salesforce's intensive audit without fail. Internally the Cloudingo teams perform security audits each time a release goes out (oftentimes more frequently).

Servers and Compliance

Cloudingo is SOC 2 Type II compliant. All the standard physical security features are present including biometric access controls, intrusion detection, redundant power feeds and generators, fire suppression, climate control, and more.

The Cloudingo servers are whitelisted, and the Salesforce and Marketo servers are the only servers allowed to communicate with the Cloudingo web service end-points. In addition, our company, our team, and all of our hardware are located in the USA. Cloudingo does not outsource.

salesforce PARTNER SINCE 2012

Adobe Technology Partner SILVER

GDPR

SSL 256 BIT ENCRYPTION

AICPA SOC

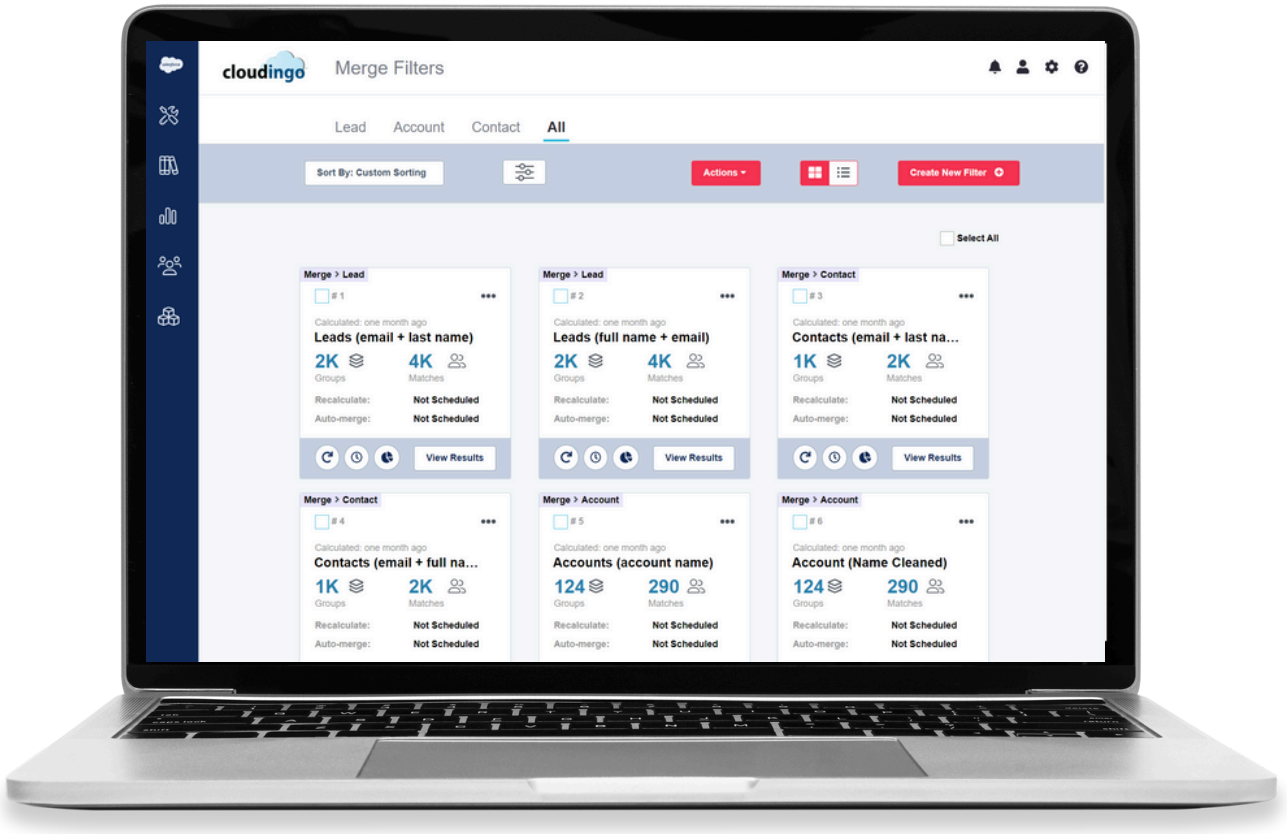
© 2024 Symphonic Source, Inc.

salesforce available on AppExchange

cloudingo™

Get started today at **cloudingo.com**!

Start your 10-day free trial today.
No credit card required. No more dupes.



About us

We deliver a full range of data management and data quality tools and services, from data cleansing, and integration, to deduplication, enabling users to realize the full potential of cloud-based and service-oriented architectures (SOA). Our mission is to provide customers with resources to manage the exponential growth in data, saving time and money and adding efficiency.

We're a certified Salesforce ISV (Independent Software Vendor) company. This means we must meet Salesforce's strict partnership requirements, including periodic security reviews. We proudly exceed the vigorous security standards every year. For you, this means that you can trust that you're working with a loyal, trustworthy company.

© 2024 Symphonic Source, Inc.