Data Quality

User Guide

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Introduction

Low-quality and duplicated data can significantly raise the cost of doing business. This is why maintaining clean, consistent, and thorough data in Salesforce is imperative for business efficiency. Because a customer's profile is ever-changing, it is important for businesses to strive for a single view of the customer. To provide this view, key stakeholders in your organization must have a 360-degree view of the customers with whom they interact.

Stibo SDQ is a certified Salesforce app that is compatible with both Salesforce Classic, Lightning Experience, and Salesforce1. It encompasses every aspect of data management including real-time contact data validation, deduplication, ongoing data monitoring, data stewardship, and a seamless integration with Dun & Bradstreet.

Stibo SDQ offers native in-app Master Data Management features embedded into existing Salesforce processes. It also provides flexible functionality options through these three themes: Real-time Contact Data Validation, Dun & Bradstreet Enrichment, and Master Data Management. They are all compatible with Salesforce Classic, Lightning Experience, and Salesforce1.

A high-level overview of each theme is offered below. For more details about each theme, see the respective sections within this guide.

Real-time Contact Data Validation

Allows users to confirm contacts are both valid and reachable, while creating and updating contact data in Salesforce. This theme offers the following features:

- Add automatic contact data validation to the existing contact creation process for Salesforce Business Accounts, Person Accounts, and Contacts.
- Capture a complete and verified address with minimal key strokes using address auto-complete.
- Verify address information against authoritative data sources for over 248 countries.
- Validate global mobile phone numbers in real-time.
- Validate email addresses instantly.

For more information, see the **Real-time Contact Data Validation** section of this guide.

Dun & Bradstreet Enrichment

Allows your organization to leverage high-quality business data from Dun & Bradstreet through a seamless real-time connection with the D&B database. Enabling this theme helps ensure your organization has the latest contact data when adding new or updating existing contacts in Salesforce. This theme offers the following features:

- Enrich and update existing customer profiles with data from the over 280 million Dun & Bradstreet records.
- Seamlessly add new contacts from the Dun & Bradstreet commercial database.

For more information, see the **Dun & Bradstreet Enrichment** section of this guide.

Master Data Management

Configuring this theme gives your organization access to STEP, a powerful MDM solution from Stibo Systems. STEP’s functional richness, strong data modeling, and powerful workflows enables companies around the world to cultivate and maintain robust information supply chains. This theme offers the following:

- Eradicate duplicates at the point of entry using powerful 'search before create' technology.
- Continuously track and automatically merge duplicates based upon match scoring.
- Control and maintain potential duplicates in Salesforce with a user-friendly data stewardship experience.
- Harness the power of MDM in Salesforce to monitor the deduplication of Business Accounts, Person Accounts, and Contacts.

For more information, see the **Master Data Management** section of this guide.

About This Guide

This guide aims to describe the different Stibo SDQ capabilities, and allow system administrators to easily configure the described capabilities by directing them to the relative topics within the **Stibo SDQ Admin Guide**.

For more information about installing and configuring Stibo SDQ, see the **Stibo SDQ Admin Guide** available within the Salesforce AppExchange Stibo SDQ information section.

For more information about Stibo SDQ, or to obtain the required application keys, email StiboSDQ@stibosystems.com.

For support, email StiboSDQSupport@stibosystems.com.

Important: Because setup is customizable, some features shown here may not be available. If your display is different than what is shown in this guide, contact your system administrator for more information.

Stibo SDQ in Salesforce

Stibo SDQ offers native in-app functionality that can be used within many existing contact data-related Salesforce pages, and the Stibo SDQ Landing Page where Stibo SDQ settings, mappings, and clerical review functionality can be accessed. Where and how the functionality is used is ultimately up to the system administrator, and the configurations they apply.

This section describes the Stibo SDQ Native In-app Functionality and Stibo SDQ Landing Page.

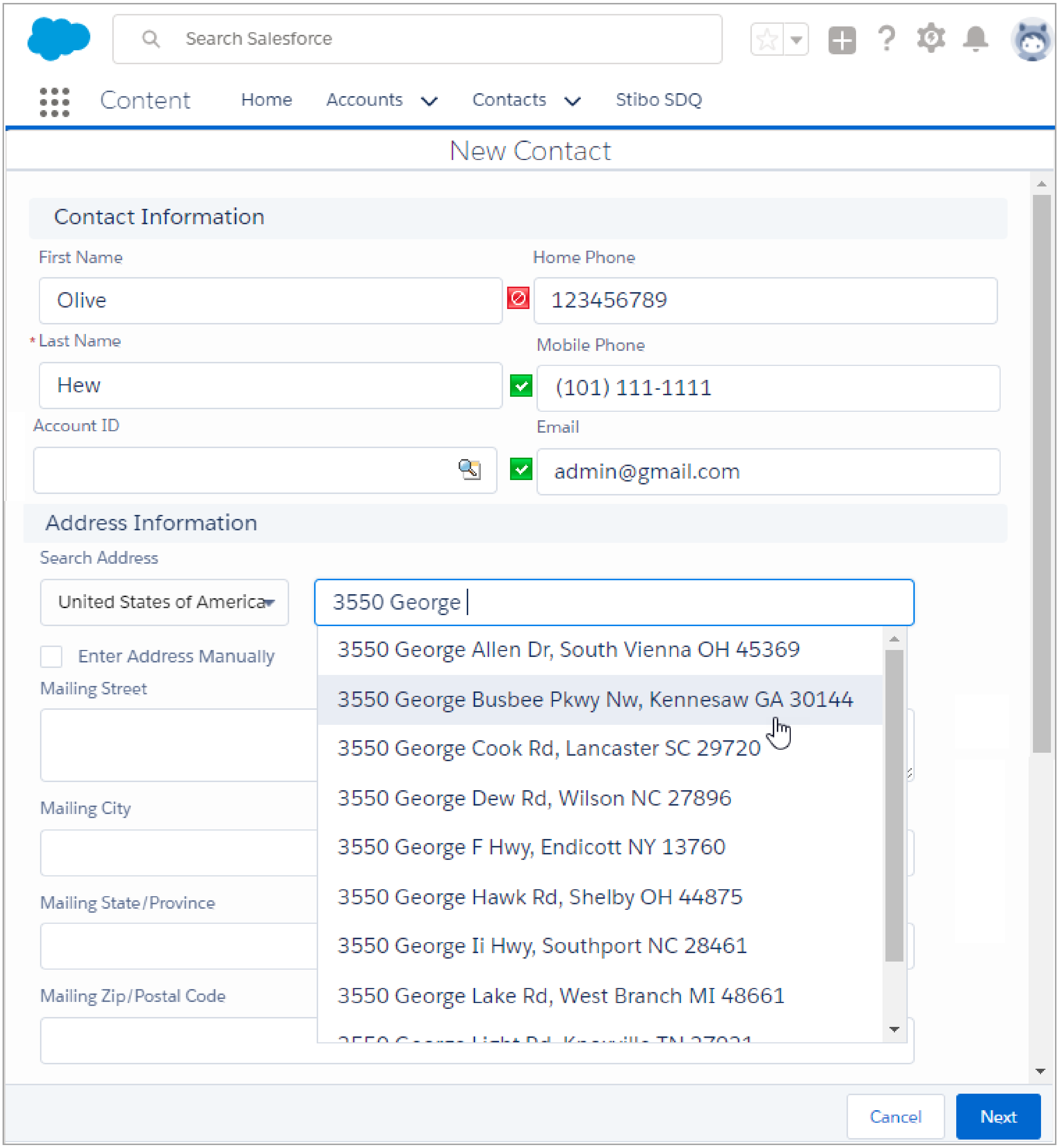
Stibo SDQ Native In-app Functionality

The native in-app functionality offered by Stibo SDQ can be used within many existing contact data-related Salesforce pages. This includes the following functionality:

- Email Validation
- Address Validation
- Phone Validation
- Search Before Create

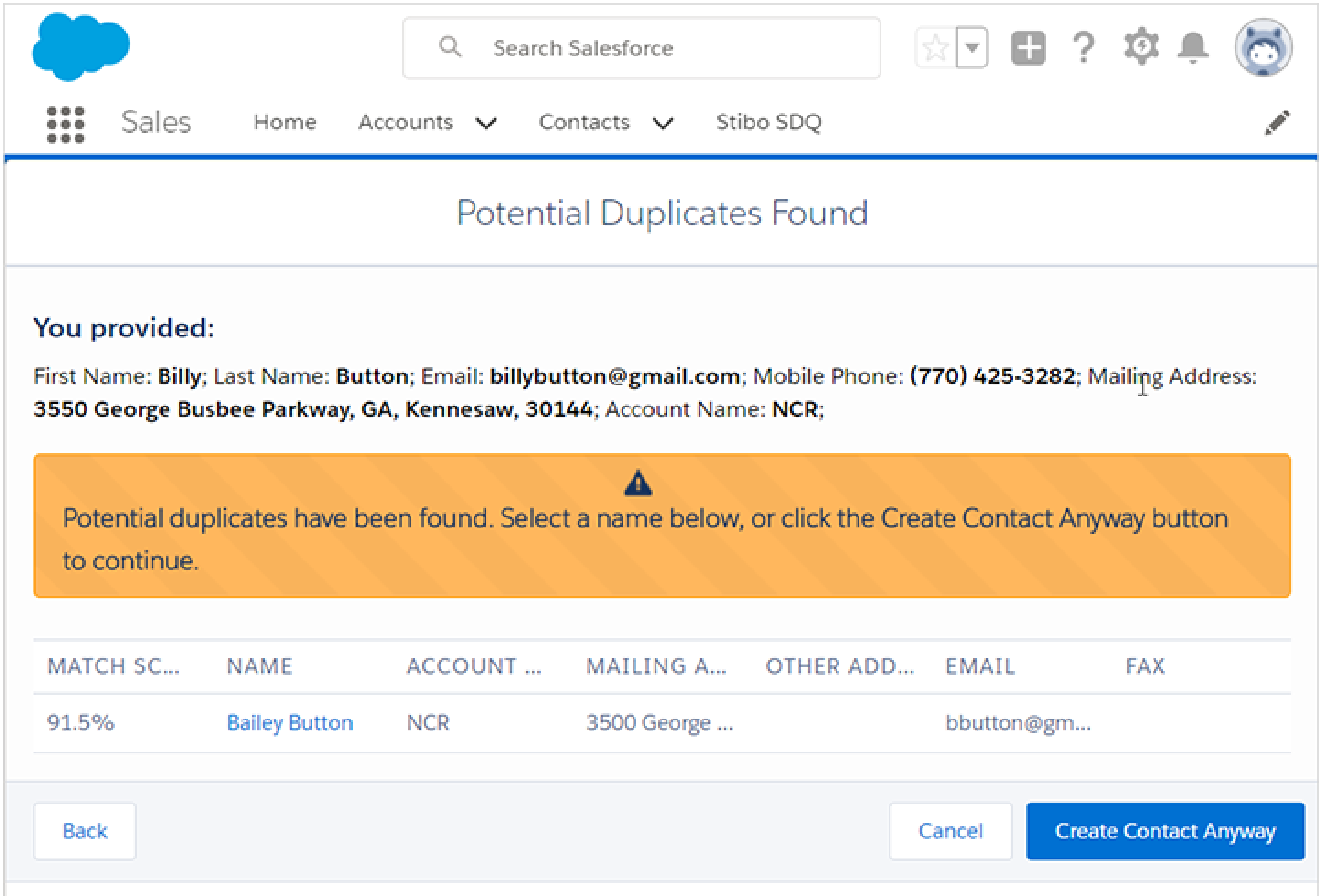
For example, when the Real-time Contact Data Validation theme is configured, the native in-app functionality can change the way users create Business Accounts, Person Accounts, and Contacts by including new Visualforce pages in the account / contact creation workflow. This allows users to see whether contact data is valid upon entry. For more information, see the **Real-time Contact Data Validation** section of this guide.

In the example below, Stibo SDQ phone, email, and address validation functionality are displayed for an end user within a Salesforce Visualforce page. Display configurations may vary widely.


Search Salesforce
Content
Home
Accounts
Contacts
Stibo SDQ
New Contact
Contact Information
First Name
Olive
Home Phone
123456789
* Last Name
Hew
Mobile Phone
(101) 111-1111
Account ID
Email
admin@gmail.com
Address Information
Search Address
United States of America
3550 George
3550 George Allen Dr, South Vienna OH 45369
3550 George Busbee Pkwy Nw, Kennesaw GA 30144
3550 George Cook Rd, Lancaster SC 29720
3550 George Dew Rd, Wilson NC 27896
3550 George F Hwy, Endicott NY 13760
3550 George Hawk Rd, Shelby OH 44875
3550 George Ii Hwy, Southport NC 28461
3550 George Lake Rd, West Branch MI 48661
Enter Address Manually
Mailing Street
Mailing City
Mailing State/Province
Mailing Zip/Postal Code
Cancel
Next

Additionally the Search Before Create page can display any potential Account and/or Contact duplicates before the new account and/or contact is created. For more information, see the **Real-time Deduplication with Search Before Create** topic within the **Master Data Management** section of this guide.

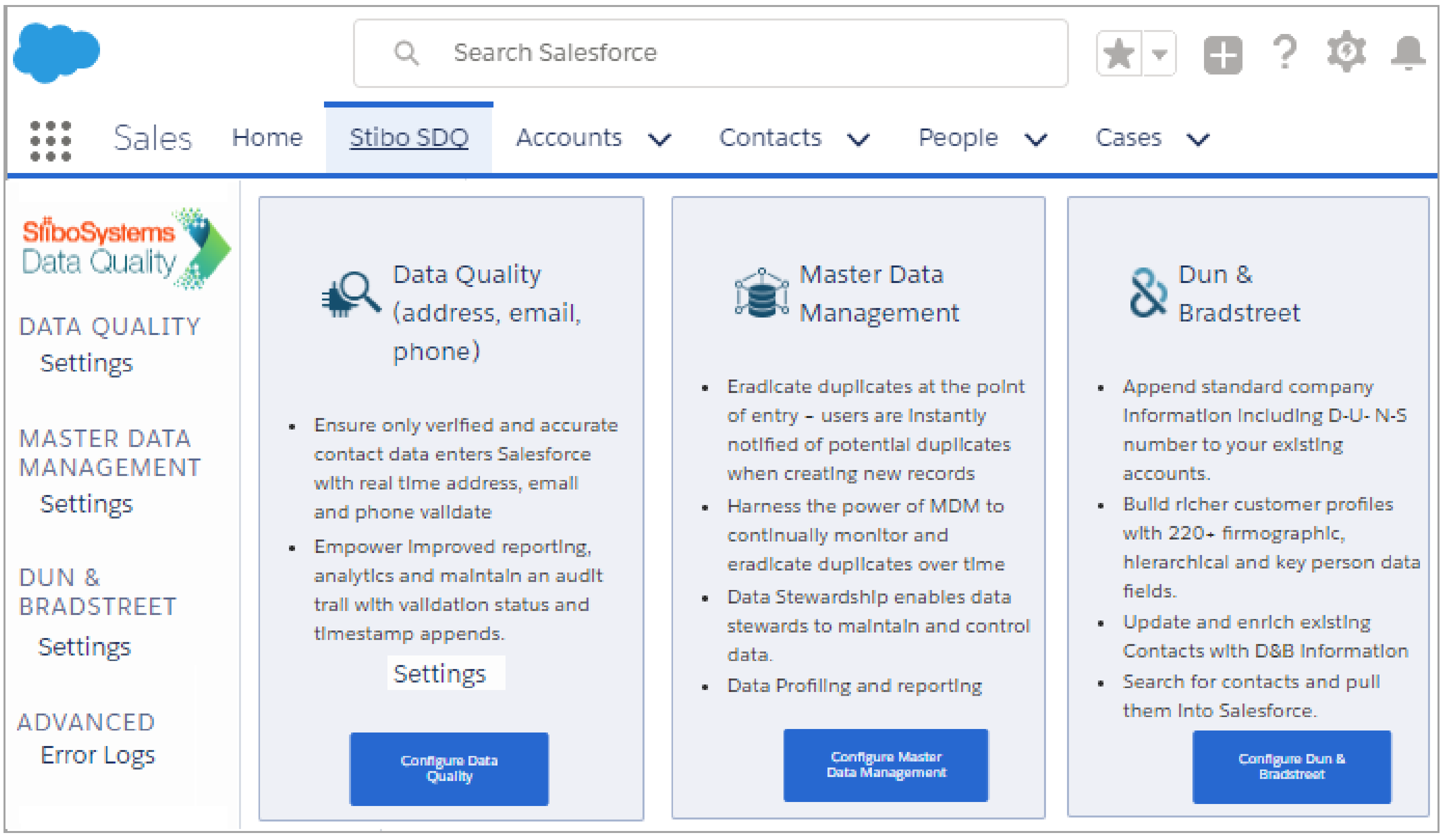
In the example below potential duplicates have been identified for the contact 'Billy Button,' and the Contact Edit page displays with the orange potential duplicates warning.



Stibo SDQ Landing Page

The Stibo SDQ Landing Page is where system administrators can configure Stibo SDQ settings and mappings, and Data Stewards can access the Stibo SDQ clerical review tasks, merge functions, and/or reporting features when the Master Data Management theme is configured. For more information, see the **Master Data Management** section of this guide.

Once the Stibo SDQ Landing page is accessed, the Stibo SDQ navigation menu is visible along the left side of the screen. Below is an example of how the Stibo SDQ Landing Page and menu options will display prior to any themes being configured. The menu options are separated into the following sections: DATA QUALITY, MASTER DATA MANAGEMENT, DUN & BRADSTREET, and ADVANCED. For details on the menu options available when a theme is configured, see the themes configuration section of the **Stibo SDQ Admin Guide**.



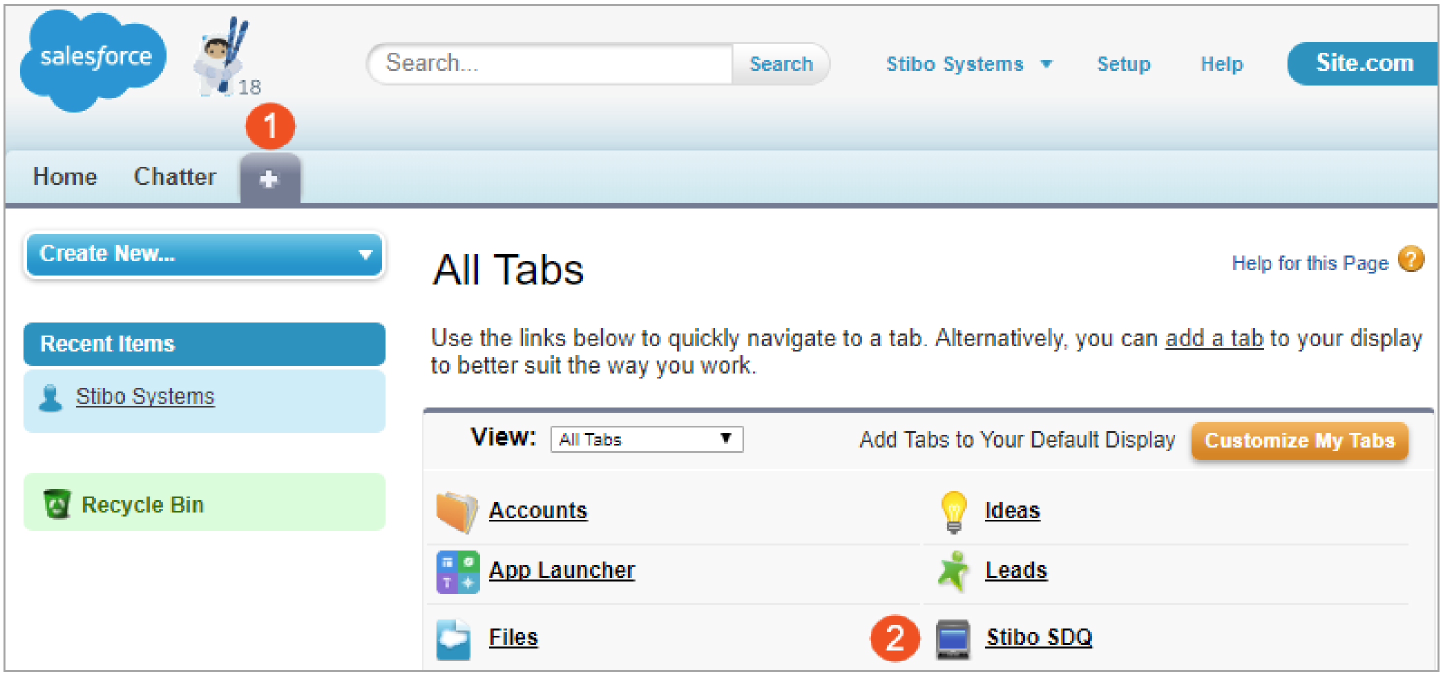
Because system administrators can configure the Stibo SDQ tab differently for each Salesforce instance, the tab may be found within different Salesforce views. In the example above, the Stibo SDQ tab has been configured to display to the right of the Home tab within the Sales app.

Important: After any one of the themes are configured, the configure buttons will no longer display as shown above. Each themes settings (including the API key fields) can be accessed by selecting the 'Settings' menu option beneath the desired theme.

Using Salesforce Classic to Access the Stibo SDQ Landing Page

Accessing the Stibo SDQ Landing Page can be done using either Salesforce Classic or Lightning Experience. This section describes how to access the Stibo SDQ Landing Page using Salesforce Classic.

1. Login to Salesforce > Click the add a new tab (**+**), and the 'All Tabs' page will display (as shown below).
2. Find the 'Stibo SDQ' tab.
3. Click the **Stibo SDQ** tab link, and the Stibo SDQ Landing Page will display.

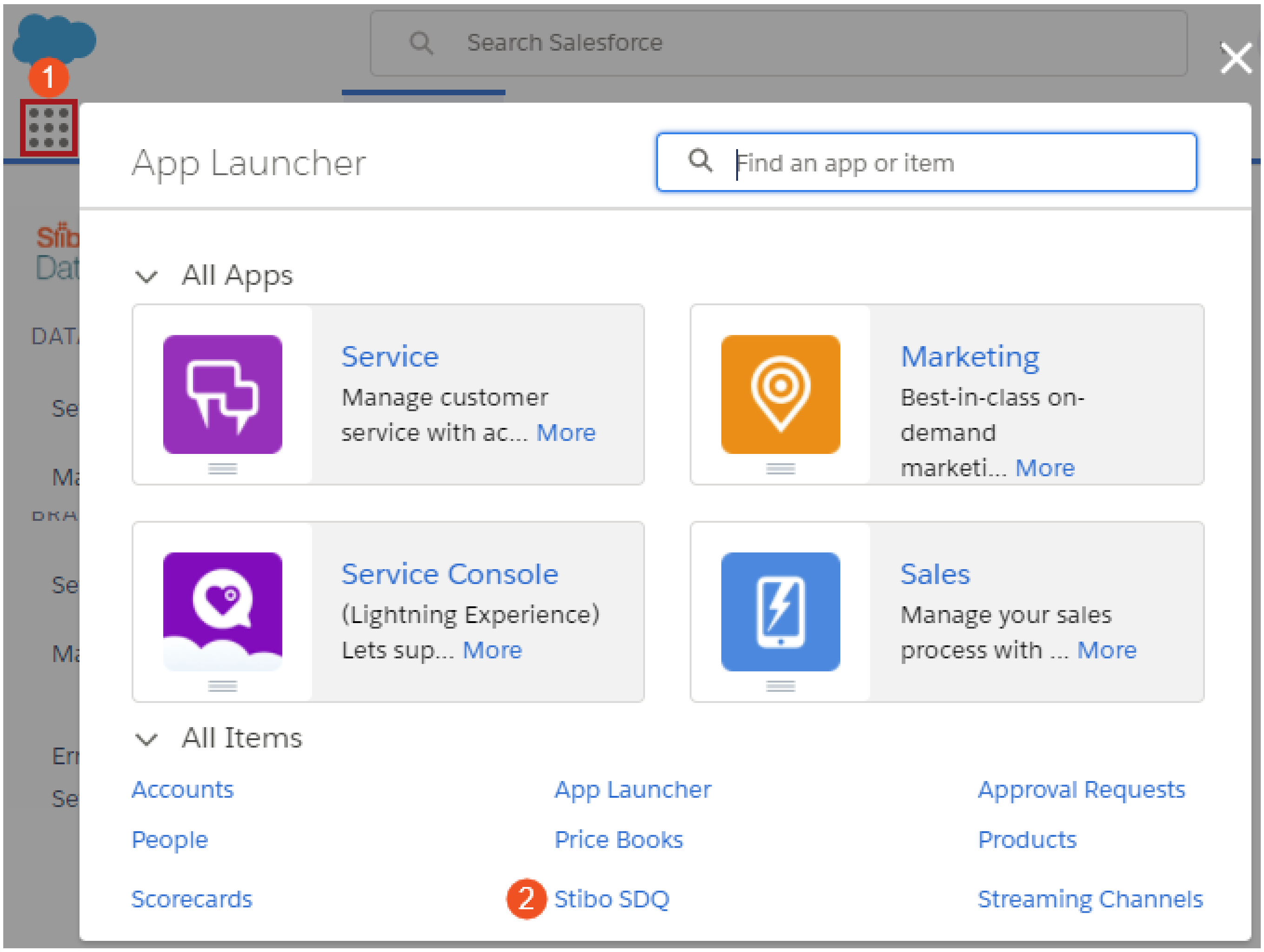


Note: For easy access, it is recommended that system administrators add the Stibo SDQ tab to a Salesforce view.

Using Lightning Experience to Access the Stibo SDQ Landing Page

Accessing the Stibo SDQ Landing Page can be done using either Salesforce Classic or Lightning Experience. This section describes how to access the Stibo SDQ Landing Page using Lightning Experience.

1. Login to Salesforce > Click the Launcher button, and the Launcher dialog will display (as shown below).
2. In the 'All Items' section, click the Stibo SDQ link, and the Stibo SDQ Landing Page will display.



Note: For easy access, it is recommended that system administrators add the Stibo SDQ tab to a Salesforce view.

Real-time Contact Data Validation

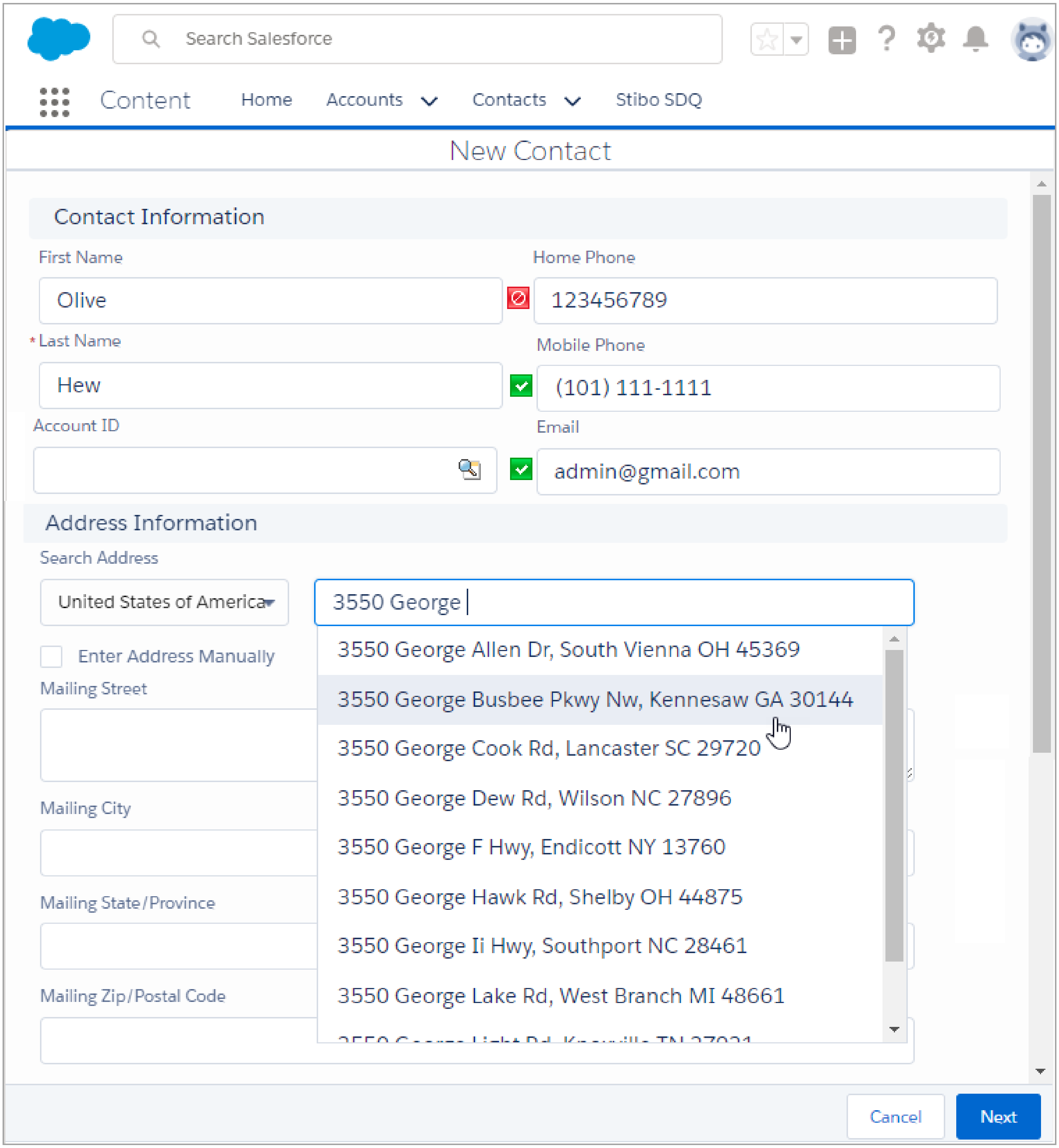
With Stibo SDQ, contact data is validated globally and in real-time with address, email, and phone verification displayed in Salesforce at the point of entry. In other words, users can validate contact information for existence and reach-ability (a validation that gives you actionable results) while creating contact data in Salesforce. This ensures only verified and accurate contact data enters Salesforce.

Once contact data has been created, and edits have been made, it is possible to configure an automatic validation that will revalidate contact data whenever a change is made. For more information, see the **Enable Async Validation** section of the **Stibo SDQ Admin Guide**.

Within this section the following real-time overarching capabilities are addressed:

- Address Validation
- Email Validation
- Phone Validation

In the example below, Stibo SDQ phone, email, and address validation functionality are displayed for an end user within a standard Salesforce page. Display configurations may vary widely.


Search Salesforce
Content
Home
Accounts
Contacts
Stibo SDQ
New Contact
Contact Information
First Name
Olive
Home Phone
123456789
* Last Name
Hew
Mobile Phone
(101) 111-1111
Account ID
Email
admin@gmail.com
Address Information
Search Address
United States of America
3550 George
Enter Address Manually
Mailing Street
Mailing City
Mailing State/Province
Mailing Zip/Postal Code
3550 George Allen Dr, South Vienna OH 45369
3550 George Busbee Pkwy Nw, Kennesaw GA 30144
3550 George Cook Rd, Lancaster SC 29720
3550 George Dew Rd, Wilson NC 27896
3550 George F Hwy, Endicott NY 13760
3550 George Hawk Rd, Shelby OH 44875
3550 George Ii Hwy, Southport NC 28461
3550 George Lake Rd, West Branch MI 48661
Cancel
Next

Address Validation

With Stibo SDQ, address validation is powered by typeahead search technology, which enables users to capture a complete and verified address with minimal key strokes. Address validation is available when creating Business Accounts, Person Accounts, and Contacts. Address information is verified against authoritative data sources for over 248 countries including USPS, Canada Post, Royal Mail, Australia Post, La Poste, New Zealand Post, and Deutsche Post.

This section addresses:

- Using Address Validation
- Address Data Quality
- Address Quality Index
- Address Validation Statuses

Using Address Validation

Once configured, when users create Business Accounts, Person Accounts, and/or Contacts using the same Salesforce button they have always used, they will be able to select valid addresses from an auto-complete dropdown of any address in the world.

In the example below, within the Search Address Country field, 'United States of America' is selected (or is set as the default), and the first few numbers and letters of an address have been entered. Based upon the text entered, the three addresses within the selected country that match the entered text will display in the dropdown. In other words, by entering a few characters and then selecting the correct address, a user can easily populate the contact record with valid address information.

In the example above, the validated address is selected from the dropdown, and will have either a Verified or Unverified address validation status. If the correct address does not display within the dropdown, then users can disable address validation or select an address that is close to the correct address and then edit the address further. When address validation is disabled the validation status will be set to 'Entered Manually.'

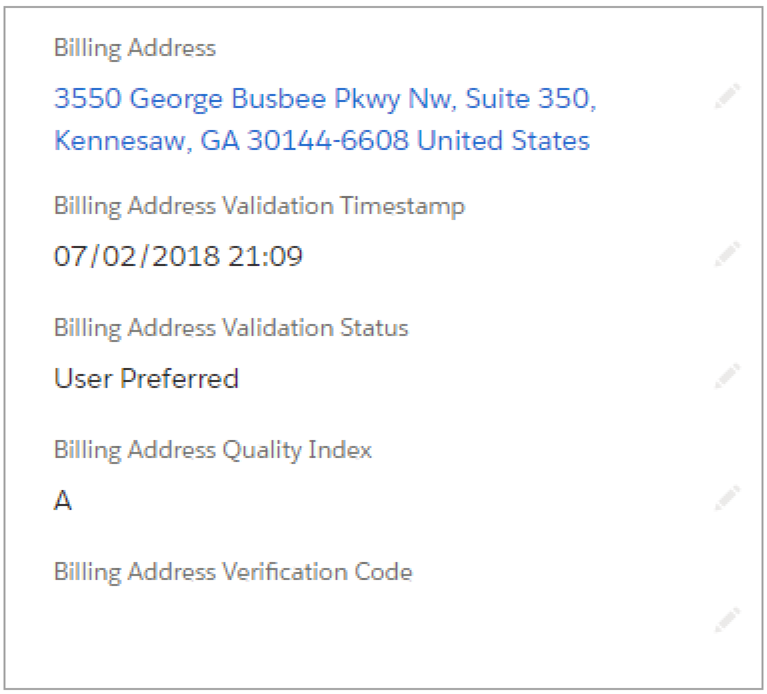
Note: In the example above, one address field is displayed, however there is no limit to the number of contact data validation configurations allowed. For more information on how to configure fields for contact data validation, see the **Configuring Mappings** section of the Enabling Real-Time Data Validation topic, the Enable Master Data Management Theme topic, or the Enable Dun & Bradstreet Theme topic within the **Stibo SDQ Admin Guide**.

Address Data Quality

Once a valid address is selected, the address data is automatically enriched by auto-populating fields configured by the system administrator. These are helpful when creating reports to get an overview of address quality. At a minimum, the following custom fields are recommended for each address type that should be validated (i.e., Billing, Shipping, Mailing):

- Address Validation Status
- Address Validation Timestamp (for the latest validation)
- Address Verification Code
- Address Quality Index (AQI)

When the suggested custom fields are configured, it is easy for users to view the important information about the record. In the example below, the following Billing related fields are displayed with the contact details: Address Validation Timestamp, Validation Status, Quality Index, and Verification Code.



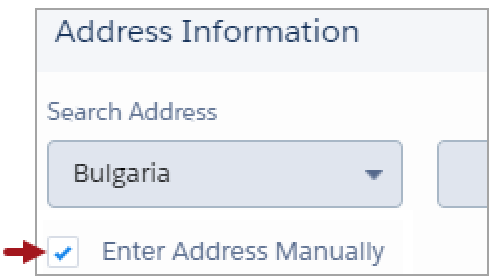
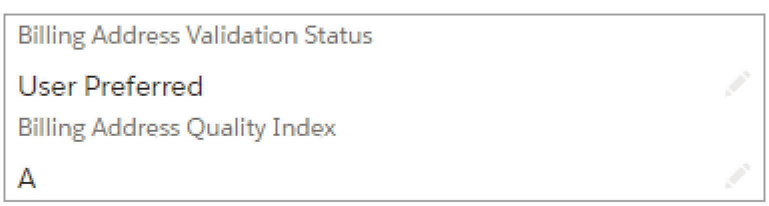
Address Quality Index

The table below describes each of the available Address Quality Indexes (AQI's).

AQI	Address Quality	Explanation
A	Excellent	Verifiable to at least Premise-level without changes.
B	Good	Verifiable to at least Thoroughfare-level with minor changes.
C	Average	Verifiable to at least Locality-level with moderate changes.
D	Poor	Only verifiable to at least Locality-level with more than moderate changes.
E	Bad	Not verifiable.

Address Validation Statuses

How a user enters an address affects the address validation status. The table below describes each address validation status and the details associated with that status.

Address Validation Status	Description
Verified	A user has selected the validated address from a dropdown.
	Address has a Loqate AQI value.
	Address has an address quality index (AQI) of Excellent or Good.
	Address is verifiable to at least Premise-level without changes or Thoroughfare level with minor changes.
Unverified	A user has selected the validated address from a dropdown.
	Address has a Loqate AQI value.
	Address has an address quality index (AQI) of Average, Poor, or Bad.
	Address is verifiable to at least Thoroughfare-level with minor changes, Locality level with average changes, or Locality level with more than moderate changes.
Entered Manually	When an address has an Entered Manually validation status, then a user has disabled address validation, by clicking the **Enter Address Manually** checkbox (as shown below). 
User Preferred	When a user edits an address field after validation, then the validation status field will be updated with 'User Preferred.' In the example below, the 'Billing Address Validation Status' field has been configured to store the billing address validation status. Since a user has edited the Billing Address, the validation status value is set to 'User Preferred.' 

For more information on configuring fields for address data enrichment, see the **Configuring the Real-time Contact Data Validation** section of the **Stibo SDQ Admin Guide**.

Email Validation

Stibo SDQ's email validation instantly detects syntax errors, verifies that a domain both exists and is reachable, and validates that the domain is accepting mail. This ensures your organization can preserve its sender reputation, because only valid and deliverable emails are entered and stored in Salesforce when Stibo SDQ is enabled.

This section addresses:

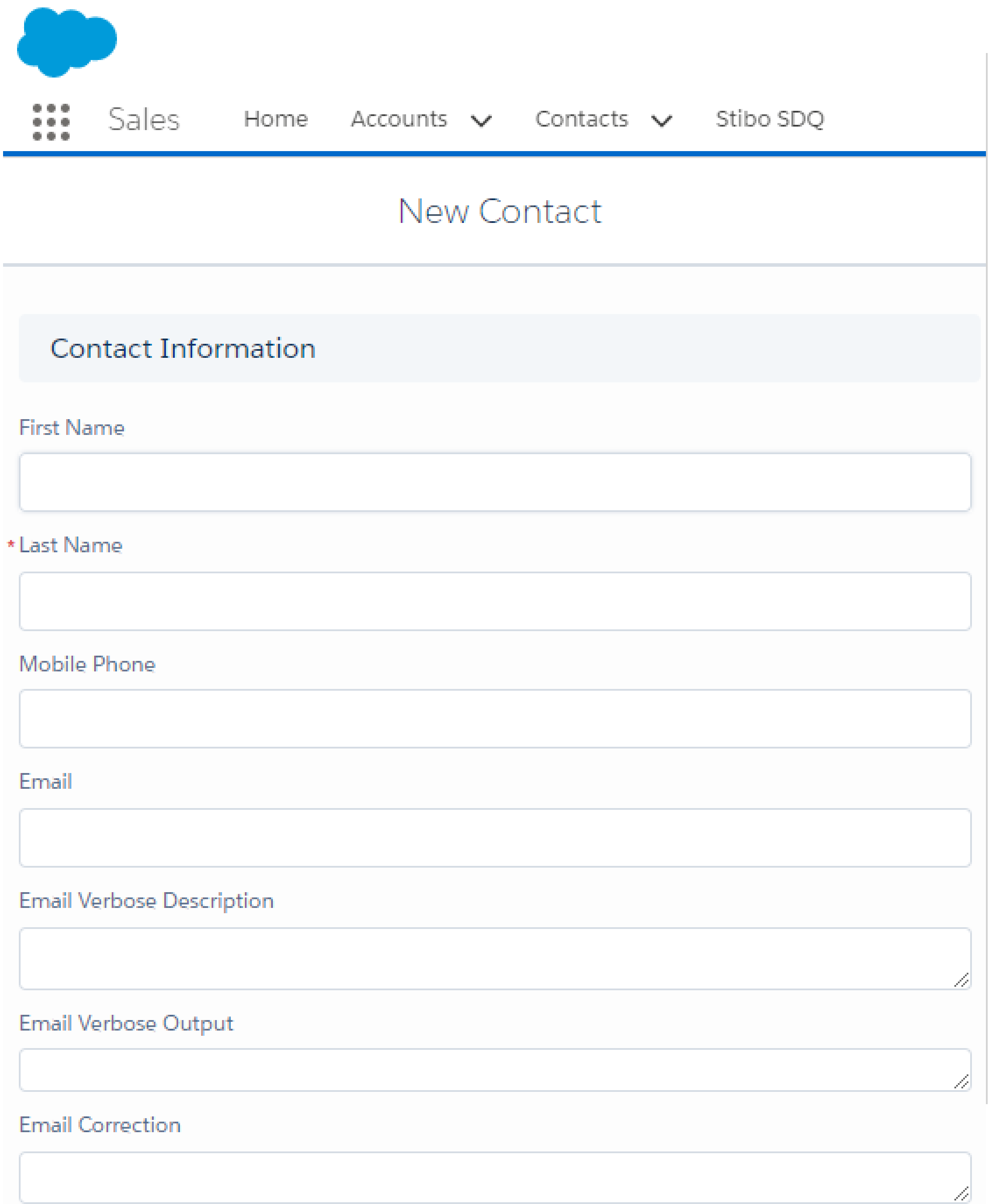
- Using Email Validation
- Email Data Quality
- Email Validation Statuses
- Email Correction

Using Email Validation

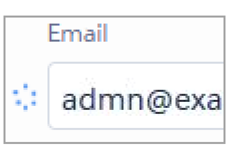
Email validation can be configured to display when creating a new Business Account, Person Account, and/or Contact.

Once configured, when an email field is viewed, it will display as any other since there are no indications that the field can validate data. However, once text is entered, and the cursor is moved off the email field, then either a red icon displays indicating the email address is invalid, or a green checkbox displays indicating the email address is valid.

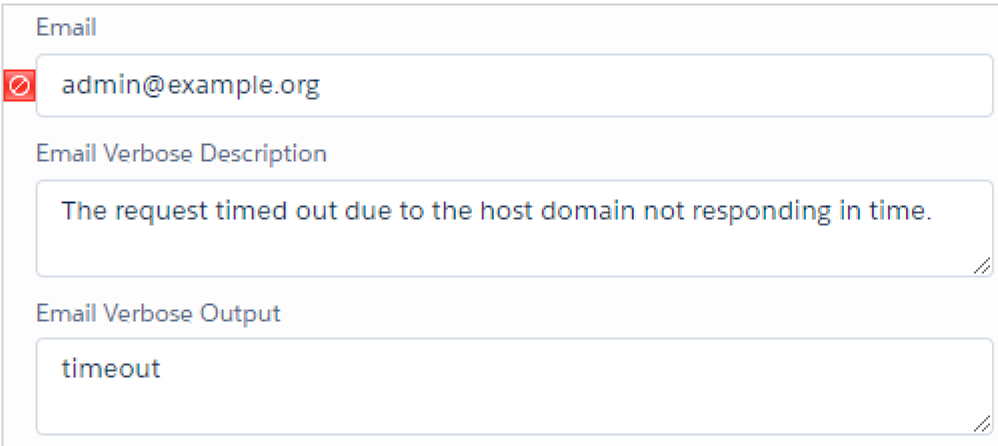
In the example below, a new contact screen is displayed with a field labeled 'Email.' The Email Verbose Description' and the 'Email Verbose Output' will expand upon the results of the validation.



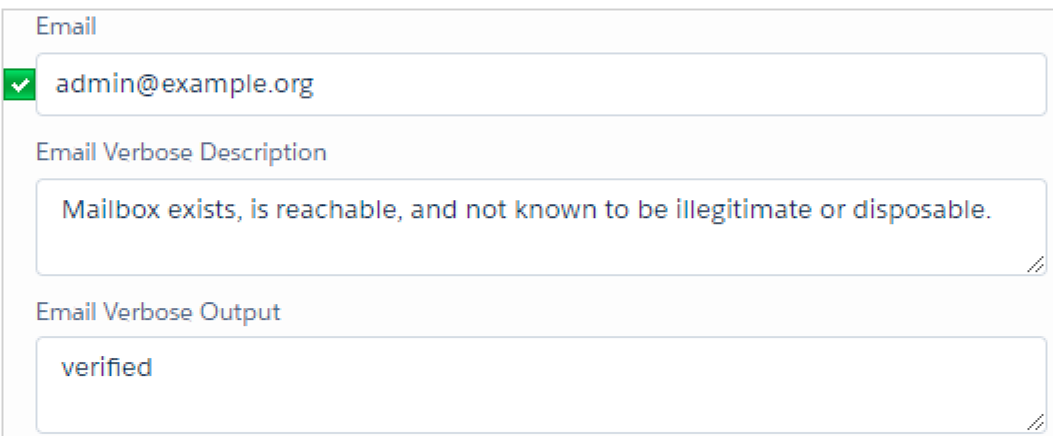
Once text is entered, and the cursor is moved off an Email field, then a processing symbol may briefly display to the left of the field (as shown below).



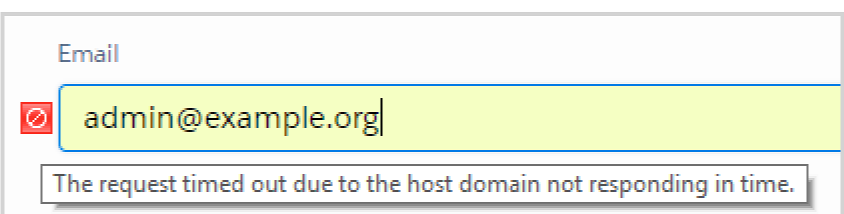
In the example below, an invalid email address is entered into an Email field, and the red icon displays along with a reason why the data was invalidated.

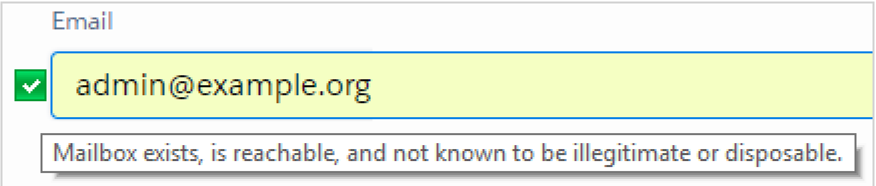


Once a valid email address is entered into an Email field, then a green checkbox icon displays, as shown below.



Users may also hover over the validation mark to see the verbose text as well. This functionality means users do not need to map the Verbose Description fields if they do not need reporting of these values.





If the red or green icons are not displayed, then the field has not been configured for email validation.

Note: In the example above, one email field is displayed, however there is no limit to the number of email validation configurations allowed. For more information, see the **Configuring Mappings** section of the Enabling Real-Time Data Validation topic, the Enable Master Data Management Theme topic, or the Enable Dun & Bradstreet Theme topic within the **Stibo SDQ Admin Guide**.

Email Data Quality

Once an email address is validated, the email metadata can be automatically enriched by auto-populating fields configured by the system administrator. This metadata is helpful when creating reports to get an overview of email data quality. It is recommended that, at a minimum, the following fields are applied:

- Email Validation Status
- Email Validation Timestamp (for the latest validation)

The following fields that may be displayed returning the reason for the validation succeeding or failing.

- Email Verbose Description
- Email Verbose Output
- Email Correction

Email Validation Statuses

The table below describes each email validation status. With the bound Email Verbose Output and Email Verbose Description fields in the mappings, these Output and Description columns will display as well.

Email Validation Status	Stibo SDQ Icon	Verbose Output	Description
Verified		verified	Mailbox exists, is reachable, and not known to be illegitimate or disposable.
Undeliverable		mailboxDisabled	Mailbox has been disabled.
		mailboxDoesNotExist	Mailbox does not exist at this domain.
		mailboxFull	Mailbox is full.
		syntaxFailure	Syntax of the email address is incorrect.
Unreachable		unreachable	Domain is not responding to validation requests or does not have any active mail servers.
		unresolved	Domain cannot be resolved.
Illegitimate		illegitimate	Seed, spam trap, black hole, technical role account, or inactive domain.
		roleAccount	Role accounts such as support@, sales@, info@.
		typoDomain	Domain was close to a common domain and although it exists, it is highly unlikely to be correct.
		localPartSpamTrap	Known local portions of the email that may indicate spam traps.
Disposable		disposable	Domain is administered by a disposable email provider (e.g., Mailinator).

Email Validation Status	Stibo SDQ Icon	Verbose Output	Description
Unknown		unknown	Unable to conclusively verify or invalidate address.
		timeout	Request timed out due to the host domain not responding in time.
		acceptAll	Domain is accept-all, thus the username cannot be validated.
		relayDenied	Result was validated at the incorrect mail exchanger.

Note: The 'Unknown' Email Validation Status commonly identifies emails where there are no indications that the email is not valid but cannot be confirmed as good (i.e., when an email domain exists, but refuses to answer), thus the green checkbox icon is used.

Phone Validation

With Stibo SDQ, real-time phone validation to check for the validity of a mobile number is conducted globally. Additionally, the validation status can be captured along with the validation timestamp.

This section addresses:

- Using Phone Validation
- Handling Country Codes
- Phone Data Quality
- Phone Validation Statuses

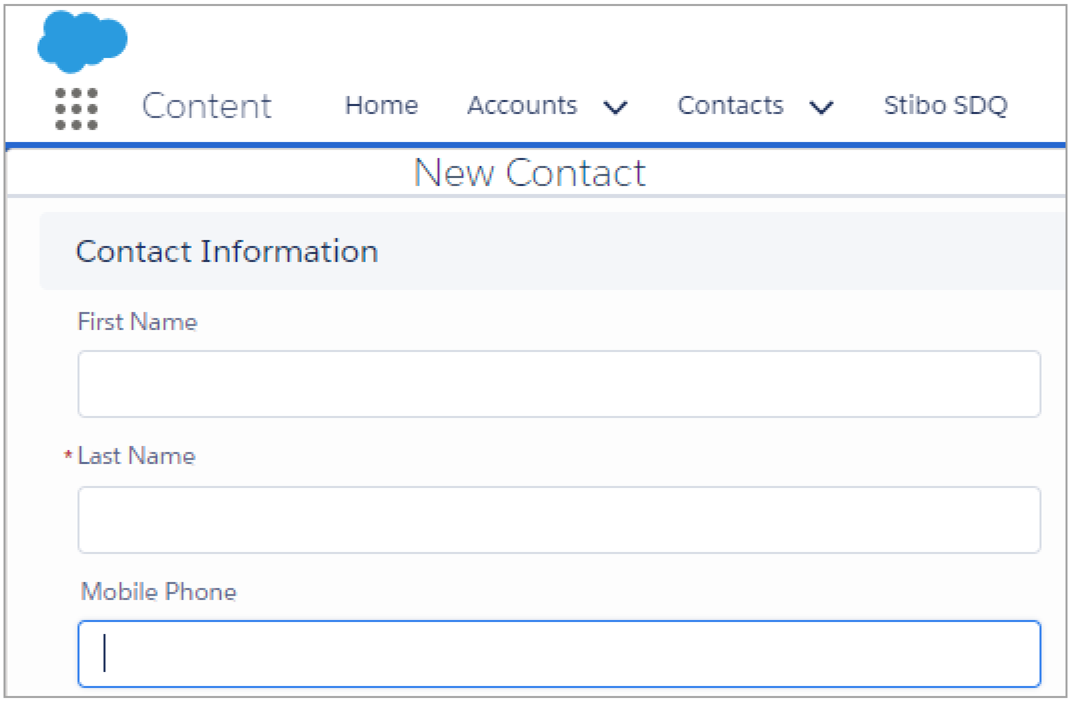
Note: Land-line phone number validation is also available for a number of countries including US / CAN.

Using Phone Validation

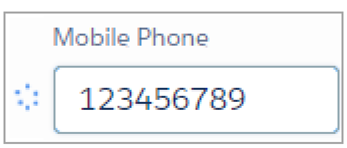
Phone validation can be configured to display when creating a new Business Account, Person Account, and/or Contact.

Once configured, when a phone field is viewed, it will display as any other. However, once text is entered, and the cursor is moved off of the phone field, then either a red icon displays indicating the phone number is invalid, or a green checkbox displays indicating the phone number is valid.

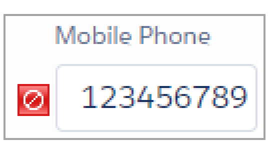
In the example below, a new contact screen is displayed with a field labeled 'Mobile Phone.'



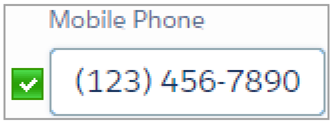
Once text is entered, and the cursor is moved off the Mobile Phone field, then a processing symbol may briefly display to the left of the field (as shown below).



In the example below, an invalid phone number is entered into the Mobile Phone field, and the red icon displays.



Once a valid phone number is entered into the Mobile Phone field, then a green checkbox icon displays, as shown below.



There is no need to enter a country code. If no country code is entered, the phone validation will automatically add a default country code.

If the red or green icons do not display, then the field is not configured for validation.

Note: In the example above, one phone field is displayed, however there is no limit to the number of phone validation configurations allowed. For more information, see the **Configuring Mappings** section of the Enabling Real-Time Data Validation topic, the Enable Master Data Management Theme topic, or the Enable Dun & Bradstreet Theme topic within the **Stibo SDQ Admin Guide**.

Handling Country Codes

System administrators can configure a default country code, allowing users to save time when entering phone numbers. If the user needs to enter a country code that is different from the default, they enter the correct country code prior to the phone number. For example, if 1 is specified for the value of the default country code, then the user will need to enter 770 425 3282 instead of +1 770 425 3282.

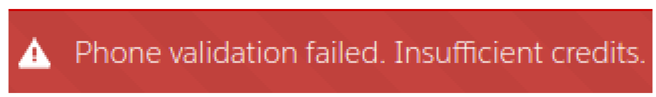
Phone Data Quality

Once a phone number is verified, the phone meta data is automatically enriched by auto-populating fields configured by the system administrator. These are helpful when creating reports to get an overview of phone number quality. At a minimum, the following custom fields are recommended for each phone number type that should be validated (i.e., Phone, Mobile, Home):

- Phone Validation Status
- Phone Validation Timestamp (for the latest validation)

Phone Validation Statuses

The table below describes each validation status.

Phone Validation Status	Stibo SDQ Icon	Error Code	Description
Live		0	Active number.
Dead		1	Number decommissioned by the owning network.
Inconclusive		5	Unable to retrieve a response from the network for this number.
No Credit	See Description Column.	7	Account has insufficient funds to process this request. The following integration error message will display, indicating that your credits with the phone validation server have expired. 
No Teleservice Provisioned		11	Number is not able to receive calls nor SMS messages. This is usually a number relating to a data SIM.
Absent Subscriber		27	Number has not been active for a short period of time. This can include a prolonged period of inactivity, and when a phone is turned off or in Airplane mode.
Number Not Supported		999	Number is invalid for one or more of the following reasons: does not contain a valid country code, does not contain a valid number range, is too long or too short.

Dun & Bradstreet Enrichment

Stibo SDQ makes it easier than ever to ensure your organization has the latest Dun & Bradstreet information. The Dun & Bradstreet Enrichment theme allows users to enrich accounts by leveraging high-quality business data from Dun & Bradstreet with the click of a button.

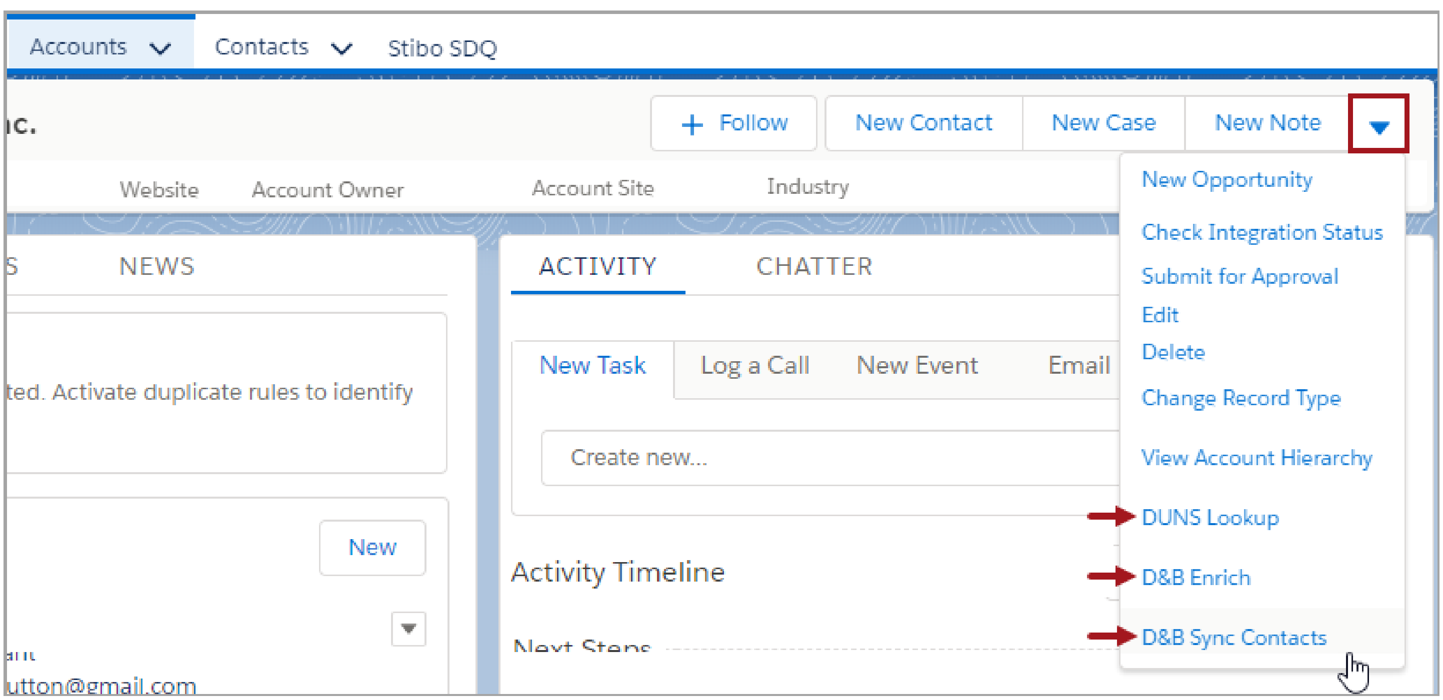
Because Stibo SDQ seamlessly integrates with Dun & Bradstreet, users can easily enrich and augment Salesforce records with industry-leading company information from Dun & Bradstreet. This includes adding a D-U-N-S number, and 220+ firmographic, hierarchical, and contacts to your organizations Salesforce Business Accounts.

Once configured, Dun & Bradstreet enrichment can be accessed within Salesforce via these three action buttons:

- DUNS Lookup Action Button
- D&B Enrich Action Button
- D&B Sync Contacts Action Button

In the example below, when an account is displayed within Salesforce Lightning Experience, the action buttons can be accessed by clicking on the action button dropdown. The red arrows indicate the three Dun & Bradstreet action buttons.

Note: When using Salesforce Classic, the dropdown is not used to access the action buttons.

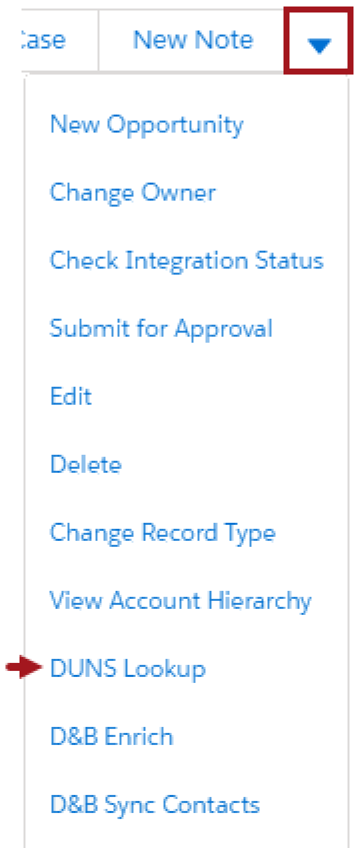


Important: Because setup is customizable, some features shown here may not be available. If your display is different than what is shown in this guide, contact your system administrator for more information.

DUNS Lookup Action Button

The DUNS Lookup action button is used to enrich an account with a DUNS Number, and optionally add other Dun & Bradstreet data to the account. The DUNS Lookup action button (shown below) can be accessed by clicking the action button dropdown arrow when viewing an account in Salesforce Lightning Experience.

Note: When using Salesforce Classic, the dropdown is not used to access the action buttons.

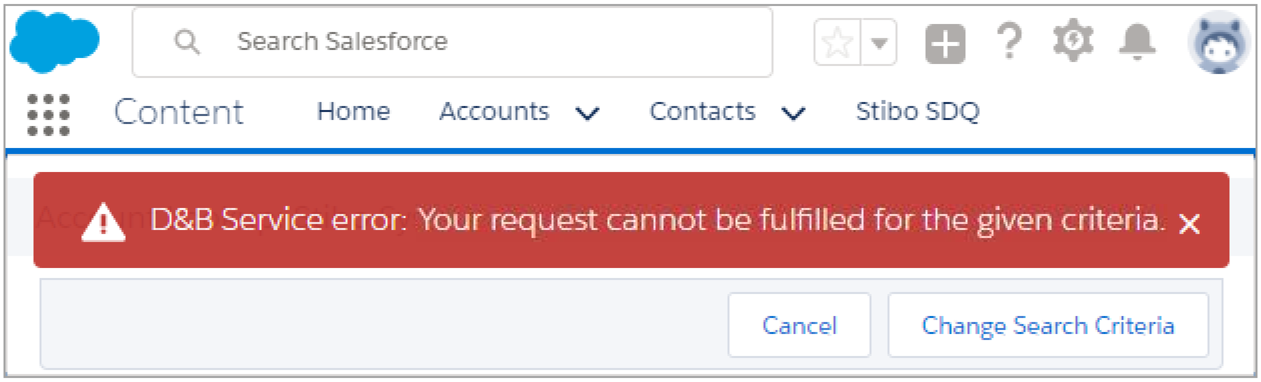


When a user clicks the DUNS Lookup action button, Stibo SDQ performs a lookup against the D&B database. If the operation successfully completes, then the user will be prompted with one of the following messages:

- Your request cannot be fulfilled for the given criteria.
- No candidates resulted for the given input criteria.
- Select from a list of potential matches.

Your Request Cannot be Fulfilled for the Given Criteria

If the account detail information already in Salesforce is deemed insufficient when run against the D&B database, an error will display as shown below.

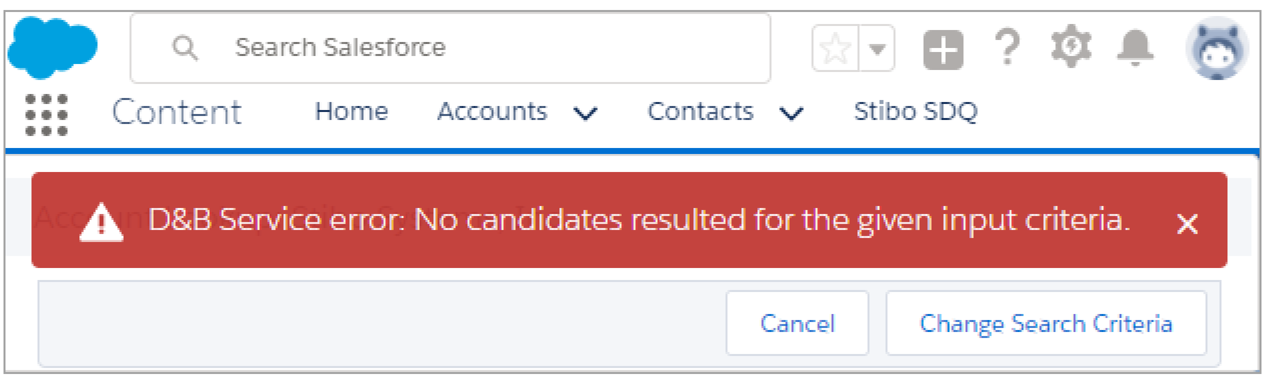


When given this message, users can:

- click the '**X**' to close the error message and remain on the page.
- click the **Cancel** button to return to the account details page.
- click the **Change Search Criteria** button to go to the Refine Lookup Search page.

No Candidates Resulted for the Given Input Criteria

If the account detail information already in Salesforce is not matched to any other accounts in the D&B Database, then an error will display (as shown below).



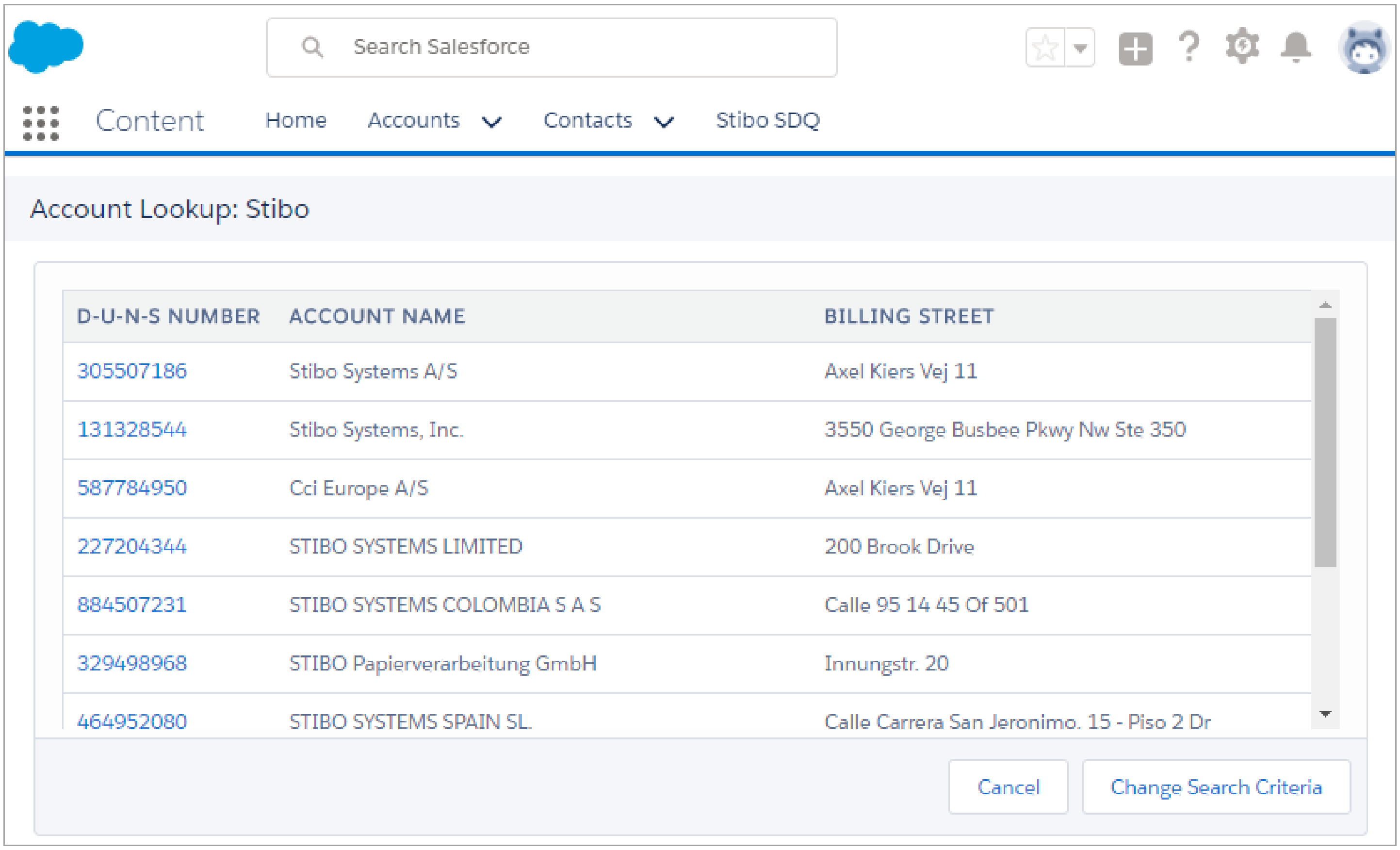
When given this message, users can:

- click the '**X**' to close the error message, and remain on the page.
- click the **Cancel** button to return to the account details page.
- click the **Change Search Criteria** button to be directed to the Refine Lookup Search page.

Select From a List of Potential Matches

If the account detail information already in Salesforce potentially matches other accounts in the D&B Database, then those potential matches will display within a list from which a user may select.

For example, when an account name field is populated with the text 'Stibo,' clicking the DUNS Lookup action button prompts a list of potential matches to display (as shown below).



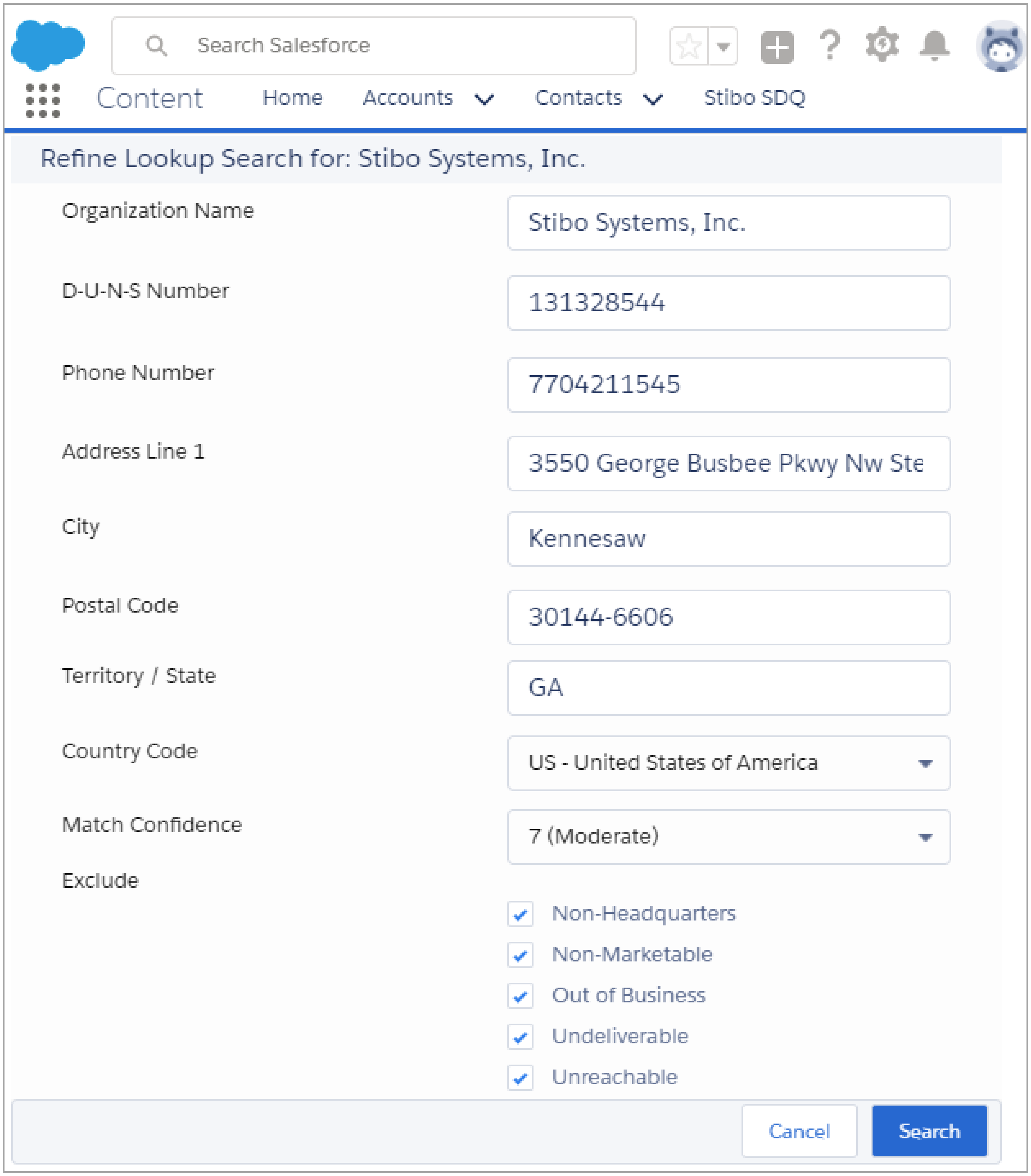
Note: If the provided search criteria results in only one potential match, that record is auto-selected.

When presented with a list of potential matches, users can:

- click the **Cancel** button to return to the account details page.
- click the **Change Search Criteria** button to go to the 'DUNS Lookup Refine Lookup Search Page.'
- select a DUNS Number from the list to go to a 'DUNS Lookup Survival Page.'

Refine Lookup Search Page

When a DUNS Lookup Action results in a list of potential matches, the user may choose to refine the search to produce more relevant results by clicking the 'Change Search Criteria' button. This takes the user to the Refine Lookup Search page (shown below).



In this screen, users can see the criteria used to produce the search results on the previous screen. Users are given the option to change or refine the criteria when the list of search results is too long.

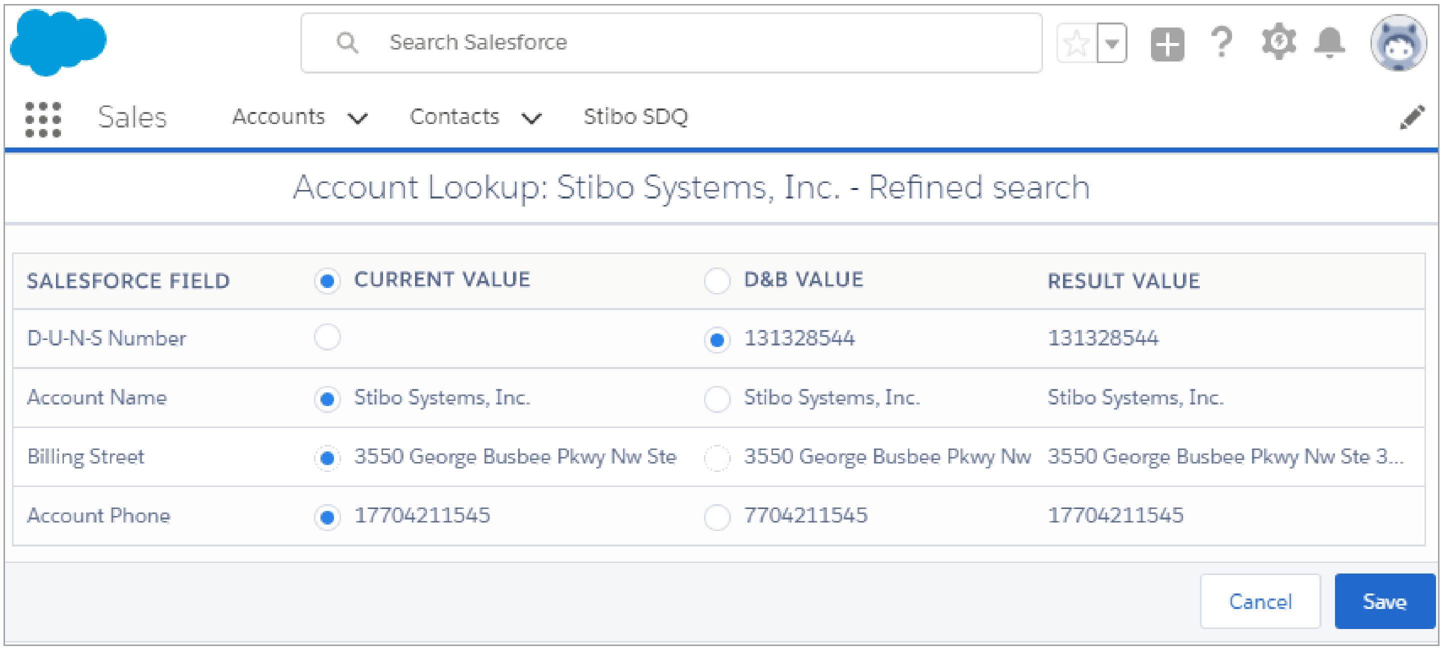
Optionally, users can:

- click the **Cancel** button to return to the account details page.
- make necessary changes to adjust the search criteria used when looking up a DUNS number.
- click the **Search** button to continue.

DUNS Lookup Survival Page

The DUNS Lookup Survival page allows users to determine which data should 'survive' the DUNS Lookup operation.

Once the DUNS Lookup Action Button is used to display a list of potential matches, and a DUNS Number is clicked, the DUNS Lookup Survival page will display as shown below.



Important: Because setup is customizable, some features shown here may not be available. If your display is different than what is shown in this guide, contact your system administrator for more information.

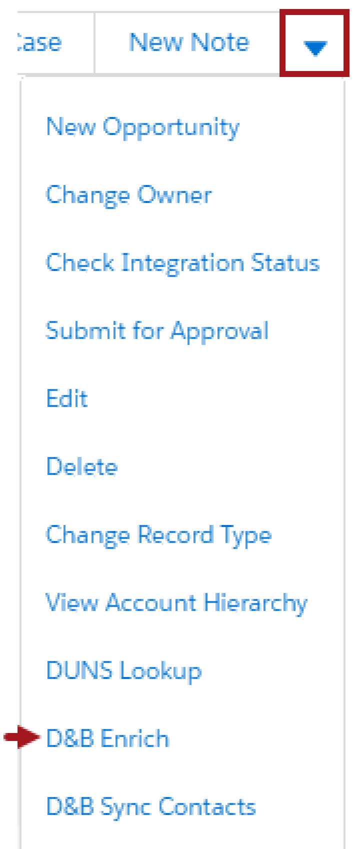
Optionally users can:

- select a radio button on a given row for either the 'CURRENT VALUE' or 'D&B VALUE' columns to determine the survival value. The survival value for the row will display within the last column, the 'RESULT VALUE' column.
- click the **Cancel** button to cancel the operation and return to the Account details page.
- click the **Save** button to update the Account with selected data.

D&B Enrich Action Button

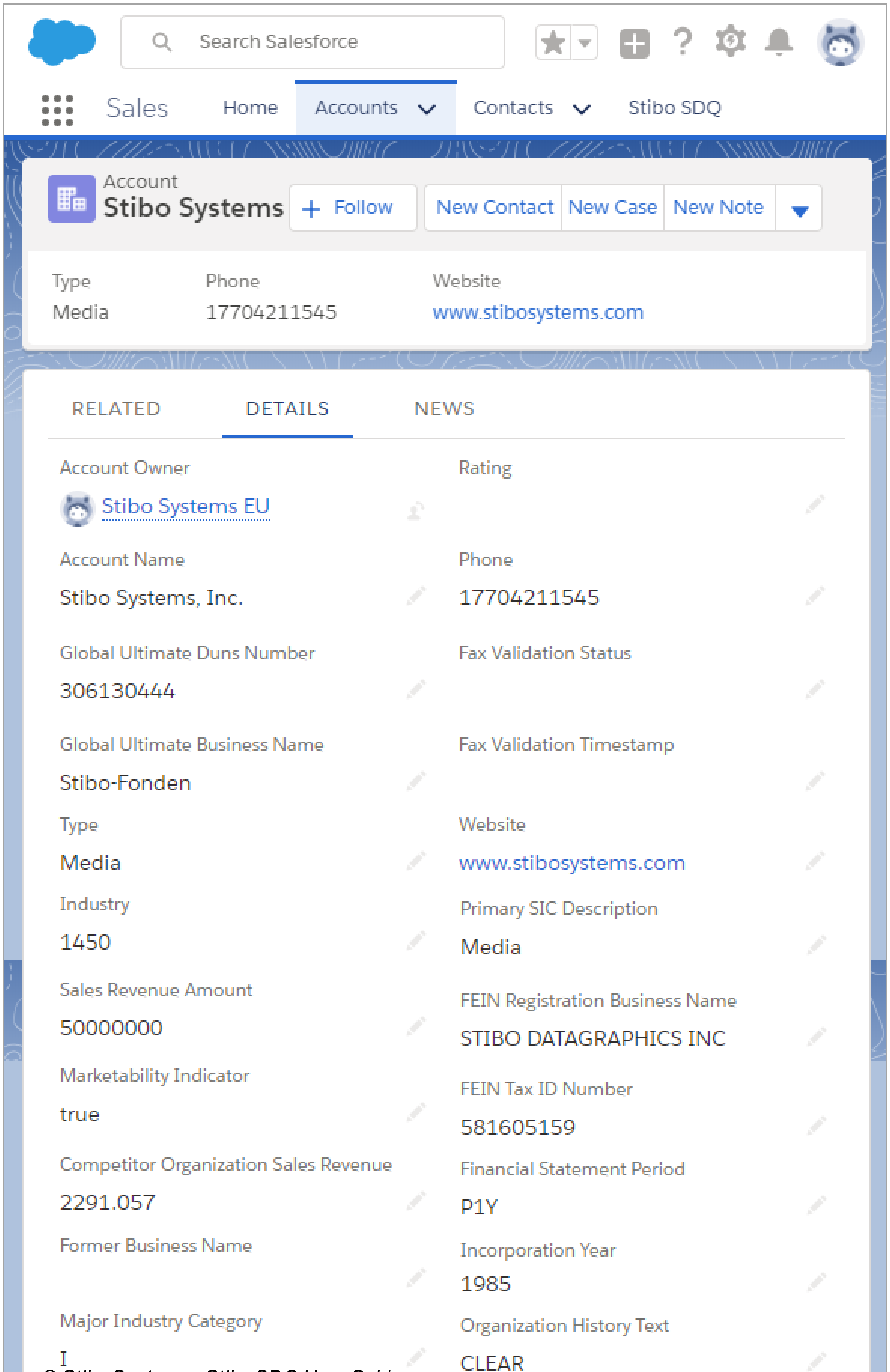
Once a DUNS Number is established, the D&B Enrich action button is used to automatically enrich the account with Dun & Bradstreet data that a system administrator has pre-configured. The D&B Enrich action button (shown below) can be accessed by clicking the action button dropdown arrow when viewing an account in Salesforce Lightning Experience.

In order to enable the full functionality of the D&B Enrich Action it is expected that a user has already performed a DUNS Lookup and assigned a DUNS Number to the account being enriched. For more information, see the **DUNS Lookup Action Button** topic within this guide.



When a user clicks the D&B Enrich action button, Stibo SDQ performs a lookup against the D&B database. If the operation successfully completes, then the account detail page will display with its data enriched.

In the example below, the following fields were automatically updated after the D&B Enrich button was clicked: Global Ultimate Duns Number, Global Ultimate Business Name, Type, Industry, Website, Sales Revenue Amount, Marketability Indicator, Primary SIC Description, FEIN Registration Business Name, FEIN Tax ID Number, Competitor Organization Sales Revenue, Financial Statement Period, Incorporation Year, and Major Industry Category.


Search Salesforce
Sales
Home
Accounts
Contacts
Stibo SDQ
Account
Stibo Systems
+ Follow
New Contact
New Case
New Note
Type
Media
Phone
17704211545
Website
www.stibosystems.com
RELATED
DETAILS
NEWS
Account Owner
Stibo Systems EU
Rating
Account Name
Stibo Systems, Inc.
Phone
17704211545
Global Ultimate Duns Number
306130444
Fax Validation Status
Global Ultimate Business Name
Stibo-Fonden
Fax Validation Timestamp
Type
Media
Website
www.stibosystems.com
Industry
1450
Primary SIC Description
Media
Sales Revenue Amount
50000000
FEIN Registration Business Name
STIBO DATAGRAPHICS INC
Marketability Indicator
true
FEIN Tax ID Number
581605159
Competitor Organization Sales Revenue
2291.057
Financial Statement Period
P1Y
Former Business Name
Incorporation Year
1985
Major Industry Category
I
Organization History Text
CLEAR

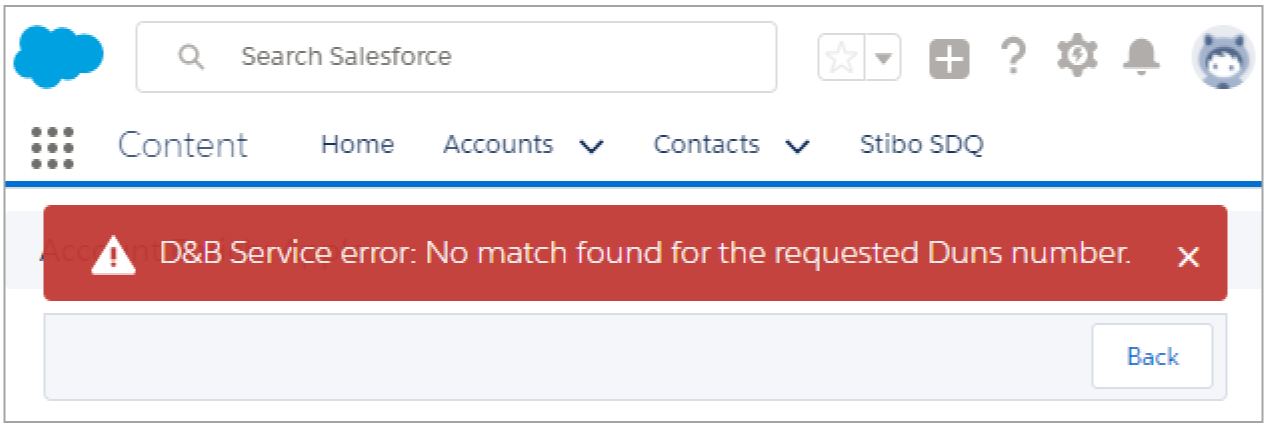
Important: Because setup is customizable, some features shown here may not be available. If your display is different than what is shown in this guide, contact your system administrator for more information.

If the selected account does not have a valid DUNS Number, and the D&B Enrich button is clicked, then one of the following errors will display.

- No match found for the requested DUNS Number.
- Missing DUNS Number.

No Match Found for the Requested DUNS Number

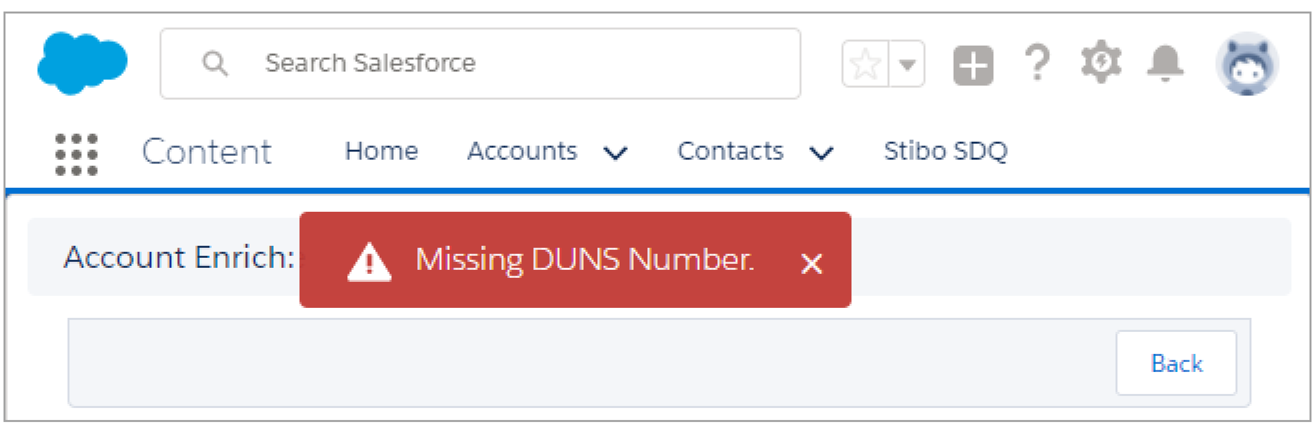
If the DUNS Number provided within the account details is not sufficient for the D&B Enrich process, then an error message will display as shown below.



This could indicate the DUNS Number is incorrect. Click the **Back** button (shown above) to return to the account details page, delete the DUNS number, and use the DUNS Lookup action button to acquire a proper DUNS Number.

Missing DUNS Number

If no DUNS Number is provided within the account details, then an error will display as shown below.



Click the **Back** button (shown above) to return to the account details page, and use the DUNS Lookup action button to acquire a proper DUNS Number.

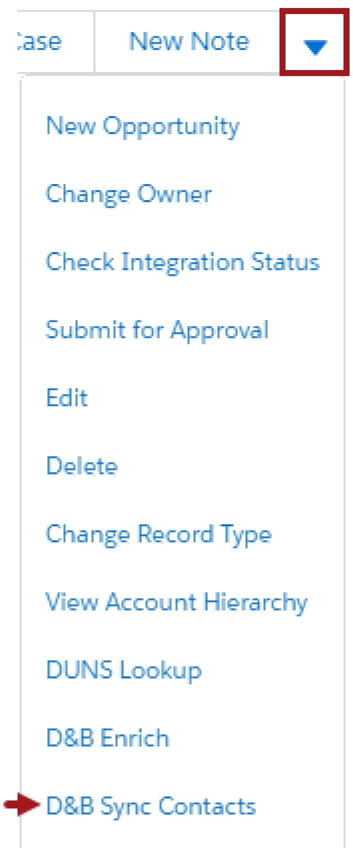
Important: If the DUNS Number displays within the account details, but the Missing DUNS Number error occurs, then there is an empty DUNS Number passed to the operation. When this occurs, the system administrator needs to confirm the correct mapping configurations are in place.

D&B Sync Contacts Action Button

Once a DUNS Number is established, the D&B Sync Contacts action button is used to search for potential contact persons. When appropriate contact candidates are found, this action button can be used to easily add the contact records to the Salesforce Business Account. The D&B Sync Contacts action button (shown below), can be accessed by clicking the action button dropdown arrow when viewing an account in Salesforce Lightning Experience.

In order to enable the full functionality of the D&B Sync Contacts action button, it is expected that a user has already performed a DUNS Lookup and assigned a DUNS Number to the account. For more information, see the **DUNS Lookup Action Button** topic within this guide.

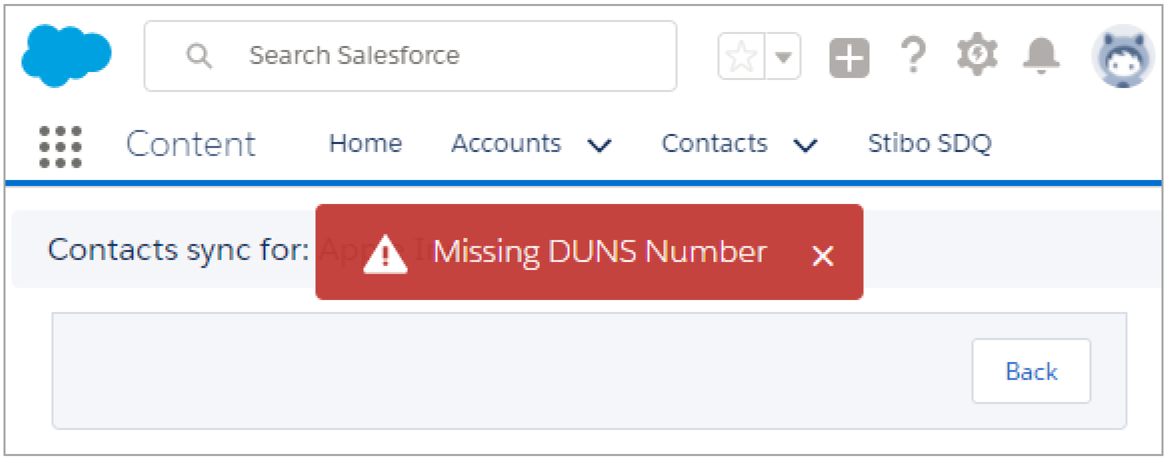
If the user clicks the D&B Sync Contacts option from the dropdown and the selected account does not have a valid DUNS Number, then an error will display. For more information, see the **Missing DUNS Number** section below.



When a user selects the D&B Sync Contacts action button, Stibo SDQ performs a contact lookup for principal contacts associated with the given account using the DUNS Number against the D&B database. If the operation fails, the user will be prompted for the missing DUNS Number. If the operation successfully completes, then the 'Contacts sync' page will display.

Missing DUNS Number

If a DUNS Number is not provided within the account details, a 'Missing DUNS Number' error will display (as shown below).



When this message displays, click the **Cancel** button to return to the account details page, and use the DUNS Lookup action button to acquire a proper DUNS Number.

Important: If the DUNS Number displays within the account details, but the Missing DUNS Number error message displays, then there is empty DUNS Number passed to the operation. When this occurs the system administrator needs to confirm the correct mapping configurations are in place.

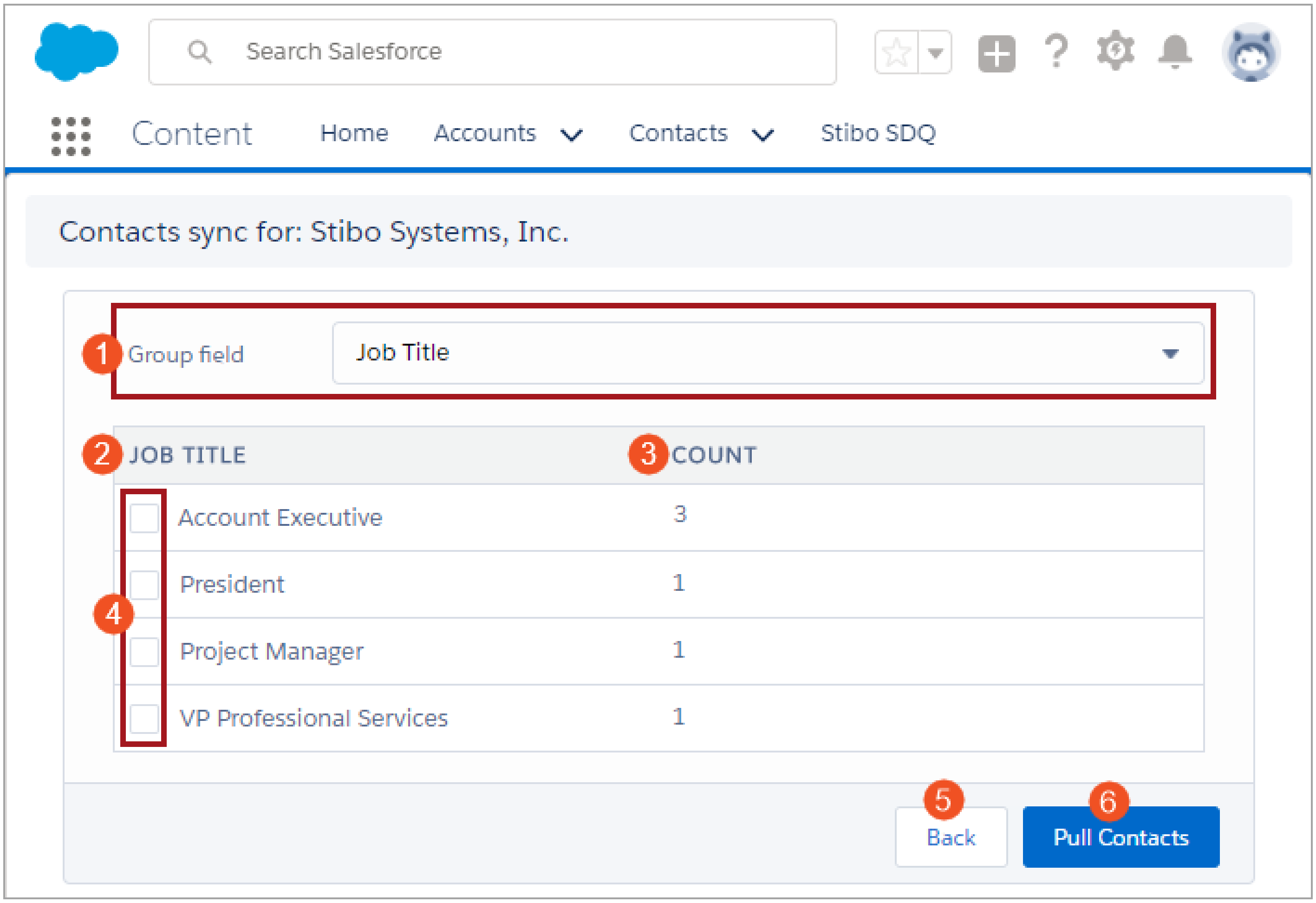
D&B Contacts Sync Page

The D&B Contacts sync page allows users to determine which contact data from the Dun & Bradstreet database should be pulled into the Salesforce account.

When a user selects the D&B Sync Contacts action button for an account with a valid DUNS Number, Stibo SDQ performs a contact-lookup for principal contacts associated with the given account. This is accomplished by searching for the DUNS Number assigned to the current account against the D&B database. The results display within the Contacts sync page.

In the example below, the Contacts sync page consists of the following elements:

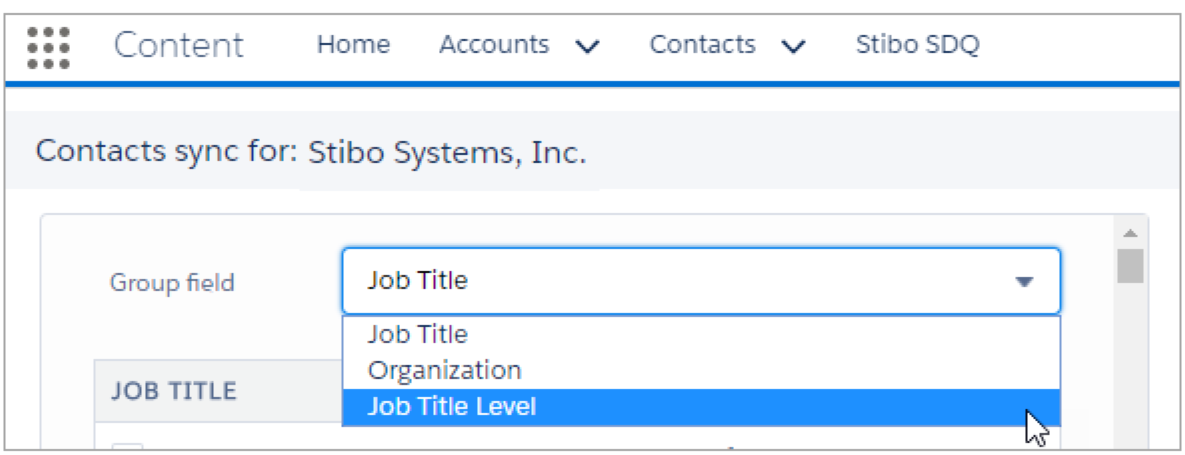
1. Group field
2. Group name column
3. Count column
4. Group checkbox
5. Back button
6. Pull Contacts button



1. Group Field

The Group field parameter allows users to choose from a dropdown list how contacts are grouped within the page.

In the example below, the contacts can be grouped by Job Title, Organization, and Job Title Level.



2. Group Name Column

The group name column displays the group name based upon the Group field selection.

In the example above, 'Job Title' is selected for the Group field parameter. Therefore the column is labeled 'JOB TITLE', and the contact groups are displayed in alphabetical order based upon their job title grouping.

3. Count Column

The count column displays with the 'COUNT' label for all of the Group field selections. The COUNT column displays the total number of individual contacts within the group.

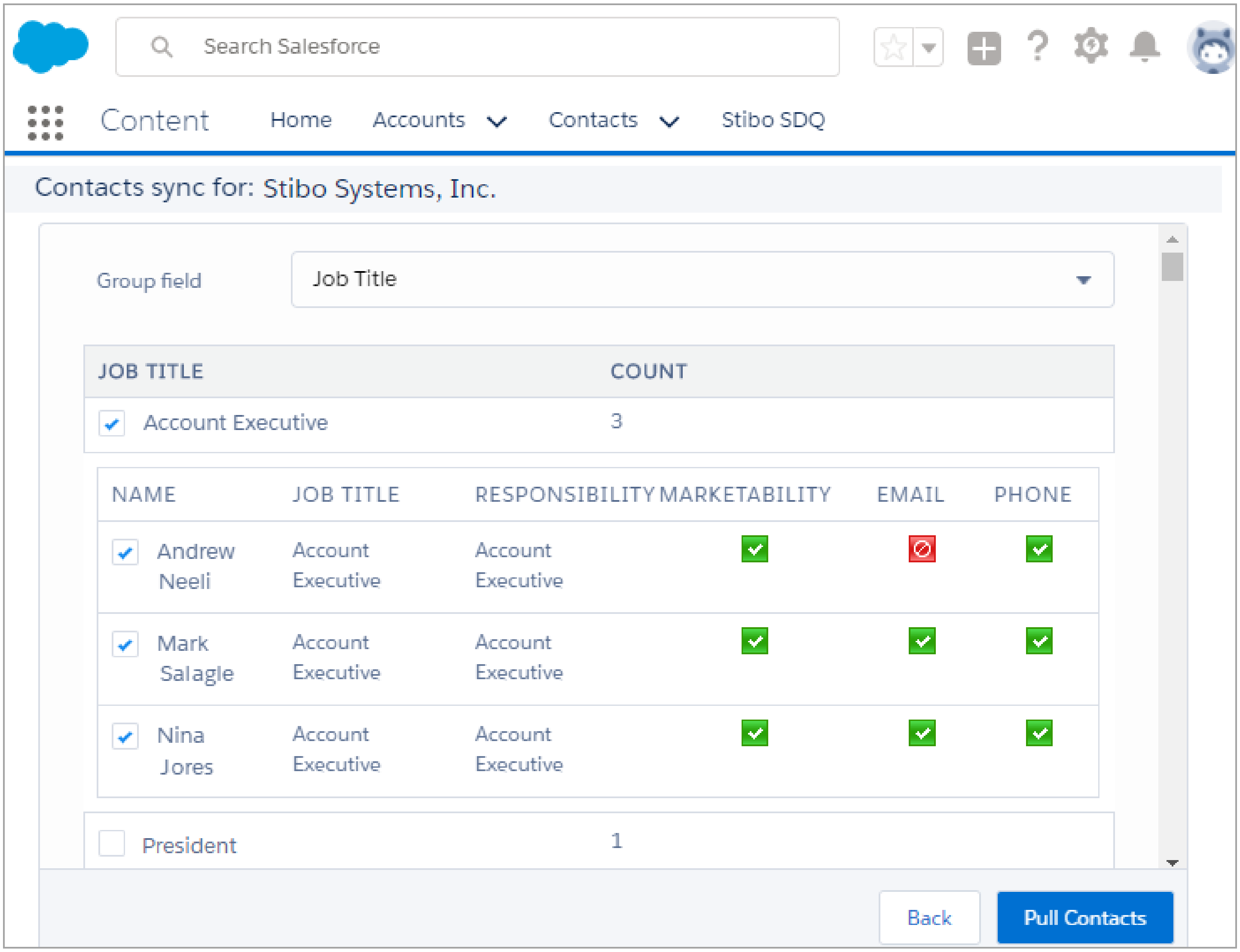
In the example above, many Job Title groups contain only one contact. However it is easy to see the 'Account Executive' group contains three contacts.

4. Group Checkbox

To the left of each group name is a checkbox. Once enabled, the group will expand to display the following contact details:

- NAME
- JOB TITLE
- RESPONSIBILITY
    - Displays additional information as to the contacts job responsibility.
- MARKETABILITY
    - Indicates if the contact record does or does not satisfies D&B marketability rules.
- EMAIL
    - Indicates if the contact record does or does not contain an email address.
- PHONE
    - Indicates if the contact record does or does not contain a phone number

In the example below, the 'Account Executive' group is enabled, and three rows of contact data are displayed with each of their contact checkboxes enabled.



Important: For this screen, the red and/or green icons do NOT indicate contact data validity. The green checkbox only indicates that contact information is provided, and the red icon only indicates that contact data is NOT provided.

By default when the group checkbox is enabled, the individual contact checkboxes are enabled. Clicking on the individual checkbox when it is enabled, will remove the blue checkbox, indicating it is not selected to be pulled into Salesforce.

Multiple groups (or partial groups) can be selected.

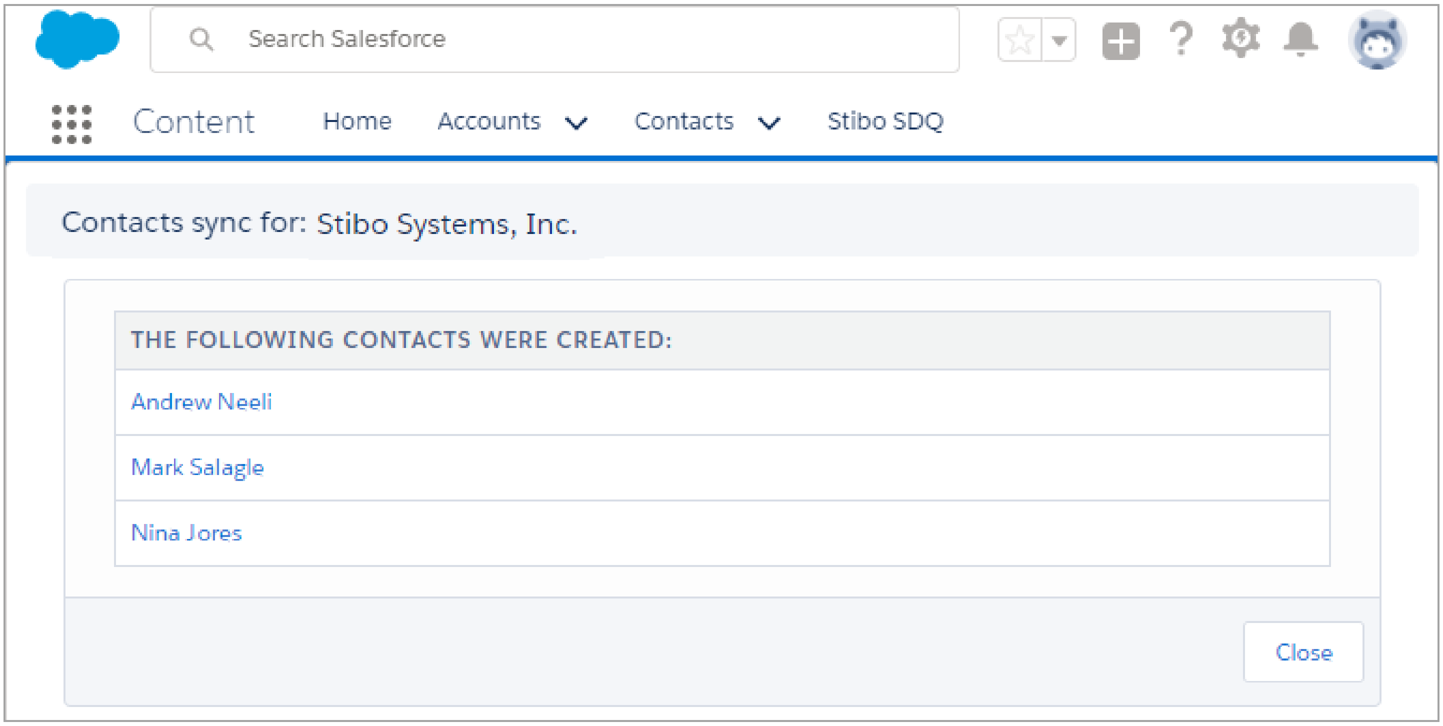
5. Back Button

Users can click the back button to return to the account details page.

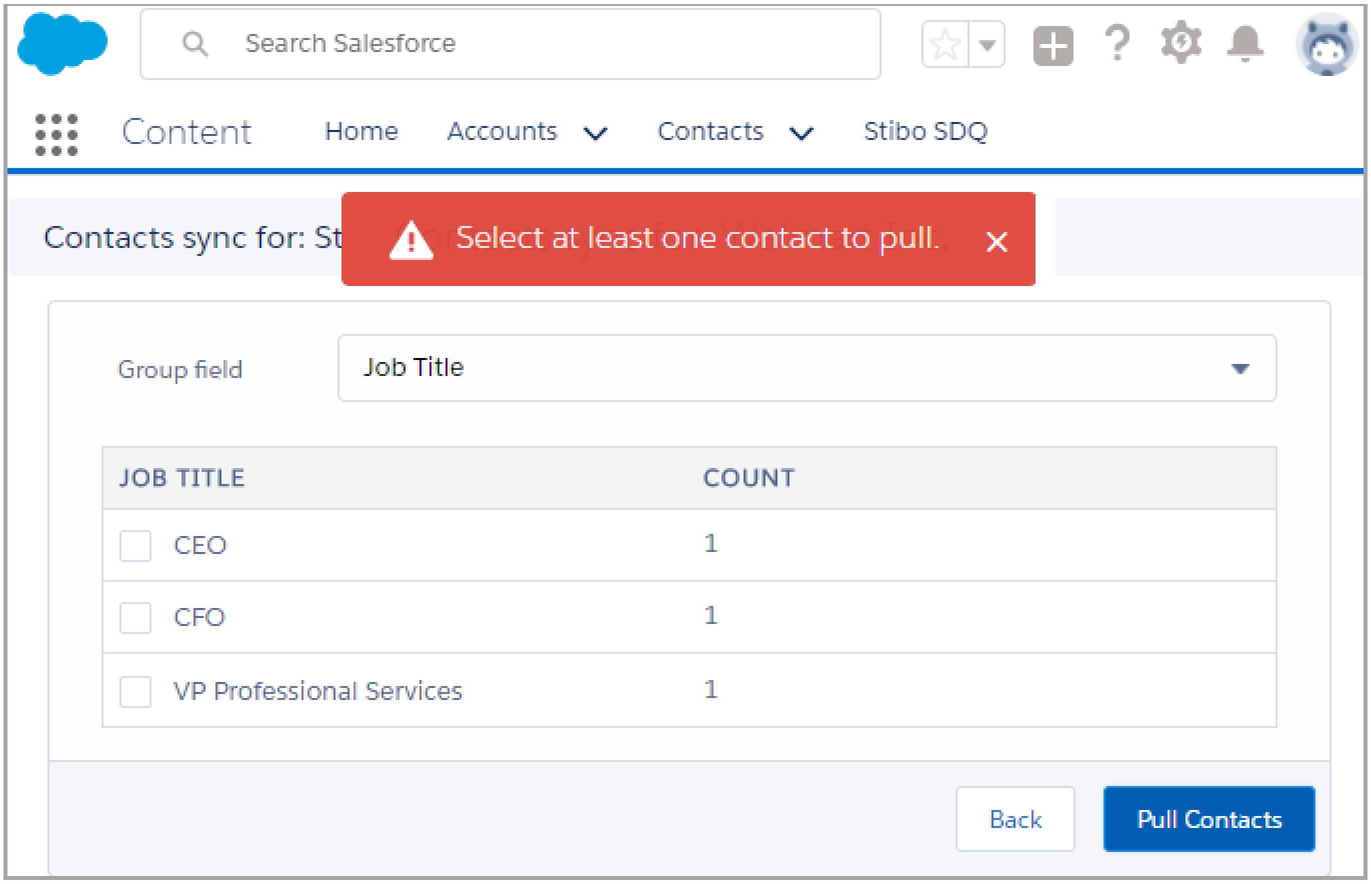
6. Pull Contacts Button

After selecting the desired contacts, a user can pull them into Salesforce by clicking the **Pull Contacts** button. Once the contacts have been pulled into Salesforce a confirmation screen will display.

In the example below, three contacts have been selected to be pulled into the Stibo Systems, Inc. account within Salesforce, the Pull Contacts button was clicked, and the confirmation screen displays as shown below.



If the Pull Contacts button is selected, and a contact has not been selected, then the 'Select at least one contact to pull' error will display (as shown below).



After contacts have been successfully pulled from Dun & Bradstreet, they can be found along with any preexisting contact data for the account.

Master Data Management

The goal of Stibo SDQ is to keep your organizations data reliable and accurate. This is best achieved by connecting your Salesforce instance to a world renowned MDM solution, STEP. The STEP solution is a single enterprise platform created over twenty years ago by Stibo Systems. STEP provides a common set of tried and tested functionalities, and operates in a uniform mode across any data domain. STEP’s functional richness, strong data modeling, and powerful workflows enables companies around the world to cultivate and maintain a robust information supply chain.

Stibo SDQ allows your users to benefit from the power of STEP while using Salesforce to perform the following:

- Automatic Background Deduplication
- Real-time Deduplication with Search Before Create
- Clerical Review for Data Stewards
- Reporting

Automatic Background Deduplication

Because Stibo SDQ integrates tightly with STEP to continuously monitor the creation of new contacts / accounts in Salesforce (when the MDM theme is applied), Stibo SDQ can be configured to provide both background deduplication, and clerical review task creation automatically. This allows for multiple processes to occur in the background so that when STEP identifies duplicate data, it can be automatically merged, and when STEP identifies *potential* duplicate data, then clerical review tasks can be automatically created and displayed within the Stibo SDQ tab.

Below are the different types of matching scenarios:

High-Volume Automatic Matching: Uses an auto-link threshold and calculated match score to reduce the need for manual intervention when a match score is above a certain confidence interval. This approach naturally requires careful tuning of the matching algorithm.

Clerical Review: Allows all matches above a specified threshold (i.e., a Clerical Review threshold) but below the auto-link threshold to be automatically sent through a clerical review workflow within Salesforce. This is useful when it is essential to not have false positive matches. For more information, see the **Clerical Review for Data Stewards** section of this guide.

Note: If necessary, the auto threshold setting can be tuned to better suit your organizations needs.

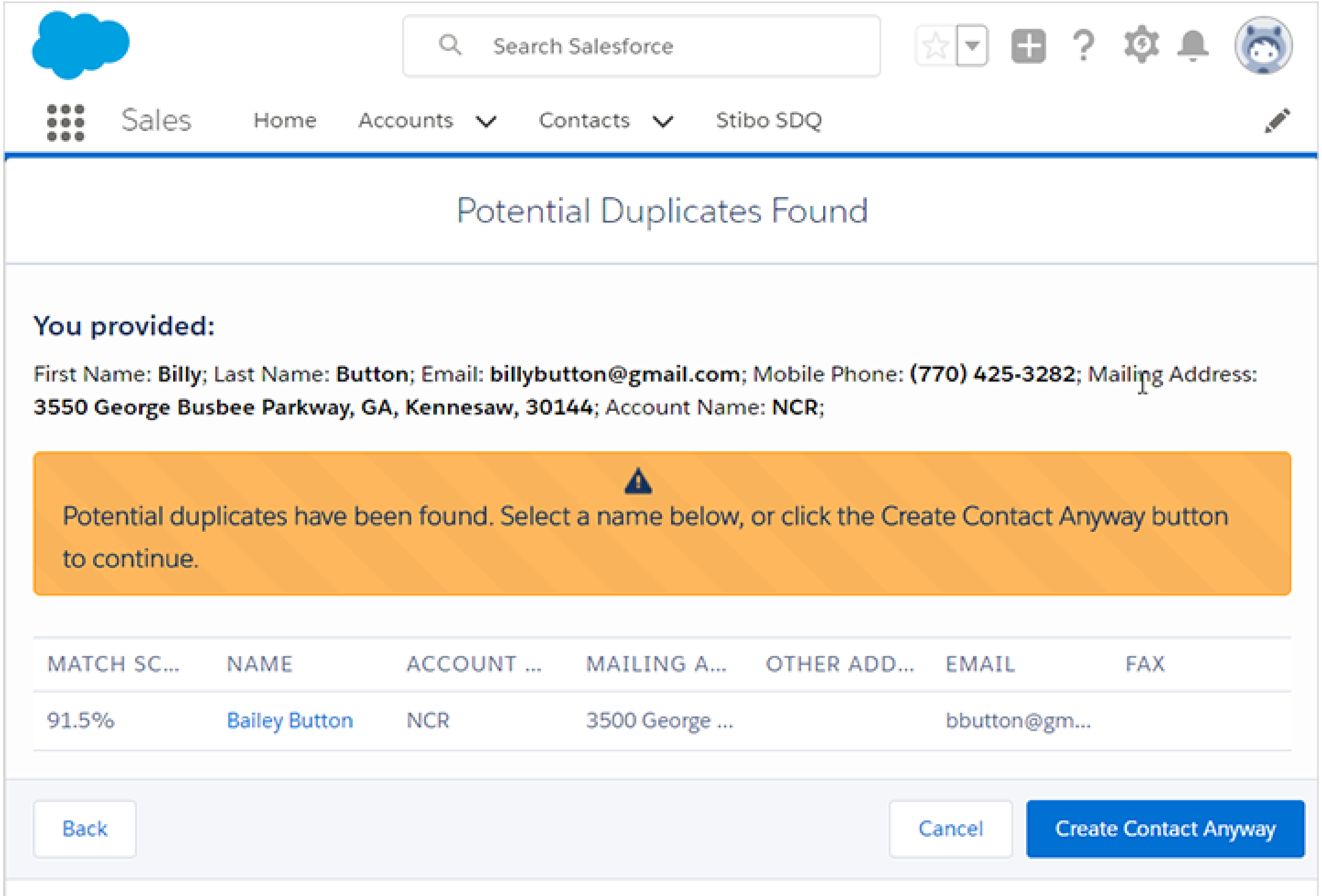
Real-time Deduplication with Search Before Create

With Stibo SDQ's powerful 'Search Before Create Technology,' users have the information they need to eradicate duplicates at the point of entry. Prior to creating a new record (Business Account, Person Account, and Contact), users are prompted to fill in relevant information, and a notification for potential duplicates (when applicable) will display for the user.

Important: When searching for duplicate contacts, only contacts within the same account are considered. In other words, if a Billy Button is associated with account 'A,' and a user creates a new contact named Billy Button for account 'B,' then the two Billy Button entries will not be recognized as duplicates because they are assigned to different accounts.

If no potential duplicate is identified for a specific contact and/or account, then the user will be directed to the Contact Edit / Account Edit page where additional data can be entered.

If one or more potential duplicates are identified for a specific contact / account, then the user will be directed to a Contact Edit (or Account Edit) page with an orange warning indicating: 'We found records that look like potential duplicates. Select an existing record instead?'



In the example above potential duplicates have been identified for the contact 'Billy Button,' and the Contact Edit page displays with the orange potential duplicates warning.

Note: Though the example below uses Contacts, the same functionality occurs when Accounts are used.

Once a list of potential duplicates displays, the following options are available for the user:

- Click the **Back** button, returning to the New Contact page without creating a new contact.
- Click the **Cancel** button, returning to the Contacts Recently Viewed without creating a new contact / account.
- Upon review of the potential duplicate list, click on an existing contact record within the NAME column. This will open a different Contact Edit page, allowing users to view details in order to determine if the contact already exists. On this page, additional information for the contact and/or account can be viewed and/or entered.
- Click the '**Create Contact anyway**' button, the New Contact Salesforce page will display, and additional information for the new contact can be entered.

Clerical Review for Data Stewards

Once the MDM theme is configured, Data Stewards can click the Stibo SDQ tab within Salesforce to access Clerical Review functionality, where potential duplicates can be manually reviewed and/or merged if a user determines they are actual duplicates.

The clerical review page offers many features such as Task Assignment and Task Priorities. The purpose of these features is to offer the tools necessary for an organization to design a workflow where multiple people can work together to monitor, assign, prioritize, and complete tasks associated to managing and cleaning up duplicate records.

Within this section the features and functionality pertaining to clerical review for data stewards is described. These option are found on the Stibo SDQ Landing Page within the following MASTER DATA MANAGEMENT menu options:

- Home
- Clerical Review
- Manual Merge Requests

For information on the configuration and settings available within the Stibo SDQ Landing Page, see the **Stibo SDQ Admin Guide**.

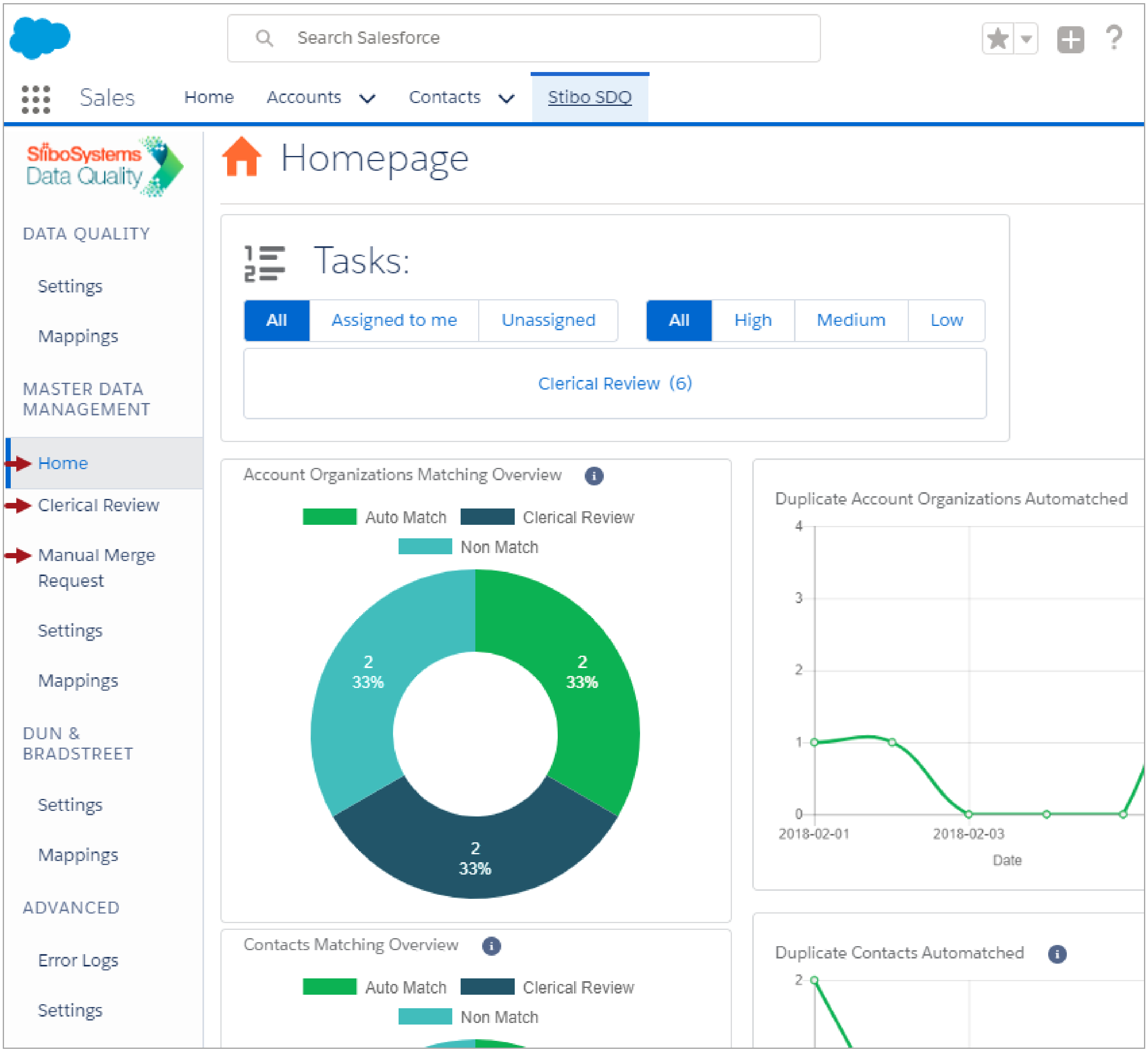
Navigating Master Data Management

User functions available for the 'MASTER DATA MANAGEMENT' menu within the Stibo SDQ tab:

- Home
- Clerical Review
- Manual Merge Request

In the example below, all three Stibo SDQ themes are configured, therefore the options for all three of the available themes are displayed. The red arrows indicate the menu options Data Steward users would commonly access.

For more information on these functions, see the **Master Data Management** section of this guide.

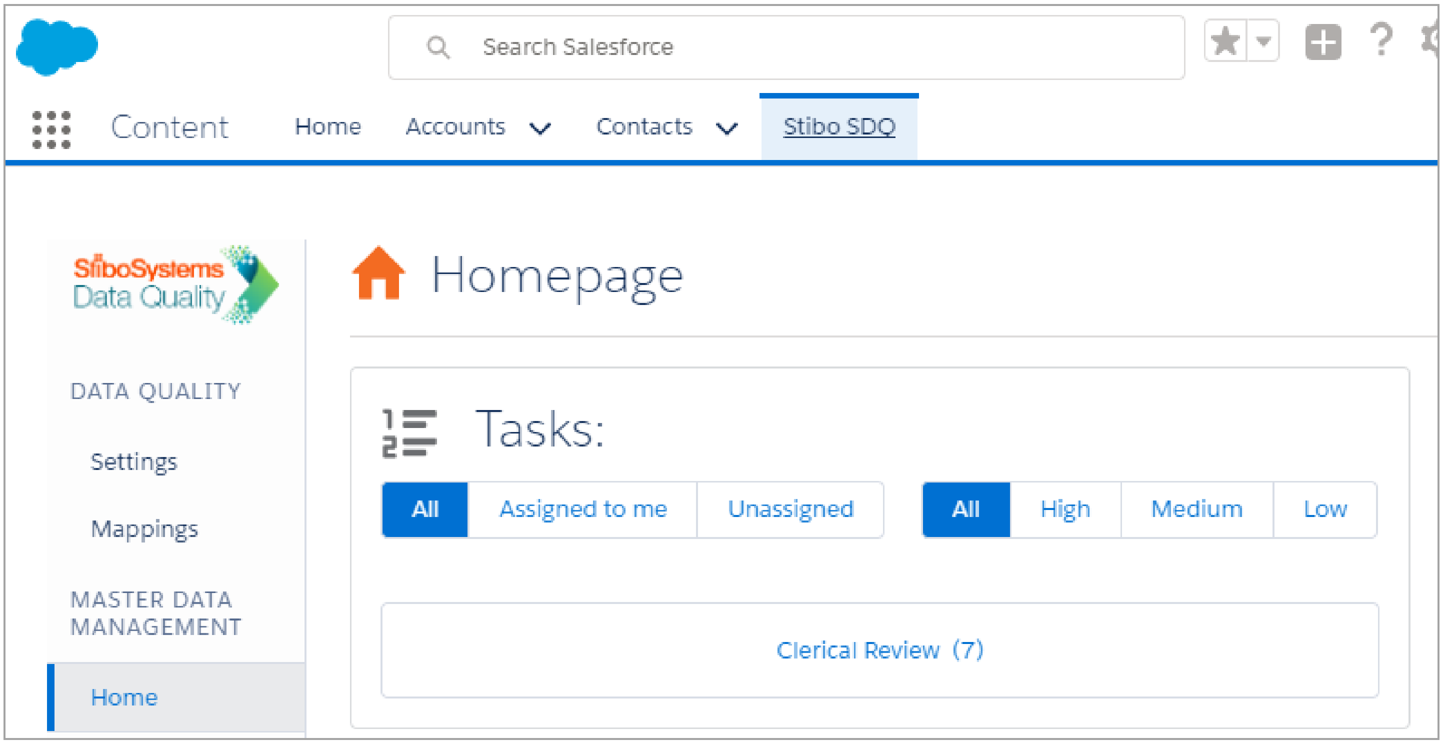


Important: Because setup is customizable, and some features many not be available, if your display is different than what is shown in this guide, contact your system administrator for more information.

Home

Once the Master Data Management theme is configured, the Home page will display by default when the Stibo SDQ tab is selected. Also, clicking the Home menu option will display the Home page where clerical review tasks and reports can be accessed.

In the example below, the Stibo SDQ tab is selected, and the Home page displays. Within the Home page, a clerical review Tasks widget is displayed. The Tasks widget displays currently open clerical review tasks, and filtering options.



Tasks can be filtered to display the following: All, Assigned to me, and Unassigned. Additionally, for each of those filters, tasks can also be filtered by the following priority levels: All, High, Medium, and Low.

As selections are made within the Tasks filters, the count of Clerical Review tasks changes. In the example above, All tasks for All priority levels are selected, and the count of '7' tasks is displayed to the right of the 'Clerical Review' hyperlink.

Once tasks are filtered as desired, and the Clerical Review hyperlink is clicked, the Clerical Review page will display according to the task filters that were applied.

Clerical Review

Clerical Review tasks allow Data Stewards to determine how to handle records flagged as potential duplicates. Records can be flagged as potential duplicates automatically or manually.

Clerical Review tasks are created when STEP identifies potential duplicate data, and clerical review tasks are automatically created within the Stibo SDQ tab. This automation helps users to focus only on conflicts that require manual intervention, automating the rest. For more information on how potential duplicate data is identified, see the **Automatic Background Deduplication** section of this guide.

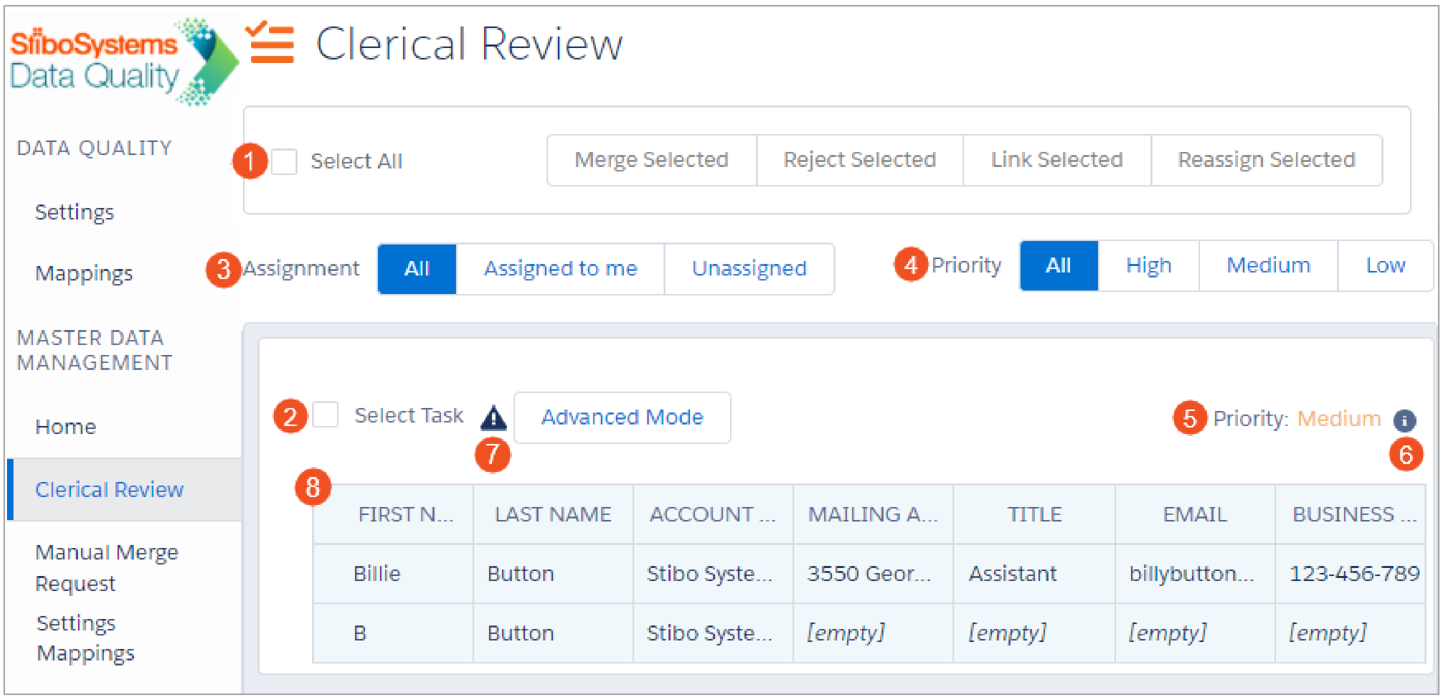
Manually created clerical review tasks occur when a user creates them from the Manual Merge Requests page. For more information, see the **Manual Merge Request** section below.

This section describes the available features, and functions for the Clerical Review page.

Clerical Review Features

Clicking the Clerical Review menu option displays a Clerical Review page where the following features are available.

1. Select All
2. Select Task
3. Assignment Filters
4. Priority Filters
5. Priority
6. Information
7. Manually Created Task Warning
8. Task Table

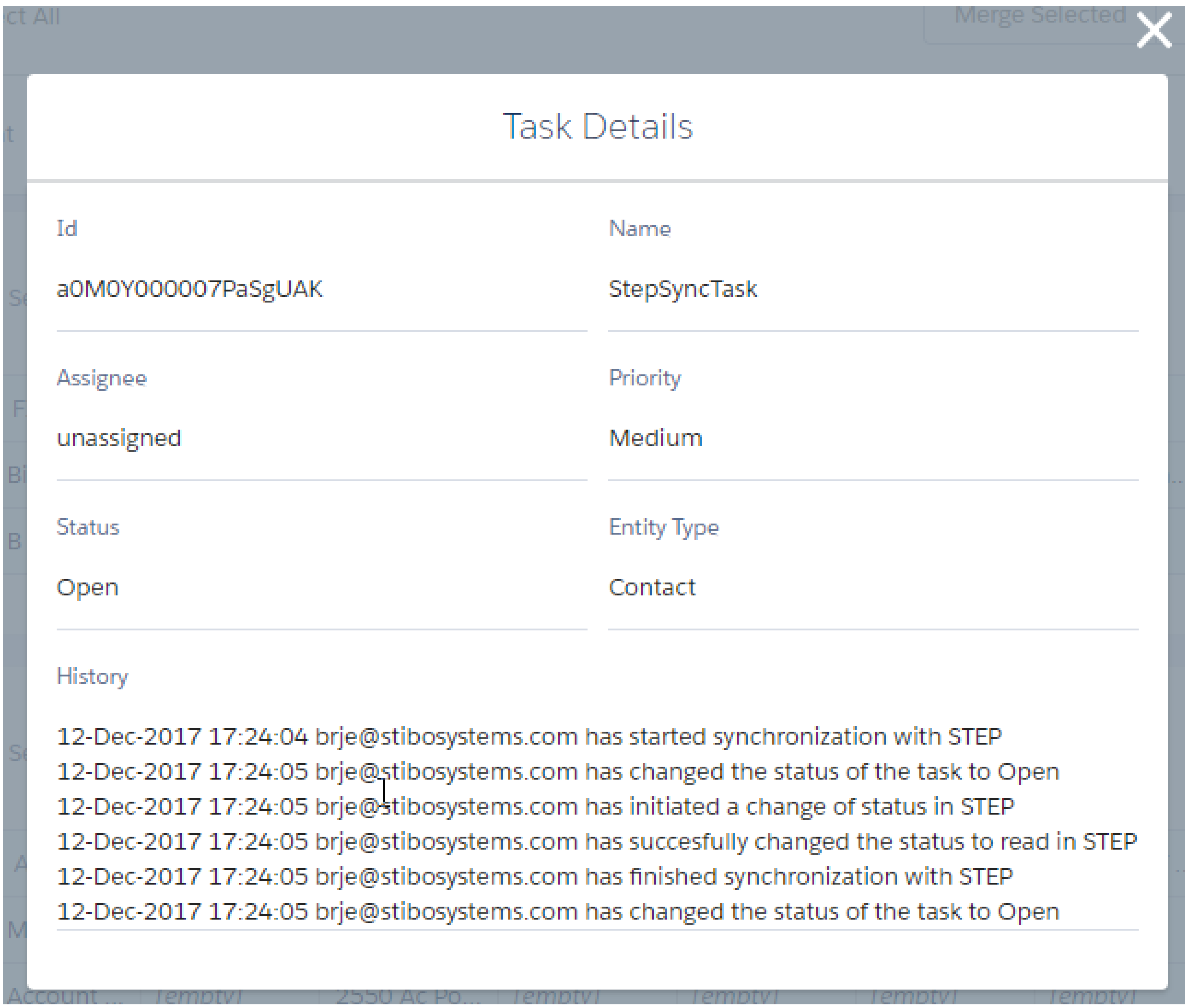


1. **Select All:** Clicking the Select All checkbox will select all the tasks displayed per the assignment and priority filters, and allow for the merge, reject, link and/or reassignment of selected tasks. This is useful when a Data Steward needs to take the same action for many tasks at one time. For example, if seven tasks are displayed, and the Select All checkbox is enabled, then all seven tasks will display with their respective Select Task checkbox enabled. Also, deselecting the Select All checkbox will disable the individual Select Task checkbox.

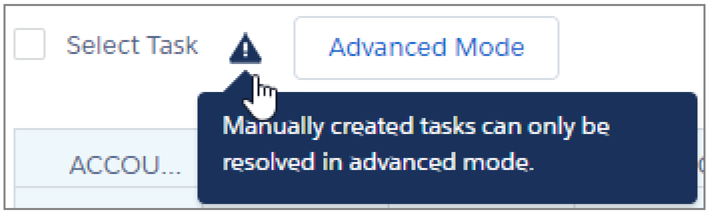
   Important: If the Select All checkbox is enabled, and a manually created task is included, then the Merge Selected and Reject Selected buttons will not be enabled because manually created tasks must be merged using the Advanced Mode button.

2. **Select Task:** Clicking the Select Task checkbox will select the individual task. This is useful when a Data Steward needs to make changes to one or more specific tasks.

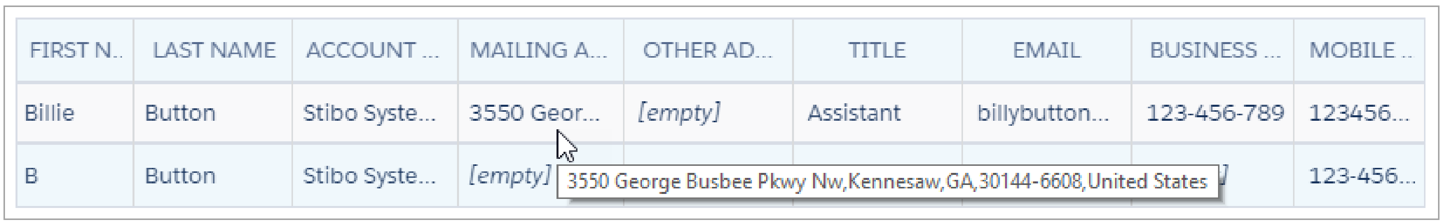
3. **Assignment Filters:** Each of the Assignment filter buttons (All, Assigned to me, and Unassigned) can be selected to filter the display of tasks by assignment. Automatically created tasks are unassigned by default. Clicking the 'Unassigned' button is useful when a Data Steward needs to focus on automatically created clerical review tasks.
4. **Priority Filters:** Each of the Priority filter buttons (All, High, Medium, and Low) can be selected to filter the display of tasks by priority. This is useful when a Data Steward needs to focus on tasks of a certain priority. For example, if many tasks are displayed with different priority levels, and the 'High' priority button is clicked, then only those tasks assigned to the logged in user with a High priority will be displayed.
5. **Priority:** Within each task, its priority is listed in the top right corner. When a clerical review task is automatically created, the default priority is 'Medium.' Data Stewards can edit the priority when creating or reassigning clerical review tasks.
6. **Information:** Each task has an information icon that when clicked, provides more information for task details. In the example below the information icon is clicked, and the Task Details page displays.



7. **Manually Created Task Warning:** When a task has been manually created, a blue warning icon will display. This is important because manually created tasks can only be resolved using the Advanced Mode button. When a user hovers over the blue warning icon, text will display as shown below.



8. **Task Table:** The task table displays two or more records identified as potential duplicates. Users can hover over the text within the table to see more details. In the example below, the mouse cursor hovers over part of a mailing address, and the full mailing address is displayed within the hover text.



FIRST N..	LAST NAME	ACCOUNT ...	MAILING A...	OTHER AD...	TITLE	EMAIL	BUSINESS ...	MOBILE ..
Billie	Button	Stibo Syste...	3550 Geor...	[empty]	Assistant	billybutton...	123-456-789	123456...
B	Button	Stibo Syste...	[empty]				]	123-456...

The type of record related to the task determines which columns display within the table.

If the task relates to Business Accounts, the table will have the following columns displayed:

- Account Name
- D-U-N-S Number
- Billing Address
- Shipping Address
- Account Type
- Account Phone
- Account Fax
- Website

If the task relates to Person Accounts, the table will have the following columns displayed:

- Salutation
- First Name
- Last Name
- Mailing Address
- Other Address
- Email
- Account Phone
- Mobile
- Other Phone

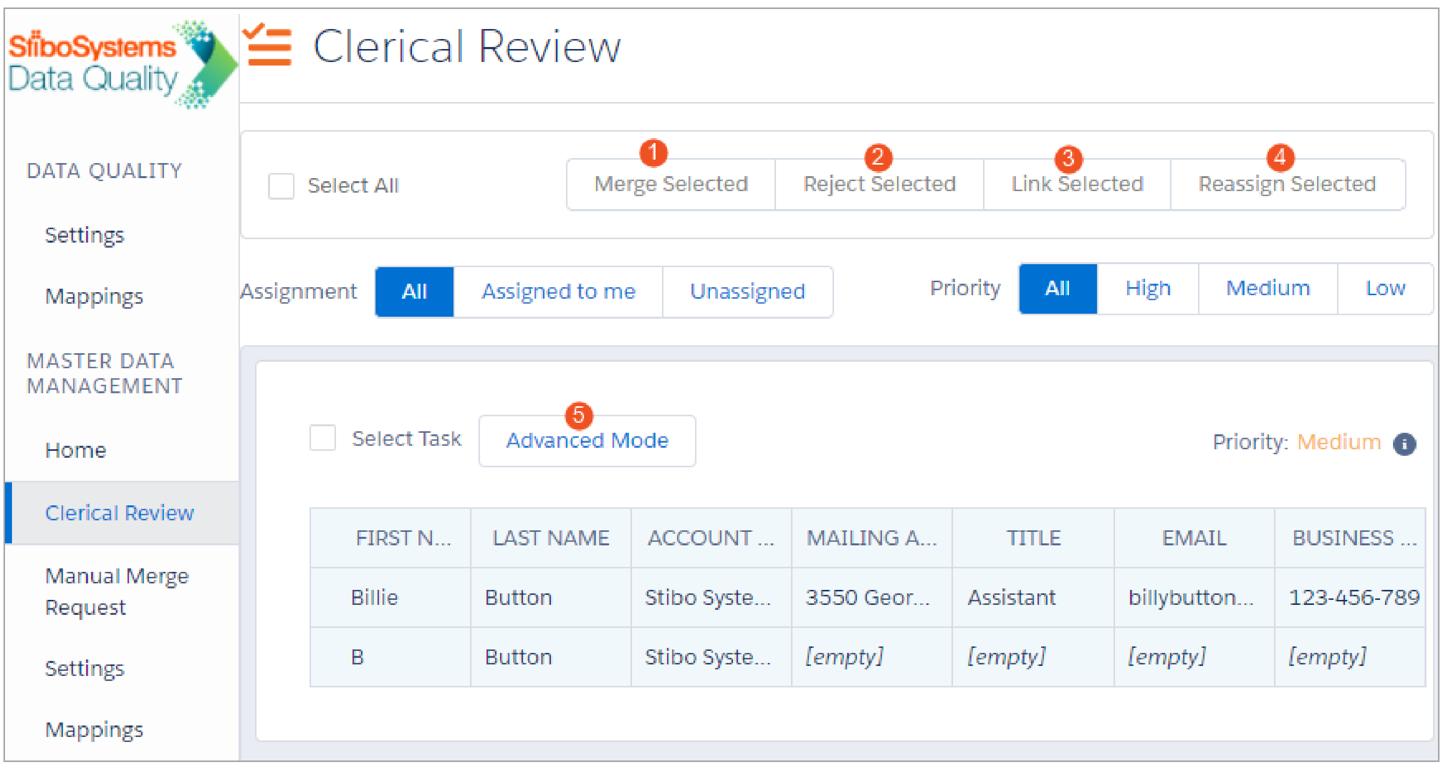
If the task relates to Contacts, the table will have the following columns displayed:

- First Name
- Last Name
- Account Name
- Mailing Address
- Other Address
- Title
- Email
- Business Phone
- Mobile Phone

Clerical Review Functions

Once one or more clerical review tasks have been selected, the following functions are available:

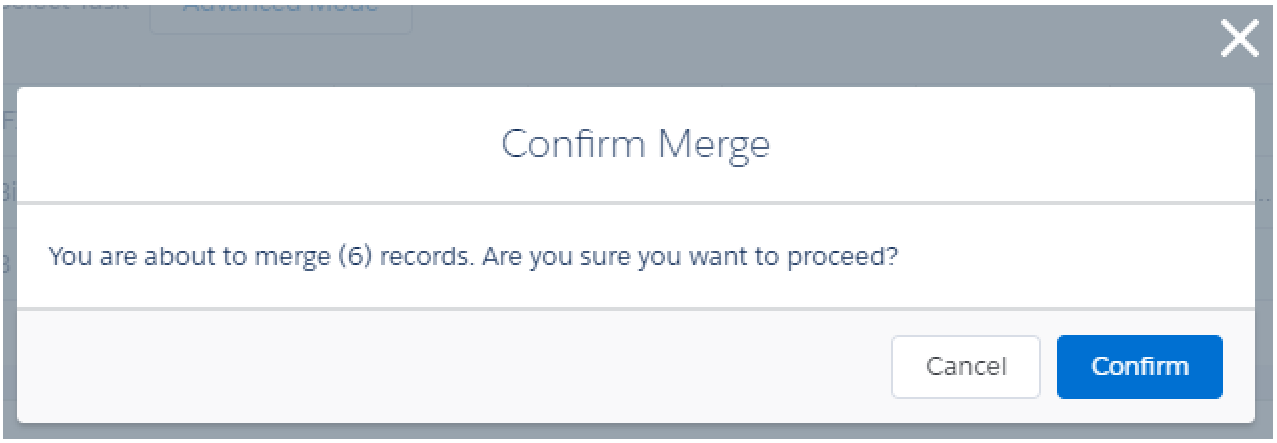
1. Merge Selected
2. Reject Selected
3. Link Selected
4. Reassign Selected
5. Advanced Mode



1. **Merge Selected:** Clicking the **Merge Selected** button will initiate the following processes for each of the selected tasks:
   - Appoint one record in each task to 'master record.'
   - Consolidate data from all records in a task to the master record.

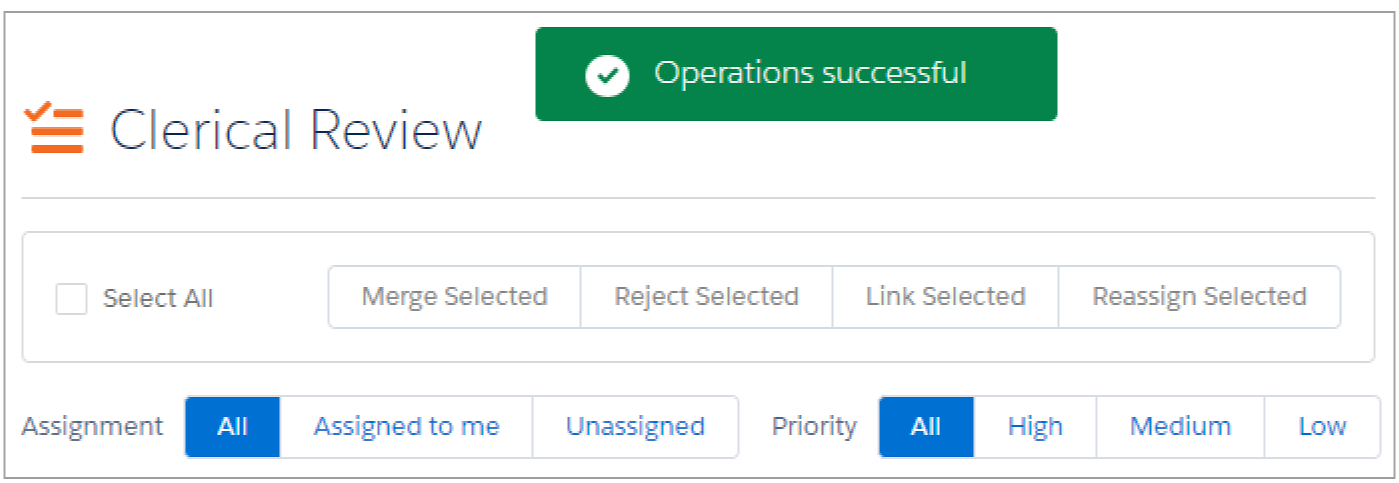
- Associate existing content (e.g., Opportunities, Contacts) from 'non-master' records in a task to the master record.
- Replace all references to the non-master records with a reference to the master record.
- Move the non-master records to the Recycle Bin.
- Close the Clerical review task and remove it from the Clerical Review Task list.

These processes run asynchronously in the background and may take a few minutes to complete. However, the user will not have to wait. What the user will see is that after one or more automatically created tasks are selected, and the Merge Selected button is clicked, the Confirm Merge dialog will display with a count of the records to be merged. In the example below, six records are selected to be merged.



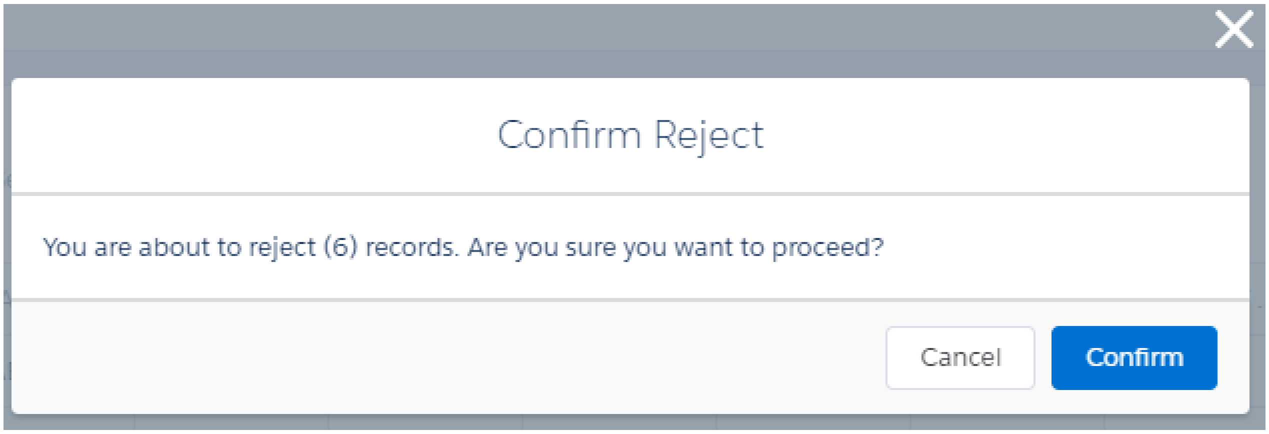
Clicking the **Cancel** button (or the white 'X' in the top right of the dialog) will close the dialog and return the user to the previous page.

Clicking the **Confirm** button merges the records, and a green 'Operations successful' confirmation dialog will display as shown below.



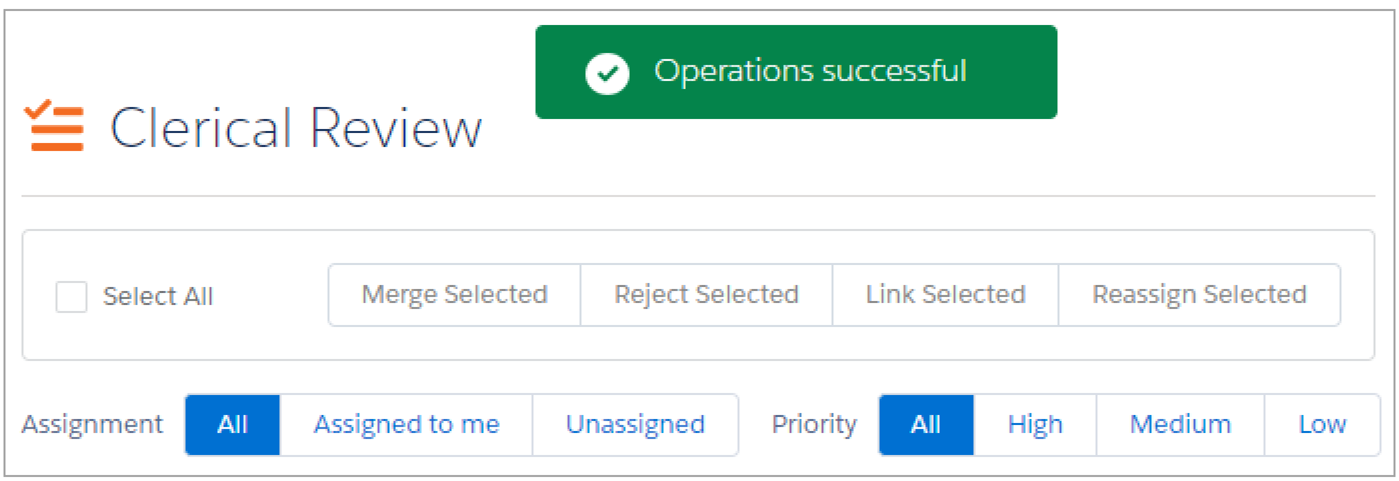
2. **Reject Selected:** Clicking the Reject Selected button will reject any selected tasks. The tasks are closed, and removed from the Clerical Review Task lists as well as deleted from Salesforce. The records from the task will not be considered as potential duplicates again.

After one or more automatically created tasks are selected and the Reject Selected button is clicked, the Confirm Reject dialog will display with a count of the records to be rejected. In the example below, six records are selected to be rejected.



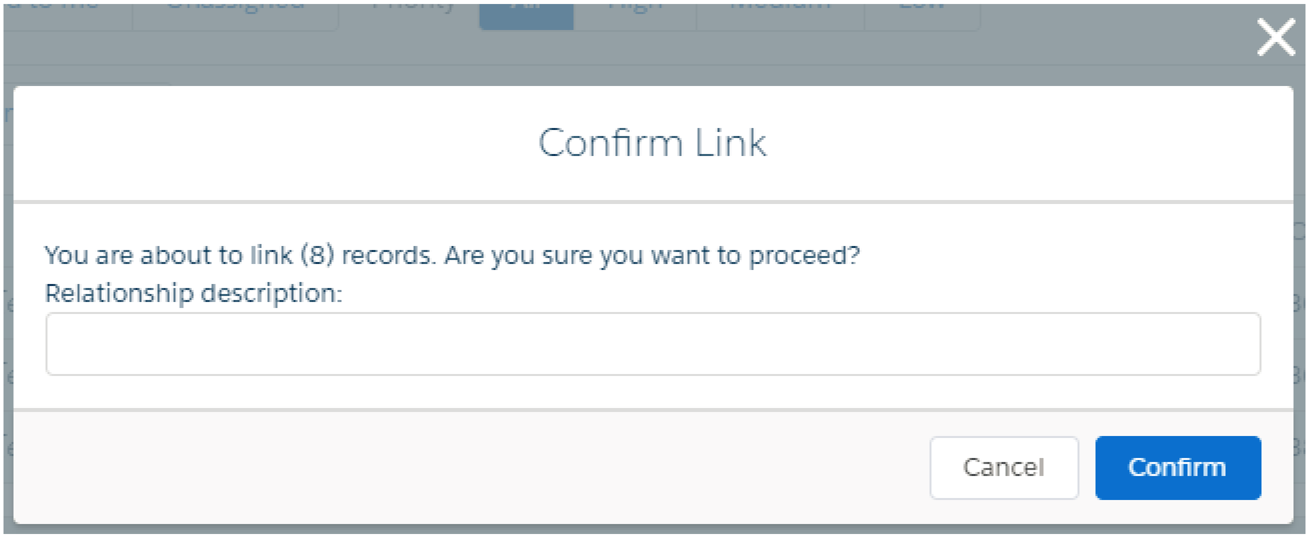
Clicking the Cancel button (or the white 'X' in the top right of the dialog) will close the dialog and return the user to the previous page.

Clicking the Confirm button ensures the task(s) will no longer display for clerical review, will close the dialog, and a green 'Operations successful' confirmation dialog will display for 'Reject' and 'Link' operations and 'Merge Initiated Successfully' as shown below.

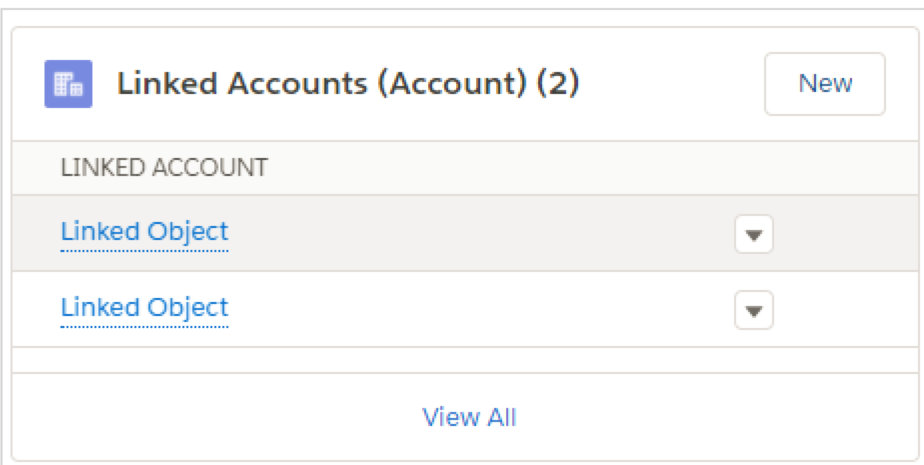


3. **Link Selected:** Clicking the Link Selected button while selecting multiple tasks will create a link between these records. The tasks are closed and removed from the Clerical Review Task lists. The records from the task will not be considered as potential duplicates again.

   When the Link Selected action is selected, a confirm link prompt will pop up confirming that the associated records with these tasks will be linked.



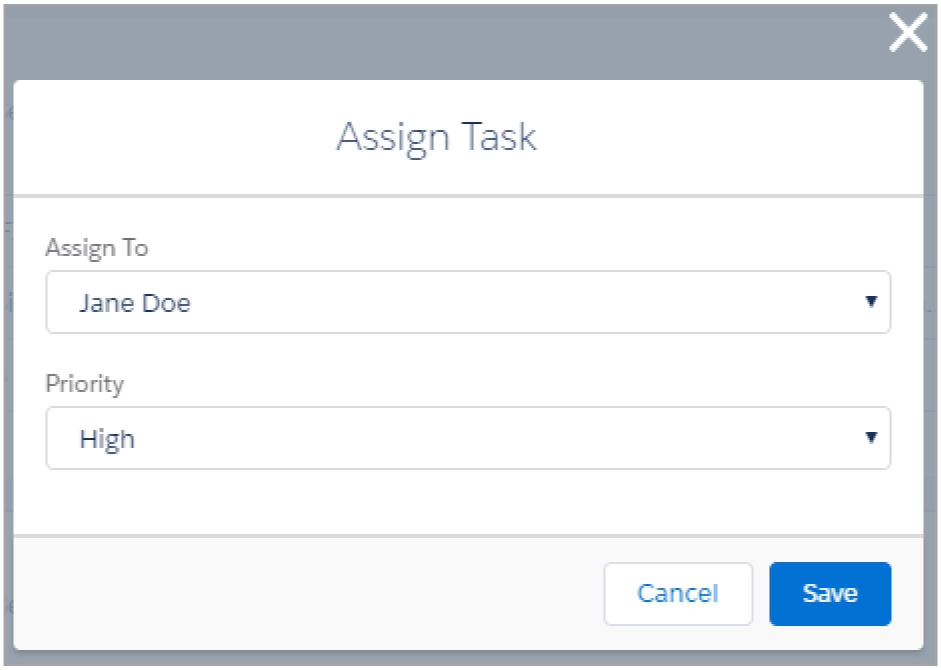
Once confirmed, the records associated with these tasks will be on the account under the Linked Accounts section if configured for the related record layout.



4. **Reassign Selected:** Clicking the Reassign Selected button will allow for one or more selected tasks to be reassigned or given a different priority.

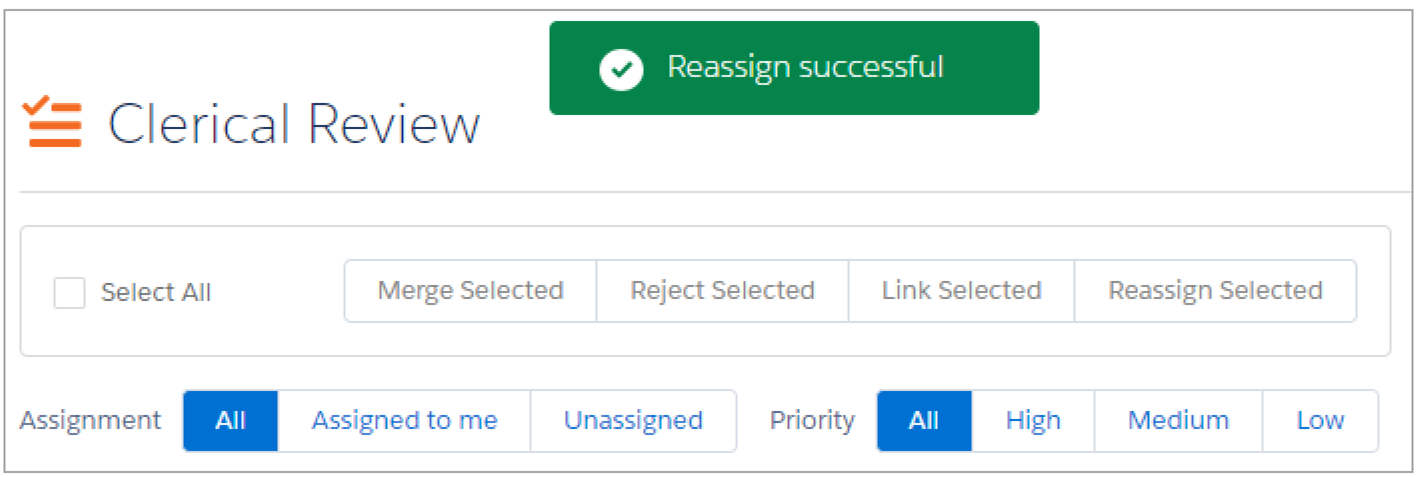
   After one or more automatically and/or manually created tasks are selected, and the Reassign Selected button is clicked, then the Assign Task dialog will display. The 'Assign To' dropdown can be used to select a user, and the 'Priority' dropdown can be used to assign a different priority (if necessary).

   In the example below, user 'Jane Doe,' and priority 'High' are selected.



Clicking the Cancel button (or the white 'X' in the top right of the dialog) will close the dialog and return the user to the previous page.

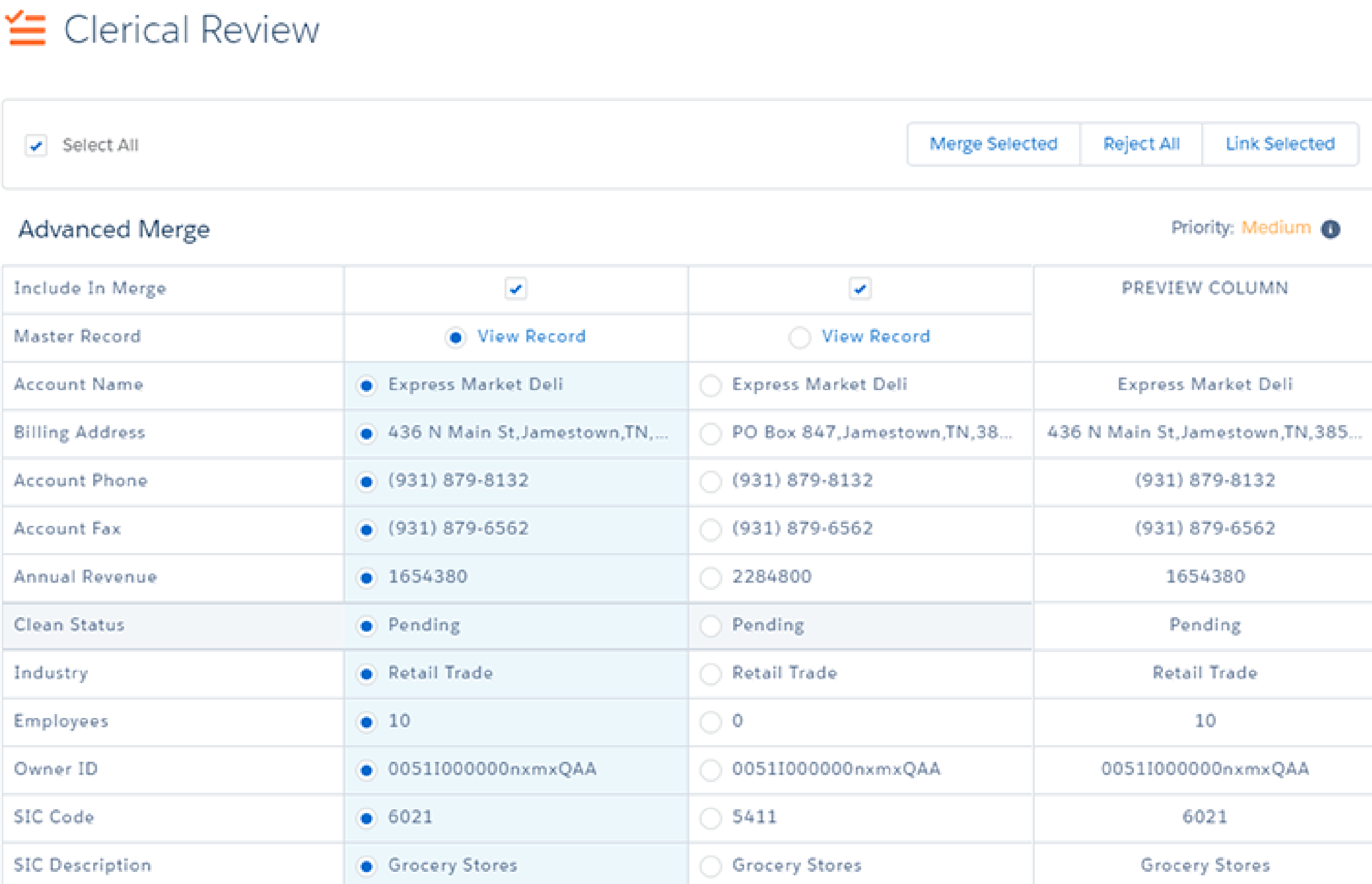
Clicking the Save button will close the dialog, and a green 'Reassign successful' confirmation dialog will display as shown below.



5. **Advanced Mode:** Clicking the Advanced Mode button will allow for one or more potential duplicates to be merged using the Advanced Merge functions. Advanced Mode does not automatically determine a master record, but rather allows users to pick and choose details within different records to be part of the master record.

Important: Manually created tasks can only be merged or rejected using the Advanced Mode button.

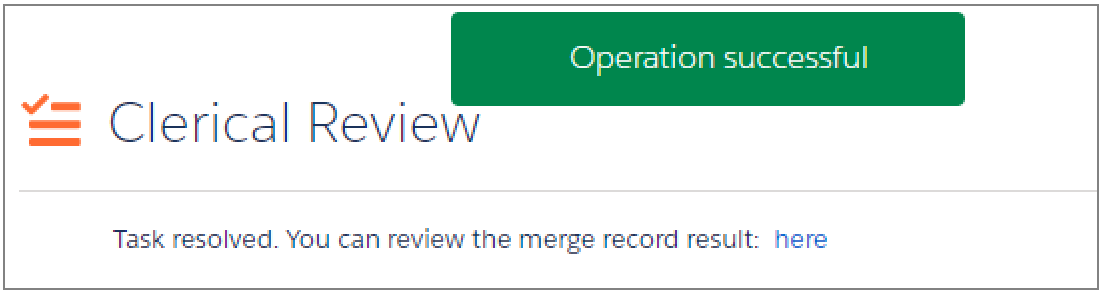
Each Clerical Review task has its own Advanced Merge button, and clicking the Select All or Select Task checkboxes has no impact on the Advanced Mode button. Once the Advanced Mode button is clicked, then the Advanced Merge dialog will display each of the potential duplicate records side by side, along with the final results displayed within a PREVIEW COLUMN (as shown below). From here, users can select the record to be used as the master by enabling the radio button for the 'Master Record' row.



The radio buttons and checkboxes can be used to select the appropriate data to be merged into the master record. Once the desired data is selected, clicking the Merge Selected button will result in the display of a Confirm Merge dialog (as shown below).

Clicking the Cancel button will close the dialog and return the user to the previous page.

Clicking the Confirm button will close the dialog, and a green 'Operation successful' confirmation dialog will display as shown below.

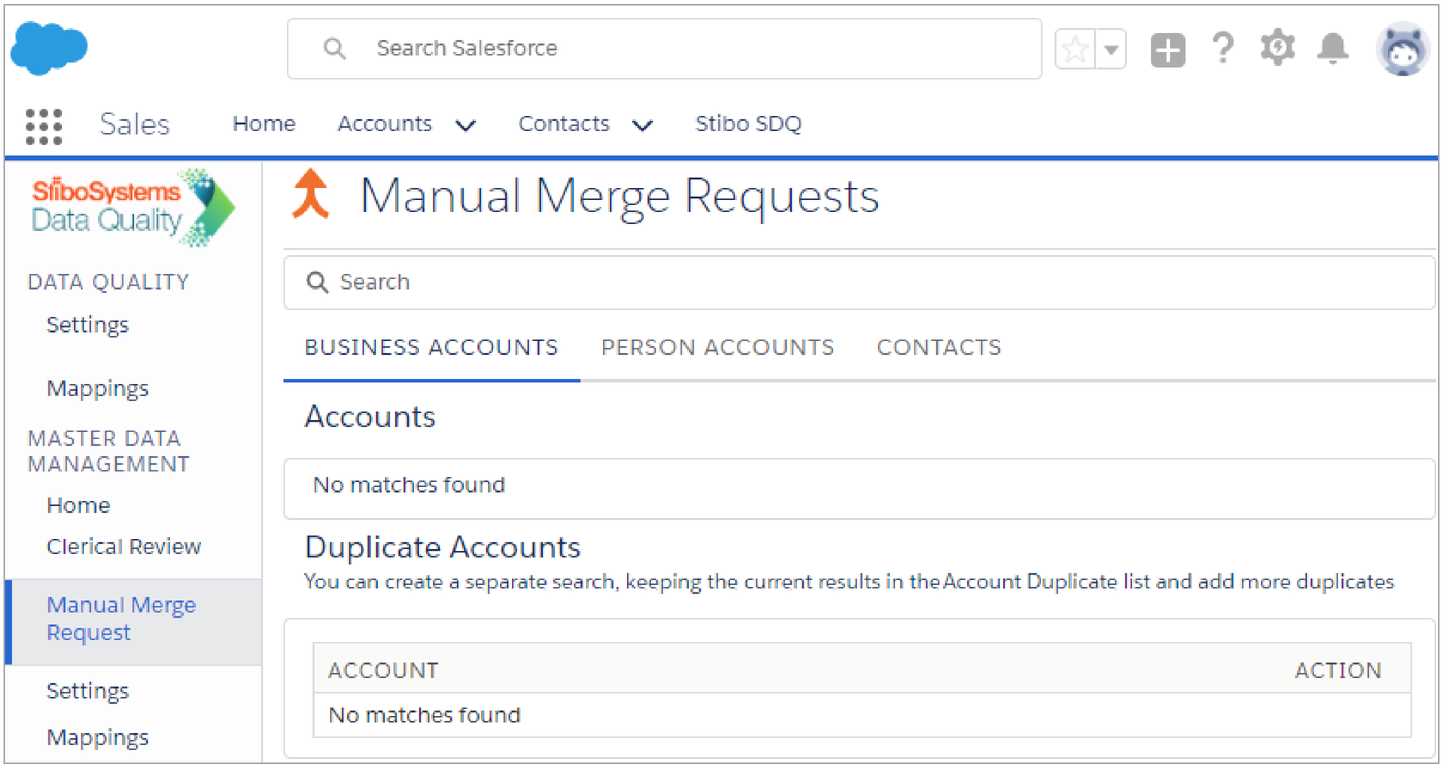


Optionally, the 'here' link can be clicked to review the merge record results.

Manual Merge Requests

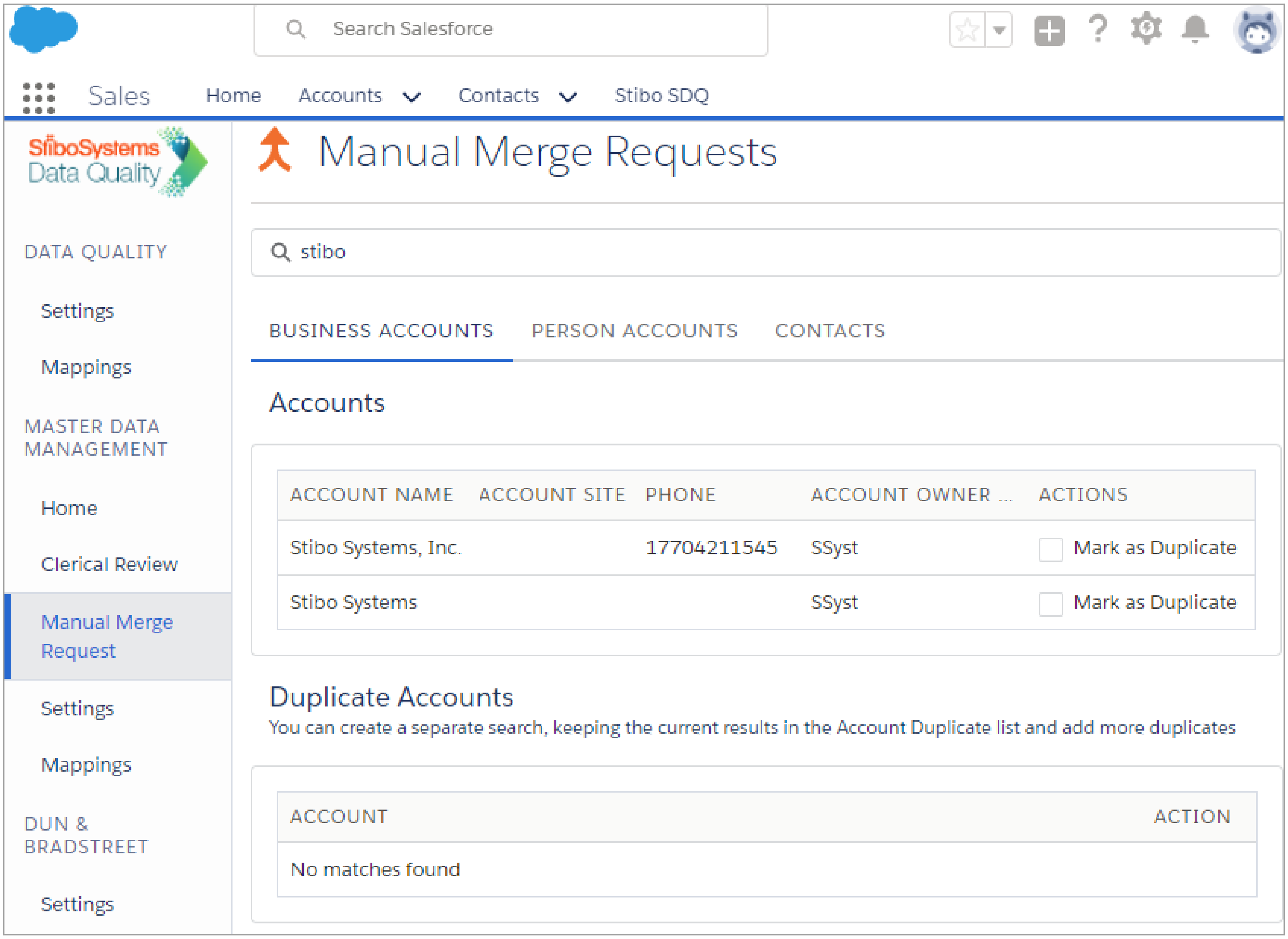
The Manual Merge Request page allows users to perform a search, add one or more results to a set of potential duplicates, then create another search for other records, and add all or some of the search results to the same set of potential duplicates. This can be repeated, and then the user can save the list, which will create a clerical review task. Users can search for Business Accounts, Person Accounts, or Contacts.

To access the Manual Merge Request page, go to the Stibo SDQ Landing Page and beneath the MASTER DATA MANAGEMENT section, click the Manual Merge Requests menu option. The page will display as shown below.



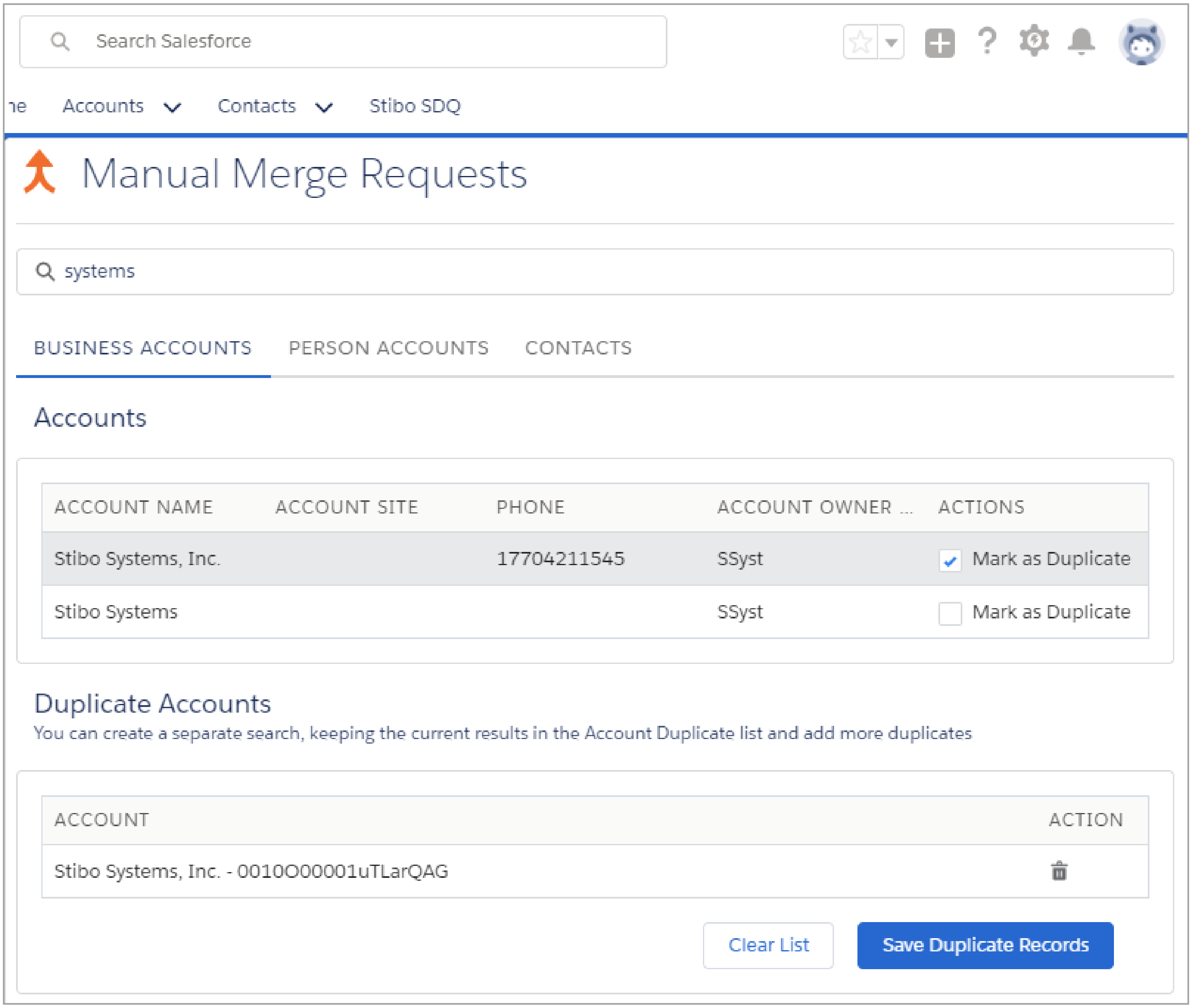
The 'Search' field can be used to type in search criteria for Business Accounts, Person Accounts, or Contacts. After typing in the desired search criteria, the user can press the Enter key on their keyboard to start the search. By default, the Business Accounts option is selected. If any duplicates are found, they will display within the Accounts section of the Business Accounts tab. Selecting the Person Accounts tab will display the Person Accounts section, and if any duplicates are found, they will be displayed without having to press the Enter key again. The same is true for selecting the Contacts tab.

In the example below, 'stibo' has been typed into the Search field, the Enter key has been pressed, and the Business Accounts matching the entry are displayed.



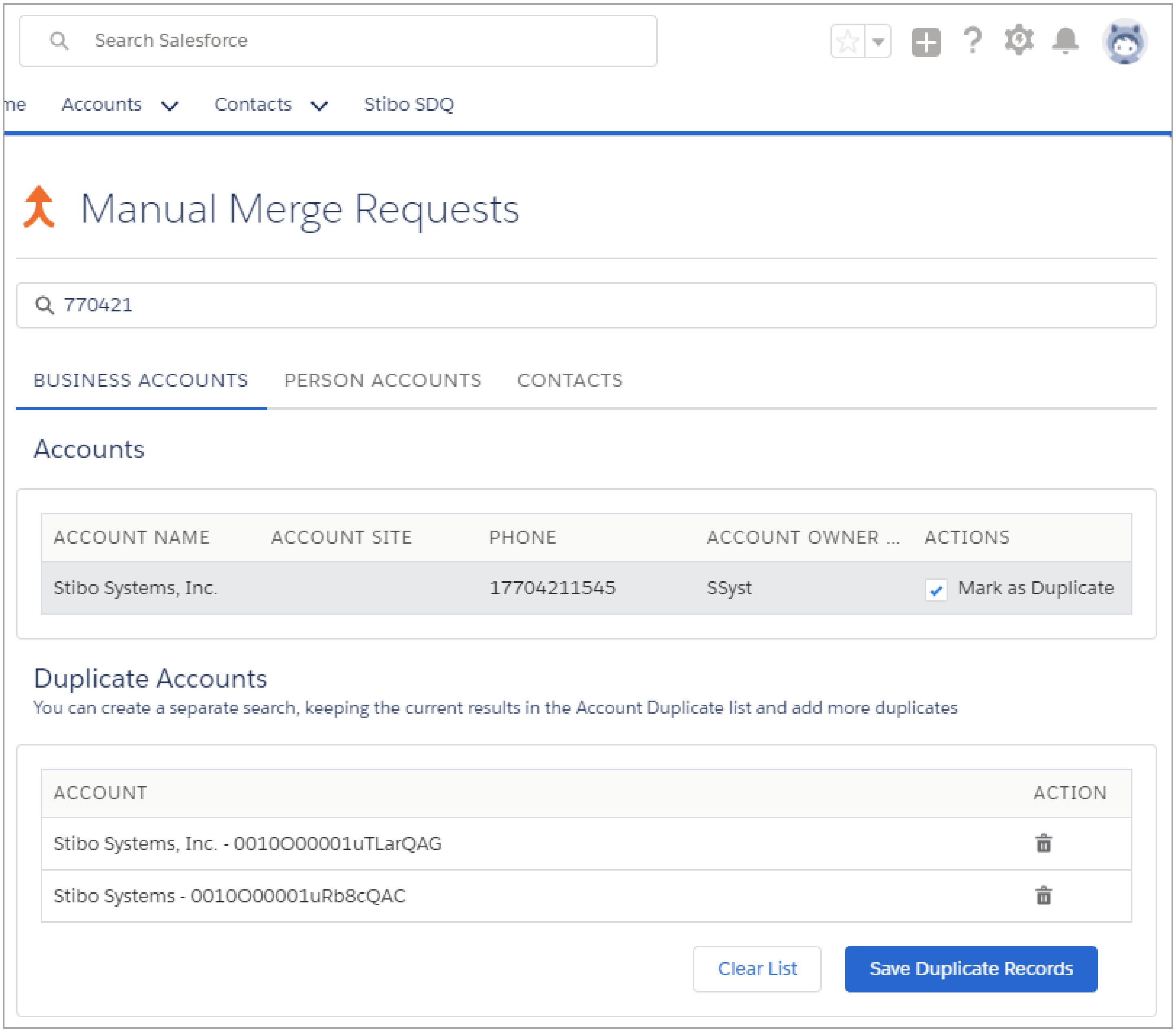
Clicking the **Mark as Duplicate checkbox** within the ACTIONS column will display the record within the Duplicate Accounts section.

In the example below, the first record in the Accounts section has been marked as a duplicate, and displays within the Duplicate Accounts section, along with the **Clear List** and **Save Duplicate Records** buttons.

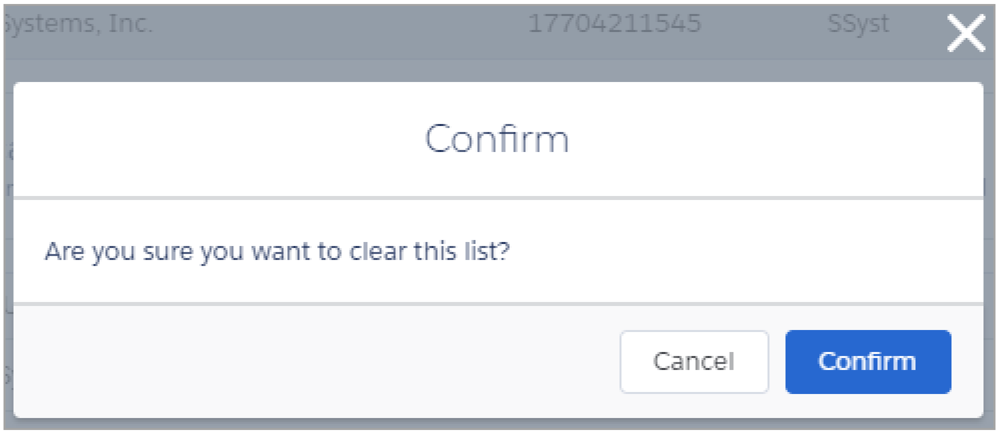


Optionally, the search criteria can be cleared, new search criteria typed into the search field, and the Enter key pressed, resulting in the new search criteria displaying within the Accounts section. Enabling one or more Mark as Duplicate checkboxes, will add records to those already listed in the Duplicate Accounts section. This can be done as many times as necessary to get the desired records to display within the Duplicate Accounts section.

In the example below, 'stibo' text was removed from the Search field, a portion of the phone number was typed in, the Enter key was pressed, resulting in the display of a record in the Accounts section.

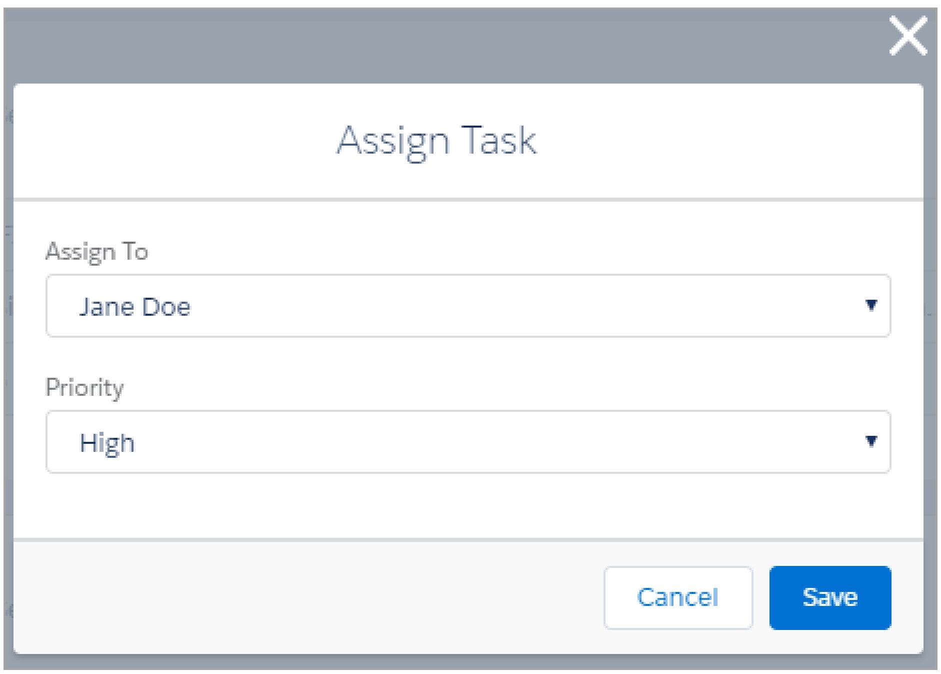


Clicking the **Clear List** button will remove all the records listed within the Duplicate Accounts. Also, disabling the Mark as Duplicate checkbox for a record will remove it from the Duplicate Accounts section. When the Clear List button is clicked, a confirmation dialog will display as shown below.



Clicking the **Save Duplicate Records** button will display the Assign Task dialog, as shown below. This dialog can be used to assign the task to a user and set priority for the manually created task.

In the example below, user 'Jane Doe,' and priority 'High' are selected.



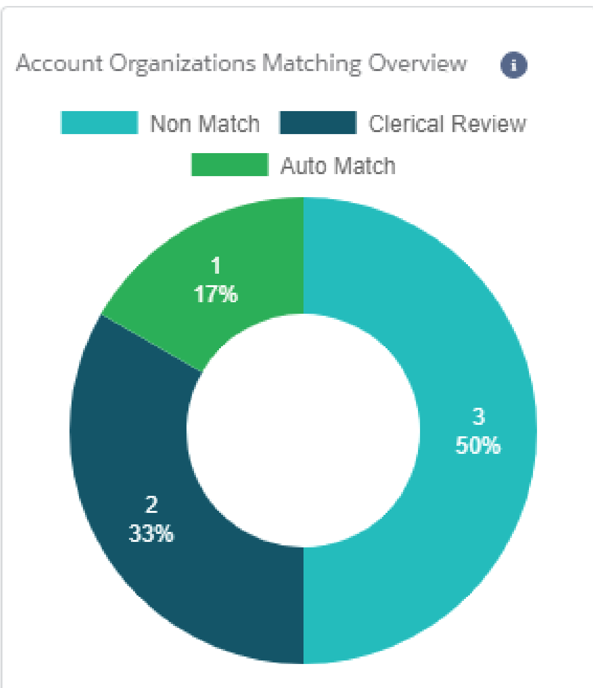
Clicking the **Save** button, will allow for the manually created task to be visible within the Clerical Review Task list.

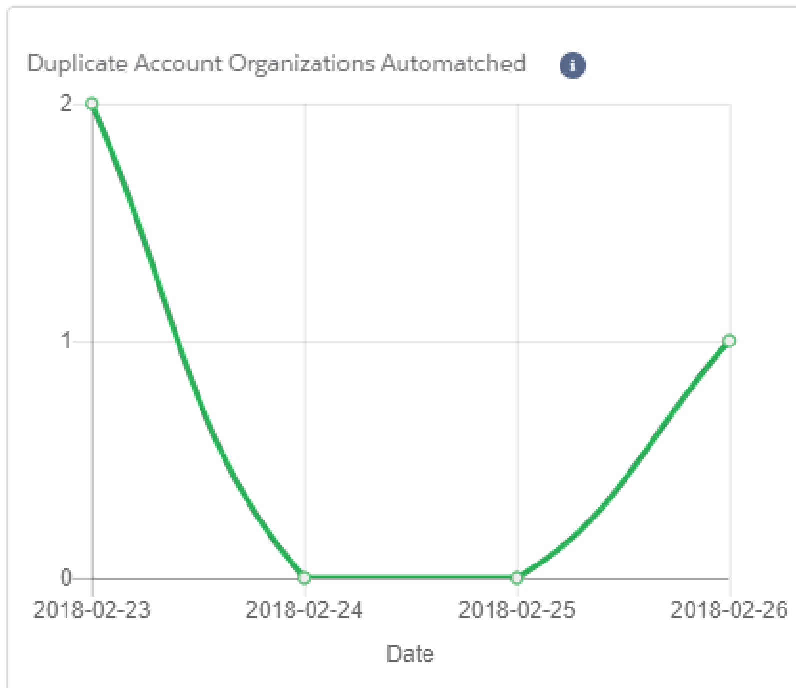
If only one record is added to the Duplicate Accounts section, and the Save Duplicate Records button is clicked, then a warning dialog will display prompting users to add at least 2 records to the Duplicate Accounts section.

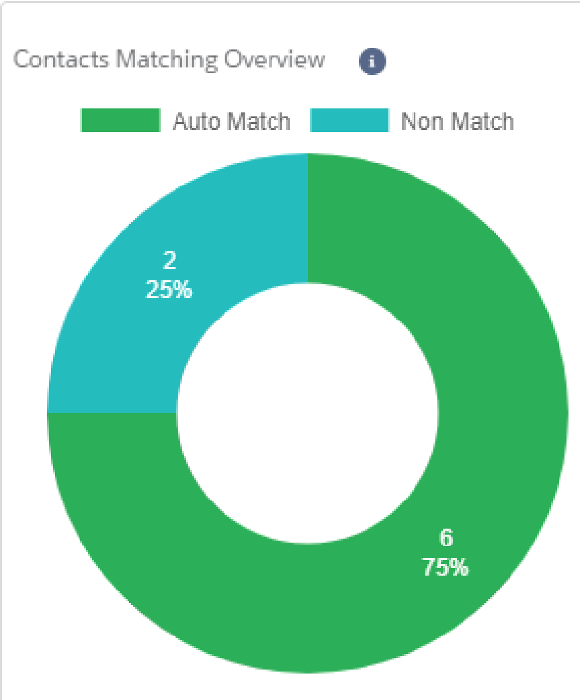
Reporting

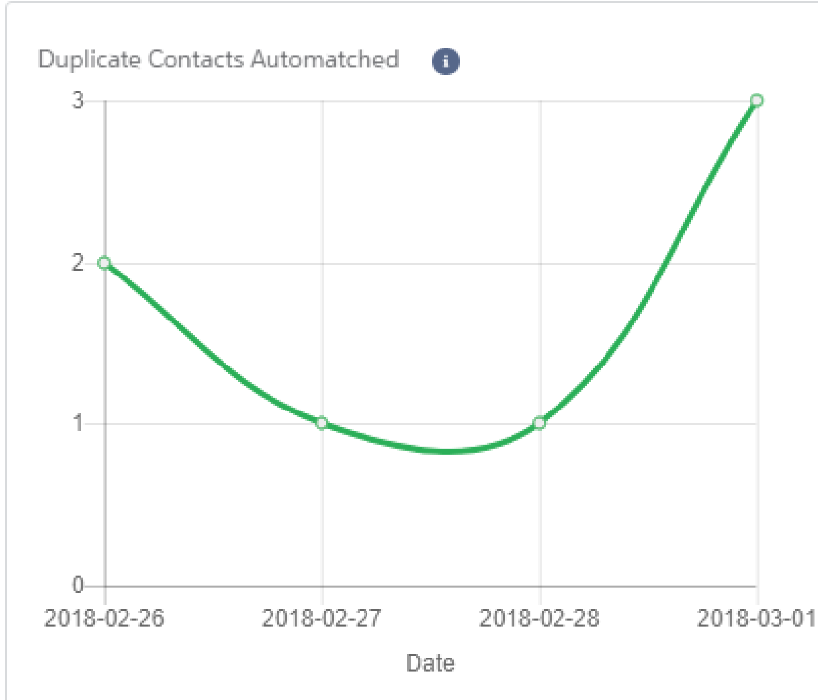
Stibo SDQ Reporting is displayed on the Stibo SDQ Home page once the MDM theme is configured, and is the main entry point for Data Stewards who need remove duplicates using the Clerical Review and Manual Merge Requests functions. Reporting displays beneath the Clerical Review Tasks, and provides an overview of performance factors pertaining to the automated deduplication that runs in the background.

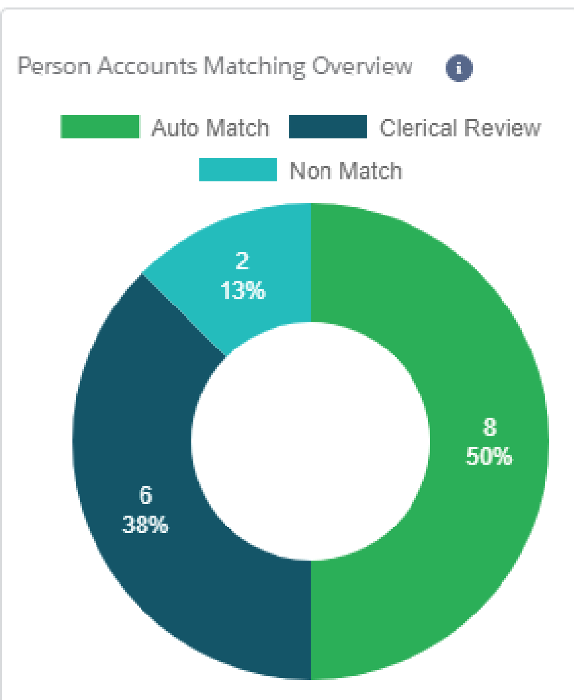
For each of the record types: Account, Contact and Person Account (if activated), two charts will be displayed:

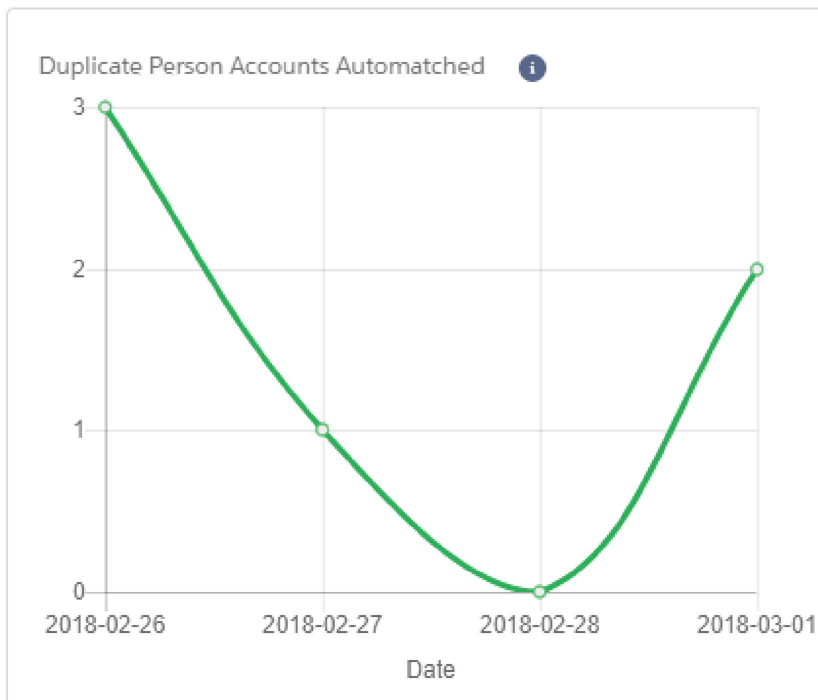












Matching Overview

The pie chart reports on records that have passed through the automatic matching and deduplication process in the last two days. Each record examined will receive one of the following statuses:

- **Auto Match:** The record has been automatically deduplicated and merged with another record.
- **Clerical Review:** The record is in or has passed through Clerical Review.
- **Non Match:** The record was examined but identified as a unique record.

Whenever a records data is changed, the deduplication process will examine the record, causing a large total number of records to display for the Matching Overview. This is not necessarily a need for concern, but rather an indication of general activity.

The Matching Overview report can be used to give a snapshot of the efficiency of the deduplication routine. This is done by comparing the size of the different slices in the Pie Chart:

- If the 'Non Match' slice is large (relatively speaking), then this indicates that few duplicates have been identified and that Real Time Deduplication works as it should. Naturally, other factors (e.g., in case of a bulk load of records into the Salesforce instance) may cause the relative number of Non Match records to decrease.
- Comparisons of the 'Auto Match' and 'Clerical Review' slices indicate how many potential duplicates need to go through a manual Clerical Review, as opposed to being automatically matched.

Duplicate Records Auto-matched

The Duplicate Records Auto-matched report can be used to look for sudden changes in the number of duplicates that are being created either by users or via bulk import. The line chart reports the number of records that have been identified as duplicates and merged by the automatic deduplication process within the last 11 days.

If Real Time Deduplication is working as it should, and if its manual entering is the main source for new records, the line should be low and stable.