

Reports & Dashboards to Monitor Your Data's Health

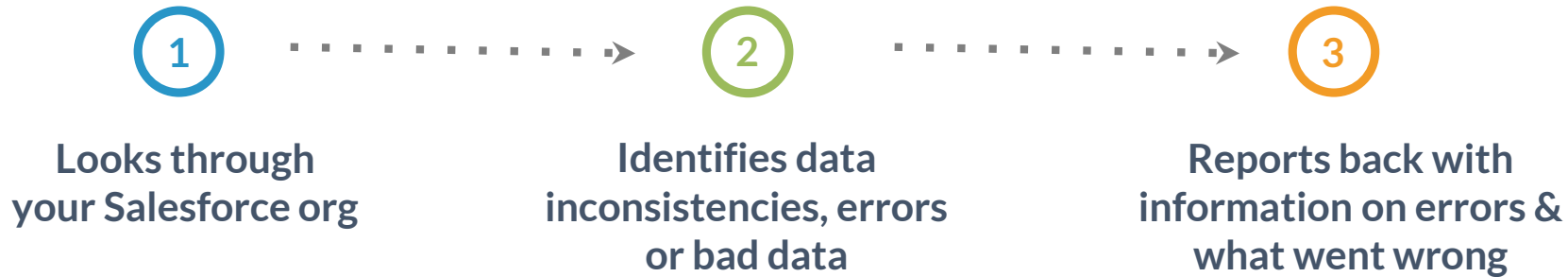
Thursday, February 4 - 1:00 PM ET

SPEAKER

Neeraj Garg
COO, Aplusify



What Is Data Health Check?



Did You Know?

Bad data is the 2nd largest issue among Salesforce users

Source: [RingLead](#)

Data Health Check





salesforce

Duplicates

- By email address
- Different first names
- Multiple addresses

Inaccurate

- Wrong Phone Numbers
- Membership/Donor Details

Inconsistent

- State Abbreviation vs. Full Name
- Naming Convention of Opportunities
- mm/dd/yy vs dd/mm/yyyy

Invalid

- Extra characters in email
- Too many digits in phone
- State/Country Mismatch
- Archived Membership Type

Incomplete

- Missing Phone Numbers
- No Organizational Name
- Empty State Fields

Dirty Data

Sources Of Bad Data



Real-Time Issues



Membership Active But Badges Expired

Subscription
000106660

Related Details

Account ⓘ	Ar...	Individual	Subscription	1 Year
Contact ⓘ	Ar...		Item (P	\$250
Entity ⓘ			Item C	Indiv
Contact			Subscri	\$21.0
Status ⓘ			Terms	1
DEPRECATED ⓘ	<input type="checkbox"/>		Busine	AIGA
Member Type				
Sustaining				
Member Since				
11/17/2020				
CONT				

Badge
00081271

Related Details

Contact ⓘ	Ar...	Is Active ⓘ	<input type="checkbox"/>
Account ⓘ		Awarded Date ⓘ	11/17/2020
Badge Type	Sustaining badge type	Expired Date ⓘ	1/19/2021
Badge Description ⓘ	Badge assigned to sustaining members	Engagement Score ⓘ	
cont	0513891		
Badge Type	Sustaining badge type		
Workflow Record			
Badge Workflow ⓘ	Sustaining	Sales Order Line ⓘ	0000080352

Chatter Feed Recent Items

Incorrect Sales Order Line Created

The screenshot shows a payment form with a blue header bar. In the top right corner of the header, there is a user profile icon. Below the header, navigation links for "Join/Renew", "Donate", "Store", "Directory", and "Contact Us" are visible. The main form area contains the following elements:

- Card number:** A text input field with a placeholder "XXXXXXXXXXXXXXXXXXXX".
- CVV:** A text input field containing "234".
- *Exp Month:** A dropdown menu showing "01".
- *Exp Year:** A dropdown menu showing "2025".
- Would you like to save this payment method for future use?**
- Billing Address:** A section with a blue button labeled "+ Create Address".
- Address is optional.
- Please do not click the Process Payment button more than once or you may incur additional charges.
- Process Payment:** A green button with a circular arrow icon.

On the right side of the form, there is a "Shopping Cart" overlay with a blue header and "1 Item". Below the header, the cart contains one item:

Supporter membership			
1	x	\$150.00	\$150.00

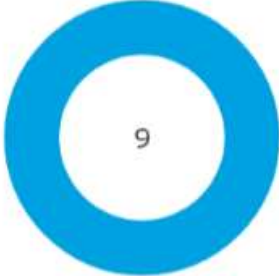
Missing Term ID

Report: [redacted] - Subscriptions with Subscription Lines

Missing Term Id

Missing Term Id from the Subscription Lines

Active ●



Contact: Status Value ↑	Contact: Membership Number	Contact: Full Name	Item (Primary): Item Name	Term: Term ID
Active (9)	000322929	Enrique Ramon Martinez	Active Member (Anniversary)	-
	000322929	Enrique Ramon Martinez	Active Member (Anniversary)	-
	000218970	Daryl L. Jessen	Active Member (Anniversary)	-

Duplicate Contacts

Membership Home Contacts Accounts Sales Orders Memberships

Report: All Contacts
Duplicate Contacts Report

Total Records
10

	Full Name	Account Name: Account Name	First Name	Last Name	Created Date
1	Ahmed Habib	Ahmed Habib	Ahmed	Habib	1/16/2019
2	Ahmed Habib	Ahmed Habib	Ahmed	Habib	2/1/2021
3	Aman Maheshwari	Aman Maheshwari	Aman	Maheshwari	4/16/2020
4	Aman Maheshwari	Aman Maheshwari	Aman	Maheshwari	5/28/2020
5	Anam Alam	Anam Alam	Anam	Alam	10/13/2020
6	Anam Alam	Anam Alam	Anam	Alam	2/1/2021
7	Chris Abazis	Chris Abazis	Chris	Abazis	8/5/2016
8	Chris Abazis	Chris Abazis	Chris	Abazis	12/2/2020
9	Jessica Bornholdt	Jessica Bornholdt	Jessica	Bornholdt	12/2/2020

Chatter Feed Recent Items

Dashboard



Data Cleansing Cycle



Contact Us

Aplusify – Your Extended Salesforce Team



Address

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