APLUSIFY
CONSULTING AND MANAGED SERVICES

salesforce registered consulting partner

Fonteva
Service Partner

Reports & Dashboards to Monitor Your Data's Health

Thursday, February 4 - 1:00 PM ET

SPEAKER

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COO, Aplusify

What Is Data Health Check?

1. Looks through your Salesforce org
2. Identifies data inconsistencies, errors or bad data
3. Reports back with information on errors & what went wrong

Did You Know?
Bad data is the 2nd largest issue among Salesforce users
Source: RingLead

Data Health Check

APLUSIFY

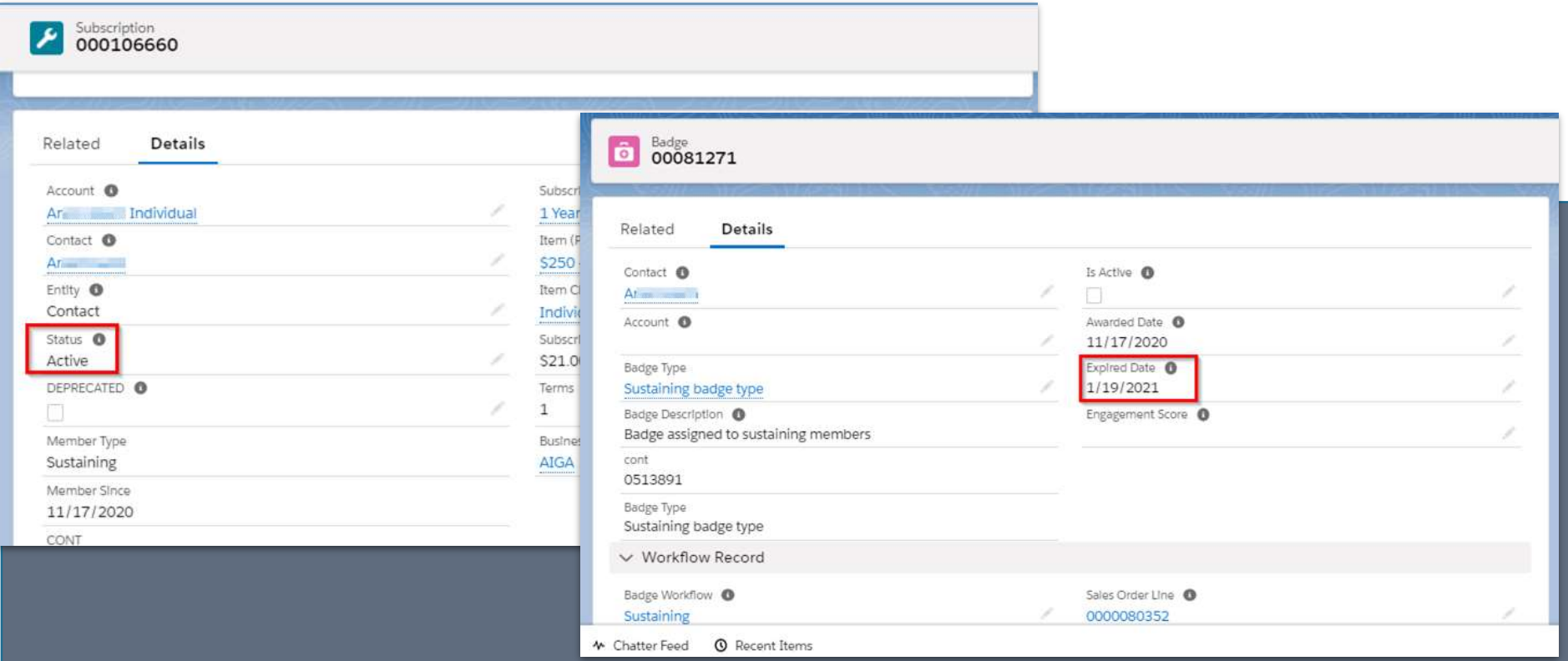
Dirty Data

Duplicates
- By email address
- Different first names
- Multiple addresses
salesforce
Inaccurate
- Wrong Phone Numbers
- Membership/Donor Details
Inconsistent
- State Abbreviation vs. Full Name
- Naming Convention of Opportunities
- mm/dd/yy vs dd/mm/yyy
Incomplete
- Missing Phone Numbers
- No Organizational Name
- Empty State Fields
Invalid
- Extra characters in email
- Too many digits in phone
- State/Country Mismatch
- Archived Membership Type

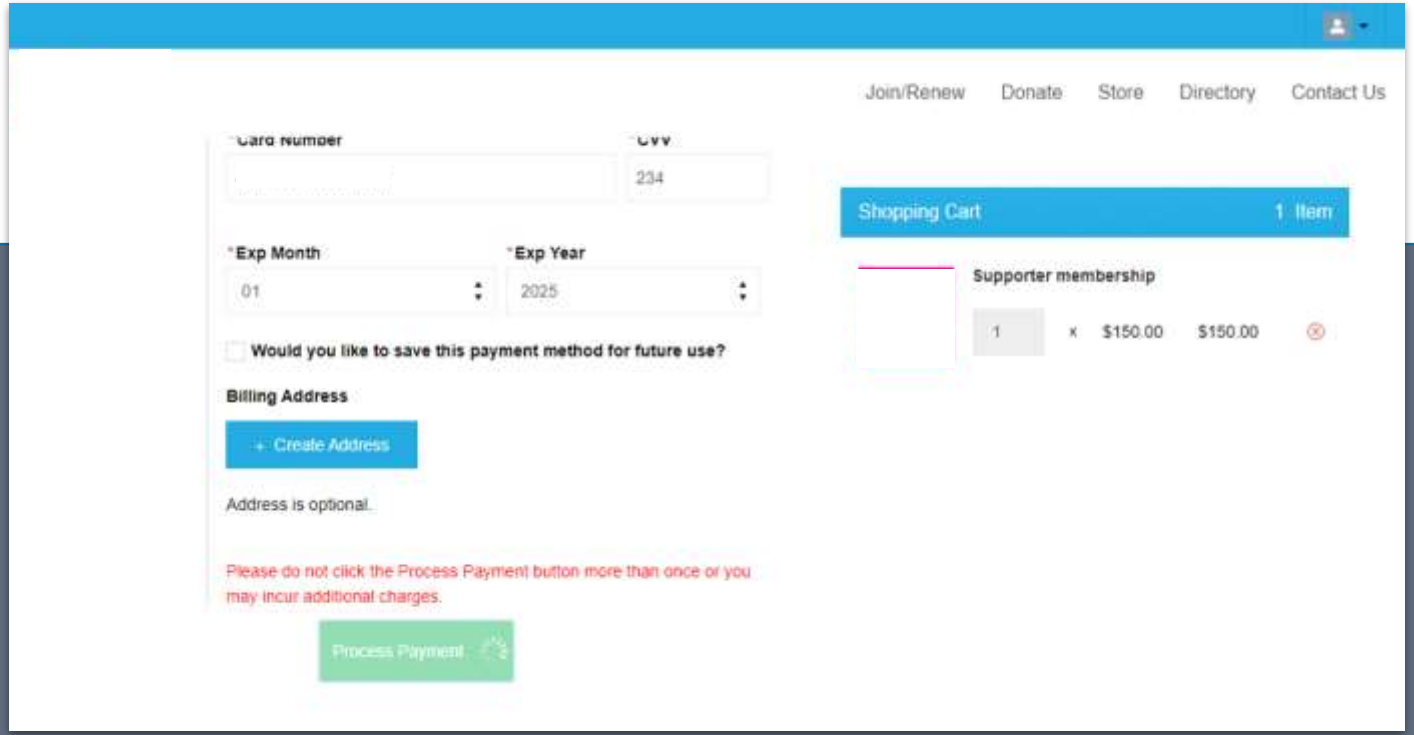
Sources Of Bad Data

Real-Time Issues

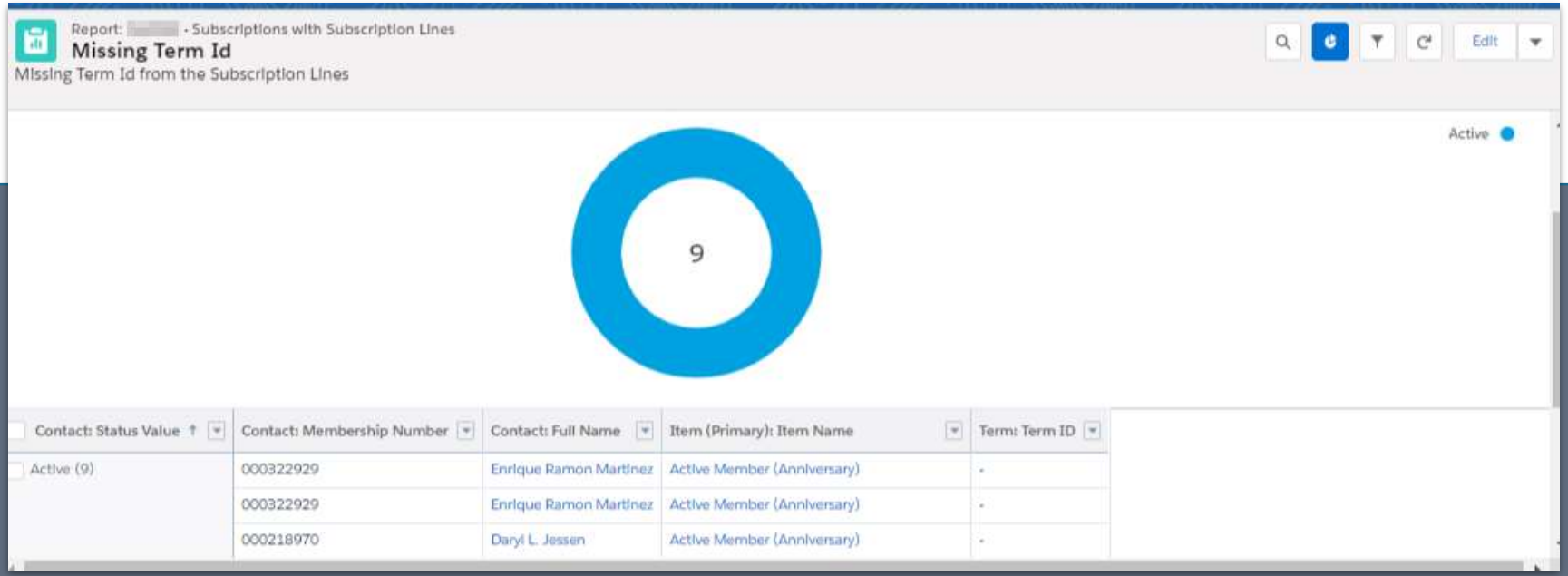
Membership Active But Badges Expired



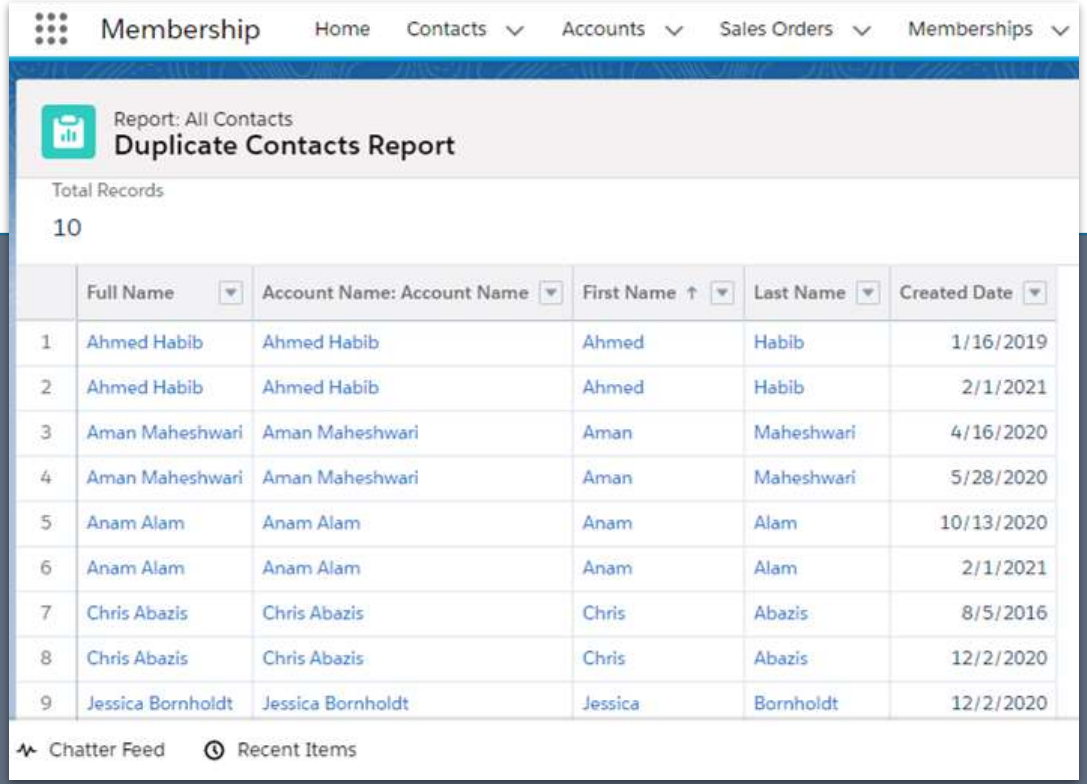
Incorrect Sales Order Line Created



Missing Term ID



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

Contacts with state as primary item
Record Count
88
Active
Expired
Suspended
Missing Term Id
Record Count
13
Active
Cancelled
Expired
Missing State of All Contacts
Record Count
259
Suspended
Cancelled
Expired
Active
Contacts with Membership and without Membership
Record Count
364,609
Duplicate Contacts
Sum of Has Duplicate Contact
265
Active
Expired
Suspended
Missing Preferred Email
Record Count
Work
Personal
Missing Preferred Address
Record Count
5K
Work
Other

Data Cleansing Cycle

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