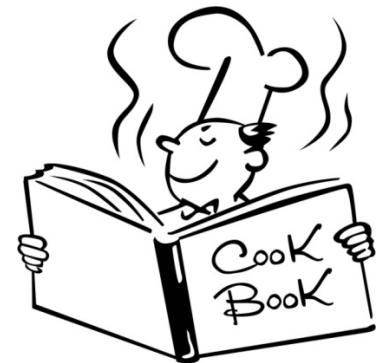# Continuous Data Management
Salesforce.com Example

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Cook Book Series

Recipe Overview

Clean SFDC Leads **Run automatically**   EDIT ▾   RUN NOW   PURGE

Rule 1	Rule 2	Rule 3	Rule 4	Rule 5	Rule 6
SFClean.R1 - Clean email	SFClean.R2 - Clean URL	SFClean.R3 - Norm state and	SFClean.R4 - Segment job	SFClean.R5 - Segment	SFClean.R6 - Export

This is a recipe for setting up continuous, closed-loop data management

- Create Data Source to continuously import data from the source system
- Create Data Target to export data back to the source system
- Create Data Pipeline to clean, segment, and transform data

You will need the following:

- A Salesforce.com (SFDC) or a Marketo account
- This cookbook will use the SFDC Lead record as an example

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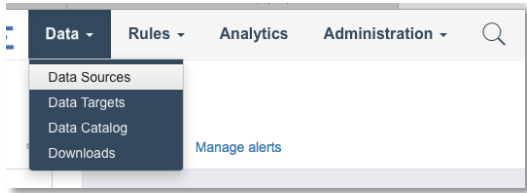- Add a rule by clicking on an existing rule and +.

- Put new data into a new data attribute so you can easily compare before vs. after and confirm the rule is doing what it is supposed to do.

- Can't see the open reference data? Check the setting in your Data Catalog:

- You can run your Pipeline anytime by pressing the RUN NOW button. To remove all previously processed data within the pipeline, press PURGE first.

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Step 1 : Create A SFDC Data Source

Data | Rules | Analytics | Administration | 🔍

Data Sources
Data Targets
Data Catalog
Downloads

Manage alerts

DATA SOURCE

INFO | PARSE | MAP

Data source name *

SFDC Leads

Data source description

Data source description

Data source administrators *

Admin Demo ✕

Source technology and data format *

Salesforce.com ▾ | AUTHENTICATED

Directory or entity *

Lead ▾

Last import date : Oct 14, 2015 8:17:00 AM

Next import date : Oct 15, 2015 10:12:00 AM

Number of records : 22

Data size : 615 KB

☑ Automatically check new and updated data

Every ▾ | 1 ⬍ | minutes ▾

☐ Allow manual update (not available if automatic update is turned on)

☐ Opt-in for Openprise community features

Set the import frequency to an interval that best supports how frequently your system's data changes. You can also set it to run at a specific time of the day.

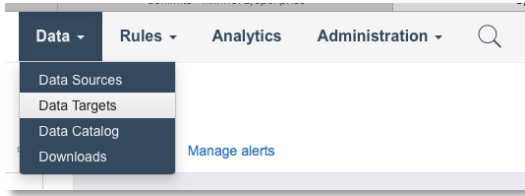Make sure you log in with a personal or system account that has sufficient privileges to use APIs.

NEXT

SAVE | CANCEL | PURGE | DELETE

Need more help creating a Data Source? Check out the tutorial videos on Openprise website's Resource page: http://openprisetech.com/resources

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Step 2 : Create A SFDC Data Target

Data ▾ | Rules ▾ | Analytics | Administration ▾ | 🔍

Data Sources
Data Targets
Data Catalog   Manage alerts
Downloads

Select the list of data attributes you will allow Openprise users to update.

DATA TARGET DETAILS

Data target name *
SFDC Leads

Data target description
Data target description

Data target administrators *
Admin Demo ✕

Target technology and data format *
Salesforce.com ▾   AUTHENTICATED

Directory or entity *
Lead

Primary/Unique column *
Lead ID

List of fields that are allowed to write   REMOVE ALL ATTRIBUTES

Lead ID ✕ Annual Revenue ✕ City ✕ Clean Status ✕ Company ✕ Company D-U-N-S Number ✕
Country ✕ Current Generator(s) ✕ D&B Company ID ✕ Data.com Key ✕ Description ✕ Email ✕
Email Bounced Date ✕ Email Bounced Reason ✕ Employees ✕ Fax ✕ First Name ✕ Industry ✕
Job Function ✕ Job Level ✕ Last Name ✕ Latitude ✕ Lead Source ✕ Longitude ✕ Mobile Phone ✕
Number of Locations ✕ Owner ID ✕ Phone ✕ Primary ✕ Product Interest ✕ Rating ✕ Salutation ✕
SIC Code ✕ Size By Employees ✕ Size By Revenue ✕ State/Province ✕ Status ✕ Street ✕ Title ✕
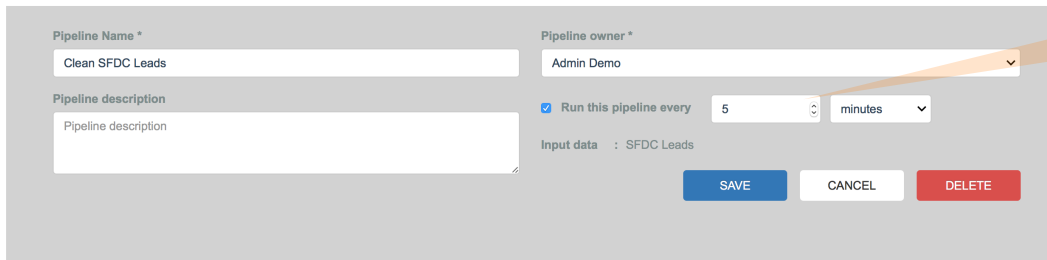Unread By Owner ✕ Website ✕ Zip/Postal Code ✕

SAVE   CANCEL   DELETE

Make sure you log in with a personal or system account that has sufficient privileges to use APIs and update data.

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Step 3 : Create a Data Pipeline

Create a pipeline to perform the tasks you wish to automate.

Need more help creating a Data Pipeline? Check out other Cook Books on Openprise website's Resource page: http://openprisetech.com/resources

Set the pipeline to run automatically. Set a frequency that is consistent with your Data Source's import frequency.

To change pipeline status and schedule, use the Edit Pipeline menu.

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First Rule : Where The Process Starts

DATA PIPELINE DETAILS - Clean SFDC Leads

Rule 1	Rule 2	Rule 3	Rule 4	Rule 5
SFClean.R1 - Clean email	SFClean.R2 - Clean URL	SFClean.R3 - Norm state and	SFClean.R4 - Segment job	SFClean.R5 - Segment

Rule Detail

Rule name *

SFClean.R1 - Clean email

Rule template * Need help picking a template?

Email address format fix

Rule description

Rule description

IF this happens

Input Data Sources

SFDC Leads

SELECT DATA

All new data

THEN take these actions

Output Data Sources

Rule Output - SFClean.R1 - Clean email

Create alert

Alert description * SFClean.R1 - Clean email

Alert importance medium

Alert owners * Admin Demo

Set the Input Data Source for rule #1 to SFDC Data Source created in Step 1

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Last Rule : Export Data Back To SFDC

DATA PIPELINE DETAILS - Clean SFDC Leads

Rule 6

SFClean.R6 - Export

Rule Detail

Rule name *

SFClean.R6 - Export

Rule template * Need help picking a template?

Copy and map

THEN take these actions

Output Data Sources

SFDC Leads

Create alert

Alert description *	SFClean.R6 - Export
Alert importance	medium
Alert owners *	Admin Demo

Copy and map

SFDC Leads	Rule Output - SFClean.R5 - Segment co
To	From	UN-MAP ALL
Id *	Id
AnnualRevenue	AnnualRevenue
City	City
CleanStatus	
Company	Company
CompanyDunsNumber	
Country	Country_Clean
CurrentGenerators__c	
DandbCompanyId	DandbCompanyId
Description	Description
Email	Email_Clean
EmailBouncedDate	EmailBouncedDate

Use the Copy and Map rule template to push data into a Data Target

Select the SFDC Data Target created in Step 2

Map the source attributes to destination attributes

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Continuous Data Management In Action

Record Changed Manually In SFDC

- Changed job title to "DBA"
- Update state to "Massachusettes" with typo
- Update country to "USA", a non-standard value
- Updated email with a typo ".edv"
- Updated website with typo and extra text
- Added company annual revenue
- Added company employee count

Record Updated By Openprise

- Re-segmented job function & job level
- Normalized state and country names and corrected typo
- Corrected email error
- Corrected and cleaned website address
- Segmented company size by employee count and annual revenue

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Recipe Review

Clean SFDC Leads **Run automatically**   EDIT ▼   RUN NOW   PURGE

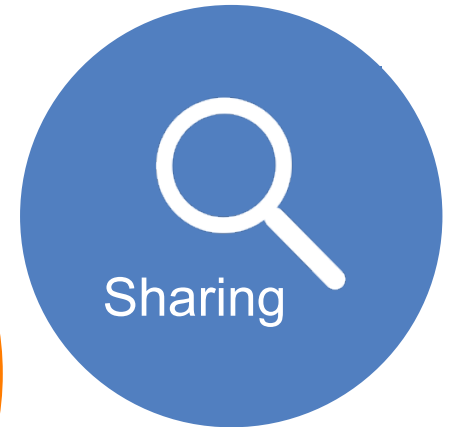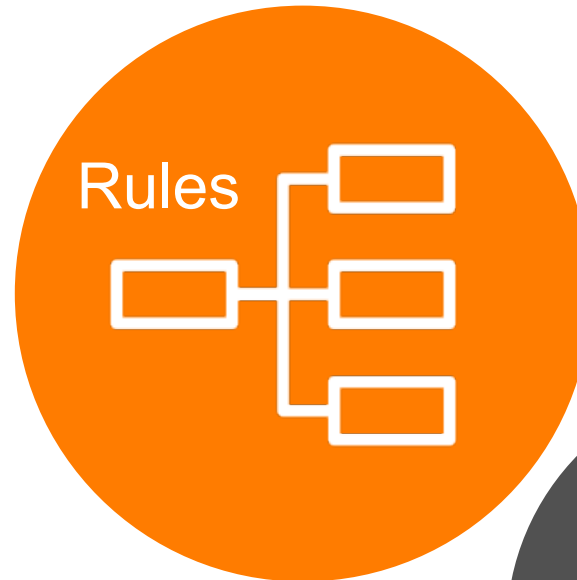| Rule 1	Rule 2	Rule 3	Rule 4	Rule 5	Rule 6
SFClean.R1 - Clean email	SFClean.R2 - Clean URL	SFClean.R3 - Norm state and	SFClean.R4 - Segment job	SFClean.R5 - Segment	SFClean.R6 - Export

Recommendations

- Start with a short Pipeline performing a few basic tasks. Add more rules once you are comfortable with the integration.
- Do not import data attributes you do not need.
- Do not allow Data Target to update any data attribute you don't want updated

Want to do more? Try the following on your own:

- Want to import and process data continuously, but only export on demand? Set up the export rule in a second Pipeline.

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Data Automation For Business Users

Rules

Sharing

Analytics

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Twitter: @openprisetech

www.openprisetech.com