

How to: Data?

Best Practice, Tips and Tricks

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Agenda

- ❖ Data Migration
- ❖ Data Quality
- ❖ Harvest Solutions

Data Migration

❖ Preparation

- Define source: # tables, # records, data format, name integrity, record ownership
- Scrub data: duplicates, data format, importance
- Mapping: Object and Field level
- Prepare Data Migration Plan: Tools to use, sequence, sample data, expected results

❖ Execution

- Load primary objects first: Acct, Cont, Opps, Leads, Custom Objects.
- Load other objects: email, events, activities, etc.

Data Migration

❖ Data Modeling from source to SFDC

- Object to Object
- Field to Field

❖ Best Practice

- Import sample data first
- Check mandatory fields
- Define ownership at source
- Create fields to track foreign keys
- Clean data NOW, avoid more work later

Data Migration

❖ Tools

- PE: Wizard
- EE/UE: Data Loader, SForce, AppExchange tools

❖ Best Practice

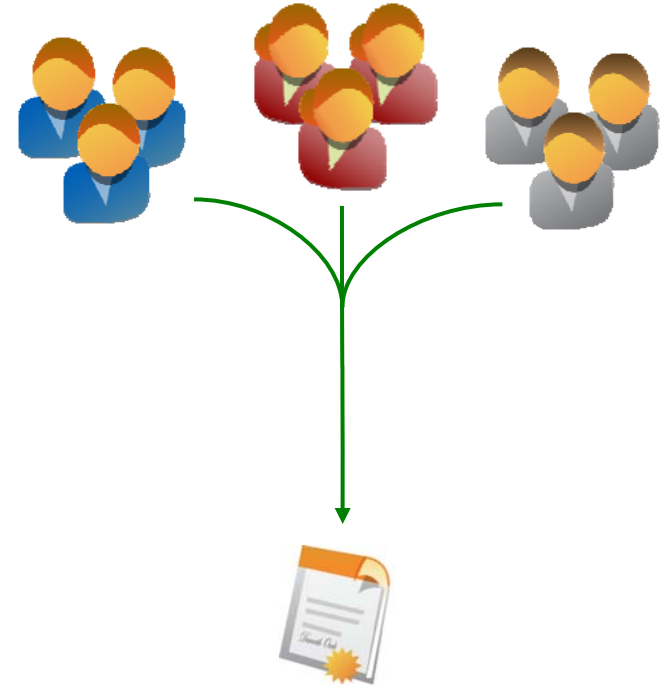
- Backup Source and Salesforce.com data
- Create import flag custom field (reporting and deleting)
- Turn off workflows and triggers
- Sandbox

Data Quality

- ❖ Why:
 - Impact reliability
 - Inaccurate reporting
- ❖ What to do?
 - People
 - Access
 - Training
 - Functionality
 - Process
 - Data Policies
 - Technology
 - Required fields and field dependency
 - Validation rules
 - Apex Code
 - Integration
 - Appexchange tools
 - Custom Formulas: Data Completeness score.

Harvest Solutions

- ❖ Founded in September of 2001 – Exclusive CRM focus
- ❖ Over 60 years of combined experience in the Customer Relationship Management (CRM) industry
- ❖ 3 Offices – 15+ person staff
- ❖ Proprietary methodology created from experience and hundreds of implementations. Ensures projects are delivered on-time and on-budget.



Harvest Solutions



- ❖ Certified Consulting Partner
- ❖ Certified Implementation Partner
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