Experian Data Quality for Salesforce

Quick Start Guide

Version 5.0, Revision 12 June 2017.

Contacts and Support

For resolutions to common issues, answers to frequently asked questions and hints and tips for using our products: https://www.edq.com/support

For more information about us and to get in touch: https://www.edq.com

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AutoMapper

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Force.com-Toolkit-for-NET

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INTRODUCTION

The **Experian Quick Start Wizard** walks you through the basic setup of the Global Data Quality for Salesforce solution within the **Accounts, Contacts, Contracts** or **Leads** standard objects.

If you wish to manually configure and install the solution or wish to utilize EDQ service within any other standard object(s) or custom objects, close the wizard and configure the solution following the steps outlined in the "Installation & Configuration Guide".

Prerequisites

To configure and use the solution, you will require the following:

- Global Data Quality for Salesforce Application Key;
- Supported Salesforce Editions:
    - Enterprise;
    - Unlimited;
    - Performance;

If you have not received your Application Key from Experian Data Quality please contact your sales representative or contact Experian Technical Support. Alternatively, you can sign up for a free trial from within the app once downloaded into your Salesforce environment.

Location	**Phone**
United Kingdom	+44 (0)20 7819 5760
USA and Canada	+1 (888) 707-8822
Australia, New Zealand and Singapore	Melbourne: +61 (0) 3 8699 0100 Sydney: +61 (0) 2 8907 7200
France and the Netherlands	+33 (0) 1 70 39 45 55

INSTALLATION

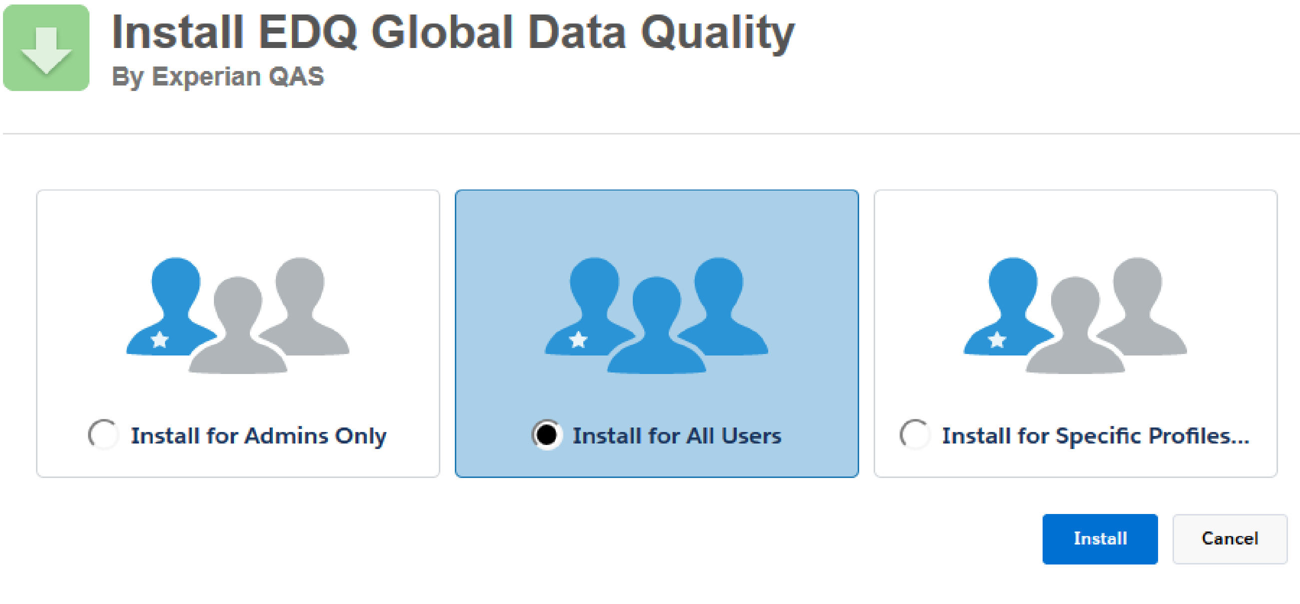
Install the Global Data Quality for Salesforce solution from the AppExchange:

https://appexchange.salesforce.com/listingDetail?listingId=a0N300000055e86EAA

1. Click **Get It Now** and login with your Salesforce credentials.

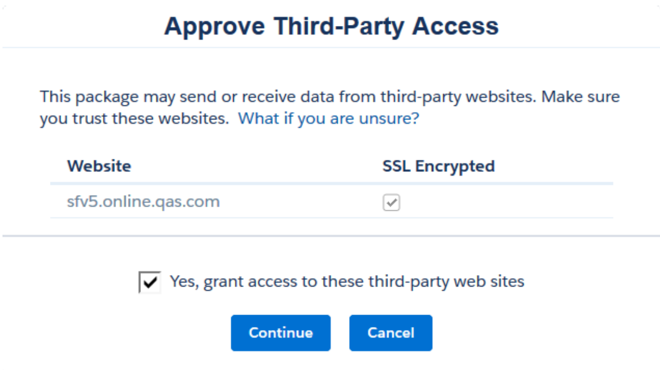
Note: You must use an account with administrator access to install this application.

2. You will be taken to the **Install Package** page where you should specify Install for all Users.

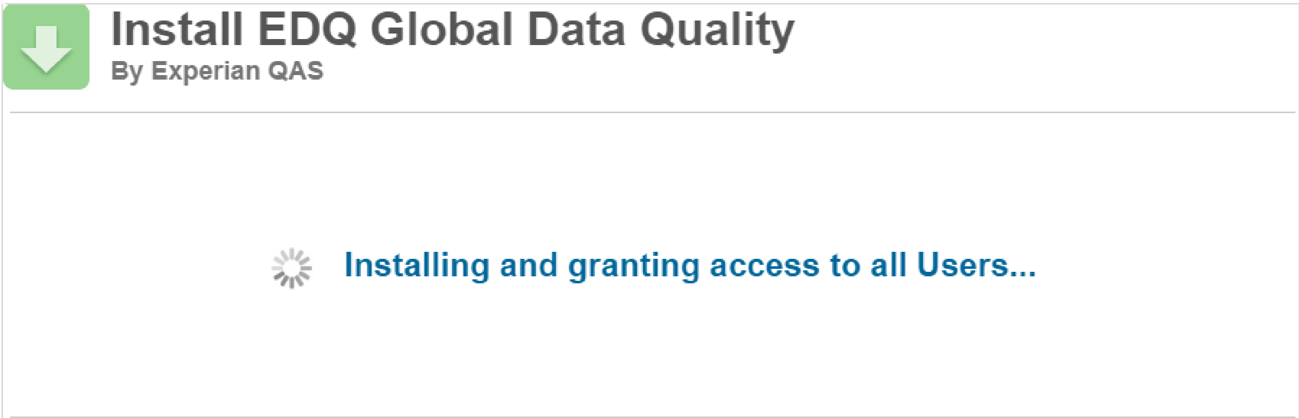


Make sure you select **Install for All Users** before you click on the Install button to proceed.

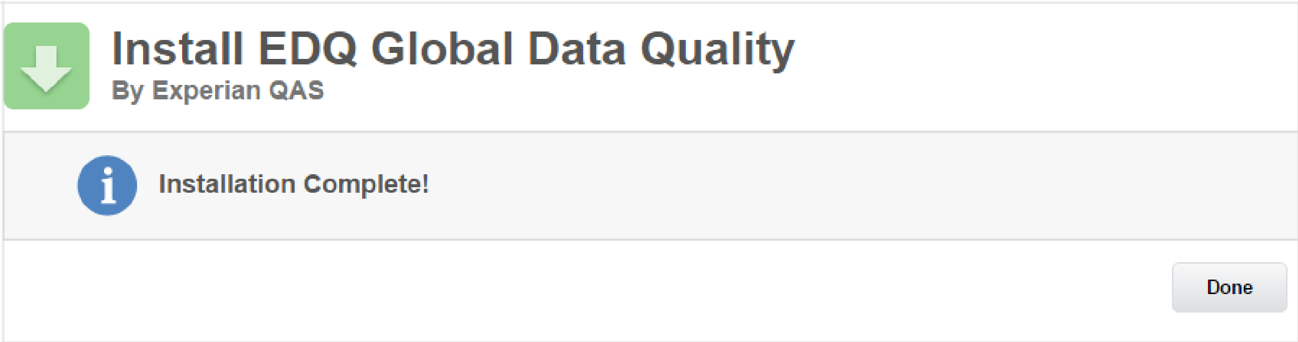
3. After clicking the Install button the Approve Third-Party Access window will appear. Check the '*Yes, grant access to these third-party web sites*' checkbox and then click **Continue**.



4. After you click on the **Continue** button the Installation process will start as shown on the screenshot below.



5. Installation is complete once you see the following page:



Congratulations, you have just installed Global Data Quality for Salesforce.

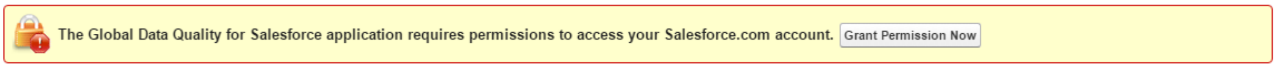
The next step is to configure the solution.

CONFIGURATION

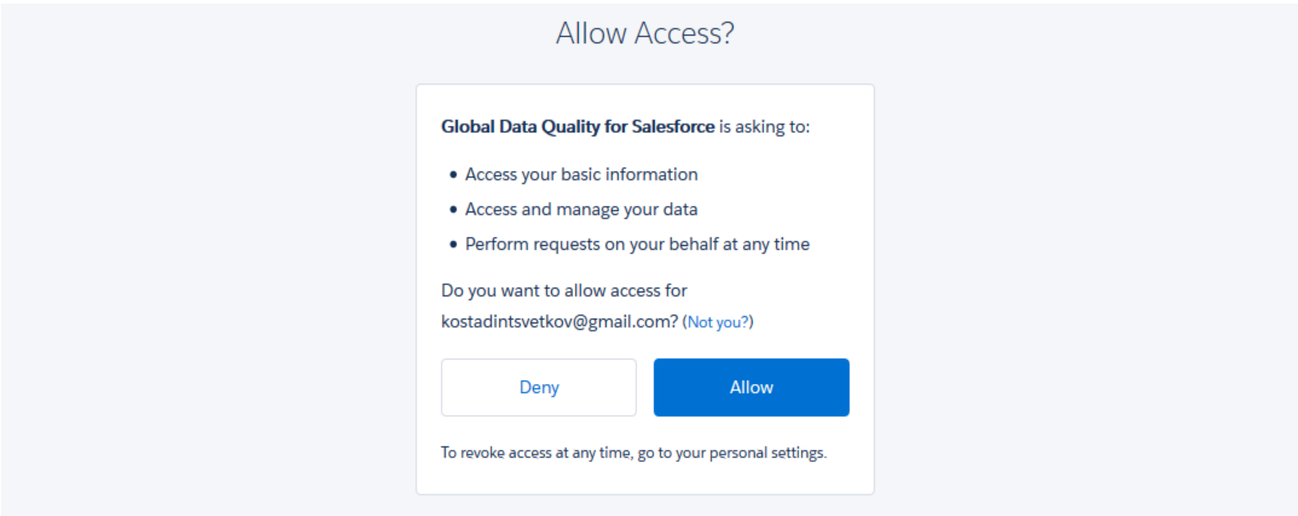
The following steps outline the process of configuring the Address, Email and Phone using the Quick Start Wizard.

Note: Your Experian Data Quality package comes with pre-configured settings for Address, Email and Phone Verification for the **Account**, **Contact**, **Lead** and **Contract** standard Objects.

1. Configuration settings for EDQ service are completed in the **EDQ Administration** tab. In order to enable / configure Address, Email and Phone Verification you will be required to grant the application permission to your Salesforce account. If you have troubles with invoking the EDQ tab, refer to the Troubleshooting section. The first time you access the administration area you will be requested to grant access to the application.



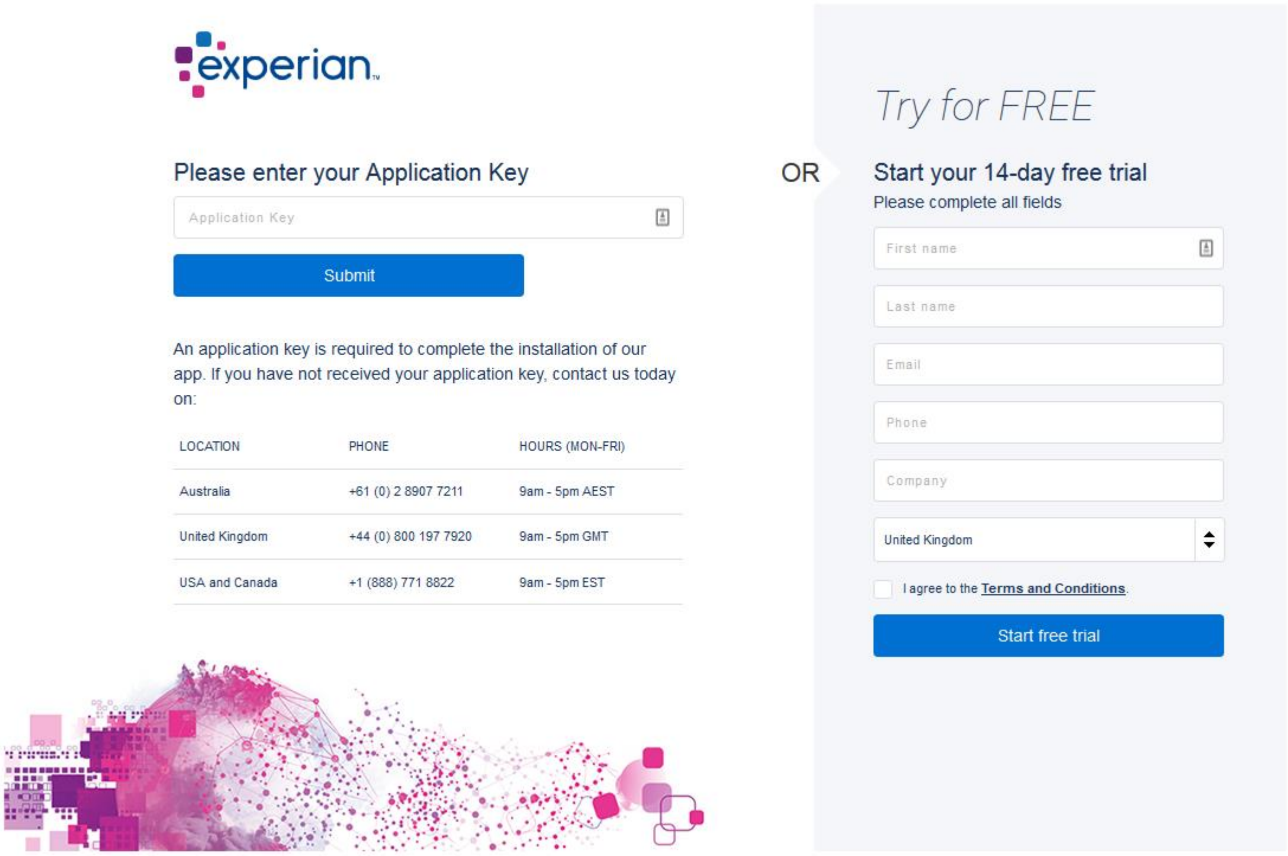
2. Click on the **Grant Permission Now** button. A pop up page will open describing the permission the application is requesting.



3. Click **Allow**.

Note: You will only need to grant permission to the application once.

4. Once access has been granted, you will be prompted to enter your **Application Key** or you can sign up for a free trial.



5. Enter your **Application Key** and click **Submit**

The Application Key is provided by your Experian representative.

Note: If you have not received your Application Key from Experian Data Quality please contact Experian Technical Support.

Signing up for a FREE Trial

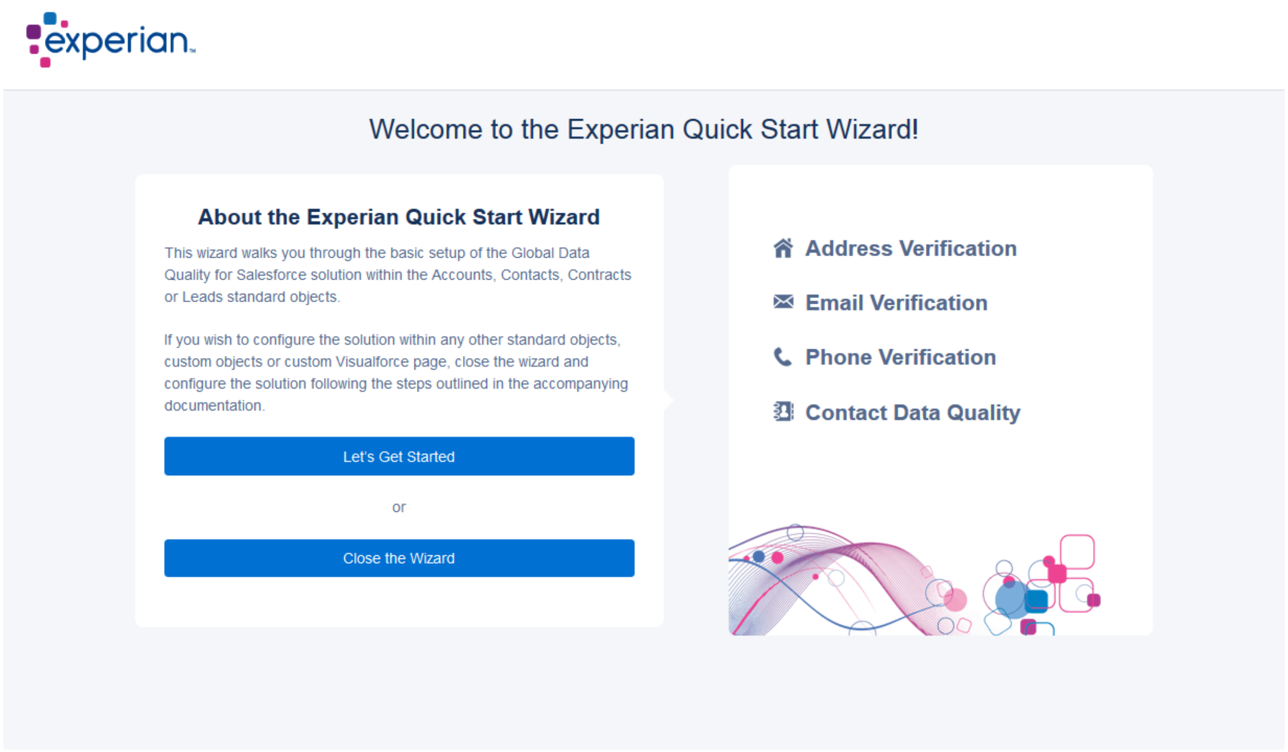
If you would like to try the app for FREE simply complete the free trial sign up form to start your free trial.

- ***United States, Canada or APAC users:*** once you fill in the free trial form you will automatically be provisioned with an application key and will immediately be able to proceed to the **Experian Quick Start Wizard**.
- ***Non-United State, Canada or APAC users:*** once you fill in the free trial form, you will receive a confirmation email and a member of the team will be in touch within two working days to get you up and running with your free trial.

After your application key is registered the **Experian Quick Start Wizard** will open.

Note: If you wish to configure the solution within any other standard object(s), custom object(s), custom Touchpoint(s) or custom Visualforce page(s), close the wizard and configure the solution following the steps outlined in the "*Configuration*" section (page 7) in the "**Installation and Configuration Guide**".

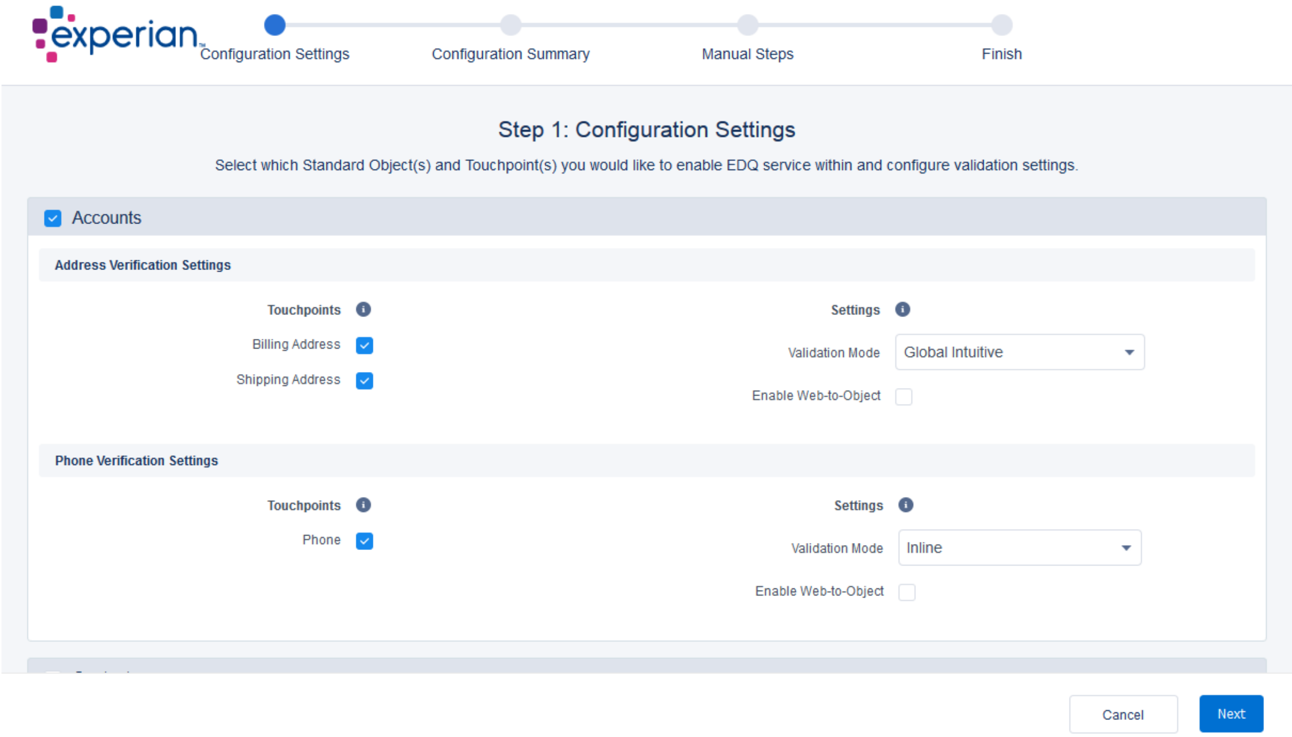
Start the wizard by clicking on the **Let's Get Started** button.



The wizard consists of four simple steps described below.

Step 1: Configuration Settings

After clicking on the **Let's Start** button the Configuration Settings page will open. Select the Object(s) for which you would like to enable EDQ service, further settings will be displayed allowing you to configure specific Touchpoints and verification settings.



Touchpoints – Select the available pre-configured Touchpoints for the Object(s) selected previously.

Settings – Select the validation mode for each respective Touchpoint. For optimal performance we recommend utilizing the default values provided.

Address validation modes

Rapid Search: The Rapid Search Address Verification workflow is used for both new and edited records. Rapid Search mode allows you to validate an address at the point of entry quickly and accurately, reducing keystrokes and time.

Interactive: The Interactive Address Verification workflow is used for both new and edited records. EDQ service is invoked on Save, when a new record is created or edited, the user is directed to the EDQ Interactive Verification screen to verify an address.

Passive: Enables silent validation, EDQ service is invoked on Save however the user will not be prompted for verification or interaction as the process is silent. If an address is verified by EDQ or it matched to the building level but the required sub-building information could not be validated the address is considered "*Verified*", in all other cases the address will be returned as "*Could not be Verified*".

Global Intuitive: The Global Intuitive Address Validation allows you to validate an address at the point of entry by providing a list of matching options on each keystroke.

Rapid Search + Interactive: Uses the Rapid Search Address Verification workflow for new record creation and the Interactive Address Verification workflow for edited records.

Global Intuitive + Interactive: Uses the Global Intuitive Address validation for new address creation and the Interactive Address Validation workflow for edited records.

Global Intuitive + Rapid Search: Uses the Global Intuitive Address validation for new address creation and the Rapid Search Address Validation workflow for edited records.

Email validation modes

- ***Inline***: Email verification is performed "inline" directly on the Salesforce page.
- ***Interactive***: Email verification is invoked on Save and is performed via the Interactive validation workflow.
- ***Passive***: Email verification is invoked on Save, however verification will be performed silently and there is no interaction with the user.

Phone validation modes

- ***Inline***: Phone verification is performed "inline" directly on the Salesforce page.
- ***Interactive***: Phone verification is invoked on Save and is performed via the Interactive validation workflow.
- ***Passive***: Phone verification is invoked on Save, however verification will be performed silently and there is no interaction with the user.

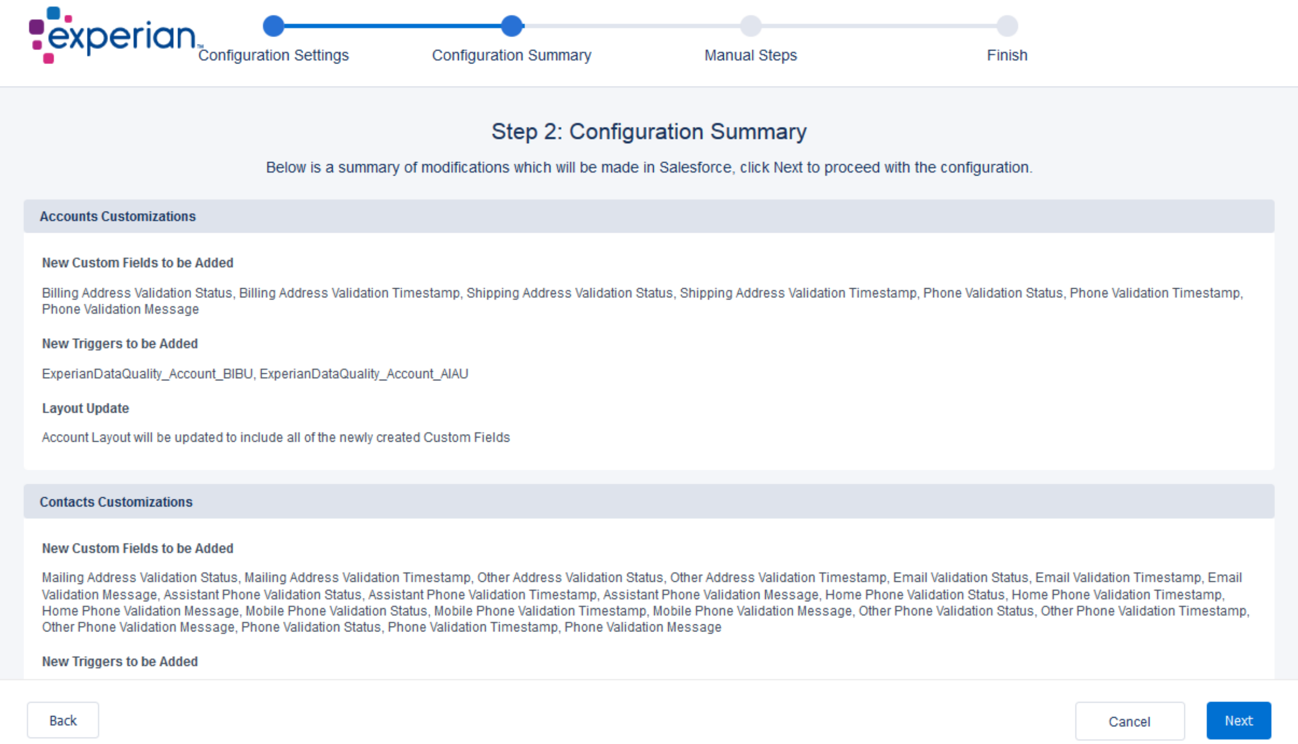
Note: For more information regarding the validation modes please refer to the user guide.

Enable *Web-to-Object* Functionality – For each Object, *Web-to-Object* functionality can be selected. This option allows you to enable verification for records created by Salesforce' *Web-to-Lead* functionality or from other external sources. As soon as a record enters the Salesforce database from an external source address / email / phone verification is performed automatically without user interaction.

Click on the **Next** button to proceed to the next step.

Step 2: Configuration Summary

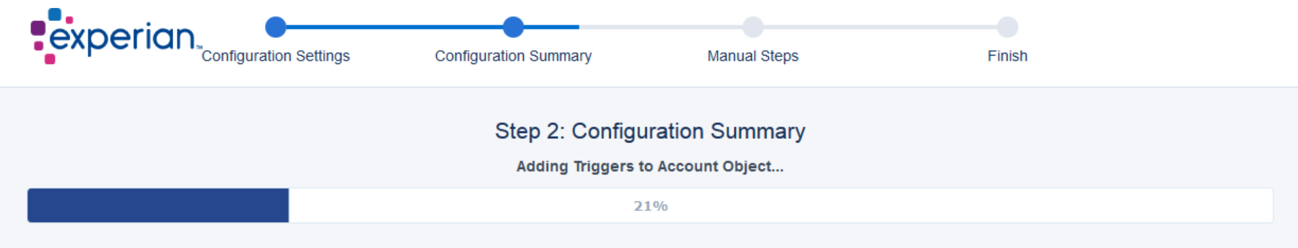
Based on the configuration settings selected in step 1, a summary of the modifications which will be made in your Salesforce account will be displayed.



You can use the **Back** button to return to the previous page and re-modify your settings or click **Next** to proceed with the modifications.

> **Note**: You will be unable to change Configuration Settings from within the Quick Start Wizard once you click Next, if required you can change configuration settings or add additional touchpoints from within the EDQ Administration area.

A progress bar will display the changes which are currently being made and the current progress.

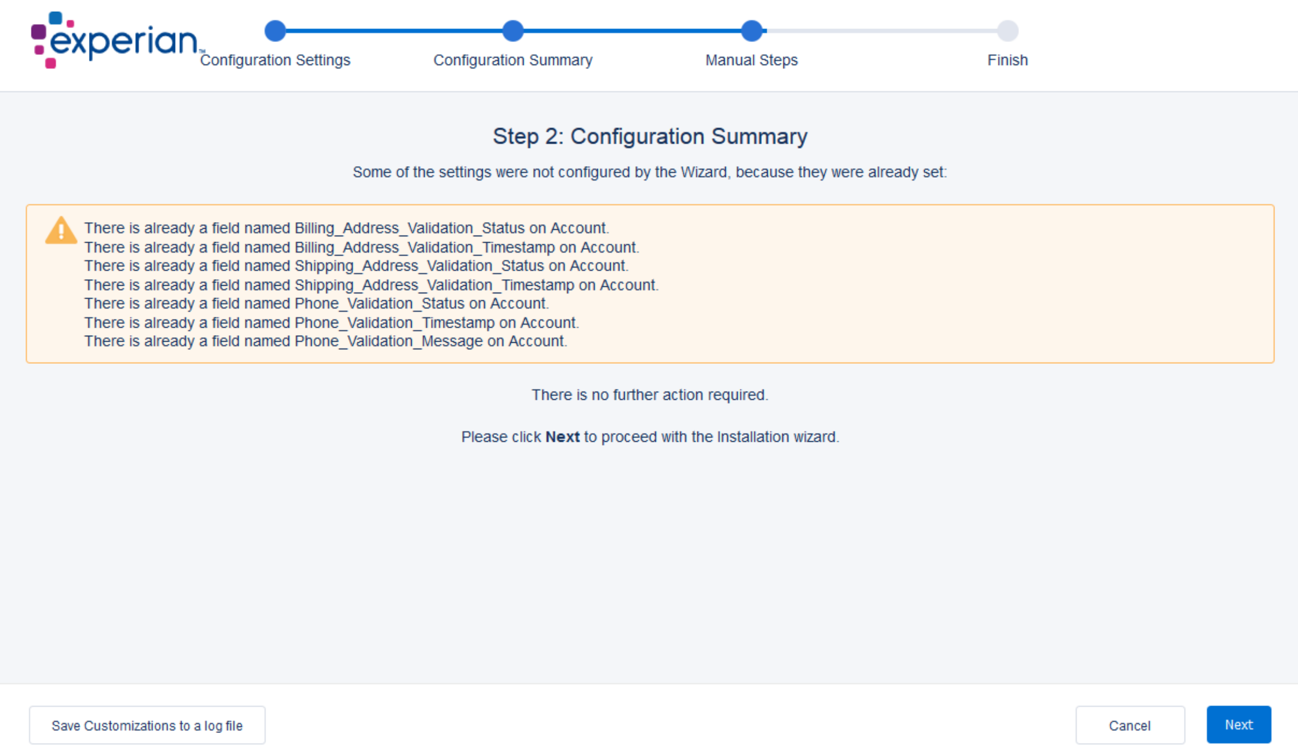


When the progress bar reaches 100% you will see a message saying that all settings were configured by the wizard.

Save Customizations to a log file – You are provided with a link at the bottom left side of the page upon completion of the configuration process. Use this link if you would like to download a description of the modifications made to your Salesforce account.

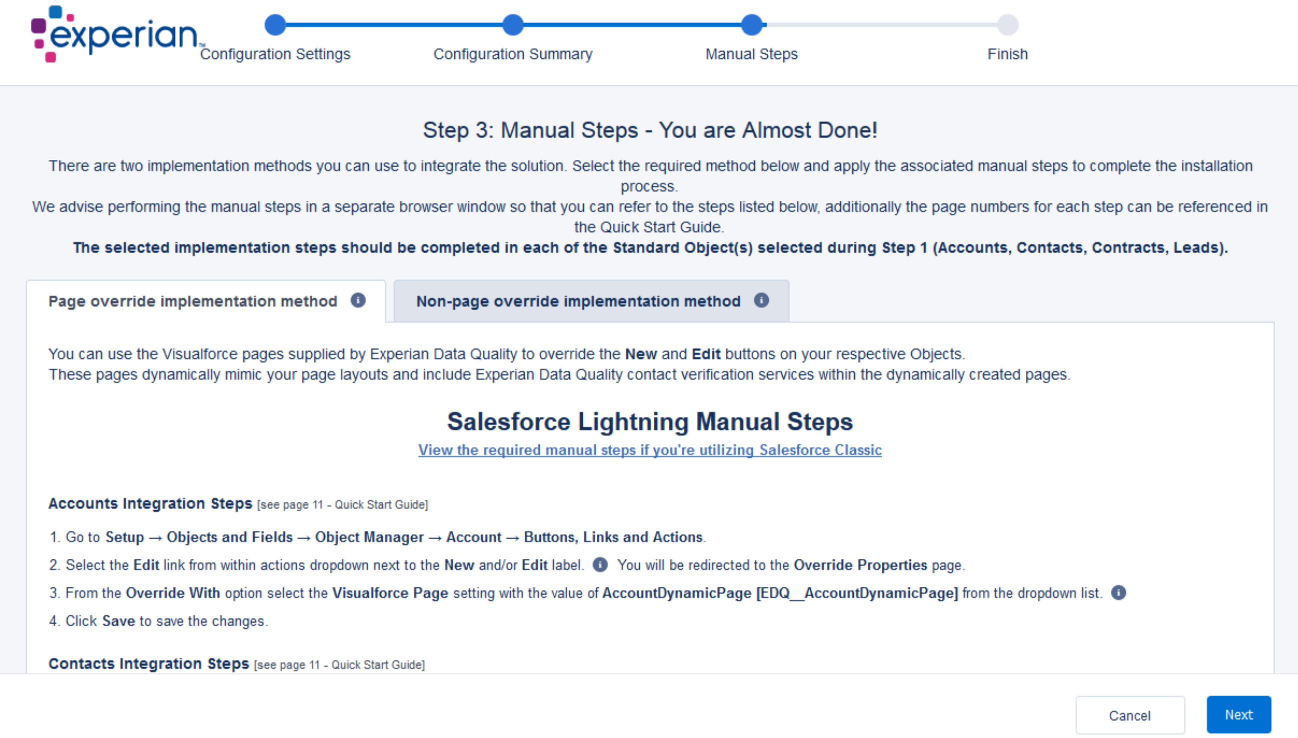
Click on the **Next** button to go to the final step of the wizard.

Note: If the solution has been installed or configured within your Salesforce Org previously you will see informational messages at the end of the installation process. These messages indicate that certain settings were not configured and the respective reason. The messages are for informational purposes and will not require any further action.



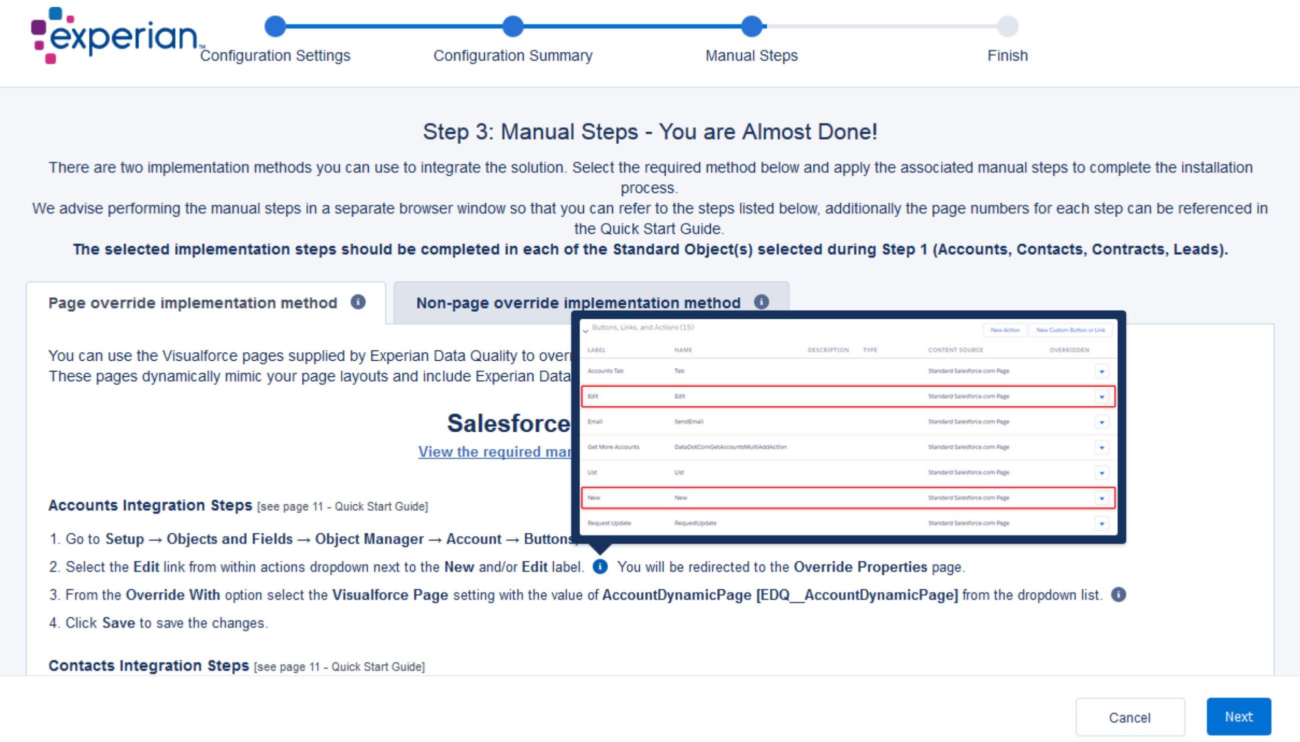
Step 3: Manual Steps

The Quick Start Wizard automates the majority of the installation and configuration process however manual integration steps are required to complete the installation process. Select the required implementation method, once an appropriate method is selected, the **manual steps** pertaining to the selected method will be displayed.



There are two implementation methods you can use to integrate the solution. The selected implementation steps should be completed in each of the Standard Object(s) selected during Step 1.

Hover over the information icon (i) for a detailed screenshot of the specific step.



Note: We advise opening a separate browser window to perform the manual steps so that you can easily refer to the steps listed within the wizard.

Dynamic Page Override Implementation Method (Recommended)

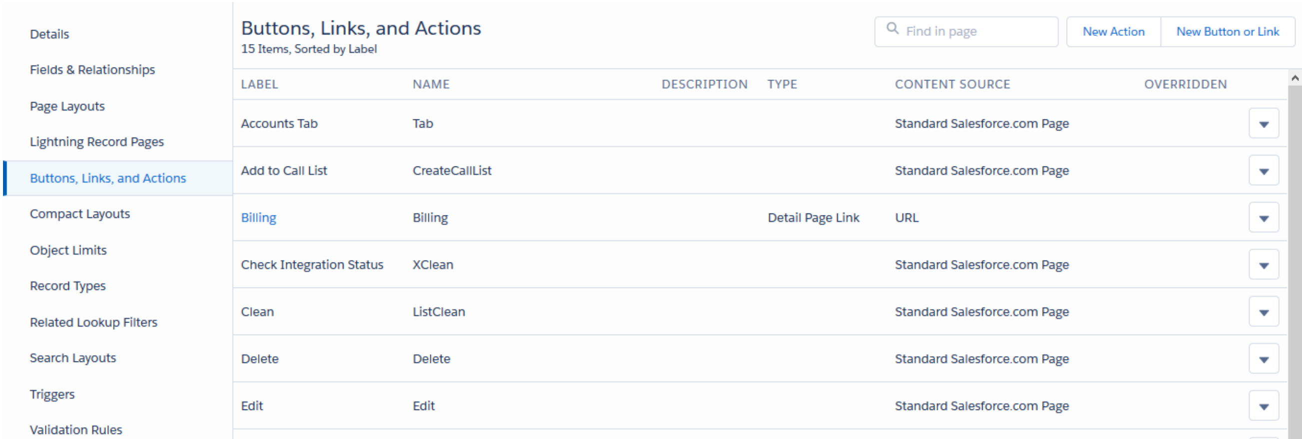
Note: Overriding standard buttons and links changes the meaning of the **Salesforce URL** and also changes any requests to that URL (e.g. a Salesforce page, a browser shortcut or an external system).

You can use the Visualforce pages supplied by Experian Data Quality to override the New and Edit buttons on your respective Objects. These pages dynamically mimic your page layouts and include Experian Data Quality contact verification services within the dynamically created pages.

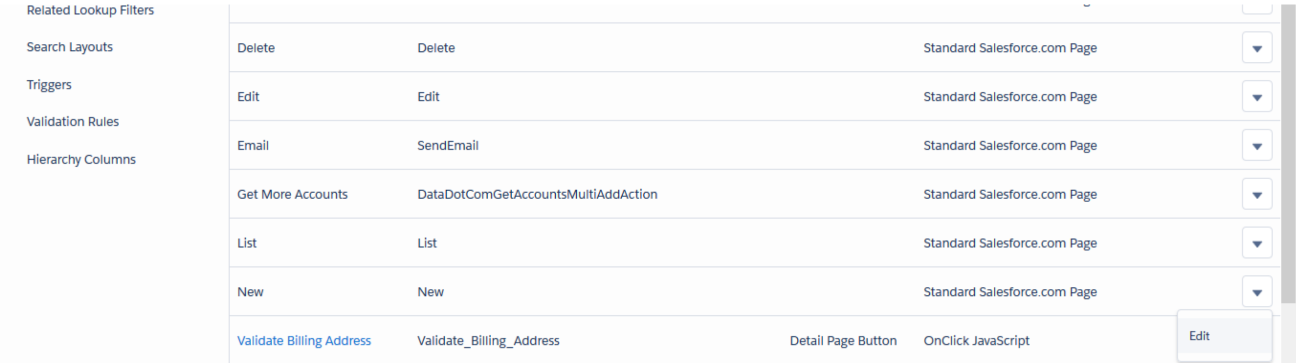
Follow the below steps to override your **New** and **Edit** buttons:

Note: Overriding your standard "**Edit**" button will disable the inline editing of the fields in your Object's Detail page.

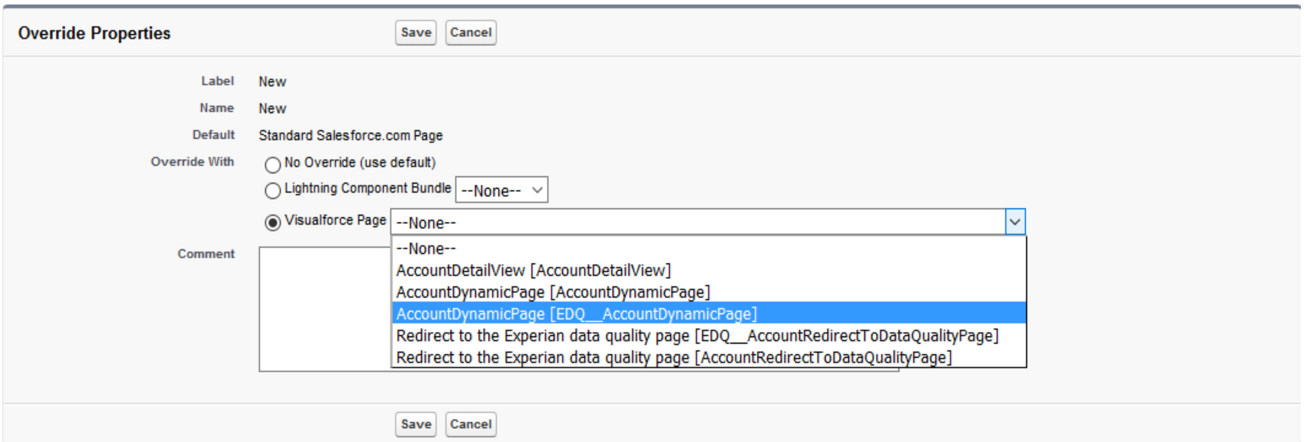
1. Go to **Setup → Platform Tools → Objects and Fields → Object Manager → *{Object Name}*** (e.g. Account).
2. Navigate to the **Buttons, Links, and Actions** section.



3. Navigate to the **New** button and click on the arrow. Click the **Edit** link. You will be redirected to the Override Properties page.



4. Select the **Visualforce Page** radio button and make sure to select the ***{Object Name}*DynamicPage** page from the drop down list.



5. Click **Save**.

Note: Be careful not to select the ***"Redirect to Experian data quality page"*** VF page which appears below the dynamic visual force page. The "Redirect to Experian data quality page" is only used for the non-page override method which requires you to add it to your page layout. You must not select it when overriding your buttons.

After saving you will notice that a tick (✓) appears in the tick box within the overridden column for the button you chose to override.

Repeat the steps above for the **Edit** button if EDQ service is also required for Edit pages.

Note: Repeat steps **1-4** for the remaining Object(s) selected in Step 1 (Configuration Settings). The Objects selected in Step 1 are displayed at the top of the screen.

NB! If you are using a ***custom salesforce.com*** domain you need to add the Salesforce instance URL into the Remote Site Settings in order for the page override implementation to work. For more information on how to find your Salesforce instance and how to add it into your remote site setting, please refer to page 20 *"Add your Salesforce Instance URL to Remote Site Settings"* in the Installation and Configuration guide.

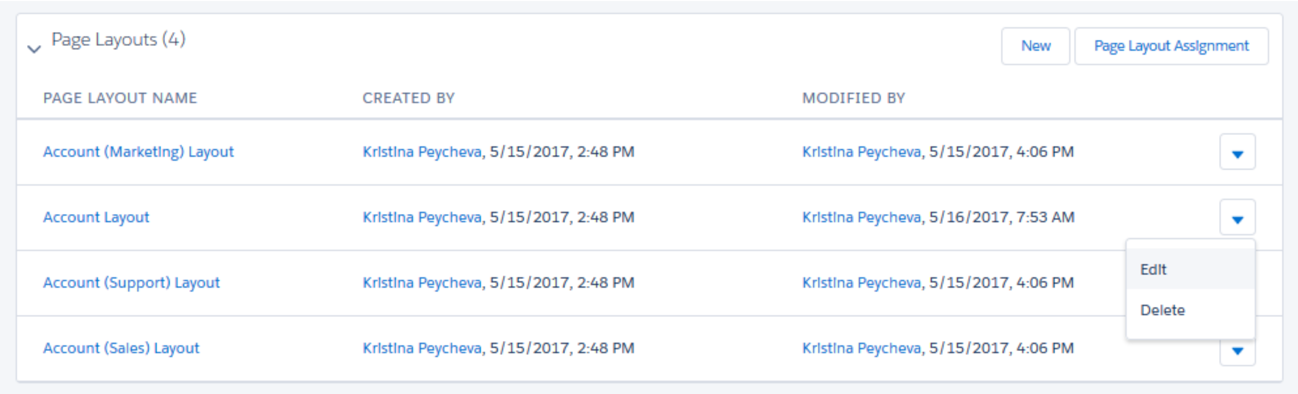
Non-page Override Implementation Method

If you do not wish to override your standard buttons you can manually perform the necessary steps to configure the EDQ service in an alternative way. Depending on the validation workflow you wish to use, follow the steps below specific to the required validation mode.

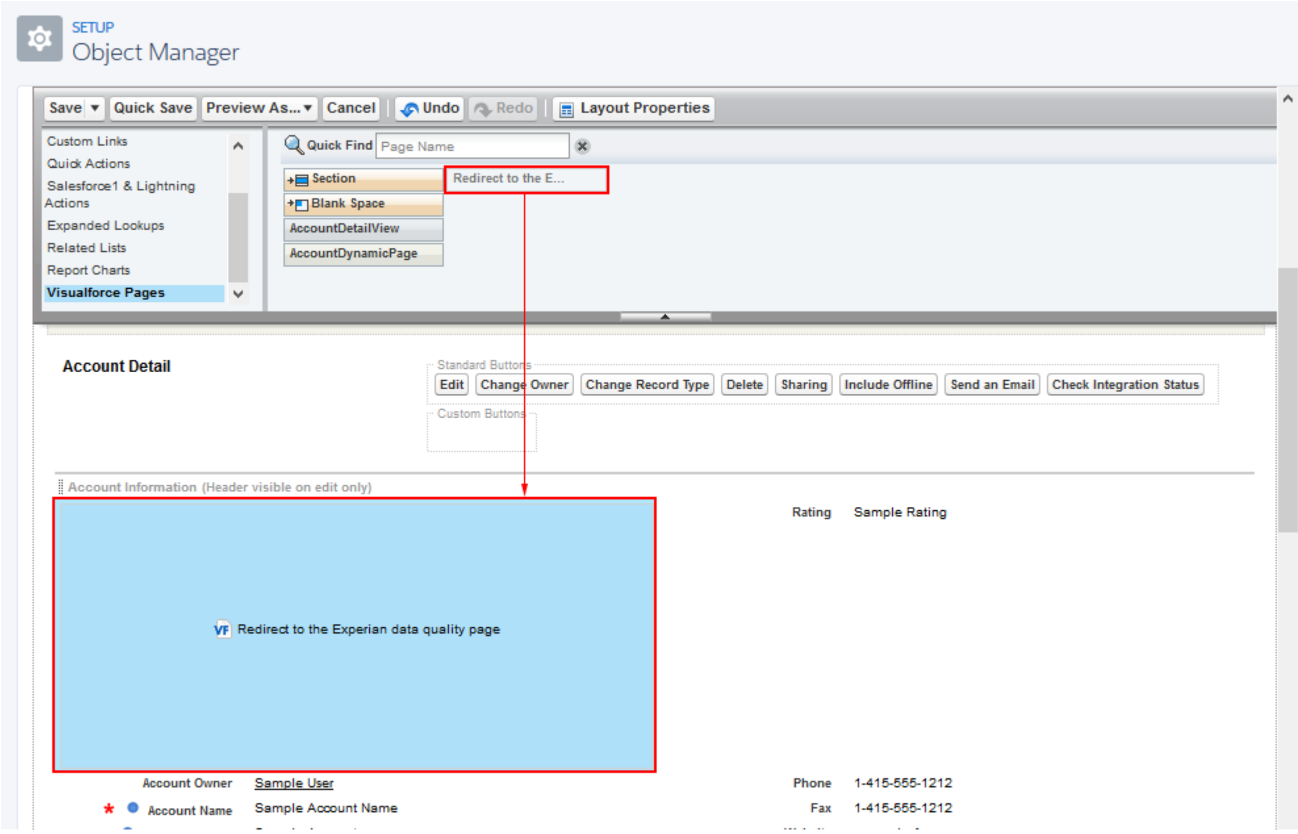
For further information regarding the validation modes visit page 38 for Address validation modes, page 48 for Email and page 55 for Phone validation modes.

Interactive Address or Email / Phone Verification – Non-page Override Implementation Method

1. Go to **Setup → Platform Tools → Objects and Fields → Object Manager → *{Object Name}*** (e.g. Account).
2. Navigate to the **Page Layouts** section. Click on the arrow next to the desired page layout which you would like to edit and click the **Edit** link.

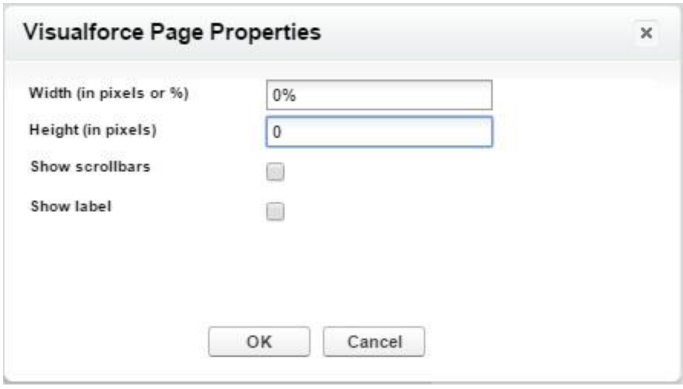


3. Select the **Visualforce Pages** item from the list on the left side of the **Account layout** table.
4. Drag the ***{Object Name}*RedirectToDataQualityPage** component somewhere on the page layout. Once it is placed, hover over it and click on the **Properties** icon which looks like a wrench ( ) positioned in the upper right corner of the component.



5. A pop up with the Visualforce Page Properties will appear. Enter:

   Width (in pixels or %): 0%
   Height (in pixels): 0
   Show scrollbars and **Show label** should be left **unchecked**.



6. Click **OK** and then click **Save**.

Note: Repeat steps 1-5 for the remaining Object(s) selected in Step 1 (Configuration Settings) which are configured for Interactive verification. The Objects selected in Step 1 are displayed at the top of the screen.

Global Intuitive Address Verification – Non-page Override Implementation Method

Note: You should only follow the steps described in this section if you are utilizing **Global Intuitive** address verification and you chose **NOT** to override the "New" and "Edit" buttons.

There are two non-page override workflows supported by the Experian Data Quality.

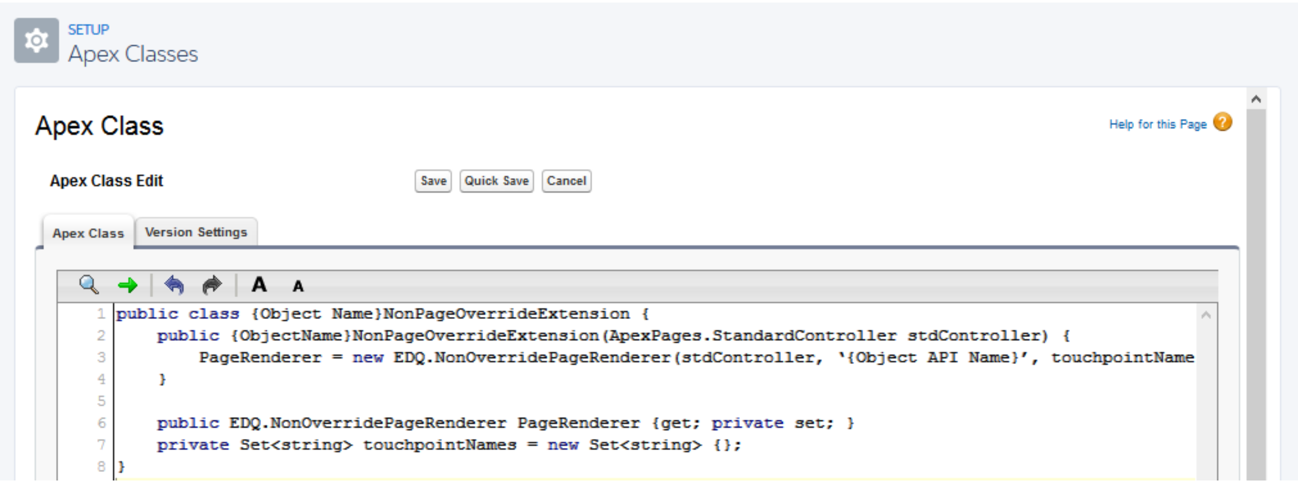
Utilize Global Intuitive Using an Action Button

Note: You should have configured the Object for which you would like to utilize the Global Intuitive Address verification described in the EDQ Administration Settings.

1. Go to **Setup → Platform Tools → Custom Code → Apex Classes**.
2. Click on **New** and enter the following code replacing ***{Object name}*** with the name of your Object.

```
public class {Object Name}NonPageOverrideExtension {
    public {ObjectName}NonPageOverrideExtension(ApexPages.StandardController stdController) {
        PageRenderer = new EDQ.NonOverridePageRenderer(stdController, '{Object API Name}', touchpointNames);
    }

    public EDQ.NonOverridePageRenderer PageRenderer {get; private set; }
    private Set<string> touchpointNames = new Set<string> {};
}
```



Note: If you would like to utilize Global Intuitive only in specific touchpoints, fill the **touchpointNames** collection with the touchpoint names you'd like to be displayed on the view. (eg. Billing Address, Shipping Address).
Example:
`private Set<string> touchpointNames = new Set<string> {'Billing Address', 'Shipping Address'};`
If the touchpointNames collection is left empty, all configured for the current sObject will be available on the view.

3. Click the **Save** button.

4. Go to **Setup → Platform Tools → Custom Code → Visualforce Pages**. Click the **New** button at the top of the Visualforce page to create a new Visualforce page.

5. In the Visualforce Markup tab enter the code:

```
<apex:page standardController="{Object API Name}" title="Experian Data Quality"
tabStyle="{Object API Name}" extensions="{Object’s controller extension name you
created on step 2}" applyHtmlTag="false" applyBodyTag="false" showHeader="false"
cache="false" showQuickActionVfHeader="false">
    <body id="lightningStyle">
        <apex:form id="experianForm" styleClass="edq-{!PageRenderer.SObjectName}
edqNonPageOverride">
             <apex:outputpanel id="edqNonPageOverride" rendered="{!OR(NOT
PageRenderer.IsValidationCompleted, NOT PageRenderer.IsSalesforce1)}">
                <apex:pagemessages id="messages" escape="false" />
                <apex:dynamicComponent componentValue="{!PageRenderer.PageBody}" />

                <edq:DataQualityNonPageOverride PageRenderer="{!PageRenderer}" />
             </apex:outputpanel>
            <edq:DataQualityNonPageOverrideScripts pagerenderer="{!PageRenderer}" />
        </apex:form>
    </body>
</apex:page>
```

6. Replace *{Object API Name}* with the API name of your object (e.g Account). If your Object comes from a managed package make sure that you replace *{Object API Name}* with the full Object API name including the object’s prefix and suffix.

Note: Make sure the page is available for Lightning and Salesforce1 by checking the **Available for Salesforce mobile apps and Lightning Pages** checkbox.

7. Click the **Save** button.

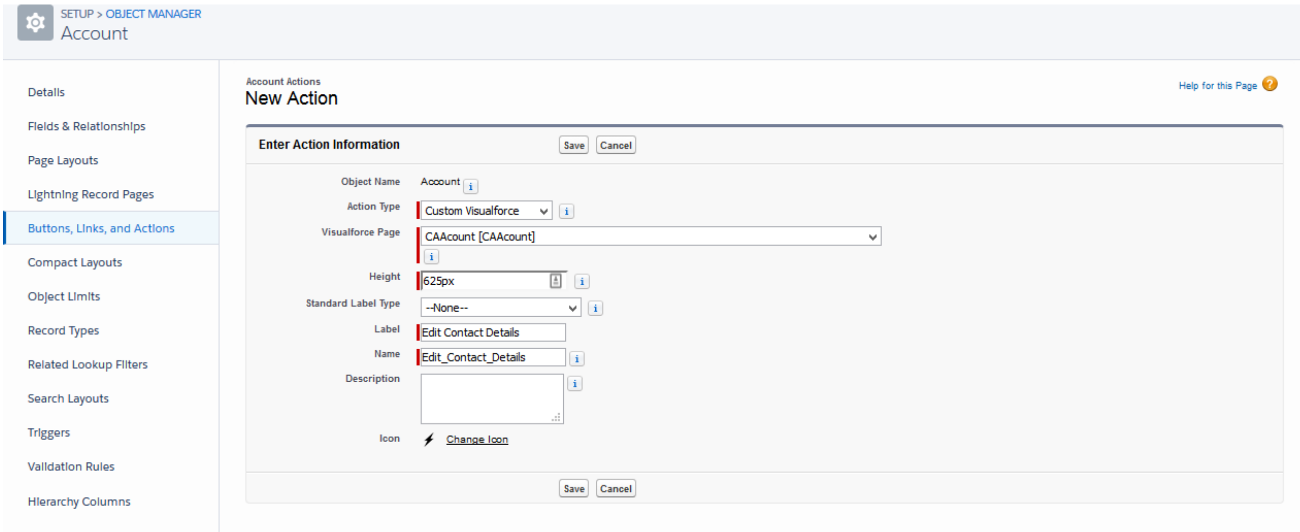
8. Go to **Setup → Platform Tools → Objects and Fields → Object manager → {Object Name}** (e.g. Account).

9. Navigate to the **Buttons, Links, and Actions** section.

10. Click the **New Action** button.

11. Fill in the following information:

    Action Type: Custom Visualforce
    Visualforce Page: Your newly created Visualforce page enabled for Salesforce Lightning and Salesforce1
    Height: 625px
    Label: Edit Contact Details (or any meaningful name)
    Name: Edit_Contact_Details (or any meaningful name)



12. Click the **Save** button.
13. Go to **Platform Tools → Objects and Fields → Object manager → {Object Name}** (e.g. Account).
14. Navigate to the **Page Layouts** section. Click on the arrow next to the desired page layout which you would like to edit and click the **Edit** link.
15. Navigate to the **Salesforce1 and Lightning** section and click on the **Override to customize** icon which looks like a wrench ( ) to customize the section.
16. From the selector at the top of the page select the **Salesforce1 & Lightning Actions** category and then drag the **Edit Contact Details** action button on the page layout in the **Salesforce1 and Lightning Experience Actions** section.
17. Click the **Save** button.