



Abstract

DataTrim is a data quality solution including extensive data cleaning functions and de-duplication of accounts, contacts and leads. DataTrim is built on a pragmatic, time and cost effective data maintenance model for companies with multi-country CRM data. The data cleaning and standardization functionality is optimized for European CRM data with country specific data recognition functionality for more than 20 European countries, USA, Canada and Australia.

Description

With years of experience in cleaning international sales and marketing data, d2b International has compiled their best practice methods and tools into a packaged solution – DataTrim.

With DataTrim for AppExchange we are able to provide you with an integrated solution for cleaning and de-duplicating your data.

The DataTrim cleaning activity will address the dirty data issues: Identifying and standardizing address information according to local address structures, enrichment and correction of missing elements like postcodes, location, region, etc. For contacts the solution will identify gender, harmonize job-functions from business card titles etc. and furthermore validate e-mail, URL and phone/fax respecting local preferences.

The DataTrim matching activity performs de-duplication of accounts, contacts and leads. The matching functionality supports various views and definitions on duplicates, which can be adapted to your preferences.

The results of a de-duplication are accessible through the DataTrim App and are optimized for ease of use. It reuses the merge wizard provided by Salesforce, ensuring that the merge is performed correctly within the application.

Highlights

Name	Description	Type
Data Cleaning	Detailed view of the records, which are object for further cleaning	■ ☒
Data Matcher	Detailed view of the duplicates found, which are object for merge and purge Data Merge for accounts, contacts and leads	■ ☒ ◆

■ = Custom Object, ☒ = Custom Tab, ● = Custom Link, ◆ = Custom S-Control
 ☒ = Plug-In, ✕ = Composite Component

Features & Benefits

- With country and language specific data recognition functionality for more than 20 European countries, USA, Canada and Australia the DataTrim cleaning process will help the harmonization of values across your Salesforce application to e.g. improve segmentation, as it can be configured to recode job-titles into your generic job-functions (CEO, CFO etc.) and activity codes (NACE/SIC/NAF etc.) into your industry segment values, etc.
- The cleaning process will perform the corrections and update your records without your manual intervention. For records which fail the validation checks, entries are passed back to your DataTrim application with information on the reason why they failed, allowing you or your team to validate and correct the records.
- In addition to identifying true dupes the match results with match scores are available for review. This allows matches to be found based on similarities in: Company names – to identify relationships like parent-daughter-sister companies, phone numbers – to identify branches and subsidiaries using a shared phone switchboard, etc.

Key Reports & Dashboards

Name	Description
Data Cleaning Results	Overview of the cleaning results obtained by DataTrim, showing the immediate improvement of the data quality with e.g. the number of records, which need further cleaning
DataTrim Statistics	Detailed information on the total number of records, the number of records cleaned and cleaning outcome, which can be used for customized reports, etc.

Requirements

External Service **1 time set-up**
Salesforce.com Edition **Unlimited, Enterprise, Professional**

Specifications

Publisher d2b International ApS
Type Composite
Salesforce.com Certification Certified
Pricing from €100/month unlimited users
FREE Data Quality Profile

DataTrim

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A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

[Change Owner](#)

<input type="checkbox"/> Action	Name ▲	Account	Contact	Invalid Location	Invalid Postcode	Invalid Phone	Invalid E-Mail	Invalid Website	Address Result
<input type="checkbox"/> Edit Del Detail		BTM Ltd		✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail		HipHop hf		<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail		Hildur Islands		<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail		MSN		<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail		Sirocco AktienGesellschaft		<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail		xColor Imprint GmbH		<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Tom Trift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Liz D'Cruz	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Eske Luffe	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Tom Ripley	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Olouf Harbart	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Decon Fleece	<input type="checkbox"/>	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Susan James	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail		Barbar		✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Del Detail			Jack Rimes	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Show me [fewer](#) ▲ records per list page