

# Advanced Data Quality for Salesforce

Information Asset provides an advanced data quality issue prevention, detection, and remediation solution for Salesforce®, including:

- Advanced validations during data entry to prevent data quality issues entirely
- Duplicate detection with multi-field rules for all standard objects as well as custom objects
- Reports and dashboards for data quality reporting
- Workflows for proposing new data quality rules and validations
- Workflows for reporting and remediating data quality issues

Figure 1 shows a Salesforce Lightning® Component for identifying duplicate opportunities based on a configurable list of fields, in this case the Opportunity Name standard field and two custom fields, Flight Start Date and Flight End Date.

Duplicate Opportunities Report						
Duplicate Deals Opportunities						
Records per page: 25		Search by any Column				
Count	Planning...	Opportunity Id	Opportunity Name	Flight Start Date	Flight End Date	
1	5	0061K00000fNO...	30 Madison 3Q 2020	Jun 29, 2020	Sep 27, 2020	
2	5	0061K00000fNO...	30 Madison 3Q 2020	Jun 29, 2020	Sep 27, 2020	
3	5	0061K00000fNO...	30 Madison 3Q 2020	Jun 29, 2020	Sep 27, 2020	
4	5	0061K00000fNO...	30 Madison 3Q 2020	Jun 29, 2020	Sep 27, 2020	
5	5	0061K00000fNO...	30 Madison 3Q 2020	Jun 29, 2020	Sep 27, 2020	
6	2	0061100000LP2L...	Clutch	Sep 4, 2020	Sep 5, 2020	
7	2	0061100000LP2L...	Clutch	Sep 4, 2020	Sep 5, 2020	

Figure 1: Opportunity Duplicate Detection

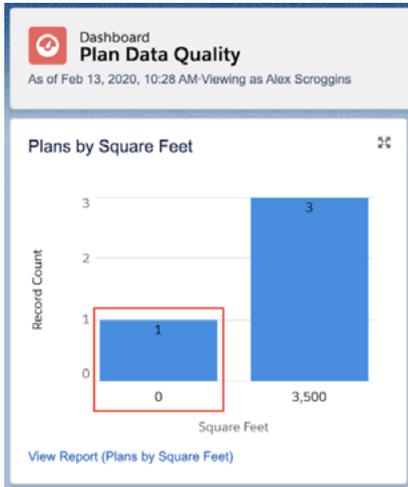


Figure 2 shows a sample report for home plans (a custom object) synced to Salesforce from an external application (JD Edwards®). The report identifies a data quality issue that allows home plans to be defined in the system with total square footage equal to zero.

Figure 2: Data Quality Dashboard for a Custom Object

Figure 3 shows a sample approval process for a proposed data quality rule to prevent the discovered data quality issue.

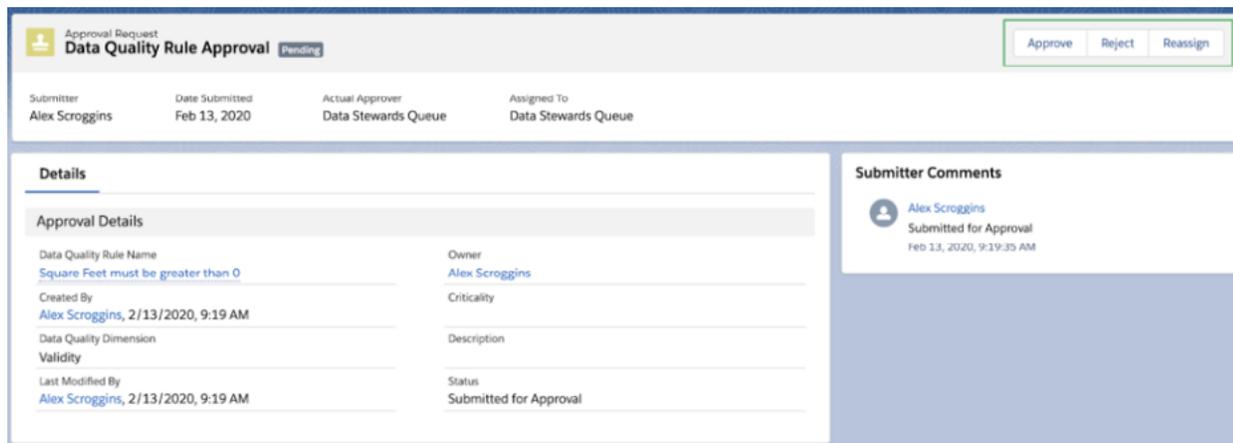


Figure 3: Data Quality Rule Approval Workflow

## Benefits

The advanced data quality solution provides several benefits:

- Prevent data quality issues entirely by catching them at the time data is entered.
- Measure the quality of data in real-time through advanced reports and dashboards.
- Remediate data quality issues faster by notifying key stakeholders through custom workflows built in Salesforce rather than a third-party application.

## Next Steps

If you'd like to explore how to build custom Salesforce applications for data-enabled digital transformation, please contact [sales@information-asset.com](mailto:sales@information-asset.com). For more information, please visit our website, [www.information-asset.com](http://www.information-asset.com).