



---

# Data Quality

Salesforce, Spring '24





# CONTENTS

<b>DATA QUALITY</b> .....	<b>1</b>
Manage Duplicate Records .....	<b>2</b>
Integrate Third-Party Data with Your Records .....	<b>50</b>
Use Data.com to Find Leads and Keep Your Data Current and Complete .....	<b>88</b>
<b>INDEX</b> .....	<b>186</b>



# DATA QUALITY

Business success depends on accurate, complete data that your sales team knows they can rely on. Use Duplicate Management to reduce and prevent duplicate records. Use Data Integration, Data.com Prospector, or Data.com Clean to incorporate data from third parties and Data.com into your records. Duplicate Management and Data Integration are included in Salesforce. Data.com Prospector and Data.com Clean require a license.

## [Manage Duplicate Records](#)

Maintaining clean, accurate data is one of the most important things you can do to get the most out of Salesforce. It builds the trust of your sales team and helps you work toward complying with various data protection and privacy regulations. Salesforce gives you tools for managing duplicates one at a time and across your org, and to track your progress in eliminating duplicates.

## [Integrate Third-Party Data with Your Records](#)

Give your sales team data and connections that they can use to cultivate great relationships with customers and target productive prospects. Lightning Data and Data.com connect you with firmographic, industry, and region-specific data from third-party providers. You license Lightning Data packages directly from providers, and you use a convenient unified interface to integrate data from all third-party sources into Salesforce.

## [Use Data.com to Find Leads and Keep Your Data Current and Complete](#)

Use Data.com Prospector to find leads to grow your business. Use Data.com Clean to keep your account, contact, and lead records current and complete. Separate licenses are required for each.

# Manage Duplicate Records

Maintaining clean, accurate data is one of the most important things you can do to get the most out of Salesforce. It builds the trust of your sales team and helps you work toward complying with various data protection and privacy regulations. Salesforce gives you tools for managing duplicates one at a time and across your org, and to track your progress in eliminating duplicates.

## [Manage Duplicates One at a Time](#)

Give your sales team the tools they need for maintaining great relationships with customers, and keep your leads, accounts, and contacts clutter free. By activating duplicate rules and the Potential Duplicates component, you can control whether and when sales reps can create duplicate accounts, contacts, and leads. You can also give them permission to merge duplicate leads, business and person accounts, and contacts.

## [Manage Duplicates Globally](#)

Find duplicates across your org by running duplicate jobs. Use reports to share job results with others, and use duplicate record sets to merge the duplicates. Use information about completed jobs to track your progress in reducing duplicate records.

## [Duplicate Detection and Handling Process](#)

Salesforce finds and handles duplicates using a combination of matching rules and duplicate rules. Duplicate rules and duplicate jobs specify matching rules that determine how duplicates are identified. Duplicate sets and reports list the duplicates found.

## [Customize Duplicate Management](#)

Configure duplicate management to align with other customizations you make and detect duplicates missed by standard rules. Customize the user interface for handling duplicates: For example, block users from creating duplicates instead of just warning them, or run different duplicate rules for different user profiles. Customize the logic used to identify duplicates: For example, include a custom field in a matching rule, specify field mapping, or customize matching criteria on fields.

## [Considerations for Using Duplicate Management in the Salesforce Mobile App](#)

Review considerations for using duplicate management features on a mobile device.

### SEE ALSO:

[Merge Duplicate Accounts](#)

[Merge Duplicate Contacts](#)

[Merge Duplicate Leads](#)

[Manage Duplicate Data Privacy Records](#)

[How Duplicate Management Works with Data.com Prospector and Data.com Clean](#)

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To view duplicate rules and matching rules:

- View Setup and Configuration

To create, edit, delete, activate, and deactivate duplicate rules and matching rules:

- Customize Application

## Manage Duplicates One at a Time

Give your sales team the tools they need for maintaining great relationships with customers, and keep your leads, accounts, and contacts clutter free. By activating duplicate rules and the Potential Duplicates component, you can control whether and when sales reps can create duplicate accounts, contacts, and leads. You can also give them permission to merge duplicate leads, business and person accounts, and contacts.

- ▶ [Take Control of Duplicates: Use Duplicate Rules and the Potential Duplicates Component \(English only\)](#)
- ▶ [Use Matching Rules to Hunt Down Duplicate Records \(English only\)](#)

### [Stop Users from Creating Duplicate Records](#)

When sales reps are in the process of creating or editing a record, alert them that the data they're entering duplicates an existing record. Or block sales reps from creating duplicate records altogether, whether or not they have access to the existing record. Activate duplicate rules and customize the settings.

### [Show Duplicate Records in Lightning Experience](#)

If a record duplicates other records, you can alert sales reps when they open the record in Lightning Experience. Activate duplicate rules and add alerts to page layouts.

### [Show Duplicate Records in Salesforce Classic](#)

If a record duplicates other records, you can alert sales reps when they open the record in Salesforce Classic by activating duplicate rules.

#### SEE ALSO:

[Manage Duplicates Globally](#)

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

#### USER PERMISSIONS

To view duplicate rules and matching rules:

- View Setup and Configuration

To create, edit, delete, activate, and deactivate duplicate rules and matching rules:

- Customize Application

## Stop Users from Creating Duplicate Records

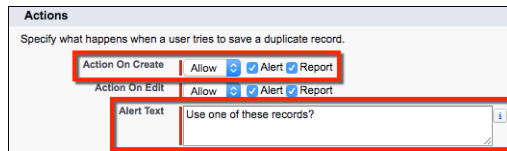
When sales reps are in the process of creating or editing a record, alert them that the data they're entering duplicates an existing record. Or block sales reps from creating duplicate records altogether, whether or not they have access to the existing record. Activate duplicate rules and customize the settings.

Standard duplicate rules are activated by default for business accounts, contacts, and leads. If your org was created before Summer '17, the rules came activated for you. To use duplicate rules for person accounts, first enable person accounts, and then activate person account matching and duplicate rules in Setup.

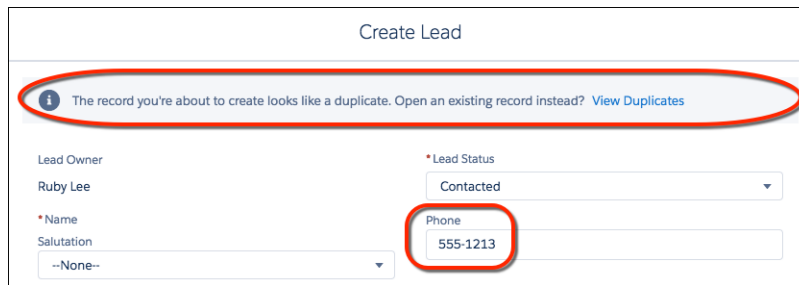
Here are three ways to use a duplicate rule to handle duplicates, using leads as an example.

- Alert sales reps when they're about to create a duplicate lead.

In Setup, use the Quick Find box to find **Duplicate Rules**. Make sure that the Standard Lead Duplicate Rule is set to display the alert.



With the Standard Lead Duplicate Rule activated, suppose that a sales rep starts creating a lead. The rep enters a phone number that matches the phone number of a lead already in Salesforce. The rule detects the duplicate and alerts the rep. The rep can choose to save the lead, because the rule is set to show an alert but not block duplicates. Or the rep can click **View Duplicates** to see existing records instead.



In this example, the lead the rep started to create is a duplicate of two other leads and a contact. Lightning Experience displays up to 15 duplicate records.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

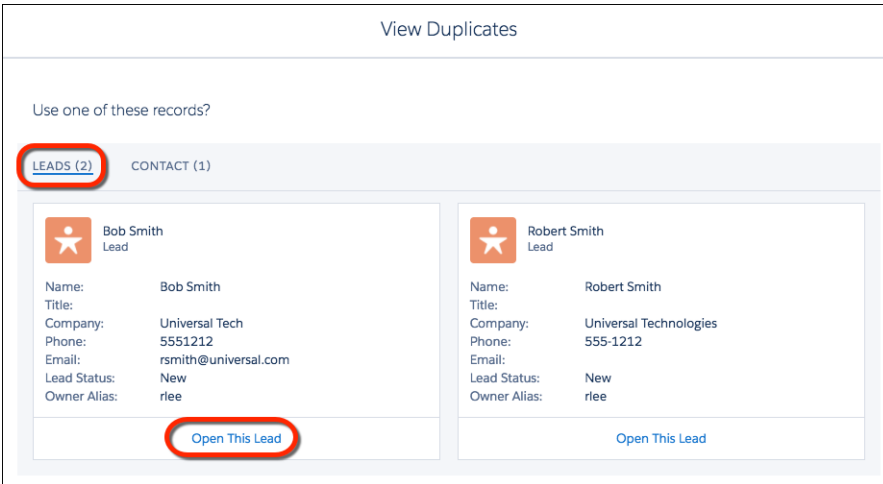
To view duplicate rules and matching rules:

- View Setup and Configuration

To create, edit, delete, activate, and deactivate duplicate rules and matching rules:

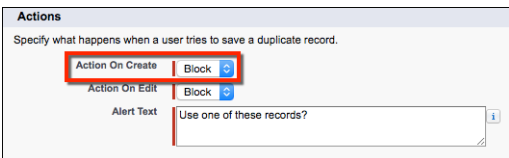
- Customize Application



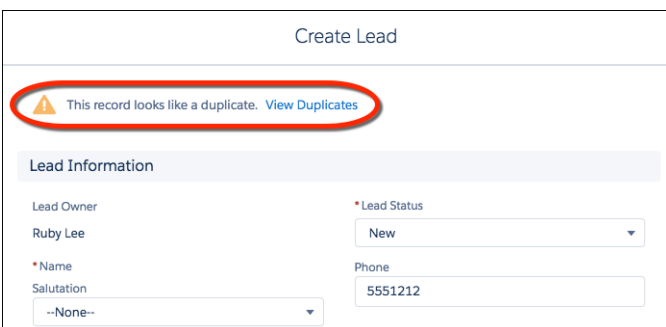


**Note:** In Salesforce Classic, when users create accounts using a quick action, they can't view duplicate records or save the new record if it's a duplicate. This condition applies even if you've set Action on Create to **Allow**.

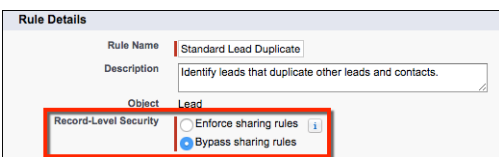
- Block sales reps from creating duplicate leads.  
In the Standard Lead Duplicate Rule, select **Block** instead of **Allow**.



With the Standard Lead Duplicate Rule set to block duplicates, a rep can click to view duplicates of leads but can't save a new lead.



- Prevent reps from creating duplicates of records they don't have permission to view.  
In the duplicate rule, change **Enforce sharing rules** to **Bypass sharing rules**.



When the duplicate rule is set to bypass sharing rules, it operates on all potential duplicates regardless of ownership. Suppose that a rep starts creating a record that duplicates a record the rep doesn't have access to. Salesforce alerts the rep and allows or blocks the duplicate according to your Action on Create setting. But Salesforce doesn't display the record the rep doesn't have access to.

SEE ALSO:

[Show Duplicate Records in Lightning Experience](#)

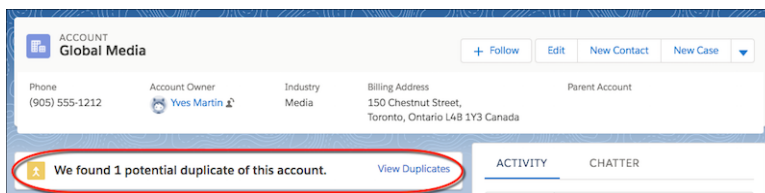
[Enable Person Accounts](#)

## Show Duplicate Records in Lightning Experience

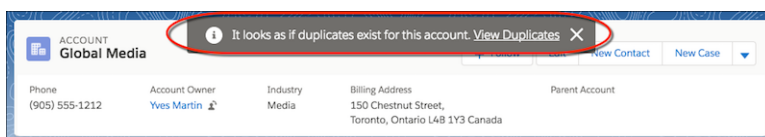
If a record duplicates other records, you can alert sales reps when they open the record in Lightning Experience. Activate duplicate rules and add alerts to page layouts.

In orgs created in Summer '17 and later, standard duplicate rules and the Potential Duplicates component are set up and activated for business accounts, contacts, and leads. To use duplicate rules and the Potential Duplicates component for person accounts, first enable person accounts. Then activate person account matching rules and duplicate rules, and add the Potential Duplicates component to your person accounts layout.

You can alert sales reps to duplicates by showing a card on record home pages.



Or you can show a temporary toast message. You can also display both types of alerts.



1. In Setup, use the Quick Find box to find **Lightning App Builder**.
2. On accounts, contacts, or leads, add the Potential Duplicates component.

### EDITIONS

Available in: Lightning Experience

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

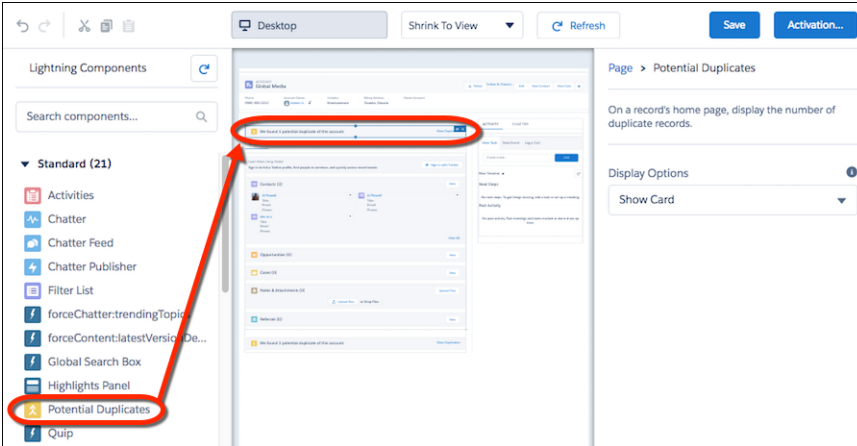
### USER PERMISSIONS

To view duplicate rules and matching rules:

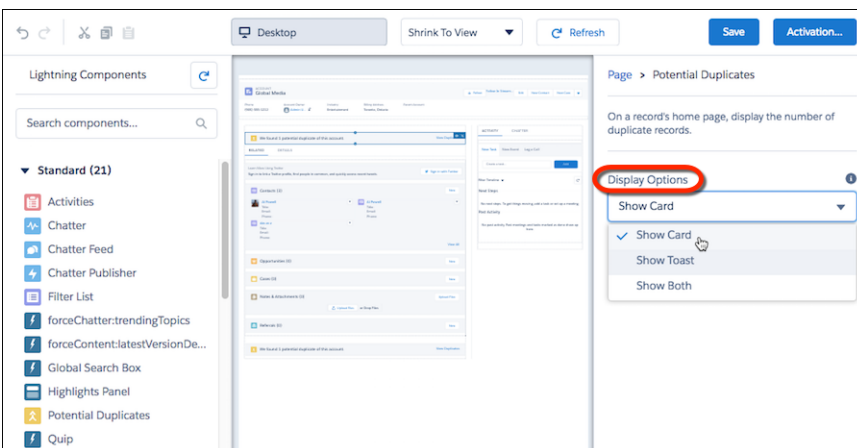
- View Setup and Configuration

To create, edit, delete, activate, and deactivate duplicate rules and matching rules:

- Customize Application



3. Select how you want to alert sales reps to duplicates.



You can't add the Potential Duplicates component to custom objects. However, you can create rules to handle custom-object records that duplicate an account, contact, or lead.

Reps who have permission to merge duplicates can choose up to three records on the same object to merge.

SEE ALSO:

- [Stop Users from Creating Duplicate Records](#)
- [Guidelines for Merging Duplicate Accounts](#)
- [Considerations for Merging Duplicate Contacts](#)
- [Things to Know About Merging Duplicate Leads](#)
- [Enable Person Accounts](#)

## Show Duplicate Records in Salesforce Classic

If a record duplicates other records, you can alert sales reps when they open the record in Salesforce Classic by activating duplicate rules.

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To view duplicate rules and matching rules:

- View Setup and Configuration

To create, edit, delete, activate, and deactivate duplicate rules and matching rules:

- Customize Application

Lead Owner

The screenshot shows the 'Lead Edit' interface for a lead named 'marc benioff'. At the top, there are buttons for 'Save (Ignore Alert)', 'Save & New (Ignore Alert)', and 'Cancel'. A red alert message states: '8 Possible Duplicate Records Found. You're creating a duplicate record. We recommend you use an existing record instead.' Below the alert is a table of duplicate leads with columns: Name, Street, Phone, Zip/Postal Code, Email, Company, City, Title, Lead Owner, and Last Modified Date. The table lists five duplicate records for 'marc benioff'. Below the table is a 'Contacts' section with two entries: 'marc Benioff' and 'Mike Benioff'. At the bottom is the 'Lead Information' form with fields for Lead Owner, First Name, Last Name, Company, Title, Lead Status, Phone, Email, and Rating. Red boxes and arrows point to these elements: 1 points to the alert message, 2 points to the alert text, 3 points to the 'Save (Ignore Alert)' button, 4 points to the duplicate records table, and 5 points to the form fields.

1. Reps see a message with the number of duplicates found. The number represents only the records that a rep has access to. If you've selected the **Bypass sharing rule** option, which compares all records regardless of a rep's access, the message indicates whether duplicates were detected. If a rep doesn't have access to any of the duplicates, the message indicates that there are duplicates but doesn't include the number.
2. If your duplicate rule includes an alert, it appears beneath the message.
3. If your duplicate rule lets reps save duplicates, they see the Save (Ignore Alert) button. If your duplicate rule blocks reps from saving duplicates, they see the Save button, but they can't save the record.
4. The list of duplicates includes only records that a rep has access to. The fields shown include only fields that the rep has access to, up to the first seven fields compared by the associated matching rule. The list displays a maximum of five records. If more than five duplicates are found, clicking **Show All >>** displays a full list of records, up to 100.
5. The highlighted fields were defined as matches by the associated matching rule.

## Manage Duplicates Globally

### USER PERMISSIONS

To run duplicate jobs:	Customize Application
To create or update custom report types:	Manage Custom Report Types
To delete custom report types:	Modify All Data
To view duplicate record sets and items:	View on accounts, contacts, or leads
To merge duplicate record items:	Edit and Delete on accounts, contacts, or leads
To view error logs:	View Setup and Configuration

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Find duplicates across your org by running duplicate jobs. Use reports to share job results with others, and use duplicate record sets to merge the duplicates. Use information about completed jobs to track your progress in reducing duplicate records.

#### [Find Duplicates Across Your Org Using Duplicate Jobs in Lightning Experience](#)

Use duplicate jobs with standard or custom matching rules to scan your Salesforce business or person accounts, contacts, or leads for duplicates.

#### [Create Reports on Duplicate Records](#)

Use duplicate record reports to fine-tune your duplicate and matching rules and share the results of duplicate jobs.

#### [Manage Duplicates Using Duplicate Record Sets](#)

A duplicate record set is a list of items identified as duplicates. It's created when a duplicate rule or job runs. Let your Lightning Experience users merge duplicates by granting them access to duplicate record sets.

#### [View Error Logs for Duplicate Rules and Matching Rules](#)

Troubleshoot system errors that prevent duplicate rules or matching rules from running. Error logs are deleted after 90 days.

#### SEE ALSO:

[Manage Duplicates One at a Time](#)

## Find Duplicates Across Your Org Using Duplicate Jobs in Lightning Experience

Use duplicate jobs with standard or custom matching rules to scan your Salesforce business or person accounts, contacts, or leads for duplicates.

### [Run Duplicate Jobs in Lightning Experience](#)

Run jobs to find duplicate business and person accounts, contacts, or leads across your org.

### [Things to Know About Duplicate Jobs](#)

Review considerations for using duplicate jobs.

### SEE ALSO:

[Manage Duplicates One at a Time](#)

## Run Duplicate Jobs in Lightning Experience

Run jobs to find duplicate business and person accounts, contacts, or leads across your org.

### [Use Matching Rules to Hunt Down Duplicate Records \(English only\)](#)

1. In Setup, use the Quick Find box to find **Duplicate Jobs**.
2. Click **New Job**.

JOB	MATCHING RULE	DUPLICATES	SCANNED	CREATED BY	STARTED	JOB STATUS
Lead Dec 6, 2017 2:25 PM	Standard Lead Matching Rule...	40,364	100,313	Ruby Lee	Dec 6, 2017 2:25:14 PM	Completed
Person Account 8-Nov-201...	Standard Person Account Ma...	48,818	58,749	Ruby Lee	Nov 8, 2017 10:52:34 AM	Results Deleted
Standard Contact Matchin...	Standard Contact Matching R...	102	210	Ruby Lee	Nov 8, 2017 10:50:46 AM	Completed

3. Select an object. Select an existing matching rule or create one. Only matching rules for the object you select are available. If you like, edit the default job name. Click **Run**.

New Duplicate Job

Object:

Matching Rule:  A matching rule determines how the job identifies duplicates. [Edit Matching Rules](#)

[> Matching Rule Details](#)

Job Name:

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Performance** and **Unlimited** Editions

### USER PERMISSIONS

To run duplicate jobs:

- Customize Application
- AND
- View All Data

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Performance** and **Unlimited** Editions

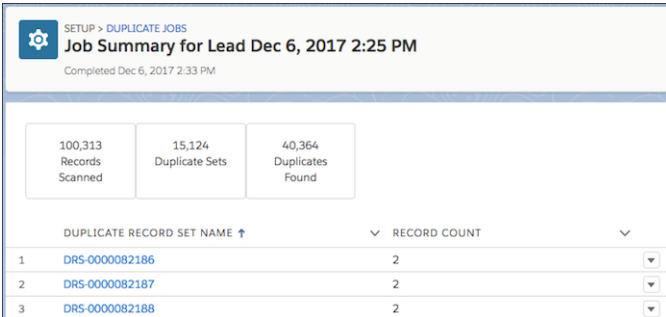
### USER PERMISSIONS

To run duplicate jobs:

- Customize Application
- AND
- View All Data

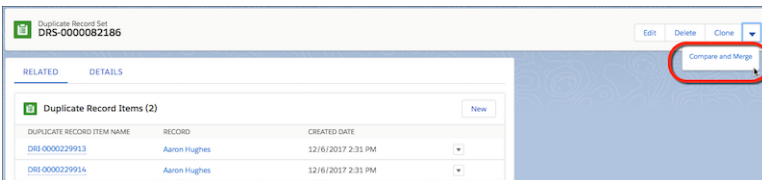
You can't delete or edit the name or description after creating a job. If you're working toward complying with various data protection and privacy regulations, consider excluding personal data from the name and description.

The job summary page shows the status of jobs. You're notified by email when a job is finished.



SETUP > DUPLICATE JOBS		
Job Summary for Lead Dec 6, 2017 2:25 PM		
Completed Dec 6, 2017 2:33 PM		
100,313 Records Scanned	15,124 Duplicate Sets	40,364 Duplicates Found
DUPLICATE RECORD SET NAME ↑	RECORD COUNT	
1 DRS-0000082186	2	
2 DRS-0000082187	2	
3 DRS-0000082188	2	

- To rerun a job, click **New Job**, and then select the same object and matching rule.
- To view and merge duplicates, open a job summary page, and then open a record set. Click the **Related** tab. Select the **Compare and Merge** action.



Duplicate Record Set		
DRS-0000082186		
Edit	Delete	Clone
Compare and Merge		
RELATED	DETAILS	
Duplicate Record Items (2)		
DUPLICATE RECORD ITEM NAME	RECORD	CREATED DATE
DRS-0000229923	Aaron Hughes	12/6/2017 2:31 PM
DRS-0000229934	Aaron Hughes	12/6/2017 2:31 PM

To let users merge duplicates in sets, give them access to duplicate record sets in Lightning Experience.

- To share the results of a job, run a report on the duplicate record set generated by the job.

## Things to Know About Duplicate Jobs

Review considerations for using duplicate jobs.

### Compare and Merge Not Supported for Custom Objects

You can run duplicate jobs on custom objects, but you can't compare and merge duplicate records.

### Job Limits

New jobs are blocked, or job results are deleted or overwritten, under the following circumstances.

- Creating a job with the same settings (object and matching rule) as a completed job overwrites the earlier job. We alert you before running the job to confirm.
- Suppose that you run a job, and then you edit the matching rule you used. When you run another job using the rule, we delete the results of the first job without alerting you.
- When the total number of duplicates in all completed jobs reaches 1,000,000, you can't run new jobs. To run a job, delete the results of one or more jobs until the number of duplicate record items falls below 1,000,000.
- In an org with many records, duplicate jobs can fail.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic (not available in all orgs)

Available in: **Performance** and **Unlimited** Editions

When the results of a duplicate job are deleted, the information about the job is preserved: the number of records scanned, sets of duplicates found, and individual duplicates found.

### Duplicate Record Sets and List Views

For each job you run, a list view of duplicate record sets is generated.

- If you delete the list view, the duplicate record sets and duplicate record items persist, and information about the job in Setup also persists.
- However, if you delete the job's results in Setup, the corresponding list view, duplicate record sets, and duplicate record items are all deleted.

### Required Custom Fields on Duplicate Record Set or Duplicate Record Item Layouts

When duplicate record sets or items in a set generated by a duplicate job contain required custom fields, the job fails.

### Encrypted Fields Used for Matching

If a field included in a matching rule used for a duplicate job is encrypted, the job fails.

## Create Reports on Duplicate Records

Use duplicate record reports to fine-tune your duplicate and matching rules and share the results of duplicate jobs.

A duplicate records report can include the following records.

- Duplicates created when a rule alerts a user to a possible duplicate, but the user creates the duplicate anyway. (To generate this report, select the **Report** option in a duplicate rule.)
  - Records manually added to a duplicate record set
  - Records in duplicate record sets generated by duplicate jobs
1. In Setup, use the Quick Find box to find **Report Types**.
  2. Create a report type, selecting **Account**, **Contact**, **Lead**, or **Duplicate Record Set** as the primary object.
 

If you use person accounts, distinguish them from business accounts by adding the **Is Person Account** field in the field layout properties for your report type.

If you're working toward complying with various data protection and privacy regulations, consider excluding personal data from the report name and description.
  3. Click **Next**.
  4. Relate **Duplicate Record Items** to the primary object that you selected. Save the report type.
  5. Give your users access to the Duplicate Record Set and Duplicate Record Items objects. Then they can create reports based on the custom record type you've created.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### USER PERMISSIONS


To create or update custom report types:

- Manage Custom Report Types

To delete custom report types:

- Modify All Data



 **Example:** Let's say that you're using the standard duplicate rule for leads. You want to report on the duplicate leads that your rule detected. Create a custom report type with Lead as the primary object. Then create reports based on that report type.

Or let's say that you want to share the results of duplicate jobs, or see how well your duplicate rules are working overall. Create a custom report type with Duplicate Record Sets as the primary object. Then create reports based on that report type.

#### SEE ALSO:

[Manage Duplicates Using Duplicate Record Sets](#)


[Set Up a Custom Report Type](#)

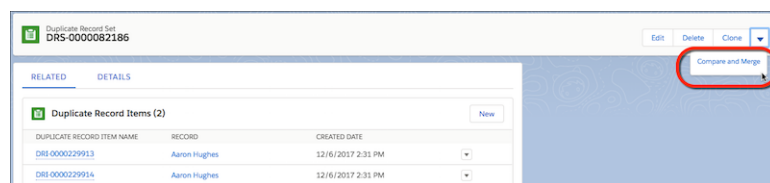
## Manage Duplicates Using Duplicate Record Sets

A duplicate record set is a list of items identified as duplicates. It's created when a duplicate rule or job runs. Let your Lightning Experience users merge duplicates by granting them access to duplicate record sets.

You can grant access to duplicate record sets and duplicate record items to users with a Sales Cloud, Service Cloud, or Sales & Service Cloud license.

Duplicate record sets containing the results of duplicate jobs don't include a link to the job by default. To include the link, use Lightning App Builder to add the Parent field to your duplicate record set layout.

- View duplicate record sets.
  - In Lightning Experience, from the App Launcher, open **Duplicate Record Sets**.
  -  **Note:** In list views, duplicate record sets are displayed in Table view only.
  - In Salesforce Classic, click the Duplicate Record Sets tab.
- To manage duplicates that aren't surfaced by a duplicate rule, create a duplicate record set.
  - On a duplicate record set list view, click **New**.
  - Specify a duplicate rule (in the Duplicate Rule field) or a duplicate job (in the Parent field).
  - In Lightning Experience, in the Related tab, click **New**. In Salesforce Classic, on the duplicate record set detail page, click **New Duplicate Record Item**.
- In Lightning Experience only, merge duplicates in a set by selecting the **Compare and Merge** action.



To let users merge duplicates in sets, give them access to duplicate record sets in Lightning Experience.

#### SEE ALSO:

[Create Reports on Duplicate Records](#)

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### USER PERMISSIONS

To view duplicate record sets and items:

- View on accounts, contacts, or leads

To merge duplicate record items:

- Edit and Delete on accounts, contacts, or leads

## View Error Logs for Duplicate Rules and Matching Rules

Troubleshoot system errors that prevent duplicate rules or matching rules from running. Error logs are deleted after 90 days.

1. From Setup, use the Quick Find box to find **Duplicate Error Logs**.
2. View the error logs. Logs are displayed in a list view.

Object	Record	Duplicate Rule	Matching Rule	Error Message	Created Date
Lead	Smith, Andy	Standard Lead Duplicate Rule	Standard Lead Matching Rule v1.0	Unable to report on duplicate records. DuplicateRecordItem : Required fields are missing; Duplicate Record Set.Account	11/7/2017 5:23 AM
Lead	Smith, Andy	Standard Lead Duplicate Rule	Standard Lead Matching Rule v1.0	Unable to report on duplicate records. DuplicateRecordItem : Required fields are missing; Duplicate Record Set.Account	11/7/2017 5:23 AM
Contact	Martinez, Kate	Standard Contact Duplicate Rule	Standard Contact Matching Rule v1.1	Unable to report on duplicate records. DuplicateRecordSet : Required fields are missing; [Account]	11/7/2017 5:22 AM
Contact	Martinez, Kate	Standard Contact Duplicate Rule	Standard Contact Matching Rule v1.1	Unable to report on duplicate records. DuplicateRecordSet : Required fields are missing; [Account]	11/7/2017 5:22 AM
Lead	Smith, Andy	Standard Lead Duplicate Rule	Standard Lead Matching Rule v1.0	Unable to report on duplicate records. DuplicateRecordItem : Required fields are missing; Duplicate Record Set.Account	10/24/2017 7:17 PM
Lead	Smith, Andy	Standard Lead Duplicate Rule	Standard Lead Matching Rule v1.0	Unable to report on duplicate records. DuplicateRecordItem : Required fields are missing; Duplicate Record Set.Account	10/16/2017 4:11 PM

**Example:** Here are some scenarios that can produce errors.

- The match engine used for fuzzy matching methods is temporarily unavailable. Matching rules that include fuzzy matching methods don't run.
- The Report option on duplicate rules is selected, but a report isn't generated because the system can't create a duplicate record set. (Reports on duplicates are based on duplicate record sets.)

## Duplicate Detection and Handling Process

Salesforce finds and handles duplicates using a combination of matching rules and duplicate rules. Duplicate rules and duplicate jobs specify matching rules that determine how duplicates are identified. Duplicate sets and reports list the duplicates found.

### 1. A Matching Rule Compares Records and Detects Duplicates

The matching rule specified in a duplicate rule or job can compare records on the same object, such as leads, or one other object. For example, a rule can compare leads that duplicate contacts.

A matching rule consists of an equation that determines how to compare the fields in a pair of records. Criteria on the fields determine how broadly a match is defined. Indexing and algorithms speed up the matching process.

When a matching rule is activated, one or more match keys are applied to existing records. The matching rule looks only for duplicates among records with the same match key. If two records don't share match keys, they aren't considered duplicates, and the matching algorithms aren't applied to them. This indexing process improves performance and returns a better set of match candidates.

### 2. A Duplicate Rule or Job Handles Duplicates

Duplicates can be detected when a sales rep creates, clones, or edits a record and a duplicate rule runs, or when you run a duplicate job. They can also be detected as part of other processes, such as importing or an API.

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### USER PERMISSIONS

To view error logs:

- View Setup and Configuration

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

A duplicate rule alerts a sales rep and lists possible duplicates.

Duplicate job results list duplicates across an org.

### 3. Sets and Reports List Duplicates Found

Duplicate record sets list the duplicates found when duplicate rules or jobs run. Reports of duplicates are generated from these sets.

## Customize Duplicate Management

Configure duplicate management to align with other customizations you make and detect duplicates missed by standard rules. Customize the user interface for handling duplicates: For example, block users from creating duplicates instead of just warning them, or run different duplicate rules for different user profiles. Customize the logic used to identify duplicates: For example, include a custom field in a matching rule, specify field mapping, or customize matching criteria on fields.

#### Duplicate Rules

A duplicate rule defines what happens when a user views a record with duplicates or starts creating a duplicate record. Salesforce provides standard duplicate rules for business and person accounts, contacts, and leads. You can also create duplicate rules.

#### Matching Rules

A matching rule defines how duplicate records are identified in duplicate rules and duplicate jobs. Salesforce provides standard matching rules for business and person accounts, contacts, and leads. You can also create custom matching rules.

## Duplicate Rules

A duplicate rule defines what happens when a user views a record with duplicates or starts creating a duplicate record. Salesforce provides standard duplicate rules for business and person accounts, contacts, and leads. You can also create duplicate rules.

#### Customize Duplicate Rules

Manage duplicates more effectively by adjusting the settings in standard duplicate rules or creating custom rules.

#### Things to Know About Duplicate Rules

Review considerations for using and customizing duplicate rules.

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### USER PERMISSIONS

To create, edit, or delete duplicate rules and matching rules:

- Customize Application

To activate and deactivate duplicate rules and matching rules:

- Customize Application

To view duplicate rules and matching rules:

- View Setup and Configuration

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### Standard Duplicate Rules

Each standard duplicate rule includes a corresponding standard matching rule that determines how records are identified as duplicates.

SEE ALSO:

[Matching Rules](#)

[Enable Person Accounts](#)

## Customize Duplicate Rules

Manage duplicates more effectively by adjusting the settings in standard duplicate rules or creating custom rules.

To see the duplicates detected by a duplicate rule, users must have Read access to the object defined in the rule.

1. From Setup, use the Quick Find box to find **Duplicate Rules**.
2. To edit a rule, click the rule name, and click **Edit**. To create a rule, click **New Rule**, and select the object you want the rule to apply to.
3. Enter the rule details, including a name, description, and record-level security settings.  
If you're working toward complying with various data protection and privacy regulations, consider excluding personal data from the name and description.
4. Select the actions you want to occur when a user starts creating a duplicate.  
The default actions are to alert users when they start to create a duplicate, and report on duplicates created when users create or edit records. You can customize the provided alert text.

5. In the Matching Rules section, select the object to compare records on. Then select the matching rule that determines how records are identified as duplicates.

The list includes all available matching rules for the selected object.



**Tip:** If you want to use a new custom matching rule, we recommend that you finish creating your duplicate rule before selecting **Create New Matching Rule**. Then create and activate the matching rule. The new matching rule is automatically associated with the duplicate rule.

6. Select the field mapping for each matching rule, if needed.  
If the matching rule compares records on two different objects or uses custom fields, consider the following:
  - Decide how you want to compare the fields on the first object to the fields on the second object. For example, map a custom field called Work Email to the standard Email field.
  - If two text fields with different maximum lengths are compared, data in the fields can be truncated before a match is determined.
7. If you want your duplicate rule to run only when specific conditions are met, enter the conditions.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To create, edit, or delete duplicate rules:

- Customize Application

To activate and deactivate duplicate rules:

- Customize Application

To view duplicate rules:

- View Setup and Configuration

For example, the rule runs only if a user with a certain profile or role creates a record. Or set a condition for the rule to run only if the record includes a specific country, state, or province.

**8.** Save and activate the rule.

For the activation to succeed, all associated matching rules must be active.

**9.** If you have more than one active duplicate rule for a particular object, consider adjusting the order in which the rules are processed. Reorder rules by clicking **Reorder** on any rule's detail page.



**Tip:** If the first duplicate rule finds a match for a particular record, subsequent duplicate rules skip that record. Arrange your duplicate rules so that rules with the Block option run before rules with the Allow option.

## Things to Know About Duplicate Rules

Review considerations for using and customizing duplicate rules.

### Number of Duplicate and Matching Rules

- You can use up to five active duplicate rules per object.
- You can add up to three matching rules in each duplicate rule, with one active matching rule per object. When you use multiple duplicate rules, you can include up to five active matching rules per object.

### Duplicate Record Sets Generated by Selecting the Report Option

If you select the Report option for duplicates identified using a duplicate rule, and a user saves a record identified as a duplicate, the following happens.

- The saved record and the maximum number of duplicates are reassigned to a new or existing duplicate record set. For each matching rule run on a record, up to 100 duplicates can be reassigned to a duplicate record set. A matching rule can be associated with a duplicate rule or a duplicate job.
- The saved record and each of its duplicates are listed as duplicate record items in the duplicate record set.
- If the duplicate rule looks for duplicates across objects (for example, contacts that duplicate leads), the duplicate record set includes duplicates on the other objects.

If a duplicate lead is converted before the duplicate record set is created, the duplicate record set doesn't include the converted lead.

### Records with More Than 100 Matches

Match keys help to increase the performance of duplicate rules through a preliminary comparison that narrows the matches to the 100 most likely duplicate records. Then the rule applies the matching equation only to those likely matches.

### Impact of User Access on Rules

If a user who updates a record doesn't have access to one or more fields referenced in a matching rule, then the duplicate rule doesn't work as expected. For example, suppose that standard users don't have access to the account name field. Then an admin creates a matching rule that depends on the field. If an admin updates a record, the duplicate rule runs as expected. But when a standard user updates the same record, the rule doesn't identify duplicates.

### How Rules Operate on Edited Fields

You can configure a duplicate rule to perform an action when a record is created or edited. However, the rule only runs on edited records when the edited fields are included in the associated matching rule. For example, if a sales rep edits a custom field, the rule doesn't run unless you've created a matching rule that includes the custom field.

### Global Picklist Value Sets

Global picklist values aren't supported in duplicate rules.

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

**Custom Picklists**

Custom picklist fields aren't supported in matching rules used in cross-object duplicate rules. For example, you can't use a custom picklist field on the lead object in a rule that matches contacts which duplicate leads.

**Changes to a Rollup Summary Field Value**

When a rollup summary field value changes, duplicate rules run, and the Allow option (to save a duplicate record) isn't supported.

**Conditions Under Which Duplicate Rules Don't Run**

- Records are created using Quick Create or Community Self-Registration.
- Leads are converted to accounts or contacts, and **Use Apex Lead Convert** isn't enabled.
- Records are restored with the Undelete button.
- Records are added using Lightning Sync or Einstein Activity Capture.
- Records are manually merged.
- A Self-Service user creates records, and the rules include conditions based on the User object.
- Duplicate rule conditions are set for lookup relationship fields and records but no value for these fields has been saved. For example, a condition specifies that a duplicate rule runs when a campaign doesn't contain "Salesforce." If you then add a record with no value for the Campaign field, the duplicate rule doesn't run.

**Conditions Under Which Duplicate Rule Settings Are Overridden**

In the following situations, no alert is shown and users can't save records.

- Records are added using the data import tools.
- A person account is converted to a business account, and the newly created business account matches an existing business account.
- Records are added or edited using Salesforce APIs.

**Timing of Saves**

Suppose that multiple records are saved simultaneously and your duplicate rule is set to block or alert sales reps. The records aren't compared with each other. They're compared only with records already in Salesforce. This behavior doesn't affect the Report option, and duplicate record sets do include records that match other records saved simultaneously.

**Translation Workbench**

The Translation Workbench doesn't support the customizable alert text in duplicate rules.

## SEE ALSO:

[Manage Duplicates Using Duplicate Record Sets](#)

[Create Reports on Duplicate Records](#)

## Standard Duplicate Rules

Each standard duplicate rule includes a corresponding standard matching rule that determines how records are identified as duplicates.

### Standard Account Duplicate Rule

The standard account duplicate rule defines what happens when a user views an account with duplicates or starts to create a duplicate account. It's activated by default.

### Standard Person Account Duplicate Rule

The standard person account duplicate rule defines what happens when a user views a person account with duplicates or starts to create a duplicate person account. To use this rule, enable person accounts, and then activate the standard person account matching and duplicate rules in Setup.

### Standard Contact Duplicate Rule

The standard contact duplicate rule defines what happens when a user views a duplicated contact or starts to create a record that duplicates a contact. If your org was created in Summer '17 or later, this duplicate rule includes a cross-object matching rule: It matches contacts that duplicate other contacts and leads that duplicate contacts. If your org was created before Summer '17, you can get the same functionality by activating a new duplicate rule available in Setup. Otherwise, your default rule matches only contacts that duplicate other contacts.

### Standard Lead Duplicate Rule

The standard lead duplicate rule defines what happens when a user views a lead with duplicates or starts to create a record that duplicates a lead. If your org was created in Summer '17 or later, this duplicate rule includes a cross-object matching rule: It matches leads that duplicate other leads and contacts that duplicate leads. If your org was created before Summer '17, you can get the same functionality by activating a new duplicate rule available in Setup. Otherwise, your default rule matches only leads that duplicate other leads.

## EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

## Standard Account Duplicate Rule

The standard account duplicate rule defines what happens when a user views an account with duplicates or starts to create a duplicate account. It's activated by default.

### Rule Details

#### Rule Name

Standard Account Duplicate Rule

#### Description

Handle accounts that duplicate other accounts.

#### Object

Account

#### Default Record-Level Security Setting

Enforce Sharing Rules

### Actions

An action specifies what happens when a user starts creating a duplicate record.

#### Default Action On Create

Allow: The user is alerted but allowed to create the record.

**Default Action On Edit**

Allow: You can generate a report of duplicates created when this rule runs.

**Customizable Alert Text**

Use one of these records?

## Matching Rules Included in This Duplicate Rule

**Matching Rule**

Standard Account Matching Rule

**Description**

Match accounts that duplicate other accounts.

**Default Field Mapping**

Mapping Selected

## SEE ALSO:

[Standard Account Matching Rule](#)

**Standard Person Account Duplicate Rule**

The standard person account duplicate rule defines what happens when a user views a person account with duplicates or starts to create a duplicate person account. To use this rule, enable person accounts, and then activate the standard person account matching and duplicate rules in Setup.

## Duplicate Rule

**Rule Name**

Standard Person Account Duplicate Rule

**Description**

Handle person accounts that duplicate other person accounts.

**Object**

Person Account

**Default Record-Level Security Setting**

Enforce Sharing Rules

## Actions

Action options specify what happens when a user starts creating a duplicate record.

**Default Action On Create**

Allow: The user is alerted but allowed to create the record.

**Default Action On Edit**

Allow: You can generate a report of duplicates created when this rule runs.

**Customizable Alert Text**

Use one of these records?



## Matching Rules

This duplicate rule is based on the following matching rule.

### Matching Rule

Standard Person Account Matching Rule

### Default Field Mapping

Mapping Selected

SEE ALSO:

[Enable Person Accounts](#)

## Standard Contact Duplicate Rule

The standard contact duplicate rule defines what happens when a user views a duplicated contact or starts to create a record that duplicates a contact. If your org was created in Summer '17 or later, this duplicate rule includes a cross-object matching rule: It matches contacts that duplicate other contacts and leads that duplicate contacts. If your org was created before Summer '17, you can get the same functionality by activating a new duplicate rule available in Setup. Otherwise, your default rule matches only contacts that duplicate other contacts.

## Rule Details

### Rule Name

Standard Account Duplicate Rule

### Description

Handle contacts that duplicate other contacts and leads that duplicate contacts.

### Object

Contact

### Default Record-Level Security Setting

Enforce Sharing Rules

## Actions

An action specifies what happens when a user starts creating a duplicate record.

### Default Action On Create

Allow: The user is alerted but allowed to create the record.

### Default Action On Edit

Allow: You can generate a report of duplicates created when this rule runs.

### Customizable Alert Text

Use one of these records?

## Matching Rules Included in This Duplicate Rule

### Matching Rules

Standard Contact Matching Rule, Standard Lead Matching Rule

### Description

Match contacts that duplicate other contacts and leads that duplicate contacts.

**Default Field Mapping**

Mapping Selected

SEE ALSO:

[Standard Contact Matching Rule and Standard Lead Matching Rule](#)**Standard Lead Duplicate Rule**

The standard lead duplicate rule defines what happens when a user views a lead with duplicates or starts to create a record that duplicates a lead. If your org was created in Summer '17 or later, this duplicate rule includes a cross-object matching rule: It matches leads that duplicate other leads and contacts that duplicate leads. If your org was created before Summer '17, you can get the same functionality by activating a new duplicate rule available in Setup. Otherwise, your default rule matches only leads that duplicate other leads.

Rule Details

**Rule Name**

Standard Lead Duplicate Rule

**Description**

Handle leads that duplicate other leads and contacts that duplicate leads.

**Object**

Lead

**Default Record-Level Security Setting**

Enforce Sharing Rules

Actions

An action specifies what happens when a user starts creating a duplicate record.

**Default Action On Create**

Allow: The user is alerted but allowed to create the record.

**Default Action On Edit**

Allow: You can generate a report of duplicates created when this rule runs.

**Customizable Alert Text**

Use one of these records?

Matching Rules Included in This Duplicate Rule

**Matching Rules**

Standard Lead Matching Rule, Standard Contact Matching Rule

**Description**

Match leads that duplicate other leads and contacts that duplicate leads.

**Default Field Mapping**

Mapping Selected

SEE ALSO:

[Standard Contact Matching Rule and Standard Lead Matching Rule](#)

## Matching Rules

A matching rule defines how duplicate records are identified in duplicate rules and duplicate jobs. Salesforce provides standard matching rules for business and person accounts, contacts, and leads. You can also create custom matching rules.

### [Customize Matching Rules](#)

Find more duplicates by creating custom matching rules.

### [Things to Know About Matching Rules](#)

Find out how matching rules work, review what to know when you customize matching rules, and look at some examples to get started. Or go further: Do a deep-dive on matching criteria, methods, algorithms, match keys, and normalization criteria.

### [Standard Matching Rules](#)

You can use the provided standard matching rules with duplicate rules and duplicate jobs. You can't edit these standard matching rules, but you can create custom matching rules.

#### SEE ALSO:

[Duplicate Rules](#)

[Run Duplicate Jobs in Lightning Experience](#)

[Enable Person Accounts](#)

## Customize Matching Rules

Find more duplicates by creating custom matching rules.

1. From Setup, use the Quick Find box to find **Matching Rules**.
2. If editing an existing matching rule, make sure that the rule is inactive.
3. Click **New Rule** or **Edit**.
4. Apply the matching rule to an object.
5. Enter a name and description for the rule.

If you're working toward complying with various data protection and privacy regulations, consider excluding personal data from the name and description.

6. Enter the matching criteria.

The matching criteria define which fields to compare and how. To add fields (up to 10 total) or adjust the matching equation (for example, to change an AND expression to an OR expression), add filter logic.

7. Save and activate the rule.

The activation process can take some time. You're notified by email when your matching rule is ready to use.

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### USER PERMISSIONS

To create, edit, or delete matching rules:

- Customize Application

To activate and deactivate matching rules:

- Customize Application

To view matching rules:

- View Setup and Configuration

When a matching rule is active, you can use it with duplicate rules and duplicate jobs.

SEE ALSO:

[Manage Duplicates One at a Time](#)

[Manage Duplicates Globally](#)

[Matching Criteria in Matching Rules](#)

## Things to Know About Matching Rules

Find out how matching rules work, review what to know when you customize matching rules, and look at some examples to get started. Or go further: Do a deep-dive on matching criteria, methods, algorithms, match keys, and normalization criteria.

### [Things to Know Before You Customize Matching Rules](#)

Review considerations for customizing matching rules.

### [Matching Rule Examples](#)

Review these examples to understand how records are compared and evaluated as duplicates.

### [Matching Criteria in Matching Rules](#)

A matching rule applies criteria to determine how closely a field on a new or edited record matches the same field on an existing record. Standard matching rules include predefined criteria. When you create a custom matching rule, you define the criteria.

### [Matching Methods Used in Matching Rules](#)

The matching method determines how a specific field in a record is compared to the same field in another record. Each matching method is defined by normalization criteria, match key definitions, and matching algorithms.

### [Matching Algorithms Used with Matching Methods](#)

The matching method and its corresponding matching algorithms are part of the matching rule's matching criteria. They help determine how a specific field in one record is compared to the same field in another record and whether the fields are considered matches.

### [How Match Keys Are Generated and Used in Matching Rules](#)

When a matching rule runs, it applies one or more match key formulas before applying a comprehensive matching equation. Match keys help to increase the performance of duplicate rules through a preliminary comparison that narrows the matches to the 100 most likely duplicate records. Then the rule applies the matching equation only to those likely matches.

### [Normalization Criteria for Match Keys](#)

As part of the process of creating match key values, matching rule field values are normalized. How a field value is normalized depends on several factors, including the matching method for that field as specified in the matching rule. In addition, some commonly used fields are normalized to optimize duplicate detection.

## EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Things to Know Before You Customize Matching Rules

Review considerations for customizing matching rules.

### Limits

- Up to five matching rules can be activated or deactivated at a time.
- Up to five active matching rules are allowed per object.
- Up to 25 total active matching rules are allowed.
- Up to 100 total matching rules are allowed (both active and inactive).
- Only one lookup relationship field is allowed per matching rule.

### Order of Evaluation of Certain Fuzzy Matching Method Segments

Suppose the following: a matching rule includes a filter with logic that includes an OR operator, and the segments before and after the operator include the same field with a fuzzy matching method. The rule evaluates only the filter segment closest to the end, and ignores the others.

As another example, suppose that a filter criterion has 1 = account name (fuzzy), 2 = address (exact), 3 = phone (exact), and 4 = zipcode (exact). If filter logic is (1 AND 2) OR (1 AND 3) OR (1 AND 4), the rule evaluates only (1 AND 4) and ignores both (1 AND 2) and (1 AND 3).

If filter logic is (1 AND 2) OR (1 AND 3) OR (1 AND 4) OR (2 AND 4), the rule evaluates (1 AND 4) OR (2 AND 4). Both (1 AND 2) and (1 AND 3) are ignored.

To avoid skipped logic, create a matching rule for each OR segment that includes the same fuzzy fields.

### International Data

Standard and custom matching rules that use fuzzy matching methods support only Latin characters. If you're using international data, we recommend using the exact matching method with your matching rules.

### Lookup Fields

If the value of a lookup field is a person account and the matching rule includes a contact lookup field, the matching rule isn't applied. All contact lookup fields, except Reports To on the Contact object, contain both contacts and person accounts. You can configure a lookup filter to exclude person accounts. To match on person account values, use an account lookup field instead.

### Records in Hierarchies

If the record chosen as primary is below another selected duplicate in a hierarchy, you can't finish merging. Choose a different primary record or edit the Parent Account or Reports To value on one of the records.

### Fields That Become Unavailable

If a field on an object is no longer available in your org, it can cause matching rules with mappings to this field to be ignored. When the fields in your org change, check all duplicate rule field mappings for an object. For example, the Clean Status field is only available to customers with a Data.com license. If your org no longer has a Data.com license, this field is no longer available. Matching rules with mappings to this field are ignored.

### Shield Platform Encryption

Standard matching rules that include fields with Shield Platform Encryption don't detect duplicates. However, custom matching rules can reference encrypted fields as long as those fields are encrypted deterministically. Probabilistic encryption isn't supported.

When you rotate your key material, you must update custom matching rules that reference encrypted fields. After you rotate your key material, deactivate and then reactivate the affected matching rules. Then contact Salesforce to request the background encryption process. When the background encryption process is finished, your matching rules can access the data encrypted with your active key material.

Service protections ensure that loads are balanced across the system. The matching service searches for match candidates until they find all matches or up to 200 matches. With Shield Platform Encryption, the service search maximum is 100 candidates. With encryption, you could find fewer or no possible duplicate records.

### EDITIONS

Available in: **Lightning Experience** and **Salesforce Classic** (not available in all orgs)

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Duplicate jobs aren't supported.

## Matching Rule Examples

Review these examples to understand how records are compared and evaluated as duplicates.



### Example: Custom Lead Matching Rule with Fuzzy Matching Methods

**Table 1: Matching Criteria**

	Field	Matching Method
1	Company	<i>Fuzzy: Company Name</i>
2	Email	<i>Exact</i>
3	Phone	<i>Fuzzy: Phone</i>
	Matching equation is (Company OR Email) AND (Phone)	

Based on these matching criteria, here's how matching works.

- 1. Match key values are generated for existing leads.** Based on the matching equation and the specified matching methods, two match keys are created. From these keys, match key values are generated.

**Table 2: Match Keys**

Matching Equation in Standardized Format	Match Key	Sample Matching Field Values	Sample Match Key Values
(Company AND Phone) OR	Company (2,6) Phone	Company = Global Guitars Inc. Phone = 415-123-4567	globalguitars415123
(Email AND Phone)	Email Phone	Email = sally.smith@globalguitars.com Phone = 415-123-4567	sally.smith@globalguitars.com415123

- 2. Match key values for the new record are generated.** The values are generated when the new record is saved.

**Table 3: New Record**

Matching Field Values	Match Key Values
Company = Eltie Sports	eltiesports415555
Email = john.doe@elitesport.com	john.doe@elitesport.com415555
Phone = 1-415-555-1234	

## EDITIONS

Available in: Lightning Experience and Salesforce Classic (not available in all orgs)

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### 3. Match key values for the new record are compared with values from existing records.

**Table 4: Existing Records Compared with New Record**

Record	Matching Field Values	Match Key Values	Match?
1	Company = Elite Sports Email = john.doe@elitesports.com Phone = 1-415-555-1234	elitesports415555 john.doe@elitesports.com415555	No. Not considered a duplicate.
2	Company = Elite Sport Email = john.doe@elitesport.com Phone = 1-415-555-1234	elitesport415555 john.doe@elitesport.com415555	Yes. The first match key values don't match. However, the second match key values are identical, so the record is considered a potential duplicate. Only one match key value match is needed.

### 4. Determine if the new record is a potential duplicate. Does the new record have the same match key value as an existing record?

- Yes, the new record is considered a potential duplicate. It's evaluated further using other matching resources, including matching algorithms.
- No, the new record isn't considered a duplicate.



#### Example: Custom Contact Matching Rule with Exact Matching Methods

**Table 5: Matching Criteria**

	Field	Matching Method
1	City	<i>Exact</i>
2	Email	<i>Exact</i>
3	Phone	<i>Exact</i>
	Matching equation is (City OR Email) AND (Phone)	

Based on these matching criteria, here's how matching works.

### 1. Match key values are generated for existing contacts. Based on the matching equation and the specified matching methods, two match keys are created. From these keys, match key values are generated.

**Table 6: Match Key**

Matching Equation in Standardized Format	Match Key	Sample Matching Field Values	Sample Match Key Values
(City AND Email) OR	City Email	City = San Francisco Email = john.doe@elitesports.com	sfjohn@elites.com

Matching Equation in Standardized Format	Match Key	Sample Matching Field Values	Sample Match Key Values
(City AND Phone)	City Phone	City = San Francisco Phone = 415-555-1234	sanfrancisco4155551234

2. **Match key values for the new record are generated.** The values are generated when the new record is saved.

Table 7: New Record

Matching Field Values	Match Key Values
City = San Francisco Email = john.doe@elitesports.com Phone = 415-555-1234	sanfranciscojohn.doe@elitesports.com sanfrancisco4155551234

3. **Match key values for the new record are compared with values from existing records.**

Table 8: Existing Records Compared with New Record

Record	Matching Field Values	Match Key Values	Match?
1	City = San Francisco Email = john.doe@elitesports.com Phone = 1-415-555-1234	sanfranciscojohn.doe@elitesports.com sanfrancisco4155551234	No. Not considered a duplicate.
2	City = San Francisco Email = john.doe@elitesports.com Phone = 1-415-555-1111	sanfranciscojohn.doe@elitesports.com sanfrancisco4155551234	Yes. The first match key values are identical, so the record is considered a potential duplicate. Only one match key value match is needed.

4. **Determine if the new record is a potential duplicate.** Does the new record have the same match key value as an existing record?
- Yes—The new record is considered a potential duplicate. It's evaluated further using other matching resources, including matching algorithms.
  - No—The new record is not considered a duplicate.

Although this matching rule is within the field limit, it exceeds the row limit of 10 when written in the standardized format. Therefore, it can't be saved. Refine the matching rule so that it uses fewer OR operators within groupings.



**Example:** You get an error that your matching rule uses too many OR operators within groupings. The error is generated because a matching rule has a limit of 10 fields arranged into an equation. When a matching rule is saved, the equation is rewritten into a standardized format that translates the OR statements to AND statements. The standardized format has a limit of 10 rows.

Suppose that your matching rule includes the following equation.

(Field 1 OR Field 2) AND



(Field 3 OR Field 4) AND

(Field 5 OR Field 6) AND

(Field 7 OR Field 8)

It's rewritten as follows. Although this matching rule is within the field limit, it exceeds the row limit of 10 when written in the standardized format. Therefore, it can't be saved. Refine the matching rule so that it uses fewer OR operators within groupings.

(Field 1 AND Field 3 AND Field 5 AND Field 7) OR

(Field 1 AND Field 3 AND Field 5 AND Field 8) OR

(Field 1 AND Field 3 AND Field 6 AND Field 7) OR

(Field 1 AND Field 3 AND Field 6 AND Field 8) OR

(Field 1 AND Field 4 AND Field 5 AND Field 7) OR

(Field 1 AND Field 4 AND Field 5 AND Field 8) OR

(Field 1 AND Field 4 AND Field 6 AND Field 7) OR

(Field 1 AND Field 4 AND Field 6 AND Field 8) OR

(Field 2 AND Field 3 AND Field 5 AND Field 7) OR

(Field 2 AND Field 3 AND Field 5 AND Field 8) OR

(Field 2 AND Field 3 AND Field 6 AND Field 7) OR

(Field 2 AND Field 3 AND Field 6 AND Field 8) OR

(Field 2 AND Field 4 AND Field 5 AND Field 7) OR


(Field 2 AND Field 4 AND Field 5 AND Field 8) OR

(Field 2 AND Field 4 AND Field 6 AND Field 7) OR

(Field 2 AND Field 4 AND Field 6 AND Field 8)

## Matching Criteria in Matching Rules

A matching rule applies criteria to determine how closely a field on a new or edited record matches the same field on an existing record. Standard matching rules include predefined criteria. When you create a custom matching rule, you define the criteria.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

### Criterion Definition

**Automatically  
Defined  
for  
Custom  
Matching  
Rules**


Field	Definition
Field	Indicates which field to compare. When selecting fields, keep the following in mind. <ul style="list-style-type: none"> <li>The available fields depend on which object the matching rule applies to and include both standard and custom fields.</li> </ul>

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Criterion	Definition	Automatically Defined for Custom Matching Rules
	<ul style="list-style-type: none"> <li>The supported input field types are email, lookup relationship, master-detail relationship, number, phone, standard picklists, custom picklists (single-select only), text, and URL.</li> <li>You can't use an auto-numbered lookup or master-detail relationship field in a matching rule.</li> <li>If you enable state and country/territory picklists, we recommend using State/Province Code and Country Code in your matching rules. These fields yield better results than the state and country text fields.</li> </ul>	
Matching Method	<p>Defines the method for how the fields are compared. You can use the provided exact matching method for almost any field, including custom fields. A fuzzy matching method is available for commonly used standard fields. Each matching method is defined by normalization and match key definitions, matching algorithms, and other criteria.</p>	
Match Blank Fields	<p>Specifies how blank fields affect whether the two fields being compared are considered matches. If you select <b>Match Blank Fields</b> for a field and that field is blank in both records being compared, the fields are considered matches. However, if you select <b>Match Blank Fields</b> for a field and that field is blank in only one of the records being compared, the fields aren't considered matches.</p> <p>If you don't select <b>Match Blank Fields</b> for a field and that field is blank in both records being compared, the fields aren't considered matches.</p>	
Match Key	<p>A formula that improves the speed and performance of duplicate detection. When the matching rule runs, it compares the match key values of the saved record with existing records. If the saved record has the same match key value as an existing record, it's a potential duplicate and evaluated further. If the saved record has a unique match key value, it's not considered a duplicate.</p>	✔
Matching Algorithm	<p>Defines the logic that determines whether two fields match. For the exact matching method, the exact matching algorithm is automatically used. For the fuzzy matching method, various fuzzy matching algorithms can be used. Each matching algorithm is scored based on how closely it matches the two fields. For example, if you select exact matching and the two fields match, the match score is 100. If the two fields don't match, the score is 0.</p>	✔
Scoring Method	<p>Determines how the matching algorithms' match scores are calculated to come up with one match score for the field. Each matching algorithm is scored based on how closely it matches the two fields. Only standard matching rules use the scoring method.</p> <p>Average: Uses the average match score.</p> <p>Maximum: Uses the highest match score.</p> <p>Minimum: Uses the lowest match score.</p> <p>Weighted Average: Uses the weight of each matching method to determine the average match score.</p>	✔

Criterion	Definition	Automatically Defined for Custom Matching Rules
Threshold	Determines the minimum match score needed for the field to be considered a match. The field is given a match score based on how closely it matches the same field in an existing record.	

## SEE ALSO:

[Matching Methods Used in Matching Rules](#)

[Matching Algorithms Used with Matching Methods](#)

[How Match Keys Are Generated and Used in Matching Rules](#)

### Matching Methods Used in Matching Rules

The matching method determines how a specific field in a record is compared to the same field in another record. Each matching method is defined by normalization criteria, match key definitions, and matching algorithms.

The exact matching method looks for strings that exactly match a pattern. If you're using international data, we recommend using the exact matching method with your matching rules. You can use the exact matching method for almost any field, including custom fields.

The fuzzy matching methods look for strings that approximately match a pattern. Some fuzzy matching methods, such as Acronym and Name Variant, identify similarities using hard-coded dictionaries. Because the dictionaries aren't comprehensive, results can include unexpected or missing matches. Specific fuzzy matching methods are available for commonly used standard fields on accounts, contacts, and leads.

#### EDITIONS

Available in: **Lightning Experience** and **Salesforce Classic** (not available in all orgs)

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Matching Method	Matching Algorithms	Scoring Method	Threshold	Special Handling
Exact	Exact			
Fuzzy: First Name	Exact Initials Jaro-Winkler Name Variant	Maximum	85	If the Middle Name field is used in your matching rule, it's compared using the Fuzzy: First Name matching method.
Fuzzy: Last Name	Exact Keyboard Distance Metaphone 3	Maximum	90	
Fuzzy: Company Name	Acronym Exact Syllable Alignment	Maximum	70	Removes words such as "Inc" and "Corp" before comparing fields. Also, company names are normalized. For example, "IBM" is normalized to "International Business Machines".

Matching Method	Matching Algorithms	Scoring Method	Threshold	Special Handling
Fuzzy: Phone	Exact	Weighted Average	80	<p>Phone numbers are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>• International code (exact, 10% of field's match score)</li> <li>• Area code (exact, 50% of field's match score)</li> <li>• Next 3 digits (exact, 30% of field's match score)</li> <li>• Last 4 digits (exact, 10% of field's match score)</li> </ul> <p>For example, these phone numbers are being compared: 1-415-555-1234 and 1-415-555-5678.</p> <p>All sections match exactly except the last four digits, so the field has a match score of 90. This score is considered a match because it exceeds the threshold of 80.</p>
Fuzzy: City	Edit Distance Exact	Maximum	85	
Fuzzy: Street	Exact	Weighted Average	80	<p>Addresses are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>• Street Name (Edit Distance, 50% of field's match score)</li> <li>• Street Number (exact, 20% of field's match score)</li> <li>• Street Suffix (exact, 15% of field's match score)</li> <li>• Suite Number (exact, 15% of field's match score)</li> </ul> <p>For example, these billing streets are being compared: 123 Market Street, Suite 100, and 123 Market Drive, Suite 300.</p>

Matching Method	Matching Algorithms	Scoring Method	Threshold	Special Handling
				Only the street number and street name match, so the field has a match score of 70. This score isn't considered a match because it falls below the threshold of 80.
Fuzzy: ZIP	Exact	Weighted Average	80	<p>ZIP codes are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field.</p> <ul style="list-style-type: none"> <li>• First five digits (Exact, 90% of field's match score)</li> <li>• Next four digits (Exact, 10% of field's match score)</li> </ul> <p>For example, these ZIP codes are being compared: 94104-1001 and 94104.</p> <p>Only the first five digits match, so the field has a match score of 90. This score is considered a match because it exceeds the threshold of 80.</p>
Fuzzy: Title	Acronym Exact Kullback-Liebler Distance	Maximum	50	

## Matching Algorithms Used with Matching Methods

The matching method and its corresponding matching algorithms are part of the matching rule's matching criteria. They help determine how a specific field in one record is compared to the same field in another record and whether the fields are considered matches.

We provide an exact matching method and several fuzzy matching methods. When the exact matching method is selected, the exact matching algorithm is used to compare the fields. When a fuzzy matching method is selected, various fuzzy matching algorithms are used to compare the fields.

More than one matching algorithm can be used to compare a field. Each matching algorithm is scored based on how closely it matches the fields. The fields being compared aren't case sensitive.

### Matching Algorithms Available with the Exact Matching Method

Matching Algorithm	Description
Exact	Determines whether two strings are the same. For example, salesforce.com and Salesforce aren't considered a match because they're not


## EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Matching Algorithm	Description
	identical. The algorithm returns a match score of 0.

### Matching Algorithms Available with Fuzzy Matching Methods

Matching Algorithm	Description
Acronym	Determines whether a business name matches its acronym. For example, Advanced Micro Devices and its abbreviation AMD are considered a match, returning a score of 100.
Edit Distance	Determines the similarity between two strings based on the number of deletions, insertions, and character replacements needed to transform one string into the other. For example, VP Sales matches VP of Sales with score of 73.
Initials	Determines the similarity of two sets of initials in personal names. For example, the first name Jonathan and its initial J match and return a score of 100.   <b>Note:</b> When First Name is set to fuzzy matching and Last Name is set to exact matching, in the index, the initials include the last letter of a contact's first name. For example, Jane Smith is indexed as jesmith instead of jsmith. To match only the first initial of a first name, create a custom matching rule with both First Name and Last Name set to fuzzy matching.
Jaro-Winkler Distance	Determines the similarity between two strings based on the number of character replacements needed to transform one string into the other. This method is best for short strings, such as personal names. For example, Johnny matches Johny with a score of 97.
Keyboard Distance	Determines the similarity between two strings based on the number of deletions, insertions, and character replacements needed to transform one string into the other, weighted by the position of the keys on the keyboard.
Kullback Liebler Distance	Determines the similarity between two strings based on the percentage of words in common. For example, Director of Engineering matches Engineering Director with a score of 65.
Metaphone 3	Determines the similarity between two strings based on their sounds. This algorithm attempts to account for the irregularities among languages and works well for first and last names. For example, Joseph matches Josef with a score of 100.
Name Variant	Determines whether two names are a variation of each other. For example, Bob is a variation of Robert and returns a match score of 100. Bob is not a variation of Bill and returns a score of 0.
Syllable Alignment	Determines the similarity between two strings based on their sounds. First, the character strings are converted into syllables strings. Then the syllable strings are also compared and scored using the Edit Distance algorithm. This matching algorithm works well for company names. For example, Syllable Alignment gives Department of Energy and Department of Labor a relatively low score of 59. The syllable sequences of these two company names differ more than their character sequences (energy sounds very different from labor). Edit Distance gives the two strings a score of 74. Therefore, Syllable Alignment works better because the two strings aren't good match candidates.

## How Match Keys Are Generated and Used in Matching Rules

When a matching rule runs, it applies one or more match key formulas before applying a comprehensive matching equation. Match keys help to increase the performance of duplicate rules through a preliminary comparison that narrows the matches to the 100 most likely duplicate records. Then the rule applies the matching equation only to those likely matches.

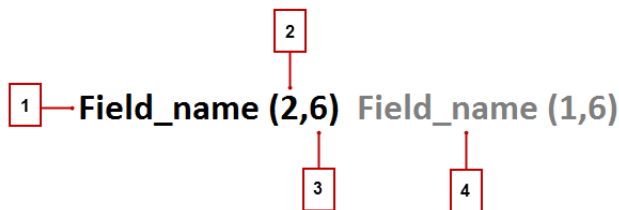
In rare instances, match keys result in undetected duplicates, but generally, match keys greatly improve the performance of duplicate rules.

### How Match Keys Are Generated

1. The matching equation that determines the arrangement of the fields is rewritten into a standardized format that translates the OR statements into AND statements.
2. Values for fields in the matching rule are normalized.
3. A match key is generated using the field combinations specified in the standardized field format. A matching rule can have multiple match keys. A custom matching rule can have up to 10 match keys; you're prevented from saving a matching rule that requires more.
4. The match key is used to combine normalized field values for each record.

 **Note:** No match key is generated for the Title field.

The match key notation shows which fields and which characters in those fields are used in a match key.



- The field used in the match key (1).
- Number of words (or tokens) in the field value to include in the match key (2). If no number is present, all words are included.
- Number of characters per word to include in the match key (3). If no number is present, all characters are included.
- Additional field used in the match key (4).

### Match Keys for Standard and Custom Rules

Standard matching rules use predefined match keys. Custom rules that contain standard field combinations also use predefined match keys. For example, the matching rule equation for a custom contact matching rule is (First Name AND Last Name AND Company). A fuzzy matching method is selected for at least one field. The notation for its match key is: First\_Name (1,1) Last\_Name Company (2,6).

For nonstandard field combinations, custom rules use keys generated from their corresponding matching criteria.


### EDITIONS

Available in: Lightning Experience and Salesforce Classic (not available in all orgs)

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Normalization Criteria for Match Keys

As part of the process of creating match key values, matching rule field values are normalized. How a field value is normalized depends on several factors, including the matching method for that field as specified in the matching rule. In addition, some commonly used fields are normalized to optimize duplicate detection.

 **Note:** Fields, including custom fields and fields to which the exact matching method is applied, are normalized by lowercasing all letters and removing leading and trailing spaces.

Field	Normalization Details	Applies to Standard and Custom Matching Rules?	Examples
City	Lowercases all characters. Removes non-alphabetical and non-numeric characters, including white spaces. Retains up to the first six characters.	Yes. But on custom matching rules, the matching method must be <b>Fuzzy: City</b> .	San Francisco = sanfra Rome = rome
Company	Expands abbreviations. Lowercases all characters. Removes suffixes, such as Corporation, Incorporated, Inc, Limited, and Ltd. Removes the words and, the, of. Removes special characters and accents.	Yes. But on custom matching rules, the matching method must be <b>Fuzzy: Company</b> .	IBM = international business machines Intel Corp. = intel
First Name	Replaces the first name with an alias, if applicable. Removes salutations, special characters, and accents. Keeps only the first letter of the first word, and lowercases this letter.	Yes. But on custom matching rules, the matching method must be <b>Fuzzy: First Name</b> .	Dr. Jane = j Mr. Bob = robert = r
Last Name	Removes special characters and suffixes. Replaces consecutive identical consonants with a single consonant. Lowercases the first letter. After normalization, the double metaphone algorithm is applied so that misspellings and spelling variants are accounted for.	Yes. But on custom matching rules, the matching method must be <b>Fuzzy: Last Name</b> .	O'Reilly, Jr. = oreily (without double metaphone) O'Reilly, Jr. = oreily = arl (with double metaphone)
Email	Removes special characters, such as underscores and periods, from both parts of the email address. Retains the @ character.	No. Applies only to standard matching rules.	john.doe@us.salesforce.com = johndoe@salesforcecom

### EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



Field	Normalization Details	Applies to Standard and Custom Matching Rules?	Examples
Phone	Removes all non-alphabetical and non-numeric characters. For all U.S. phone numbers, converts alphabetical characters to numeric characters, and removes leading international code. Removes last four digits.	Yes. But on custom matching rules, the matching method must be <b>Fuzzy: Phone</b> .	1-800-555-1234 = 800555 44 20 0540 0202 = 44200540
Street Address	Removes all punctuation except hyphens. Removes common stop words, such as Avenue and Street. Takes the first five characters of the first two tokens.	Yes. But on custom matching rules, the matching method must be <b>Fuzzy: Street Address</b> .	123 Ocean View Avenue = 123ocean 567 Fifty-fourth St. = 567fifty
Website	Removes the protocol (http), subdomain (www), and file path. Then takes only the last two or three tokens, depending on whether there are international designations. Retains the periods.	No. Applies only to standard matching rules.	http://www.us.salesforce.com/product = salesforce.com http://www.ox.ac.uk/ = ox.ac.uk

## Standard Matching Rules

You can use the provided standard matching rules with duplicate rules and duplicate jobs. You can't edit these standard matching rules, but you can create custom matching rules.

### [Standard Account Matching Rule](#)

The standard account matching rule identifies duplicate accounts using match keys, a matching equation, and matching criteria. It's activated by default.

### [Standard Person Account Matching Rule](#)

The standard person account matching rule identifies duplicate person accounts using match keys, a matching equation, and matching criteria. To use the rule, first enable person accounts, and then activate rule in Setup.

### [Standard Contact Matching Rule and Standard Lead Matching Rule](#)

The standard contact matching rule and standard lead matching rule identify duplicate contacts and leads using match keys, a matching equation, and matching criteria. They're activated by default.

### [Standard Matching Rule for Leads on Accounts](#)

The standard matching rule for leads on accounts is activated with the purchase of Account Engagement Advanced or Premium edition. The rule populates the content of the Matched Leads component using a matching equation and matching criteria. By reducing redundant data, the rule and the component help you work toward complying with data protection and privacy regulations.

## EDITIONS

Available in: Lightning Experience and Salesforce Classic ([not available in all orgs](#))

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Standard Account Matching Rule

The standard account matching rule identifies duplicate accounts using match keys, a matching equation, and matching criteria. It's activated by default.

### Match Keys

Match keys speed up matching by narrowing the potential matches to the most likely duplicates before the rule applies the comprehensive matching equation.

Match Key Notation	Match Key Value Examples
Company (2,6) City (, 6)	Account: Orange Sporting Company = orangesporti City: San Francisco = sanfra Key: orangesportisanfra
Company (2,6) ZIP (1,3)	Account Name: salesforce.com = salesf ZIP: 94105-5188 = 941 Key: salesf941
Website City (,6)	Website: https://www.salesforce.com = salesforce.com City: San Francisco = sanfra Key: salesforce.comsanfra
Website ZIP (1,3)	Website: https://www.salesforce.com = salesforce.com ZIP: 94105-5188 = 941 Key: salesforce.com941

### Matching Equation

**!** **Important:** For accurate matches, the new or edited record must include a value in the Account Name field and either the City or the ZIP Code field.

(*Account Name* AND *Billing Street*)  
 OR (*Account Name* AND *City* AND *State*)  
 OR (*Account Name* AND *ZIP*)  
 OR (*Account Name* AND *Phone*)  
 OR (*Website* AND *Phone*)  
 OR (*Website* AND *Billing Street*)

### Matching Criteria

Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
Account Name	Acronym Edit Distance Exact	Maximum	70	Don't match	Removes words such as "Inc" and "Corp" before comparing fields. Company names are normalized.
Phone	Exact	Weighted Average	80	Don't match on all sections	Phone numbers are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one

Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
				except Area Code, which ignores blank fields	<p>score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>• International code (Exact, 10% of field's match score)</li> <li>• Area code (Exact, 50% of field's match score)</li> <li>• Next three digits (Exact, 30% of field's match score)</li> <li>• Last four digits (Exact, 10% of field's match score)</li> </ul> <p>For example, these two phone numbers are being compared: 1-415-555-1234 and 1-415-555-5678.</p> <p>All sections match exactly, except the last four digits, so the field has a score of 90, which is considered a match because it exceeds the threshold of 80.</p>
Billing Street	Edit Distance Exact	Weighted Average	80	Don't match	<p>Addresses are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>• Street Number (exact, 20% of field's match score)</li> <li>• Street Name (Edit Distance, 50% of field's match score)</li> <li>• Street Suffix (exact, 15% of field's match score)</li> <li>• Suite Number (exact, 15% of field's match score)</li> </ul> <p>For example, these two billing streets are being compared: 123 Market Street, Suite 100, and 123 Market Drive, Suite 300.</p> <p>Because only the street number and street name match, the field has a match score of 70. The field isn't considered a match because the score is below the threshold of 80.</p>
ZIP	Exact	Weighted Average	80	Don't match	<p>ZIP codes are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field.</p> <ul style="list-style-type: none"> <li>• First five digits (exact, 90% of field's match score)</li> <li>• Next four digits (exact, 10% of field's match score)</li> </ul> <p>For example, these two ZIP codes are being compared: 94104-1001 and 94104.</p> <p>Because only the first five digits match, the field has a match score of 90. The field is considered a match because the score exceeds the threshold of 80.</p>
City	Edit Distance Exact	Maximum	85	Don't match	

Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
Website	Exact	Maximum	100	Don't match	The prefix "https://" is appended to the website domain. For example, the field value www.salesforce.com becomes https://www.salesforce.com for matching purposes. Matching for an account record that has a website without the "https://" prefix identifies the record as a duplicate.

## SEE ALSO:

[Standard Account Duplicate Rule](#)

[Matching Criteria in Matching Rules](#)

### Standard Person Account Matching Rule

The standard person account matching rule identifies duplicate person accounts using match keys, a matching equation, and matching criteria. To use the rule, first enable person accounts, and then activate rule in Setup.

#### Match Keys

Match keys speed up matching by narrowing the potential matches to the most likely duplicates before the rule applies the comprehensive matching equation.

Match Key Notation	Examples
Email	Email: john_doe@us.ibm.com = johndoe@ibm.com Key: johndoe@ibm.com
First_Initial (1,1) Last_Name City (1,6)	First Initial: J = j Last Name: Doe = doe = t (with double metaphone applied) City: Philadelphia = philad Key: jtphilad
First_Initial (1,1) Last_Name ZIP (1,3)	First Initial: J = j Last Name: Doe = doe = t (with double metaphone applied) ZIP: 10001 = 100 Key: jt100
Street Address	123 Maple Avenue Key: 123maple
Phone (drop last four digits)	415-555-1234 Key: 415555 555-1234-5678

Match Key Notation	Examples
	Key: 5551234

### Matching Equation

The threshold for the first three conditions in the equation is 85; the threshold for the fourth condition is 75.

*(First Name AND Last Name AND Email)*

*OR (First Name AND Last Name AND Billing Street AND (City OR ZIP))*

*OR (First Name AND Last Name AND Phone )*

*OR (First Name AND Last Name AND Phone AND (City OR ZIP) AND Mailing Street AND Phone)*

### Matching Criteria

Fields on Contacts	Fields on Leads	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
First Name	First Name	Exact Initials Jaro-Winkler Distance Metaphone 3 Name Variant	Maximum	85 and 75	Don't match (ignores blank fields when Email is included in field grouping)	If the record contains a value for both the First Name and Last Name fields, the values are transposed to account for possible data entry mistakes.  For example, suppose that the first name is George and the last name is Michael. The matching rule also evaluates the first name as Michael and the last name as George.
Last Name	Last Name	Exact Keyboard Distance Metaphone 3	Maximum	90 and 75	Don't match (ignores blank fields when Email is included in field grouping)	If the record contains a value for both the First Name and Last Name fields, the values are transposed to account for possible data entry mistakes.  For example, suppose that the first name is George and the last name is Michael. The matching rule also evaluates the first name as Michael and the last name as George.
Account Name	Company	Acronym Edit Distance Exact	Maximum	70	Don't match	
Email	Email	Exact	Maximum	100	Don't match	
Phone	Phone	Exact	Weighted Average	80	Don't match on all sections except Area Code, which	Phone numbers are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to determine a single

Fields on Contacts	Fields on Leads	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
					ignores blank fields	<p>score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>International code (exact, 10% of field's match score)</li> <li>Area code (exact, 50% of field's match score)</li> <li>Next three digits (exact, 30% of field's match score)</li> <li>Last four digits (exact, 10% of field's match score)</li> </ul> <p>For example, these phone numbers are being compared: 1-415-555-1234 and 1-415-555-5678. All sections match exactly except the last four digits. The field has a match score of 90, which is considered a match because it exceeds the threshold of 80.</p>
Billing Street	Street	Edit Distance Exact	Weighted Average`	80	Don't match	<p>Addresses are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to determine a single score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>Street Name (Edit Distance, 50% of field's match score)</li> <li>Street Number (exact, 20% of field's match score)</li> <li>Street Suffix (exact, 15% of field's match score)</li> <li>Suite Number (exact, 15% of field's match score)</li> </ul> <p>For example, these addresses are being compared: 123 Market Street, Suite 100, and 123 Market Drive, Suite 300.</p> <p>Only the street number and street name match. The field has a match score of 70, which isn't considered a match because it's less than the threshold of 80.</p>
Billing ZIP/Postal Code	ZIP/Postal Code	Exact	Weighted Average	80		<p>ZIP codes are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to determine a single score for the field.</p>

Fields on Contacts	Fields on Leads	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
						<ul style="list-style-type: none"> <li>• First five digits (exact, 90% of field's match score)</li> <li>• Next four digits (exact, 10% of field's match score)</li> </ul>
Billing City	City	Edit Distance Exact	Maximum	85	Don't match	

## SEE ALSO:

[Enable Person Accounts](#)

[Matching Criteria in Matching Rules](#)

[How Match Keys Are Generated and Used in Matching Rules](#)

## Standard Contact Matching Rule and Standard Lead Matching Rule

The standard contact matching rule and standard lead matching rule identify duplicate contacts and leads using match keys, a matching equation, and matching criteria. They're activated by default.

### Match Keys

Match keys speed up matching by narrowing the potential matches to the most likely duplicates before the rule applies the comprehensive matching equation.

Contact Match Key Notation	Contact Examples
Email	Email: john_doe@us.ibm.com = johndoe@ibm.com Key: johndoe@ibm.com
First_Name (1,1) Last_Name Email	First Name: John = j Last Name: Doe = doe = t (with double metaphone applied) Email: john_doe@us.salesforce.com = johndoe@salesforce.com Key: jt@salesforce.com
First_Name (1,1) Last_Name Company (2,5)	First Name: Marc = m Last Name: Benioff = pnf (with double metaphone applied) Company: salesforce.com = sales Key: mpnfsales
First_Name (1,1) Last_Name Phone (drop leading 1 and last four digits)	First Name: Marc = m Last Name: Benioff = pnf (with double metaphone applied)

Contact Match Key Notation	Contact Examples
	Phone: 1-415-555-1234 = 415555 Key: mpnf415555

Lead Match Key Notation	Lead Examples
Email	Email: john_doe@us.ibm.com = johndoe@ibm.com Key: johndoe@ibm.com
First_Name (1,1) Last_Name Email	First Name: John = j Last Name: Doe = doe = t (with double metaphone applied) Email: john_doe@us.salesforce.com = johndoe@salesforce.com Key: jt@salesforce.com
First_Name (1,1) Last_Name Company (2,5)	First Name: Marc = m Last Name: Benioff = pnf (with double metaphone applied) Company: salesforce.com = sales Key: mpnfsales
First_Name (1,1) Last_Name Phone (drop leading 1 and last four digits)	First Name: Marc = m Last Name: Benioff = pnf (with double metaphone applied) Phone: 1-415-555-1234 = 415555 Key: mpnf415555

### Matching Equations

The standard contact matching rule uses the following matching equation.

*(First Name AND Last Name AND Title AND Account Name)*

OR *(First Name AND Last Name AND Email)*

OR *(First Name AND Last Name AND Phone AND Account Name)*

OR *(First Name AND Last Name AND Mailing Street AND (City OR ZIP OR Phone))*

OR *(First Name AND Last Name AND Mailing Street AND Title)*

OR *(First Name AND Last Name AND Title AND Email)*

OR *(First Name AND Last Name AND Phone)*

The standard lead matching rule uses the following matching equation.

*(First Name AND Last Name AND Title AND Company)*

OR *(First Name AND Last Name AND Email)*

OR *(First Name AND Last Name AND Phone AND Company)*



OR(*First Name* AND *Last Name* AND *Mailing Street* AND (*City* OR *ZIP* OR *Phone*))

OR(*First Name* AND *Last Name* AND *Mailing Street* AND *Title*)

OR(*First Name* AND *Last Name* AND *Title* AND *Email*)

OR(*First Name* AND *Last Name* AND *Phone*)

### Matching Criteria

Fields on Contacts	Fields on Leads	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
First Name	First Name	Exact Initials Jaro-Winkler Distance Metaphone 3 Name Variant	Maximum	85	Don't match (ignores blank fields when Email is included in field grouping)	If record contains a value for the First Name and Last Name fields, the values are transposed to account for possible data entry mistakes.  For example, suppose that the first name is Felix and the last name is Michael. The matching rule also evaluates the first name as Michael and the last name as Felix.
Last Name	Last Name	Exact Keyboard Distance Metaphone 3	Maximum	90	Don't match (ignores blank fields when Email is included in field grouping)	If record contains a value for the First Name and Last Name fields, those values are transposed to account for possible data entry mistakes.  For example, suppose that the first name is Felix and the last name is Michael. The matching rule also evaluates the first name as Michael and the last name as Felix.
Title	Title	Acronym Exact Kullback-Liebler Distance	Maximum	50	Don't match	
Account Name	Company	Acronym Edit Distance Exact	Maximum	70	Don't match	
Email	Email	Exact	Maximum	100	Don't match	
Phone	Phone	Exact	Weighted Average	80	Don't match on all sections except Area Code, which ignores blank fields	Phone numbers are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to determine a score for the field. This process works best with North American data.  <ul style="list-style-type: none"> <li>International code (exact, 10% of field's match score)</li> </ul>

Fields on Contacts	Fields on Leads	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
						<ul style="list-style-type: none"> <li>• Area code (exact, 50% of field's match score)</li> <li>• Next three digits (exact, 30% of field's match score)</li> <li>• Last four digits (exact, 10% of field's match score)</li> </ul> <p>For example, these phone numbers are being compared: 1-415-555-1234 and 1-415-555-5678.</p> <p>All sections match exactly except the last four digits. The field has a match score of 90, which is considered a match because it exceeds the threshold of 80.</p>
Mailing Street	Street	Edit Distance Exact	Weighted Average`	80	Don't match	<p>Addresses are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to determine a score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>• Street Name (Edit Distance, 50% of field's match score)</li> <li>• Street Number (exact, 20% of field's match score)</li> <li>• Street Suffix (exact, 15% of field's match score)</li> <li>• Suite Number (exact, 15% of field's match score)</li> </ul> <p>For example, these addresses are being compared: 123 Market Street, Suite 100, and 123 Market Drive, Suite 300.</p> <p>The street number and street name match. The field has a match score of 70, which isn't considered a match because it's less than the threshold of 80.</p>
Mailing ZIP/Postal Code	ZIP/Postal Code	Exact	Weighted Average	80	Don't match	<p>ZIP codes are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to determine a score for the field.</p> <ul style="list-style-type: none"> <li>• First five digits (exact, 90% of field's match score)</li> <li>• Next four digits (exact, 10% of field's match score)</li> </ul>

Fields on Contacts	Fields on Leads	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
Mailing City	City	Edit Distance Exact	Maximum	85	Don't match	

## SEE ALSO:

- [Standard Contact Duplicate Rule](#)
- [Standard Lead Duplicate Rule](#)
- [Matching Criteria in Matching Rules](#)
- [How Match Keys Are Generated and Used in Matching Rules](#)

### Standard Matching Rule for Leads on Accounts

The standard matching rule for leads on accounts is activated with the purchase of Account Engagement Advanced or Premium edition. The rule populates the content of the Matched Leads component using a matching equation and matching criteria. By reducing redundant data, the rule and the component help you work toward complying with data protection and privacy regulations.



**Note:** The standard matching rule for leads on accounts works best on accounts with values in the Website field or the Account Name, Phone, Address, and City fields.

#### Matching Equation

(*Company AND Street*)

OR (*Company AND City AND State*)

OR (*Company AND ZIP/Postal Code*)

OR (*Company AND Phone*)

OR (*Website*)

#### Matching Criteria

Account Field	Lead Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
Account Name	Company	Acronym Edit Distance Exact	Maximum	70	Don't match	Removes words such as Inc and Corp before comparing fields. Also, company names are normalized. For example, 1st National Bank is normalized to First National Bank.
Phone	Phone	Exact	Weighted Average	80	Don't match on all	Phone numbers are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field. This process works best with North American data.

Account Field	Lead Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
					sections except Area Code, which ignores blank fields	<ul style="list-style-type: none"> <li>International code (Exact, 10% of field's match score)</li> <li>Area code (Exact, 50% of field's match score)</li> <li>Next 3 digits (Exact, 30% of field's match score)</li> <li>Last 4 digits (Exact, 10% of field's match score)</li> </ul> <p>For example, suppose that these two phone numbers are being compared: 1-415-555-1234 and 1-415-555-5678.</p> <p>All sections match exactly <i>except</i> the last 4 digits, so the field has a match score of 90. The field is considered a match because the score exceeds the threshold of 80.</p>
Billing Street	Street	Edit Distance Exact	Weighted Average	80	Don't match	<p>Addresses are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field. This process works best with North American data.</p> <ul style="list-style-type: none"> <li>Street Number (Exact, 20% of field's match score)</li> <li>Street Name (Edit Distance, 50% of field's match score)</li> <li>Street Suffix (Exact, 15% of field's match score)</li> <li>Suite Number (Exact, 15% of field's match score)</li> </ul> <p>For example, suppose that these two billing streets are being compared: 123 Market Street, Suite 100, and 123 Market Drive, Suite 300.</p> <p>Because only the street number and street name match, the field has a match score of 70. The field isn't considered a match because the score is below the threshold of 80.</p>
Billing ZIP/Postal Code	ZIP/Postal Code	Exact	Weighted Average	80	Don't match	<p>ZIP codes are broken into sections and compared by those sections. Each section has its own matching method and match score. The section scores are weighted to come up with one score for the field.</p> <ul style="list-style-type: none"> <li>First 5 digits (Exact, 90% of field's match score)</li> <li>Next 4 digits (Exact, 10% of field's match score)</li> </ul> <p>For example, suppose that these two ZIP codes are being compared: 94104-1001 and 94104.</p> <p>Because only the first five digits match, the field has a match score of 90. The field is considered a match because the score exceeds the threshold of 80.</p>

Account Field	Lead Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
Billing City	City	Edit Distance Exact	Maximum	85	Don't match	
Website	Email	Exact	Maximum	100	Don't match	The domain in the email suffix in the lead record is extracted and compared to the website field in the account record. Email addresses ending in widely used domains such as gmail.com and yahoo.com are ignored.

If the account Website field has no value, and at least one contact is related to the account, the following matching criteria are also applied.

Related Contact Field	Lead Field	Matching Algorithms	Scoring Method	Threshold	Blank Fields	Special Handling
Email	Email	Exact	Maximum	100	Don't match	The domain in the lead's email suffix is extracted and compared to email suffixes in the contact records with the 20 most recent system timestamps. Among those 20 records, the rule then identifies the 5 most frequently occurring email suffixes. Finally, the rule identifies as possible matches any leads that share those suffixes. Email addresses ending in widely used domains such as gmail.com and yahoo.com are ignored.

#### SEE ALSO:

- [Account Engagement Pricing](#)
- [View and Convert Leads on an Account](#)
- [Matching Criteria in Matching Rules](#)
- [How Match Keys Are Generated and Used in Matching Rules](#)

## Considerations for Using Duplicate Management in the Salesforce Mobile App

Review considerations for using duplicate management features on a mobile device.

- The Salesforce mobile app doesn't alert users to existing duplicate accounts, contacts, or leads.
- The Salesforce mobile app does alert users when they're about to create an account, contact, or lead that appears to duplicate an existing record.
- Each possible duplicate is shown on a "duplicate card." The app displays a maximum of 30 duplicates (10 per object), even if there are more.

- A duplicate card displays three fields, which are derived from the search results format defined for your org, not from the associated matching rule.
- If users tap a duplicate card that appears while they're editing or creating a record, any information they entered before tapping the card is lost.
- By default, duplicate rules run when users complete fields on a record, rather than when they save a record.
- The Salesforce mobile app doesn't support merging of records.

## Integrate Third-Party Data with Your Records

---

### USER PERMISSIONS

To update records:	Edit on accounts, contacts, leads, and Read on the custom and external objects included in a data package
To activate or deactivate data integration rules:	Customize Application
To install a package:	Download AppExchange Packages
To activate and configure data integration rules for third-party data services:	View Setup and Configuration AND Customize Application
To run or access a data assessment:	Customize Application AND View All Data

Give your sales team data and connections that they can use to cultivate great relationships with customers and target productive prospects. Lightning Data and Data.com connect you with firmographic, industry, and region-specific data from third-party providers. You license Lightning Data packages directly from providers, and you use a convenient unified interface to integrate data from all third-party sources into Salesforce.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions; Geocode rules also available in **Developer** Edition; Company Info rules available with a Data.com Premium Clean license

#### [Use Third-Party Data to Update and Add Records to Salesforce](#)

A rule set up by your Salesforce admin compares your accounts, contacts, and leads to data from a third-party source—Lightning Data or Data.com. Depending on how your admin sets up the rule, your records are updated as information changes. Or your admin can give you purchase credits to import Lightning Data records to add to Salesforce as accounts.

#### [Set Up and Monitor Data Integration](#)

Set up Lightning Data or Data.com data services to update your existing records or import new ones. Monitor match rates and updates.

[Considerations for Using Data Integration in the Salesforce Mobile App](#)

Review considerations for using Data Integration features on a mobile device.

## SEE ALSO:

[AppExchange: Lightning Data](#)

## Use Third-Party Data to Update and Add Records to Salesforce

A rule set up by your Salesforce admin compares your accounts, contacts, and leads to data from a third-party source—Lightning Data or Data.com. Depending on how your admin sets up the rule, your records are updated as information changes. Or your admin can give you purchase credits to import Lightning Data records to add to Salesforce as accounts.

[Check for New Data Matched to a Record](#)

Look at the data status to see whether a data service has new data matched to an account, contact, or lead.

[Discover Companies to Import as Accounts in Lightning Experience](#)

Fill your pipeline with ideal prospects. When your Salesforce admin sets up a Lightning Data package, you can find companies to target and import them into Salesforce as business accounts.

[Refine Your Search for Companies to Import](#)

Narrow your Discover Companies search results to the most ideal prospects.

### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To update records:

- Edit on accounts, contacts, leads, and Read on the custom and external objects included in a data package

## Check for New Data Matched to a Record

Look at the data status to see whether a data service has new data matched to an account, contact, or lead.

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

[Check for New Data Matched to a Record in Lightning Experience](#)

Check whether a data service has new data matched to an account, contact, or lead. On each record, you can choose field by field to keep the data you have or use a value from a data service instead. Your Salesforce admin can configure rules in Salesforce to compare your records to records in the data service and update them automatically. Some Lightning Data services let you override the automatic match and select another.

[Update Data Matched to a Record in Salesforce Classic](#)

Check whether a data service has new data matched to an account, contact, or lead. Your Salesforce admin can configure rules in Salesforce to compare your records to records in the data service and update them automatically.

[Data Statuses](#)

When you check for new data on a record, the data status indicates how the record compares with data service records.

## SEE ALSO:

[Data Statuses](#)

## Check for New Data Matched to a Record in Lightning Experience

### USER PERMISSIONS

To update records using Lightning Data packages:

Read and Edit on accounts, contacts, and leads

AND

Read, Edit, and Create on the custom object included in a data package

AND

Read on the external object included in a data package

AND

View Setup and Configuration

To update records using geocode data integration rules:

Read and Edit on accounts, contacts, and leads

To update records using company info rules:

Read and Edit on accounts, contacts, and leads

AND

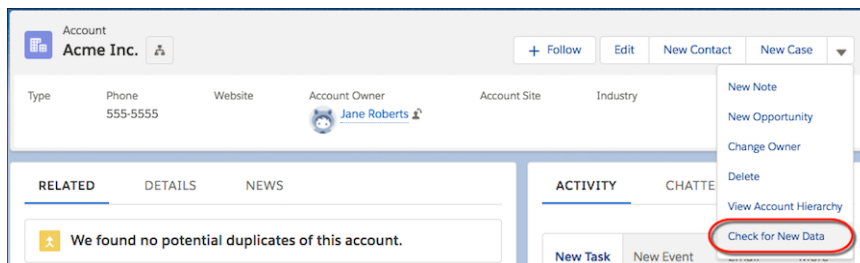
Read, Edit, and Create on the D&B Company object

### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Check whether a data service has new data matched to an account, contact, or lead. On each record, you can choose field by field to keep the data you have or use a value from a data service instead. Your Salesforce admin can configure rules in Salesforce to compare your records to records in the data service and update them automatically. Some Lightning Data services let you override the automatic match and select another.

1. Open the account, contact, or lead you want to check.
2. In the action menu, select **Check for New Data**.

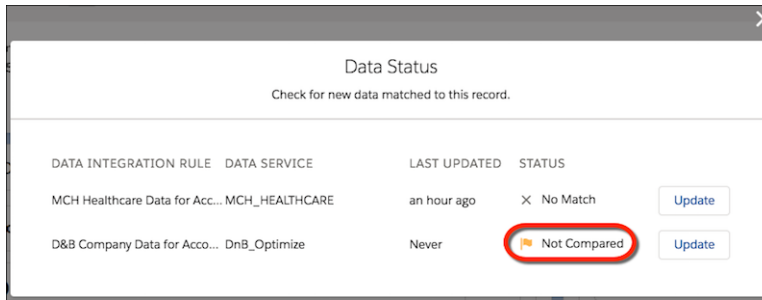


3. Look at the status of each rule.

### Not Compared, No Match

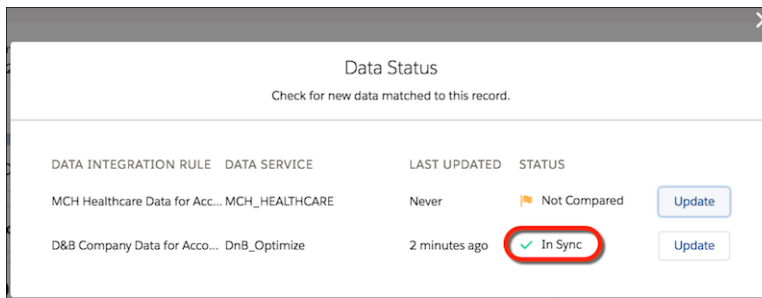
Not Compared indicates that the rule for matching between Salesforce and the data service hasn't been run on the record. To look for a match in that data service, click **Update**. If no match is found, the status changes to No Match.



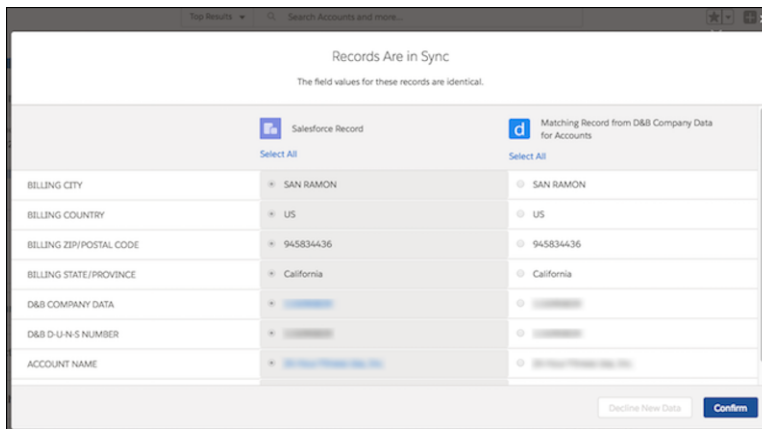


**In Sync, Reviewed, Different**

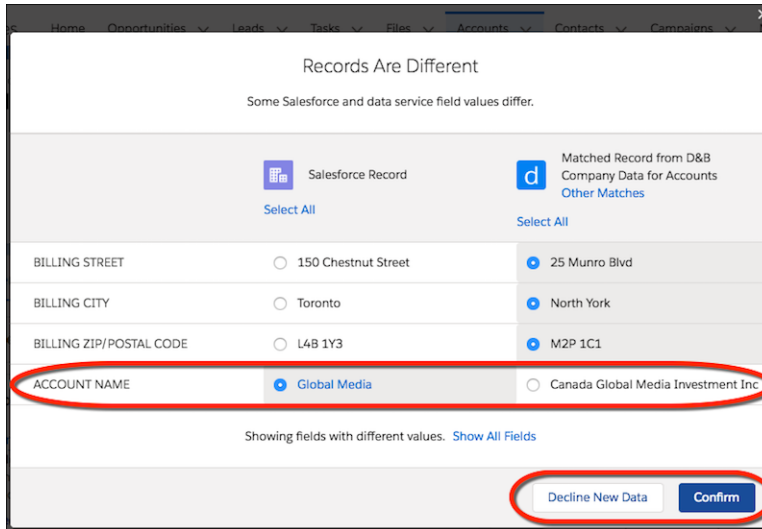
These statuses indicate that the record has been matched to a data service record, and the data is identical or different. To compare the fields side by side, click **Update**.



If the records are in sync, you can confirm the values.



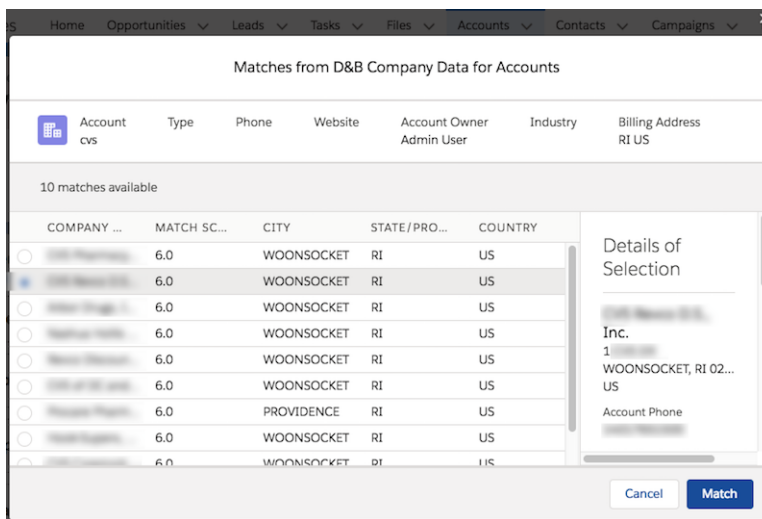
If the records are different, leave the Salesforce record unchanged by clicking **Decline New Data**. The status changes to Reviewed. Or select the values you want for each field, and click **Confirm**. The status changes to In Sync or Reviewed.



Some data services match records automatically on the basis of a match score threshold set by your Salesforce admin. With some of these services, you can override the automatic match and select another. Click **Other Matches**.



You see details of up to 10 matches.



**Match Available**

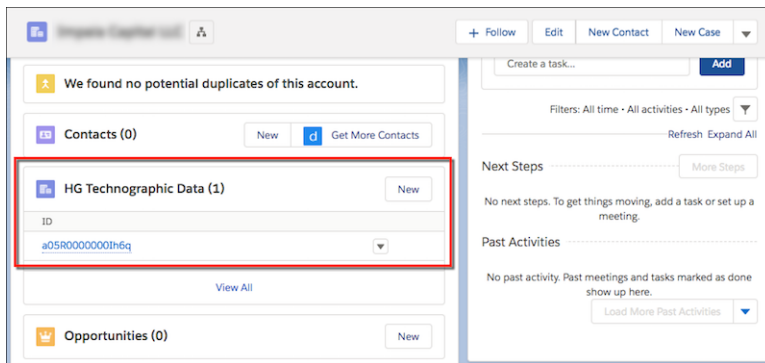
Sometimes a Lightning Data rule doesn't assign a match automatically. Instead, you can choose from matches that don't meet the threshold set by your Salesforce admin. To see those matches, when you check for new data, click **Update**.

DATA INTEGRATION RULE	DATA SERVICE	LAST UPDATED	STATUS
	MCH Healthcare Data for Acc... MCH_HEALTHCARE	8 minutes ago	✘ No Match <span>Update</span>
	D&B Company Data for Acco... DnB_Optimize	9 days ago	✔ Match Available <span>Update</span>

Updates to records are handled as follows.

### Automatic Updates

- If a field in a Salesforce record is empty and the corresponding data service record contains a value, the empty field is filled in automatically.
- When new data is available, geocodes and certain fields determined by your Salesforce admin are updated automatically. Some fields also show the updated data in a related list or via a link on the record.



- Some automatically updated Salesforce records are shown as last modified by Data.com Clean.

### Edits to Fields Used for Matching

When you edit a record, if you change a field that a data service uses for matching, the record's status is updated after you save.

### Data Service Records That Become Unavailable

If a data service record becomes unavailable, the record is labeled Inactive and the status is changed to Not Found, but the data isn't deleted.

SEE ALSO:

[Data Statuses](#)

## Update Data Matched to a Record in Salesforce Classic

Check whether a data service has new data matched to an account, contact, or lead. Your Salesforce admin can configure rules in Salesforce to compare your records to records in the data service and update them automatically.

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

1. Open the account, contact, or lead that you want to check.  
If you don't see the Data Integration Rules related list, ask your Salesforce admin to add it to the page.
2. In the Data Integration Rules related list, look at the status of each rule.

Action	Status	Data Integration Rule Name	Data Service	Last Updated
Update	Not Compared	Bombora Purchase Intent Data for Accounts	BOMBORA	Never
Update	In Sync	D&B Company Data for Accounts	DnB_Optimize	1 week ago

### Not Compared, No Match

Not Compared indicates that the rule for matching between Salesforce and the data service hasn't been run on the record. To look for a match in that data service, click **Update**. If no match is found, the status changes to No Match.

### In Sync, Different

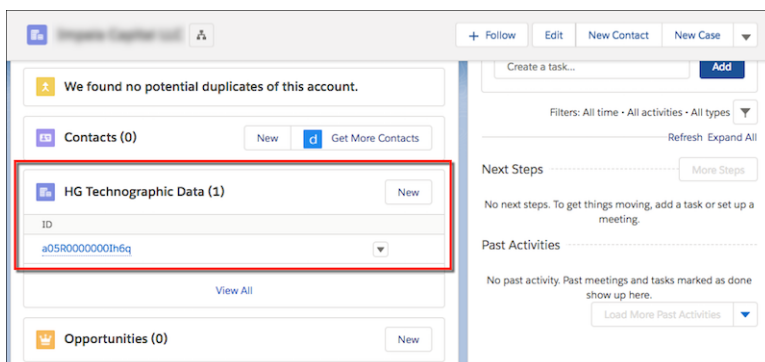
These statuses indicate that the record has been matched to a data service record, and the data is identical or different. If the records are different, click **Update**.

**Note:** Sometimes clicking **Update** doesn't result in updates, depending on how the data service is set up. Check with your Salesforce admin.

Updates to records are handled as follows.

### Automatic Updates

- If a field in a Salesforce record is empty and the corresponding data service record contains a value, the empty field is filled in automatically.
- When new data is available, geocodes and certain fields determined by your Salesforce admin are updated automatically. Some fields also show the updated data in a related list or via a link on the record.



## USER PERMISSIONS

To update records using Lightning Data packages:

- Read and Edit on accounts, contacts, leads

AND

Read, Edit, and Create on the custom object included in a data package

AND

Read on the external object included in a data package

To update records using geocode rules:

- Read and Edit on accounts, contacts, leads

To update records using company info rules:

- Read and Edit on accounts, contacts, and leads

AND

Read, Edit, and Create on the D&B Company object

- Some automatically updated Salesforce records are shown as last modified by Data.com Clean.

### Edits to Fields Used for Matching

When you edit a record, if you change a field that a data service uses for matching, the record's status is updated after you save.

### Data Service Records That Become Unavailable

If a data service record becomes unavailable, the record is labeled Inactive and the status is changed to Not Found, but the data isn't deleted.








SEE ALSO:

[Data Statuses](#)

## Data Statuses

When you check for new data on a record, the data status indicates how the record compares with data service records.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

Data Status	Definition
 Not Compared	The Salesforce record wasn't compared with records in the data service.
 In Sync	The Salesforce record matches a record in the data service, and the fields to be updated have identical values.
 Reviewed	The Salesforce record matches a record in the data service, but not all values from the matched record were accepted. Only values for fields to be updated are used to determine the status. A record retains Reviewed status until someone updates the record manually or the data service record becomes unavailable.
 Different	The Salesforce record matches a record in the data service, but the fields to be updated have different values, and the differences haven't been reviewed.
 Match Available	The data service doesn't have a record that qualifies for automatic matching, but it does have one or more possible matches.
 No Match	The data service has no records similar to the Salesforce record.
 Skipped	The Salesforce and data service records were compared, but an error (for example a validation or trigger error) prevented the data status from being updated.

SEE ALSO:

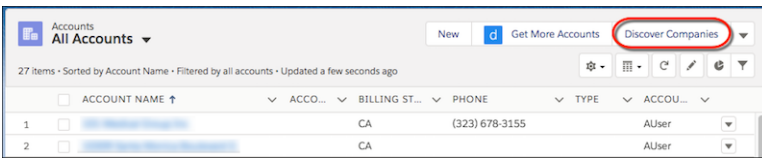
[Check for New Data Matched to a Record](#)

## Discover Companies to Import as Accounts in Lightning Experience

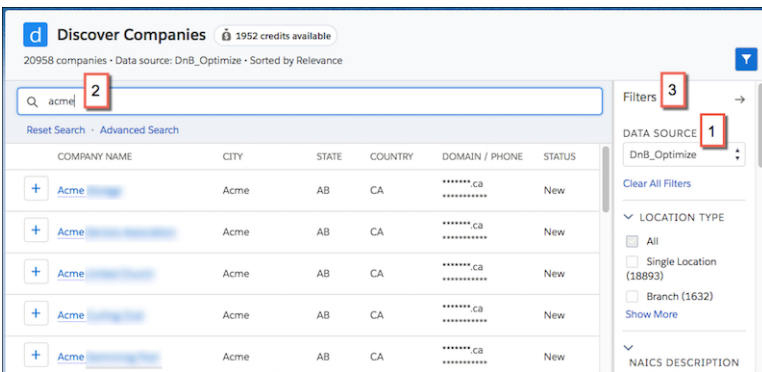
Fill your pipeline with ideal prospects. When your Salesforce admin sets up a Lightning Data package, you can find companies to target and import them into Salesforce as business accounts.

To give you access to Discover Companies, your Salesforce admin installs a Lightning Data package from AppExchange and assigns you credits for importing company records.

1. On Accounts, select a list view other than Recently Viewed. Click **Discover Companies**.

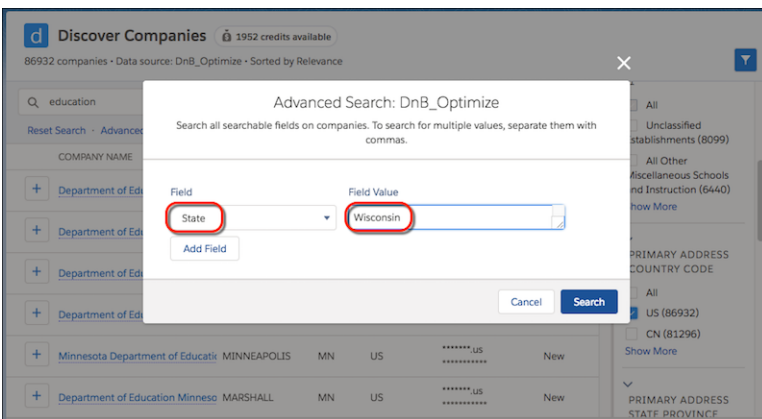


2. Choose a data service (1), search (2), and filter the search results (3).



Filters vary depending on the package.

To search for specific values on a field, use advanced search.



3. Select records, and use your purchase credits to import up to 25 records at a time as business accounts. As you select companies, you see the number of companies you've selected and the remaining number of Lightning Data purchase credits available to use.

### EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To import company records:

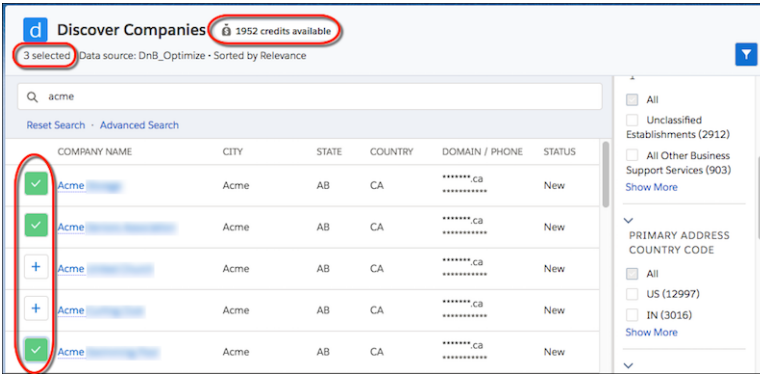
- Read and Create on accounts

AND

Read on all fields on the external object included in the Lightning Data package

AND

Purchase credits assigned by a Salesforce admin



The status shows whether a record has been imported.

### New

You don't have a record in Salesforce that matches this record.

### In Salesforce

This record was already matched against this data service via a data integration rule update or imported via Discover Companies.

### Purchased

This record was already purchased from this data service via Discover Companies.

### SEE ALSO:

[Refine Your Search for Companies to Import](#)

[AppExchange: Lightning Data](#)

[Refine Your Search for Companies to Import](#)

## Refine Your Search for Companies to Import

Narrow your Discover Companies search results to the most ideal prospects.

- Use free-text search.
  - Group search terms by using quotation marks.
  - Use an asterisk (\*) to find items that match zero or more characters in the middle or at the end of your query.
  - Use a question mark (?) to find items that match a single character in the middle or at the end of your query.
- To search for specific values on a field, use advanced search.

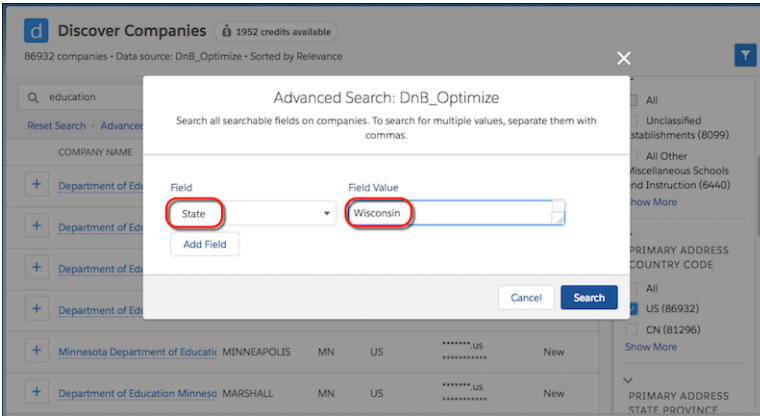
### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To search for companies:

- Read on all fields on the external object included in the Lightning Data package



- Separate multiple values with commas.
- You can't use an asterisk (\*) or a question mark (?) to represent characters.
- Advanced search applies an AND operation between fields, and an OR operation between multiple values for a single field.
- Filter your results for values specific to the data source you select. In filters representing a range, you can use the following shortcuts.
  - To perform a "less than" search, leave the min field blank.
  - To perform a "greater than" search, leave the max field blank.
  - Use *k* as a US English abbreviation for thousand, *m* for million, and *b* for billion. For example, *150m* = 150,000,000.

## SEE ALSO:

[Discover Companies to Import as Accounts in Lightning Experience](#)

[Discover Companies to Import as Accounts in Lightning Experience](#)

[AppExchange: Lightning Data](#)



## Set Up and Monitor Data Integration

Set up Lightning Data or Data.com data services to update your existing records or import new ones. Monitor match rates and updates.

### [Activate and Configure Data Integration Rules](#)

Activate data integration rules, map fields in your records to fields from a data service, and configure page layouts so that your sales team can view third-party data and update records.

### [Use Third-Party Data Services](#)

Use Lightning Data packages and Geocode and Company Info rules from Data.com to update and add to your records.

### [Check the Match Rates for a Data Service](#)

Monitor the percentage of your records that data integration rules have matched to a record in data services. When records are matched, the data service can update them.

### [Factors That Affect Match Rates](#)

Various factors can affect the match rates for matching records from a data service with your Salesforce records.

### [Create Reports on Data Integration Updates](#)

Use reports on data integration status to monitor your accounts, contacts, and leads for records that need attention and to ensure the highest possible match rates.

## Activate and Configure Data Integration Rules

Activate data integration rules, map fields in your records to fields from a data service, and configure page layouts so that your sales team can view third-party data and update records.

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

### [Activate the Data Integration Rule for a Data Service](#)

Automatically match records to current information in a data service by activating a Lightning Data package rule, a geocode rule, or a company info rule. When a user edits a record by changing the value of a field used in matching, the rule updates the record. When a record is created, the rule looks for matches in the data service. Plus, you can fine-tune Lightning Data rules: Add a custom field you can use to identify records to update or to include in data assessments, while skipping other records.

### [Edit the Field Mapping for a Data Integration Rule](#)

To help ensure that your records and reports are accurate, check the field mapping when you activate a data integration rule. Some Lightning Data rules let you keep or overwrite field values when new data is available.

### EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To activate or deactivate data integration rules:

- Customize Application

To install a package:

- Download AppExchange Packages

To activate and configure data integration rules for third-party data services:

- View Setup and Configuration

AND

Customize Application

To run or access a data assessment:

- Customize Application

AND

View All Data

### USER PERMISSIONS

To activate or deactivate data integration rules:

- Customize Application

### [Things to Know About Configuring and Activating Data Integration Rules](#)

Review considerations for configuring and activating data integration rules, including rules in Lightning Data packages and rules for adding geocodes and company information from Dun & Bradstreet.

### [Integration Rule Info Fields](#)

Integration Rule Info fields are available in reports.

## Activate the Data Integration Rule for a Data Service

Automatically match records to current information in a data service by activating a Lightning Data package rule, a geocode rule, or a company info rule. When a user edits a record by changing the value of a field used in matching, the rule updates the record. When a record is created, the rule looks for matches in the data service. Plus, you can fine-tune Lightning Data rules: Add a custom field you can use to identify records to update or to include in data assessments, while skipping other records.

### USER PERMISSIONS

To activate or deactivate data integration rules:

- Customize Application

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

Each data service includes an external object used for updating and importing records and a data integration rule that identifies matches with your Salesforce records. Some data services also include a custom object that contains more data.

Regardless of whether a rule is activated, users can view rule status and manually update a record at any time.


1. In Salesforce Classic, new data isn't displayed on records by default. If your users use Salesforce Classic, add the Data Integration Rules related list to the page layouts for accounts, contacts, and leads.
2. Assign object permissions to users.  
The object permissions required depend on the rule. For details, contact the data service provider.
3. In Setup, use the Quick Find box to find **Data Integration Rules**.
4. Select the rule settings you want.

### Update all records

When you deselect this option, the rule runs only on records that are added or edited.

Before selecting **Update all records**, first test the rule. With the option deselected, save the rule settings and update a few records manually. If the updates are made, select the option and save the settings again. When you select this option, the rule runs under the following conditions.

- When you first activate the rule, it runs on all records. If you have more than 10 million records on an object—account, contact, or lead—the rule doesn't run.
- After the rule is activated, it runs on records that are added or edited. It also runs on all records periodically, at the frequency determined by the data service provider, unless it's a geocode rule.

 **Note:** When the **Update all records** option is selected, a rule doesn't necessarily run immediately after you edit the rule's field mapping or match score. To run the rule immediately, deactivate the rule, change the settings, and reactivate the rule.

When the following options are selected, they're applied whether the rule updates the records or users update the records manually.

### Bypass triggers

Triggers on the object are bypassed. However, triggers on the related custom object aren't bypassed.

**Bypass workflows**

Workflow rules and workflows created via Process Builder are bypassed. However, workflow rules and workflows on the related custom object aren't bypassed.

**Leave last-modified information unchanged**

The values of the LastModifiedById and LastModifiedDate fields on records aren't updated. The SystemModstamp field is always updated, regardless of this setting.

However, if there's a custom triggered automation modifying a record at the same time as an integration rule, the LastModifiedById is updated to "Data.com User".

5. Save the rule settings.
6. Review the field mapping for the rule to ensure that the data service fields are correctly mapped to your Salesforce object's fields.
7. To specify which records you want a Lightning Data rule to run on, create a custom field.
  - a. Create a checkbox field, and name it according to the pattern *LD\_USE\_Data Source Name*. To find the data source name, in Setup, enter *External Data Sources*, and look for the name under the External Data Source column. Use the exact data source name, including uppercase and lowercase letters.
  - b. Label the field using one of these patterns: *Match Using Data Service Provider Name* or *Enrich Using Data Service Provider Name*. The data service provider name is different from the data source name.
  - c. Add the field to the layout for the object targeted by the rule.

The rule runs on records with the checkbox selected, and skips the rest. To select or deselect the checkbox on many records at one time, use Data Loader.

8. Activate the rule.

## SEE ALSO:

[AppExchange: Lightning Data](#)

[Edit the Field Mapping for a Data Integration Rule](#)

[Test the Match Score Setting](#)

[About Data Loader](#)

**Edit the Field Mapping for a Data Integration Rule**

To help ensure that your records and reports are accurate, check the field mapping when you activate a data integration rule. Some Lightning Data rules let you keep or overwrite field values when new data is available.

The data service provider determines a rule's default field mapping.

1. In Setup, use the Quick Find box to find **Data Integration Rules**. Select the rule you want to look at, and then click **Edit Field Mapping**.
2. On the Match tab, look at the fields used to match your records to fields in the data service. If a data service field isn't correctly mapped to the standard object, select a different standard object field.

For example, suppose that the data service field City is mapped to the account field Billing City, but you use Shipping City in account addresses. Change Billing City to Shipping City.

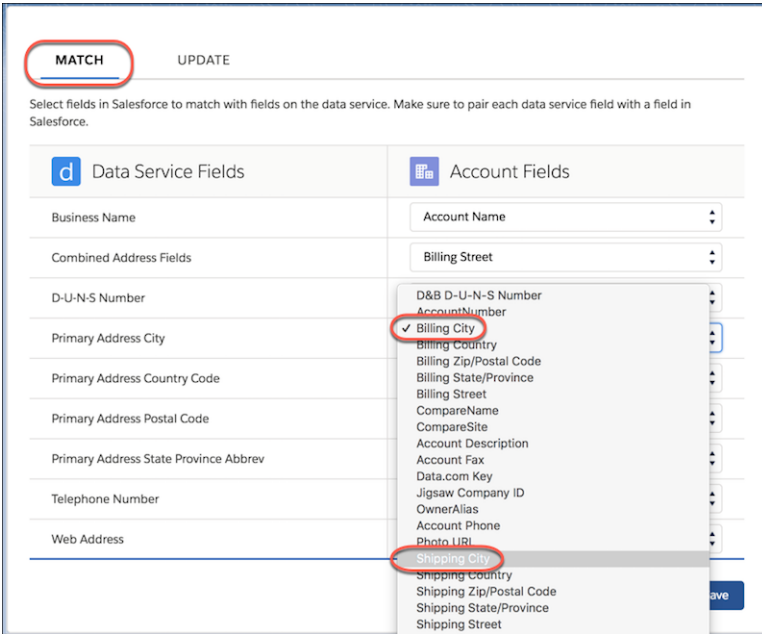
**EDITIONS**

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

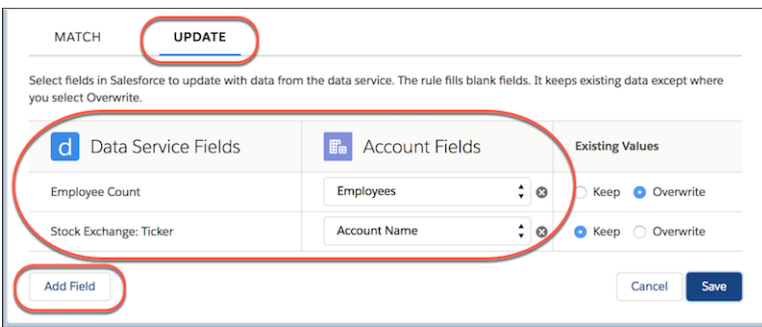
**USER PERMISSIONS**

To edit field mapping:

- Customize Application



3. If the rule can update fields, the settings include an Update tab. Click **Update** and look at the fields that can be updated with new data when the rule runs. Check that each data service field is correctly mapped to a Salesforce standard object field. If needed, select different standard object fields and add or remove fields to update.



You can add, remove, or change up to 12 mappings at a time before saving.

Rules that support data updates determine a record’s data status using the standard object field values in the update mapping. The data service fields used to match records and the fields used to update them can differ.

4. If you use a Lightning Data rule that updates fields via custom object lookups, you can update a field automatically when new data is available. First enable history tracking for the field, and then select **Overwrite**.

MATCH **UPDATE**

Select fields in Salesforce to update with data from the data service. The rule fills blank fields. It keeps existing data except where you select Overwrite.

Data Service Fields	Account Fields	Existing Values
Employee Count	Employees	<input type="radio"/> Keep <input checked="" type="radio"/> Overwrite
Stock Exchange: Ticker	Account Name	<input checked="" type="radio"/> Keep <input type="radio"/> Overwrite

Add Field Cancel Save

You can't overwrite data from company info or geo rules.

SEE ALSO:

[Track Field History for Standard Objects](#)

## Things to Know About Configuring and Activating Data Integration Rules

Review considerations for configuring and activating data integration rules, including rules in Lightning Data packages and rules for adding geocodes and company information from Dun & Bradstreet.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

[Things to Know About Data Integration Rules](#)

Review considerations for using data integration rules.

[Things to Know About Geocode Data Integration Rules](#)

Review considerations for using geocode data integration rules.

[Things to Know About Company Info Data Integration Rules](#)

Review considerations for using company info data integration rules.

SEE ALSO:

[Factors That Affect Match Rates](#)

## Things to Know About Data Integration Rules

Review considerations for using data integration rules.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### Frequency of Updates

When the **Update all records** option is selected, the update frequency depends on the rule.

- For Lightning Data packages, each data service provider determines how often the rule runs.
- Geocode rules run only at the time they're activated and, from that point on, on records that are added or edited.

- Company info rules run approximately every 14 days. They also run when they're activated and when records are added or edited.

### Field Mapping Changes Made While a Rule Is Activated

If you select the **Update all records** option and then you change your field mapping settings, update all your records by deactivating and then reactivating the rule.

### Sandbox Testing Recommended

We recommend that you test data integration rules in a sandbox before running them in production.

### Update Status in Sandboxes

You can't copy status information associated with data integration rules to or from a sandbox. To get status information in your sandbox, activate your data integration rules and process your records in your sandbox.

### Field Customizations

Rule-based updates are independent of field customizations (such as approvals, workflow rules, or Apex triggers) that you use for accounts, contacts, or leads. Review and edit your customizations to ensure that they work after values are updated.

### Currency Conversion

Data integration rules for Lightning Data and company info give currency amounts in US dollars. When the multiple currencies feature is enabled, Lightning Data rules convert numerical fields mapped to a currency type field from US dollars to the record currency. Company info rules convert the Data.com Annual Revenue field to the record currency. Make sure that US dollars and the currency of the records that you want to update are both active. The rules use the conversion rate defined for your org.

Multicurrency Enabled?	Other Conditions	Result
Yes	Data service currency field is mapped to a currency field in Salesforce. US dollars is one of the active currencies.	The rule populates the record's currency field with converted data service value, using conversion rate defined for org. Values are shown in the following format: Record Currency (User Currency). After conversion, the data service currency value is no longer displayed.  If an error prevents the conversion, the rule leaves the record's currency field blank.
Yes	US dollars or record currency is inactive.	The rule leaves the record's currency field blank.  When users compare records side by side, the currency field isn't displayed.
Yes	Data service currency field is mapped to a non-currency field in Salesforce.	The record is populated with the value from the data service, without converting.
No	Data service currency field is mapped to a currency field in Salesforce.  Org currency is US dollars.	The record is populated with the value from the data service, without converting.

Multicurrency Enabled?	Other Conditions	Result
No	Data service currency field is mapped to a currency field in Salesforce. Org currency isn't US dollars.	The rule leaves the record's currency field blank. When users compare records side by side, the currency field isn't displayed.

## SEE ALSO:

[Factors That Affect Match Rates](#)

[Enable Multiple Currencies](#)

[Things to Know About Using Lightning Data to Update or Import Records](#)

## Things to Know About Geocode Data Integration Rules


Review considerations for using geocode data integration rules.

### Actions When Geocode Information Is Added to Records

When geocode fields are updated, values in the fields are overwritten.

### Visibility of Geocode Information

Geocode information isn't visible on records. However, you can view it using the Salesforce API. You can also create custom fields that use formulas to show geocode fields on records.

 **Note:** If you map geocode information (latitude, longitude, and accuracy rating) to custom fields, the custom fields must be text fields. Geocode fields can't be mapped to other custom field types, including number fields.

### EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## SEE ALSO:

[Factors That Affect Match Rates](#)

## Things to Know About Company Info Data Integration Rules

Review considerations for using company info data integration rules.

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions with a Data.com Premium Clean license

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### Location Matching for Accounts

Company Info for Accounts matches an account record based on the account's location, using Data.com matching. All Dun & Bradstreet countries are supported.

### Location Matching for Leads

If a lead contains a value for the Country field, the Company Info for Leads rule adds company information for the domestic headquarters in that country. If the lead doesn't contain a value for Country, the rule adds global headquarters information.

### Separate Field Mapping Settings for Rules

The field mapping selections in **Setup > Data.com Administration > Field Mapping** don't affect field mapping for company info rules. Each rule has its own customizable field mapping settings.

### Status Fields for Company Info Rules Versus Data.com Clean

Company info rules and Data.com Clean use different status fields.

- Company info rules use the Data Integration Status field in the Integration Rule Info object.
- Data.com Clean uses the Clean Status field in the Account or Lead object.

### Conflicts Between Company Info Rules and Data.com Clean

Because company info rules and Clean jobs can run at different times, the status fields can contain different values. Workflow rules or triggers that depend on a status field can work incorrectly. For example, the Company Info for Accounts data integration rule updates fields after a user adds an account. The value of the Data Integration Status field is In Sync. However, if the scheduled Clean job for accounts hasn't run yet, the value of the Clean Status field is still Not Compared.

Avoid running bulk processes for company info rules and Clean jobs simultaneously. If you've scheduled Clean jobs, we recommend deselecting the option **Update all records after this rule is activated or saved** in company info rules.

### When Data.com Clean Button Appears on Same Layout as Data Integration Related List (Salesforce Classic)

The Clean button and Clean Status field control Data.com Clean, and the Data Integration Rules related list is for data integration rules. If you include all these elements on the same page layout, we recommend training your users about the difference between Data.com Clean and data integration.

SEE ALSO:

[Factors That Affect Match Rates](#)

## Integration Rule Info Fields

Integration Rule Info fields are available in reports.

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

Field	Description
Data Integration Status	Indicates the data integration status of a Salesforce record matched to a data service record by a data integration rule.
Data Integration Rule ID	Contains the ID of the data integration rule.
Description	Displays the data integration rule description.
Message	Contains error messages, such as validation errors, generated when a record isn't saved after the rule runs.

SEE ALSO:

[Create Reports on Data Integration Updates](#)



## Use Third-Party Data Services

Use Lightning Data packages and Geocode and Company Info rules from Data.com to update and add to your records.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions; Geocode rules also available in **Developer** Edition; Company Info rules available with a Data.com Premium Clean license

### [Use Lightning Data to Update and Import Records](#)

Use Lightning Data packages to keep your data current and help your sales team find prospects.

### [Get Geocodes for Addresses in Your Records](#)

Geocodes help your sales and marketing teams find nearby prospects and assign territories and campaigns. After you activate a geocode rule, verify that geocodes were added to your accounts, contacts, and leads. Give your users access to related objects and fields so that they can review records.

### [Update Accounts and Leads with Key Company Information](#)

Key company information from Dun & Bradstreet helps your sales teams pursue the most promising leads, segment accounts, plan territories and campaigns, and understand customers better. Use rules to add company, industry, and financial information—number of employees, DUNS number, annual revenue, and more—to all your accounts and leads.

#### SEE ALSO:

[AppExchange: Lightning Data](#)

[Geocode Data Integration Rules](#)

[Company Info Data Integration Rules](#)

[Check the Match Rates for a Data Service](#)

## USER PERMISSIONS

To install a package:

- Download AppExchange Packages

To activate and configure data integration rules for third-party data services:

- View Setup and Configuration

AND

Customize Application

To run or access a data assessment:

- Customize Application

AND

View All Data

## Use Lightning Data to Update and Import Records

Use Lightning Data packages to keep your data current and help your sales team find prospects.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### [Use Lightning Data Packages to Update Records in Lightning Experience](#)

To add firmographic, industry, and region-specific data to your accounts, contacts, or leads, activate the data integration rules included in a Lightning Data package. To let your users update records manually, give them access to certain objects. Some packages also require adding items to the page layout.

### [Set Up a Lightning Data Package to Import Records as Accounts](#)

Give your sales team a better way to prospect for new customers. When you license and set up a Lightning Data package, a Discover Companies button is added to the Accounts page. It gives sales teams access to powerful search filters they can use to find companies and then import them into Salesforce as business accounts. You assign data import credits to each sales rep.

### [Test the Match Score Setting](#)

Before you activate a data integration rule that includes a minimum match score, we recommend testing the setting. The setting gives you control over whether matches are broad or precise.

When you activate the rule, we match your records to the data service records with the highest score that meets the minimum.

### [Things to Know About Using Lightning Data to Update or Import Records](#)

Review considerations for using Lightning Data to update or import records.

### [Get a Free Assessment Before You Purchase a Lightning Data Package](#)

Before you purchase a Lightning Data package, get a free assessment to determine whether the package is valuable for your business.

## Use Lightning Data Packages to Update Records in Lightning Experience

To add firmographic, industry, and region-specific data to your accounts, contacts, or leads, activate the data integration rules included in a Lightning Data package. To let your users update records manually, give them access to certain objects. Some packages also require adding items to the page layout.

Each Lightning Data package includes the following.

- A custom object containing data from the data service
- An external object used for updating and importing records
- A data integration rule that identifies matches between the external object records and your Salesforce records

For details, contact the data service provider.

1. Give users access to the following objects.
  - Read and Edit on the standard object—Account, Contact, or Lead
  - Read, Edit, and Create on the custom object included in the package
  - Read on the external object included in the package

### USER PERMISSIONS

To install a package:

- Download AppExchange Packages

To activate and configure data integration rules included in a package:

- View Setup and Configuration

AND

Customize Application

To run or access a data assessment:

- Customize Application

AND

View All Data

### EDITIONS

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To set up a package:

- View Setup and Configuration

AND

Customize Application

- Some Lightning Data packages require an extra step to give your users access to the data from the package. You add a lookup field or related list for the custom object included in the package to the page layout. For details, contact the data service provider.

 **Example:** New data from a package is surfaced to users differently, depending on the type of data.

#### On the Standard Object

The package rule applies updates to standard object records according to the rule's update field mapping.

#### In a Related List or via a Link

On standard object records, users see a related list of the custom object fields or a link to the custom object record. The rule applies updates to custom object records.

SEE ALSO:

[Activate and Configure Data Integration Rules](#)

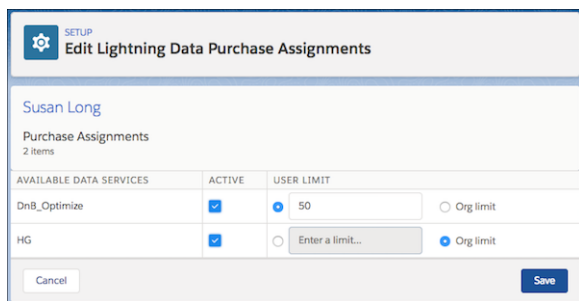
[Track Field History for Standard Objects](#)

## Set Up a Lightning Data Package to Import Records as Accounts

Give your sales team a better way to prospect for new customers. When you license and set up a Lightning Data package, a Discover Companies button is added to the Accounts page. It gives sales teams access to powerful search filters they can use to find companies and then import them into Salesforce as business accounts. You assign data import credits to each sales rep.

You negotiate the price of data import credits with a data service provider. Not all data service providers offer import credits.

- In Setup, use the Quick Find box to find **Users**. Click a user's name.
- Find the Lightning Data Purchase Assignments related list. Edit the assignments: Specify a limit for the user, or give the user all the credits for the org. Activate the assignments and save.



AVAILABLE DATA SERVICES	ACTIVE	USER LIMIT
DnB_Optimize	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> 50 <input type="radio"/> Org limit
HG	<input checked="" type="checkbox"/>	<input type="radio"/> Enter a limit... <input checked="" type="radio"/> Org limit

- Repeat steps 1 and 2 for each user.
- Assign object and field permissions to users.
- Activate the data integration rule for your Lightning Data package.  
A Discover Companies button on the Accounts page gives your sales team access to a search page for companies to import.
- Monitor your overall credit usage for the package. In Setup, use the Quick Find box to find **Data Integration Metrics**.
- In the Credits tab, view your org's total credits and the credits remaining for each data service.

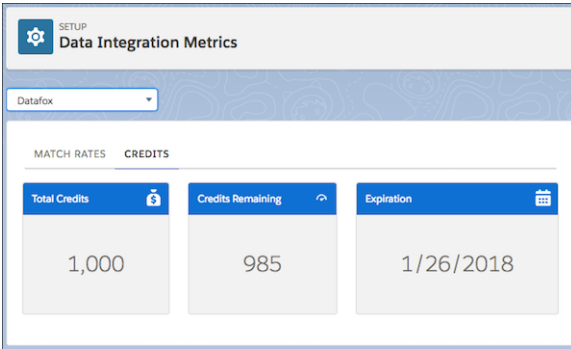
### EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To set up a Lightning Data package:

- View Setup and Configuration
- AND
- Customize Application



## SEE ALSO:

[AppExchange: Lightning Data](#)

[Get a Free Assessment Before You Purchase a Lightning Data Package](#)

[Use Lightning Data Packages to Update Records in Lightning Experience](#)

[Check the Match Rates for a Data Service](#)

## Test the Match Score Setting

Before you activate a data integration rule that includes a minimum match score, we recommend testing the setting. The setting gives you control over whether matches are broad or precise. When you activate the rule, we match your records to the data service records with the highest score that meets the minimum.

**Data Integration Rules**

**Data Integration Rule Details**

Name: D&B Company Data for Accounts  
 Description: Integrates D&B Company Data with Accounts  
 Object: Account  
 Data Service: DnB\_Optimize

**Data Integration Rule Settings**

Update all records (recommended)

When records are updated, do the following:

Bypass triggers  
 Bypass workflow rules  
 Leave last-modified information unchanged

**Match Score**  
 Before activating this rule, test the match score setting.  
 Minimum score for determining a match: 10

Save Cancel

You can test the setting in two ways.

- Run a data assessment on the rule. Adjust the setting, run another assessment, and then compare the match rates.
- Run the rule in your sandbox. Inspect the results to see whether you're getting the matches you expect. Clear out matches by refreshing the sandbox each time you run the rule, especially if you raise the minimum score.

Try starting with a high minimum score, to get the most precise matches. From there, lower the setting to broaden the possible matches.

### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To change the default match score:

- Customize Application

An active rule applies the setting only when records are created and when it finds matches for records that weren't matched before Summer '18. Existing matches are retained, not overwritten. If vendor ID is one of the match fields, you can override a match or force a match on an unmatched record. Add a DUNS number or other vendor ID.

SEE ALSO:

[Run a Data Assessment for a Lightning Data Package](#)

[When to Use a Sandbox](#)

[AppExchange: Lightning Data](#)

## Things to Know About Using Lightning Data to Update or Import Records

Review considerations for using Lightning Data to update or import records.

### Lightning Data Package Upgrades

When you upgrade a Lightning Data package, the data integration rule is deactivated, and customized field mapping is overwritten with the package's default. If you've customized the package's field mapping, note the current settings before you upgrade, and then restore them after the upgrade is complete. Before you reactivate any rule, double-check the rule settings and field mapping.

### Duplicate Management

If you set duplicate rules to alert users to potential duplicates, and data service records duplicate your Salesforce records, import of those records is skipped.

### State and Country/Territory Values

If you enable state and country/territory picklists, we convert vendors' state and country/territory values into the ISO2 codes used in Salesforce during updating and importing. However, state and country/territory values aren't normalized during searches.

### Limit on Filter Values When Searching for Companies to Import

Filter values are limited to 100. If a search produces many results, not all filters are shown. For example, in a search for "Country," the Country filter values include only up to 100 countries and territories.

### Required Layout Changes in Professional Edition

If you use Professional Edition, you must set field-level security on the fields on the objects in a Lightning Data package and the standard object. Add the fields to the page layouts for the standard object and the custom and external objects. Also add the related list for the custom object to the layout for the standard object.

SEE ALSO:

[Manage Duplicate Records](#)

[Standard Countries and Territories for Address Picklists](#)

[Things to Know About Data Integration Rules](#)

### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

## Get a Free Assessment Before You Purchase a Lightning Data Package

Before you purchase a Lightning Data package, get a free assessment to determine whether the package is valuable for your business.

### [Run a Data Assessment for a Lightning Data Package](#)

Install a Lightning Data package, configure your assessment to filter the data, run the assessment, and wait for notification that your assessment is ready. Each assessment includes a match rate and segments your data according to areas you choose.

### [Things to Know About Data Assessments for Lightning Data](#)

Review considerations and guidelines before you run data assessments for Lightning Data packages.

#### SEE ALSO:

[AppExchange: Lightning Data](#)

## Run a Data Assessment for a Lightning Data Package

Install a Lightning Data package, configure your assessment to filter the data, run the assessment, and wait for notification that your assessment is ready. Each assessment includes a match rate and segments your data according to areas you choose.

1. Install the package.  
We notify you in-app and via email when your data package has been installed. The notifications include links to the data integration rules included in the package.
2. Configure your assessment by choosing the areas of the package data that you're interested in.  
In Setup, use the Quick Find box to find **Data Integration Rules**. Click a rule in the package, and then click **Configure**.  
For example, suppose that you sell a data analytics product. A search for *analytics* filters the areas included in the data package (1). Select the items you want to include in your assessment (2).

#### EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

#### USER PERMISSIONS

To install a package:

- Download AppExchange Packages

To run or access a data assessment:

- Customize Application
- AND
- View All Data

#### EDITIONS

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

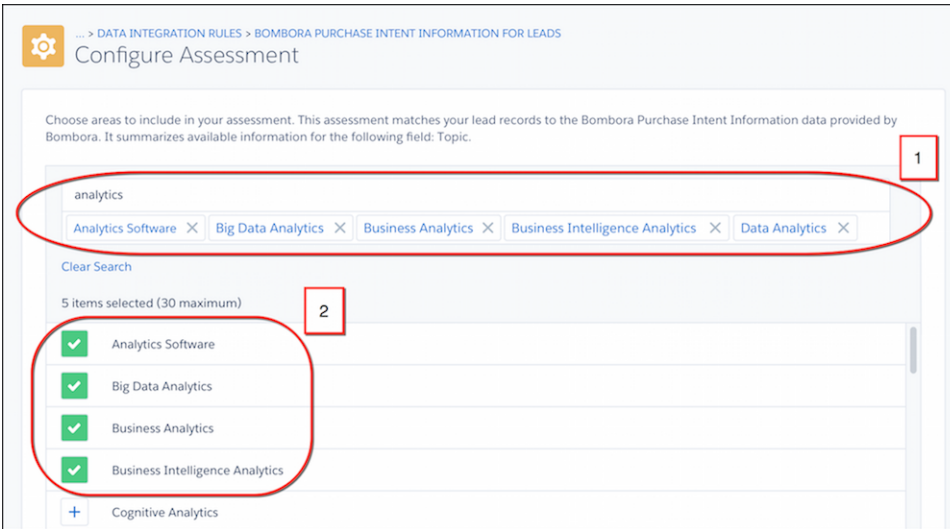
#### USER PERMISSIONS

To install a package:

- Download AppExchange Packages

To run or access a data assessment:

- Customize Application
- AND
- View All Data



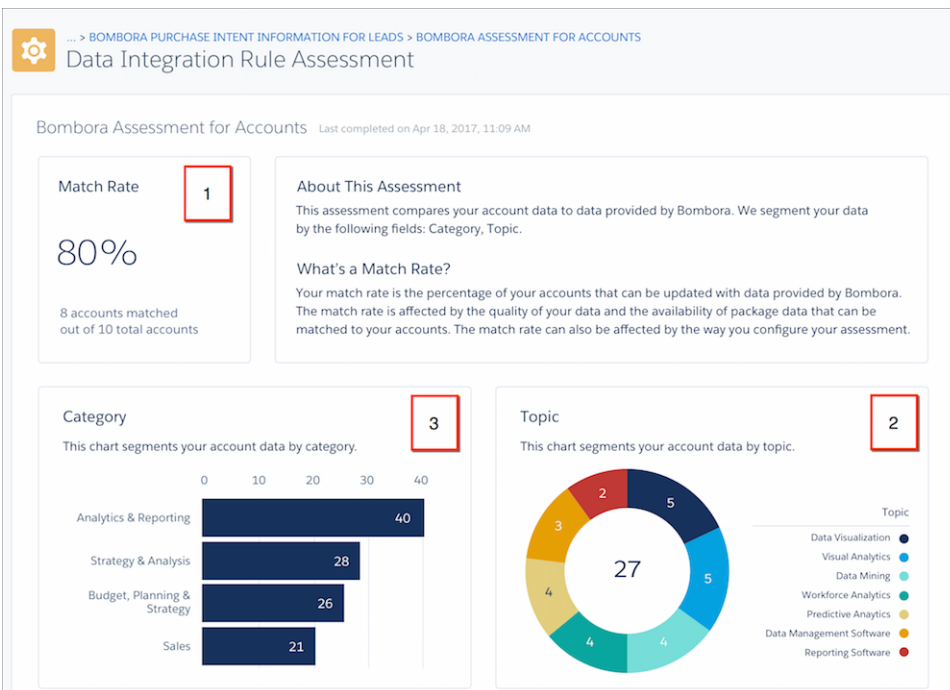
No need to configure more than one rule. All rules from the same data service share the configuration. Rules for some data services aren't configurable.

3. Run the assessment.

We notify you in-app and via email when your assessment is ready.

Your assessment includes a match rate—the percentage of your records that can be matched to records in the data package (1). It also segments your data compared to the package data by the areas you choose when configuring. Some assessments include more charts, depending on the nature of the data.

In this example, the assessment segments the data by the product areas selected (2) and also by product category (3).



## SEE ALSO:

[Things to Know About Data Assessments for Lightning Data](#)

[Activate the Data Integration Rule for a Data Service](#)

[AppExchange: Lightning Data](#)

## Things to Know About Data Assessments for Lightning Data

Review considerations and guidelines before you run data assessments for Lightning Data packages.

**Data Integration Rule**

Each AppExchange package includes a data integration rule that determines how to match your records with records from the package's data source. If you purchase the data, the rule also determines what fields to update on the custom object included in the package.

**Package Configuration**

Some AppExchange packages require configuration before you run an assessment. When you configure an assessment, you specify the areas of interest in the package data. Try selecting different areas each time you run an assessment.

**Field Mapping**

If you use custom fields, check your records for empty fields—a data service can't match empty fields in your records. Then adjust your field mapping for the data integration rule.

**Limit on Assessments You Can Run**

After you run five assessments, you can run an assessment once every seven days.

**Notifications**

We notify you in-app and via email when an AppExchange package has been installed and is ready for you to configure, if necessary. We also notify you when an assessment is ready. An email notification contains links to all the rules in a package. Each in-app notification is linked to one rule.

**Refreshing an Assessment**

A data assessment isn't refreshed automatically when your records, configuration, or field mapping are changed. To see updated results, rerun the assessment.

## SEE ALSO:

[Run a Data Assessment for a Lightning Data Package](#)

[AppExchange: Lightning Data](#)

[Edit the Field Mapping for a Data Integration Rule](#)

## EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions



## Get Geocodes for Addresses in Your Records

Geocodes help your sales and marketing teams find nearby prospects and assign territories and campaigns. After you activate a geocode rule, verify that geocodes were added to your accounts, contacts, and leads. Give your users access to related objects and fields so that they can review records.

### [Verify That Geocodes Were Added to Records](#)

Because geocode fields aren't typically visible on a record, after you activate a geocode rule, we recommend verifying that geocodes were added to your records.

### [Grant Permissions for Geocode Rules](#)

When you activate a geocode rule, give your users access to related objects and fields so that they can review new data.

### [Geocode Data Integration Rules](#)

Geocode rules update your accounts, contacts, and leads with geocodes from the Data.com data service.

### [Geocode Fields and Accuracy](#)

Geocode information identifies a location using a latitude, a longitude, and an accuracy rating. Geocode fields are available for standard addresses on accounts, contacts, and leads in Salesforce. Geocode fields aren't visible on records, but you can view them using the Salesforce API.

#### SEE ALSO:

[Activate the Data Integration Rule for a Data Service](#)

## Verify That Geocodes Were Added to Records

Because geocode fields aren't typically visible on a record, after you activate a geocode rule, we recommend verifying that geocodes were added to your records.

### [Use Lightning Experience and the API to Verify That Geocodes Were Added](#)

After you activate a geocode rule, use Lightning Experience and the API to verify that geocodes were added to records.

### [Use Salesforce Classic and the API to Verify That Geocodes Were Added](#)

After you activate a geocode rule, use Salesforce Classic and the API to verify that geocodes were added to records.

#### SEE ALSO:

[Geocode Data Integration Rules](#)

[Build a Formula Field](#)

#### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions; Geocode rules also available in **Developer** Edition

#### USER PERMISSIONS

To set up and activate data integration rules:

- [Customize Application](#)

To edit page layouts:

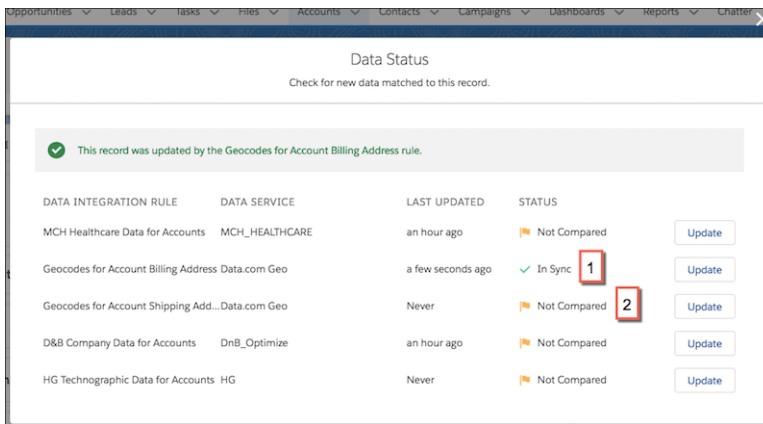
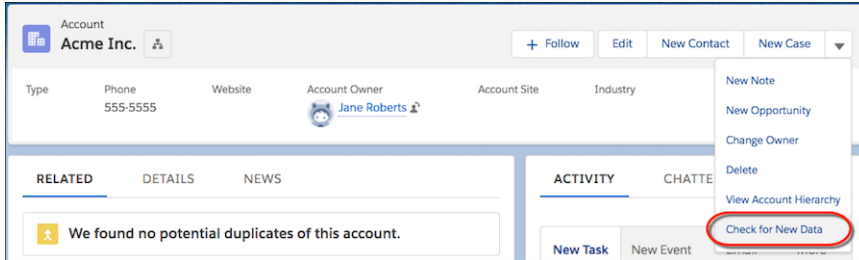
- [Customize Application](#)

Use Lightning Experience and the API to Verify That Geocodes Were Added

After you activate a geocode rule, use Lightning Experience and the API to verify that geocodes were added to records.

In Setup, activate one of the geocode rules.

1. Review the geocode rule update status for a record.
  - a. Open an account or lead record, depending on the geocode rule you activated.
  - b. In the quick action menu, select **Check for New Data**.



If the rule's status is In Sync, the record has up-to-date geocodes from the data service (1). If you see another status (2), add geocodes to the record by clicking **Update**.

2. Using the Salesforce API, make sure that the geocode fields have values.
  - a. Get the value of the Id field for a record.
  - b. Using the ID, query the address fields and geocode fields. Or query all records or the first *x* number of records for an object.

**Example: SOQL Query for Contacts**

```
SELECT Name, Email, MailingAddress, MailingCity, MailingState, MailingCountry,
MailingLatitude, MailingLongitude, MailingGeocodeAccuracy
FROM Contact
WHERE Id IN ('003D000000QRoqW', '003R0000001ySoG', '003D000000QRoqU');
```

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To use the Salesforce API:

- API Enabled

- c. Verify that the geocode fields have values.

SEE ALSO:

[Add Geocode Information to Record Page Layouts](#)

Use Salesforce Classic and the API to Verify That Geocodes Were Added

After you activate a geocode rule, use Salesforce Classic and the API to verify that geocodes were added to records.

In Setup, activate one of the geocode rules.

1. Review the geocode rule update status for a record.
  - a. Open an account or lead record, depending on the geocode rule you activated.
  - b. In the Data Integration Rules section, review the geocode rule update status.

Contact Detail			
Contact Owner	John Atkins [Change]	Phone	(905) 555-1212
Name	Jon Amos	Mobile	
Account Name	Global Media	Email	info@salesforce.com
Title	Sales Manager	Reports To	Carole White [View Org Chart]
▶ Address Information			
▶ Additional Information			
▶ System Information			
<div style="text-align: right;"> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a> <a href="#">Request Update</a> </div>			
Data Integration Rules			
Action	Status	Data Integration Rule Name	Data Service
Update	In Sync	Geocodes for Contact Mailing Address	Data.com Geo
			Last Updated
			Just now

If the geocode rule's update status is In Sync, the record has up-to-date information from the data service. If you see another status, you can manually update the record by clicking **Update**.

2. Using the Salesforce API, make sure that the geocode fields have values.
  - a. Get the value of the Id field for a record.
  - b. Using the ID, query the address fields and geocode fields. Alternatively, you can query all records or the first  $x$  number of records for an object.

#### Example: SOQL Query for Contacts

```
SELECT Name, Email, MailingAddress, MailingCity, MailingState, MailingCountry,
MailingLatitude, MailingLongitude, MailingGeocodeAccuracy
FROM Contact
WHERE Id IN ('003D000000QRoqW', '003R0000001ySoG', '003D000000QRoqU');
```

- c. Verify that the geocode information fields have values.

SEE ALSO:

[Add Geocode Information to Record Page Layouts](#)

#### EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To use the Salesforce API:

- API Enabled

## Grant Permissions for Geocode Rules

When you activate a geocode rule, give your users access to related objects and fields so that they can review new data.



**Tip:** You can add geocode fields to a page layout using custom formula fields.

- Give users Read and Edit access to the account, contact, or lead object.
- On accounts, contacts, or leads, set field-level security to Visible and give users Read and Edit access to the Address field.

### SEE ALSO:

[Activate the Data Integration Rule for a Data Service](#)

[Verify That Geocodes Were Added to Records](#)

### EDITIONS

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To grant user permissions:

- [Customize Application](#)

## Geocode Data Integration Rules

Geocode rules update your accounts, contacts, and leads with geocodes from the Data.com data service.

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Default Name	Data Service	Object	How Fields Are Updated	Fields Used to Match Records	Fields Updated
Geocodes for Account Billing Address	Data.com Geo	Account	Overwrite	Billing Address	<ul style="list-style-type: none"> <li>• BillingLatitude</li> <li>• BillingLongitude</li> <li>• BillingGeocodeAccuracy</li> </ul> <p>Latitude, longitude, and accuracy aren't visible on records.</p>
Geocodes for Account Shipping Address	Data.com Geo	Account	Overwrite	Shipping Address	<ul style="list-style-type: none"> <li>• ShippingLatitude</li> <li>• ShippingLongitude</li> <li>• ShippingGeocodeAccuracy</li> </ul> <p>Latitude, longitude, and accuracy aren't visible on records.</p>
Geocodes for Contact Mailing Address	Data.com Geo	Contact	Overwrite	Mailing Address	<ul style="list-style-type: none"> <li>• MailingLatitude</li> <li>• MailingLongitude</li> <li>• MailingGeocodeAccuracy</li> </ul> <p>Latitude, longitude, and accuracy aren't visible on records.</p>

Default Name	Data Service	Object	How Fields Are Updated	Fields Used to Match Records	Fields Updated
Geocodes for Lead Address	Data.com Geo	Lead	Overwrite	Address	<ul style="list-style-type: none"> <li>Latitude</li> <li>Longitude</li> <li>GeocodeAccuracy</li> </ul> <p>Latitude, longitude, and accuracy aren't visible on records.</p>

## SEE ALSO:

[Geocode Fields and Accuracy](#)

## Geocode Fields and Accuracy

Geocode information identifies a location using a latitude, a longitude, and an accuracy rating. Geocode fields are available for standard addresses on accounts, contacts, and leads in Salesforce. Geocode fields aren't visible on records, but you can view them using the Salesforce API.

### Geocode Fields

Object	Standard Address	Geocode Fields
Account	Billing Address	<ul style="list-style-type: none"> <li>BillingLatitude</li> <li>BillingLongitude</li> <li>BillingGeocodeAccuracy</li> </ul>
Account	Shipping Address	<ul style="list-style-type: none"> <li>ShippingLatitude</li> <li>ShippingLongitude</li> <li>ShippingGeocodeAccuracy</li> </ul>
Contact	Mailing Address	<ul style="list-style-type: none"> <li>MailingLatitude</li> <li>MailingLongitude</li> <li>MailingGeocodeAccuracy</li> </ul>
Lead	Address	<ul style="list-style-type: none"> <li>Latitude</li> <li>Longitude</li> <li>GeocodeAccuracy</li> </ul>

### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

## Accuracy Values

Accuracy tells you more about the location of a latitude and longitude. For example, `Zip/Postal Code` means that the latitude and longitude indicate the point at the center of the ZIP or postal code area for an address. In this case, a match for the exact street address couldn't be found.

Accuracy Value	Description
Address	In the same building
NearAddress	Near the address
Block	Midway point of the block
Street	Midway point of the street
ExtendedZip	Center of the extended ZIP or postal code area
Zip/Postal Code	Center of the ZIP or postal code area
Neighborhood	Center of the neighborhood
City	Center of the city
County	Center of the county
State/Province	Center of the state or province
Unknown	No match for the address was found

## Update Accounts and Leads with Key Company Information

Key company information from Dun & Bradstreet helps your sales teams pursue the most promising leads, segment accounts, plan territories and campaigns, and understand customers better. Use rules to add company, industry, and financial information—number of employees, DUNS number, annual revenue, and more—to all your accounts and leads.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions with a Data.com Premium Clean license

### USER PERMISSIONS

To set up and activate data integration rules:

- Customize Application

To edit page layouts:

- Customize Application

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### Company Info Data Integration Rules

Company info rules update your accounts and leads with over 100 fields of information from Dun & Bradstreet via the Data.com data service. Updates are handled differently depending on the rule.

### [Grant Permissions for Company Info Rules](#)

When you activate a company info rule, let users update records by giving them certain object and field permissions.

#### SEE ALSO:

[Activate the Data Integration Rule for a Data Service](#)

[Things to Know About Company Info Data Integration Rules](#)

## Company Info Data Integration Rules

Company info rules update your accounts and leads with over 100 fields of information from Dun & Bradstreet via the Data.com data service. Updates are handled differently depending on the rule.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions with a Data.com Premium Clean license



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.


For more information, see [Data.com Prospector and Clean Retirement](#).

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
Company Info for Leads	Data.com Companies for Leads	Lead	If you choose the option to update records, blanks are filled in and records with differences are flagged. Flagged records require manual review.	Changes to these fields trigger the rule to run. <ul style="list-style-type: none"> <li>Company</li> <li>Email</li> <li>Address</li> <li>Company D-U-N-S Number</li> <li>Website</li> </ul>	<ul style="list-style-type: none"> <li>Annual Revenue (US Dollars)</li> <li>Company D-U-N-S Number</li> <li>D&amp;B Company</li> <li>No. of Employees</li> <li>Industry</li> </ul>
Company Info for Accounts	Data.com Companies	Account	If you choose the option to update records, blanks are filled in and records with differences are flagged. Flagged records require manual review.	Changes to these fields trigger the rule to run. <ul style="list-style-type: none"> <li>D-U-N-S Number</li> <li>Name</li> <li>Phone</li> <li>Billing Address</li> <li>Website</li> </ul>	Changes to these fields trigger the rule to run. <ul style="list-style-type: none"> <li>Account Name</li> <li>D-U-N-S Number</li> <li>D&amp;B Company</li> <li>Employees</li> <li>Annual Revenue</li> <li>Ticker Symbol</li> </ul>

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
					<ul style="list-style-type: none"> <li>• Website</li> <li>• Industry</li> <li>• Ownership</li> <li>• Billing Address</li> <li>• Phone</li> <li>• Fax</li> <li>• Account Site</li> <li>• Tradestyle</li> <li>• Year Started</li> <li>• SIC Code</li> <li>• SIC Description</li> <li>• NAICS Code</li> <li>• NAICS Description</li> <li>• Description</li> </ul>

## Grant Permissions for Company Info Rules

When you activate a company info rule, let users update records by giving them certain object and field permissions.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

- Give users Read, Create, and Edit access to the D&B Company object. When a user updates a record, if no associated D&B Company record exists, the rule creates one.
- On the account or lead fields containing data provided by a rule, including the D&B Company field, set field-level security to Visible and give users Read and Edit access. To identify the fields, see the rule's field mapping settings. The field mapping settings don't include the D&B Company field.

Now activate the company info rule you want to use.

SEE ALSO:

[Activate the Data Integration Rule for a Data Service](#)

### EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with a Data.com Premium Clean license

### USER PERMISSIONS

To grant user permissions:

- **Customize Application**



## Check the Match Rates for a Data Service

Monitor the percentage of your records that data integration rules have matched to a record in data services. When records are matched, the data service can update them.

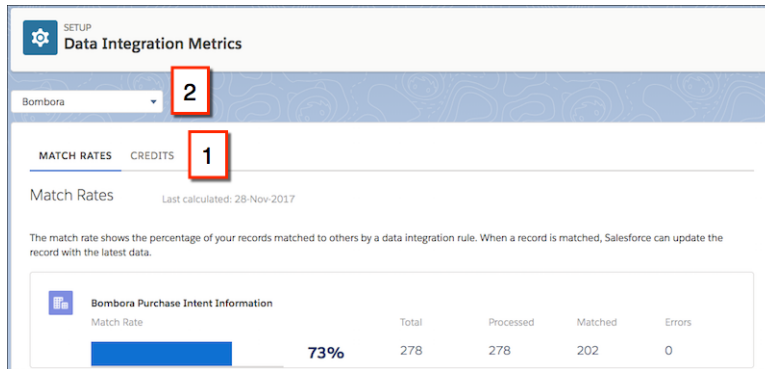
Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To check match rates:

- Customize Application

1. In Setup, use the Quick Find box to find **Data Integration Metrics**.
- 2.



On the Match Rates tab (1), select a data service from the dropdown menu (2).

### Update Frequency

Match rates are displayed 24 hours after you activate a rule. After that, match rates are aggregated and updated nightly.

### Errors

The Errors column shows the number of errors that occurred when the rule ran. An error occurs if a trigger, workflow rule, duplicate rule, or validation rule prevents a record from being updated. To download a file that includes the ID of each record with an error and the associated error message, click the number of errors. Only the most recent error for a record is available. The Errors column includes a maximum of 10,000 errors per data integration rule.

## Factors That Affect Match Rates

Various factors can affect the match rates for matching records from a data service with your Salesforce records.

### All Rules

#### Complete, Accurate Data

The more complete and accurate your data in the fields used to match records, the better your match rate. To see what fields a rule uses to match records, look at the rule's field mapping under the Match tab.

#### Criteria for Matching

Check the rule's field mapping under the Match tab. Or, for geocode and company info rules, see [Fields Used to Match Records in Geocode Data Integration Rules](#) and [Company Info Data Integration Rules](#).

If you use a custom field, adjust the field mapping so that the corresponding data service field points to it.

### EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Geocode Rules

### Complete, Accurate Addresses

Check your data for incomplete or incorrect addresses. Addresses must include data in the Country field.

### Coverage

Address and geocode coverage vary by country.

### Precision of Latitude and Longitude

If the latitude and longitude seem incorrect, look at the value of the accuracy field. It indicates the precision of the geocode value.

## Company Info for Accounts Rules

### Location Matching for Accounts

Company Info for Accounts matches account records based on location, for example a branch location rather than headquarters.

All Dun & Bradstreet countries are supported.

### Complete, Accurate Addresses

Use full addresses if possible. In particular, specify the country and state or ZIP code.

### Artifacts in Company Name Field

Make sure that the account name doesn't contain unrelated artifacts, such as numbers (1002), special characters (! # @), or unrelated words. (These artifacts are acceptable if they're part of the company's name.)

### Data in Non-Latin Characters

Dun & Bradstreet data is in Latin characters. The data in all fields used to match records must likewise be in Latin characters, unless the record has a DUNS number. In that case, the rule matches the record by DUNS number.

## Company Info for Leads Rules

### Location Matching for Leads

If a lead contains a value for the Country field, the Company Info for Leads rule adds company information for the domestic headquarters in that country. If the lead doesn't contain a value for Country, the rule adds global headquarters information.

### Minimum Fields

At a minimum, matching requires an email address or website.

### Data in Non-Latin Characters

Dun & Bradstreet data is in Latin characters. The data in all fields used to match records must likewise be in Latin characters, unless the record has a DUNS number. In that case, the rule matches the record by DUNS number.

SEE ALSO:

[Geocode Data Integration Rules](#)

## Create Reports on Data Integration Updates

### USER PERMISSIONS

To create or update custom report types:	Manage Custom Report Types
To delete custom report types:	Modify All Data
To create, edit, and delete reports:	Create and Customize Reports AND

	Report Builder
To run reports:	Run Reports
To schedule reports:	Schedule Reports

Use reports on data integration status to monitor your accounts, contacts, and leads for records that need attention and to ensure the highest possible match rates.

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

1. In Setup, use the Quick Find box to find **Report Types**.
2. Create a report type, and select **Accounts, Contacts,** or **Leads** as the primary object.  
If you're working toward complying with data protection and privacy regulations, consider excluding personal data from the report type name and description.
3. Click **Next**.
4. Relate Integration Rule Info to the primary object that you selected.
  - To report only on records processed by a rule, select **Each "A" record must have at least one related "B" record**.
  - To report on all records, select **"A" records may or may not have related "B" records**. If you choose this option, when you create reports, you can filter out records that a rule hasn't processed. Person accounts and other records that a rule hasn't processed have a data integration status of Blank.
5. Save the report type.
6. Create a report using the custom record type you created.
7. Add the Integration Rule Info fields to the report. Zero in on the information you want to see by adding filters to the report.



**Example:** To help ensure the highest possible match rates, group records by data integration status, such as Not Found, Different, and Skipped. Then inspect individual records in the report. To focus on records processed by a specific rule, filter for Description fields containing the rule's name.

#### **Not Found**

The rule processed records with a status of Not Found, but the records weren't matched to records in a data service. Inspect these records to ensure that the data in the fields the rule uses for matching are in good shape. Missing or incorrect data can prevent matching.

#### **Different**

Inspect records with a status of Different to confirm each record's field values or overwrite selected fields with values from the data service.

**Skipped**

Inspect records with a status of Skipped to see what validation or trigger error prevented the Salesforce record from being matched or updated.

## SEE ALSO:

[Set Up a Custom Report Type](#)[Build a Report](#)[Integration Rule Info Fields](#)[Data Statuses](#)

## Considerations for Using Data Integration in the Salesforce Mobile App

Review considerations for using Data Integration features on a mobile device.

- Data Assessment for data in AppExchange packages isn't available.
- Account Data Assessment (based on the Data.com Company Info for Accounts rule) isn't available.
- You can see fields that were updated by data integration rules, but you can't use Data Integration to manually update records.

## Use Data.com to Find Leads and Keep Your Data Current and Complete

---

Use Data.com Prospector to find leads to grow your business. Use Data.com Clean to keep your account, contact, and lead records current and complete. Separate licenses are required for each.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### [Use Data.com Prospector to Add Records to Salesforce](#)

Use Data.com Prospector to search valuable company information from Dun & Bradstreet and millions of crowd-sourced contacts. Add these records to Salesforce as new accounts, contacts, and leads, or export them to use in other apps. It's a great way to get the data you need to plan your sales territories, segment campaigns, find new accounts to engage, and expand your sales network.

### [Use Data.com Clean to Keep Your Data Current and Complete](#)

Use Data.com Clean to keep your Salesforce data current and complete with data from Dun & Bradstreet and crowd-sourced data from Data.com. Using Clean jobs, you can clean all your records regularly. You can also clean a single record or a list of records.

### [Install and Implement Data.com AppExchange Packages](#)

Get access to reports that help your users analyze account, contact, and lead data.

### [Considerations for Using Data.com in the Salesforce Mobile App](#)


Review considerations for using Data.com features on a mobile device.

### [How Duplicate Management Works with Data.com Prospector and Data.com Clean](#)

Learn how to add and updating records with Data.com Clean and Prospector

## Use Data.com Prospector to Add Records to Salesforce

Use Data.com Prospector to search valuable company information from Dun & Bradstreet and millions of crowd-sourced contacts. Add these records to Salesforce as new accounts, contacts, and leads, or export them to use in other apps. It's a great way to get the data you need to plan your sales territories, segment campaigns, find new accounts to engage, and expand your sales network.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

All users can search Data.com for accounts and contacts. Users with a Data.com Prospector license can:

- Add accounts and contacts to their org, and add contacts as leads.
- Add contacts for an account directly from the account record.
- Export accounts and contacts from Data.com.
- Manually update account, contact, and lead records, regardless of whether they were added from Data.com.
- Get prospecting insights into accounts' business, financial, competitive, and industry details.
- Get company hierarchical views of parent-child relationships and account information, such as the annual revenue, ownership, and number of employees. (Available to Data.com Prospector users as a beta feature.)

There are two versions of Data.com Prospector: Corporate Prospector and Premium Prospector. Premium Prospector includes more Dun & Bradstreet fields for adding to or manually cleaning account, contact, or lead records. Premium Prospector users also have access to the Company Hierarchy page. The Salesforce Help refers to Data.com Premium Prospector unless otherwise noted. For more information on Premium Prospector, contact your Salesforce account manager.

### Data.com Prospector Version

### Dun & Bradstreet (D&B) Fields

Data.com Corporate Prospector

Basic set of Dun & Bradstreet fields.

Data.com Premium Prospector

Basic set of Dun & Bradstreet fields, plus the `D&B Company` field. This field links to an associated `D&B Company` record with over 70 additional Dun & Bradstreet fields that are accessible on the `D&B Companies` tab. The Company Hierarchy page provides a hierarchical view of Dun & Bradstreet company relationships.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

## Data.com Prospector Classic and Lightning Experience

### Prospecting in Lightning Experience

[Manage Access to Data.com Search Results and Related Features](#)

[Prospecting Insights in Lightning Experience](#)

### Prospecting in Salesforce Classic

[Get Critical Industry, Financial, and Competitive Insights for Your Accounts](#)

[Prospecting Insights Data Details](#)

### [Prospect for Companies, Contacts, and Leads Right in Salesforce](#)

Find companies and contacts in the industries and locations that you're most interested in. While you're working in Salesforce, search valuable company, industry, and financial information from Dun & Bradstreet and millions of crowd-sourced contacts. Add account, contact, and lead records to Salesforce or export them to use in other apps.

### [Get Critical Industry, Financial, and Competitive Insights for Your Accounts](#)


Need detailed information about account businesses? Click the Prospecting Insights button on the account detail page to get data about your prospects' businesses and financials, as well as competitive and industry details—directly from Data.com in real time.

### [Set Up Data.com Prospector](#)

Set up Data.com Prospector to let your sales team prospect for companies, leads, and contacts right in Salesforce.

## Prospect for Companies, Contacts, and Leads Right in Salesforce

Find companies and contacts in the industries and locations that you're most interested in. While you're working in Salesforce, search valuable company, industry, and financial information from Dun & Bradstreet and millions of crowd-sourced contacts. Add account, contact, and lead records to Salesforce or export them to use in other apps.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### [Considerations for Prospecting for Companies in Salesforce](#)

There are several important limitations to note for users who are searching and adding records from Data.com.

#### [Prospect for Companies Fast Right In Salesforce](#)

With a Data.com license, it's a cinch to find new companies in the industries and locations that you're most interested in. Add company information to Salesforce as new accounts in just a few steps.

#### [Get More Accounts Using Data.com in Lightning Experience](#)

Data.com Prospector customers find the accounts that they need from the Accounts page and add them to their org in just a few clicks.

#### [Prospect for Leads Fast Right In Salesforce](#)

Need leads? With a Data.com license, you can find contacts in the companies, industries, and locations that you're most interested in. Then, add records to Salesforce as new leads.

#### [Prospect for Contacts Fast Right In Salesforce](#)

Need contacts? With a Data.com license, you can find contacts in the companies, industries, and locations that you're most interested in. Then, add records to Salesforce as new leads.

#### [Prospect for Key Contacts in Your Accounts Using Lightning Experience](#)

Want to find the right contact at one of your accounts? With a Data.com license, it's easy to search for contacts by title, location, and industry. Then, with a click, you can add those records to Salesforce.

#### [Prospect for Key Contacts in Your Accounts Using Salesforce Classic](#)

Want to find the right contact in one of your accounts? With a Data.com license, it's easy to search for contacts by title, location, and industry. Then, with a click, you can add those records to Salesforce.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### [Considerations for Prospecting for Data.com Contacts in Salesforce](#)

Data.com Prospector customers can find the contacts they need from an **Account** page and add them to their organizations in just a few clicks.

### [Prospect for Companies in the Same Corporate Hierarchy](#)


Data.com Company Hierarchy uses Dun & Bradstreet company data in Data.com to display a hierarchical view of companies. It shows parent–child relationships and account information, such as annual revenue, ownership, and number of employees.

### [Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)

Check out some guidelines to follow when prospecting for new companies and contacts with Data.com.

## Considerations for Prospecting for Companies in Salesforce

There are several important limitations to note for users who are searching and adding records from Data.com.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

- The subindustries under Government in the Data.com Industry Categories classification system are currently unavailable due to mapping limitations between the Data.com Industry Categories and the SIC system.
- By default, each user assigned a Data.com Prospector user license has a monthly record addition limit of 300. This number can be adjusted based on your agreement. Record additions expire at midnight on the last day of each month, as determined by your organization's default time zone.
- A single Data.com Prospector license is assigned every time you enable a user for Data.com Prospector.
- If your organization purchased only Data.com Prospector, only users with licenses can clean records.
- When adding records from Data.com, annual revenue is only available in US dollars. If `U.S. Dollar` is not an active currency for your organization, records added from Data.com do not include annual revenue information.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))


Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### SEE ALSO:

[Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)


## Prospect for Companies Fast Right In Salesforce

With a Data.com license, it's a cinch to find new companies in the industries and locations that you're most interested in. Add company information to Salesforce as new accounts in just a few steps.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. Click the Data.com tab.
2. Click **Find Accounts**.
3. Enter or select your search criteria. When you click the selection box in the `Industry` field, for example, you'll see the [Industry Selector](#), where you can use industry classifications to select from extensive lists of industries and subindustries to build an industry query as part of your search criteria. When you click the selection box in the `Location` field, you'll see the [Location Selector](#), where you can build a location query as part of your search criteria.
4. Click **Search**. Results are sorted by number of active contacts. To show records that have been flagged as inactive, under Options, select `Show Inactive Records`. Inactive records are marked with .
5. If the results list is long, you can:
  - Sort the results by any table heading. The `Updated` heading, for example, sorts results by when they were last updated.
  - Jump to a page by entering a number in the `Page` field.
  - Click the arrows to move from page to page.
6. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
7. Add all accounts or a selection to Salesforce Salesforce.
  - To add all accounts, click **Add to Salesforce** and select `All`.
  - To add selected accounts, select the ones you want, then click **Add to Salesforce** and choose `Selected`.
8. Click **Continue**.  
If your selection includes duplicates, we'll add them if duplicate account records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
9. From the confirmation message, click **Go to Accounts** to view the list of new records on the Accounts home page.  
If you use Data.com, when you add an account from Data.com, a corresponding D&B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the account record via its `D&B Company` field.

### SEE ALSO:

[Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)  
[Understand Data.com Searches](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To add accounts from Data.com:

- Create on accounts



## Get More Accounts Using Data.com in Lightning Experience

Data.com Prospector customers find the accounts that they need from the Accounts page and add them to their org in just a few clicks.

 [Watch a Demo](#) (1:10 minutes)

The **Get More Accounts** button opens an interactive dialog for finding and adding Data.com accounts to your org. This streamlined experience gets you the accounts you need when you need them, right from the Accounts page. You can add up to 20 accounts at a time.

Use a combination of available filters to find the accounts you want.

### Annual Revenue

Select a logical operator and enter an annual revenue value. You can add multiple Annual Revenue filters with these logical operators.

### Company or Website

Enter a full or partial company name or website.

### State

Select from a list of states or unincorporated and organized territories.

 **Note:** States are valid only when filtering with the United States as the country.

### Country

Select from a list of countries.


### Location Type

Select from a list of available location types.

- Branch: A secondary location to a headquarters location.
- Headquarters: A company that has branches or subsidiaries that report to it.
- Single Location: A company with no branches or subsidiaries.

## Prospect for Leads Fast Right In Salesforce

Need leads? With a Data.com license, you can find contacts in the companies, industries, and locations that you're most interested in. Then, add records to Salesforce as new leads.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. Go to the Data.com tab.
2. Using the Find Contacts tab, enter or select your search criteria. When you click the selection box in the **Industry** field, for example, you'll see the [Industry Selector](#), where you can use industry classifications to select from extensive lists of industries and subindustries to build an industry query as part of your search criteria. When you click the selection box in the **Location** field, you'll see the [Location Selector](#), where you can build a location query as part of your search criteria.
3. Click **Search**.

### EDITIONS

Available with a Data.com Prospector license in:

**Essentials, Group, Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To add Data.com accounts:

- Create on Accounts
- AND
- Create and Customize List Views

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))


Available with a Data.com Prospector license in:

**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To add Data.com contacts as leads:

- Create on leads

Results are sorted alphanumerically. To show records that have been flagged as inactive, under Options, select `Show Inactive Records`. Inactive records are marked with .

4. If the results list is long, you can:

- Sort the results by any table heading. The `Updated` heading, for example, sorts results by when they were last updated.
- Jump to a page by entering a number in the `Page` field.
- Click the arrows to move from page to page.

Sorting and page navigation only work for lists of fewer than 100,000 records.

5. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.

The list updates automatically.

6. Select the contacts you want to add, and click **Add to Salesforce**.

7. Select `Leads` to add the records as leads and click **Continue**.

If your selection includes duplicates, we'll add them if duplicate lead records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.

8. Click **Go to Leads** to view the list of new records on the Leads home page.


If you use Data.com, when you add a lead from Data.com, a corresponding D&B Company record (if one exists in Data.com Data.com) is automatically created in Salesforce Salesforce and linked to the lead record via its `D&B Company` field.

SEE ALSO:

[Prospect for Key Contacts in Your Accounts Using Salesforce Classic](#)


## Prospect for Contacts Fast Right In Salesforce

Need contacts? With a Data.com license, you can find contacts in the companies, industries, and locations that you're most interested in. Then, add records to Salesforce as new leads.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. Go to the Data.com tab.
2. Using the Find Contacts tab, enter or select your search criteria. When you click the selection box in the `INDUSTRY` field, for example, you'll see the [Industry Selector](#), where you can use industry classifications to select from extensive lists of industries and subindustries to build an industry query as part of your search criteria. When you click the selection box in the `LOCATION` field, you'll see the Location Selector, where you can build a location query as part of your search criteria.
3. Click **Search**.  
Results are sorted alphanumerically. To show records that have been flagged as inactive, under Options, select `SHOW INACTIVE RECORDS`. Inactive records are marked with .
4. If the results list is long, you can:
  - Sort the results by any table heading. The `UPDATED` heading, for example, sorts results by when they were last updated.
  - Jump to a page by entering a number in the `PAGE` field.
  - Click the arrows to move from page to page.

Sorting and page navigation only work for lists of fewer than 100,000 records.
5. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.  
The list updates automatically.
6. Add all contacts or a selection to Salesforce.
  - To add all contacts, click **Add to Salesforce** and select **All**.
  - To add selected contacts, first select the ones you want, then click **Add to Salesforce** and choose *Selected*.

You'll get a confirmation message showing the number of records you're adding.
7. Select **Contacts**.  
Enter or select the account you want to associate the contacts with. You can associate only one account. If you need to create the account to associate, use the lookup.
8. Click **Continue**.  
If your selection includes duplicates, we'll add them if duplicate contact records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To search Data.com for contacts:

- No permissions required

To add Data.com contacts:

- Create on contacts

To create an account when adding contacts:

- Create on accounts


- Click **Go to Account** to return to the account record.

SEE ALSO:

[Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)  
[Understand Data.com Searches](#)

## Prospect for Key Contacts in Your Accounts Using Lightning Experience

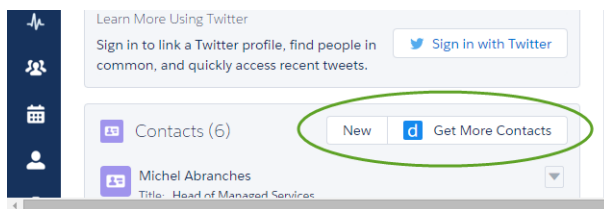
Want to find the right contact at one of your accounts? With a Data.com license, it's easy to search for contacts by title, location, and industry. Then, with a click, you can add those records to Salesforce.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

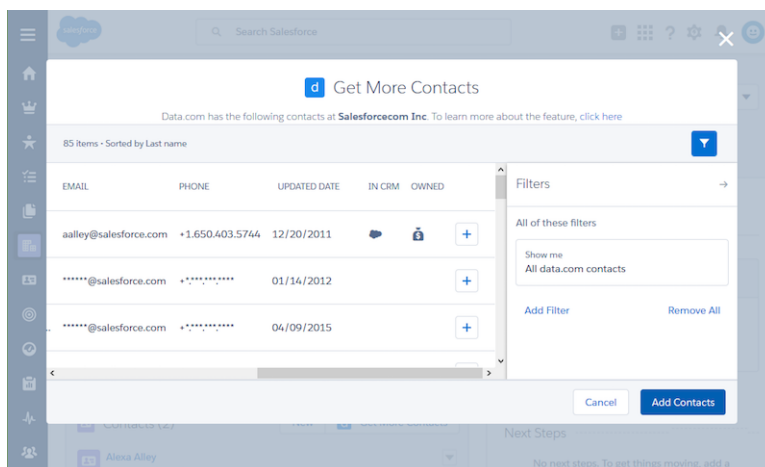
For more information, see [Data.com Prospector and Clean Retirement](#).

- To add contacts from an account page, click **Get More Contacts**.



If you don't see the **Get More Contacts** button, contact your Salesforce admin.

- Refine the results using filters. When you see the results that you want, select and add the contacts.



Icons indicate the data status of contacts.

### EDITIONS

Available in: Lightning Experience

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS


To add Data.com contacts:

- Read on Accounts
- AND
- Create on Contacts
- AND
- Create and Customize List Views

**In CRM**

 indicates that the contact is already in Salesforce.

**Owned**


 indicates that the contact has already been purchased.

3. Enter multiple values from the Department and Level picklists, or enter a comma-separated list of values in the Title filter.

Filter	Operators	Description
Department	equals	<p>The department in the company that the contact is affiliated with. The values of this field are in a multiselect picklist.</p> <ul style="list-style-type: none"> <li>• Sales</li> <li>• Marketing</li> <li>• Finance</li> <li>• Human Resources</li> <li>• Support</li> <li>• Engineering</li> <li>• Operations</li> <li>• IT</li> <li>• Other</li> </ul>
Level	equals	<p>A human resource label that designates a person's level in the company. The values of this field are fixed enumerated values.</p> <ul style="list-style-type: none"> <li>• C-Level</li> <li>• VP</li> <li>• Director</li> <li>• Manager</li> <li>• Staff</li> <li>• Other</li> </ul>
Title	<ul style="list-style-type: none"> <li>• equals</li> <li>• not equal to</li> <li>• contains</li> </ul>	<p>Title of the contact, such as CEO or Vice President.</p> <p>This field accepts a comma-separated string of values, for example, <i>CEO, Vice President, Manager</i>.</p>

## Prospect for Key Contacts in Your Accounts Using Salesforce Classic

Want to find the right contact in one of your accounts? With a Data.com license, it's easy to search for contacts by title, location, and industry. Then, with a click, you can add those records to Salesforce.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. Go to the detail page of the account you want to add contacts for.
2. Click **Get Contacts**. If you don't see the **Get Contacts** button, contact your Salesforce admin. From the dropdown menu, do one of the following.
  - Select a filter to narrow your results by level or department.
  - Select **All** to see all contacts for the account.

The Data.com tab lists the contacts that match the account name and any filters you selected. For example, if you want to get manager contacts at Universal Telco, go to Universal Telco's account detail page. Click **Get Contacts**. Under By Level, select the **Manager-Level** filter. The Data.com tab lists the managers at Universal Telco.
3. Select more filters if you need a more targeted list. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
4. Add contacts to Salesforce.
  - To add all contacts, click **Add to Salesforce**.
  - To add specific contacts, select the ones you want, click **Add to Salesforce**, and choose **Selected**.
5. Select **Contacts** to add the records as contacts associated with the account you started from.
6. Click **Continue** to add the records.
 

If your Salesforce org allows duplicate contact records, and your selection includes duplicates, the duplicate records are added. If you add more than 200 records, the process can take a few minutes. We send you an email when the process is complete.
7. Click **Go to Account** to return to the account record.

### SEE ALSO:

[Prospect for Contacts Fast Right In Salesforce](#)

[Prospect for Leads Fast Right In Salesforce](#)

## Considerations for Prospecting for Data.com Contacts in Salesforce

Data.com Prospector customers can find the contacts they need from an **Account** page and add them to their organizations in just a few clicks.

Available with a Data.com Prospector license in: **Essentials, Professional, Enterprise, Performance**, and **Unlimited** Editions

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To get Data.com contacts from an account:

- Read on Accounts
- AND
- Create on Contacts

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

The **Get More Contacts** button opens an interactive dialog for finding and adding Data.com contacts to your organization. This streamlined experience gets you the contacts you need when you need them, right from the Account page.

Here are a few things for you to know about **Get More Contacts**.

Limitation	Description
Maximum 200 contacts	You can add up to 200 contacts in a single request. When you select more than 200 contacts, you are asked to deselect some of the contacts.
Filters	<ul style="list-style-type: none"> <li>• Filters are connected by a logical AND operator.</li> <li>• Add just one of each filter. Adding more than one of each filter can cause unpredictable results.</li> <li>• <b>Department</b>—Select 1 or more departments from the scrollable list.</li> <li>• <b>Level</b>—Select 1 or more levels from the scrollable list.</li> <li>• <b>Title</b>—Enter a single title or a comma-separated list of titles.</li> </ul>
Account must be clean	<b>Get More Contacts</b> works on clean accounts only. Clean accounts have been imported from Data.com, or your organization has cleaned the account after the record was added to your organization. If the selected account is not clean, talk with your administrator about how to clean the account.

#### [Filter Contacts from Get More Contacts List View](#)

Filter available Data.com results for the selected account, and then add the contacts you need.

#### Filter Contacts from Get More Contacts List View

Filter available Data.com results for the selected account, and then add the contacts you need.

You need a Data.com Prospector license.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.



For more information, see [Data.com Prospector and Clean Retirement](#).



 [Watch a Demo](#) (1:19 minutes)

You have different options depending on the field you want to filter. You can filter by Title, Department, and Level.

- Filters are connected by a logical AND operator.
- Add just one of each filter. Adding more than one of each filter can cause unpredictable results.
- **Department**—Select 1 or more departments from the scrollable list.
- **Level**—Select 1 or more levels from the scrollable list.
- **Title**—Enter a single title or a comma-separated list of titles.

There are some new icons to identify contacts when you use filters to refine your search results.

Icon	Description
	The contact is already in CRM.
	Your organization owns the contact.

1. From the **Get More Contacts** dialog, click  .
2. Click **Add Filter**.
3. Under **New Filter**, select a filter to add.
4. Under **Value**, select or enter the values you want.
5. Click **Done**.
6. To set another filter, click **Add Filter**.
7. To remove a filter, click .
8. To apply and save filters, click **Save**.

## Prospect for Companies in the Same Corporate Hierarchy

Data.com Company Hierarchy uses Dun & Bradstreet company data in Data.com to display a hierarchical view of companies. It shows parent–child relationships and account information, such as annual revenue, ownership, and number of employees.

Data.com Company Hierarchy uses Dun & Bradstreet data to display a view of an account’s hierarchical relationship with related companies. To add an account in your Salesforce org, click the **Add Account** button next to the account.

Company Hierarchy is available as part of Data.com Prospector. In addition to showing the relationships between corporate entities, the hierarchy shows the associated annual revenue and number of employees for entities within the hierarchy. For context, the hierarchy also includes information from your Salesforce org such as whether an entity exists as an account record, and the account owner. Using this information, sales reps can identify relevant prospective customers, and then easily add them as accounts directly from the hierarchy view.

The Data.com Company Hierarchy shows different company types and how they’re related.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Company Type	Description
Global Headquarters	The highest organizational entity in a corporate hierarchical structure that oversees domestic or international companies and subsidiaries.



Company Type	Description
Domestic Headquarters	The highest level member in a corporate hierarchy within a single country. A DHQ typically reports to a GHQ.
Headquarters	A company that owns branches, divisions, or subsidiaries and has financial responsibility for the companies that report to it.
Branch	A secondary location of a headquarters.
Single Location	A company with no branches or subsidiaries.
Unmarketable	This company is unmarketable, and record details are intentionally hidden. You can't add this record from the hierarchy, but you can view or add active linked accounts.

 **Note:** Data.com Company Hierarchy is too wide to be displayed effectively in a three-column page layout in Lightning Experience. Use a one- or two-column layout instead.

#### [View the Data.com Company Hierarchy for Accounts](#)

Data.com Company Hierarchy displays a hierarchical relationship of accounts, along with important account details. View parent-child relationships and account information, such as annual revenue, ownership, and number of employees.

#### [Find New Accounts Using the Global Ultimate D-U-N-S Number](#)

If you use Data.com Prospector, it's a cinch to find new companies to do business with that are in the company hierarchy of existing accounts. Just do a search by Global Ultimate D-U-N-S Number right from a D&B Company record. You'll be able to see other companies within the same corporate structure and add those companies to Salesforce as new accounts.

#### [Guidelines for Adding Accounts in the Same Company Hierarchy to Salesforce](#)

Data.com Company Hierarchy searches Data.com for Dun & Bradstreet company records and displays company linkages in a hierarchical view. From the Company Hierarchy, you can add account records to Salesforce. Here are some guidelines to follow when you add Data.com records to Salesforce from Company Hierarchy.

#### SEE ALSO:

[Configure Page Layouts for Data.com Prospector and Data.com Clean](#)

## View the Data.com Company Hierarchy for Accounts

Data.com Company Hierarchy displays a hierarchical relationship of accounts, along with important account details. View parent–child relationships and account information, such as annual revenue, ownership, and number of employees.

1. Open an account detail page.
2. Click Data.com Company Hierarchy.


### SEE ALSO:

[Configure Page Layouts for Data.com Prospector and Data.com Clean](#)

## Find New Accounts Using the Global Ultimate D-U-N-S Number

If you use Data.com Prospector, it's a cinch to find new companies to do business with that are in the company hierarchy of existing accounts. Just do a search by Global Ultimate D-U-N-S Number right from a D&B Company record. You'll be able to see other companies within the same corporate structure and add those companies to Salesforce as new accounts.

The Global Ultimate is the highest entity within an organization and is identified by a nine-digit Global Ultimate D-U-N-S Number. All companies that are part of the same corporate structure as the Global Ultimate are identified by the same Global Ultimate D-U-N-S Number.

 **Note:** Before you can search by Global Ultimate D-U-N-S Number, the `Search Global Ultimate D-U-N-S` button must be [added to the D&B Company page layout](#).

1. Go to the detail page of the D&B Company record you want to find accounts with the same Global Ultimate D-U-N-S Number for.
2. Click **Search Global Ultimate D-U-N-S**.  
The Data.com tab opens and displays a list of accounts that match the Global Ultimate D-U-N-S Number of the D&B Company record.
3. If the results list is long, you can sort the results by any table heading. The **Location Type** heading, for example, sorts results by headquarters, single location, and branch.
4. If you don't see what you're looking for, use filters to narrow your results.
5. For more information about a particular account, such as its account site, click the account name to see its account card.
6. Add all accounts or a selection to Salesforce.
7. From the confirmation message, click **Go to Accounts** to view the list of new records on the Accounts home page.

Here are some things to keep in mind when searching by Global Ultimate D-U-N-S Number.

- Global Ultimate D-U-N-S Number search results *only* include accounts that are in Data.com, so you may not get *complete* Global Ultimate D-U-N-S results if some members of the corporate structure are not in Data.com.
- You can use filters to narrow down your Global Ultimate D-U-N-S Number search results.
- You can export records from your Global Ultimate D-U-N-S Number search results.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in:

**Essentials, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited Editions**

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:

**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance, and Unlimited Editions**

### USER PERMISSIONS

To add accounts from Data.com

- Create on accounts

- You can't save the search.

## SEE ALSO:

[Prospect for Companies Fast Right In Salesforce](#)

## Guidelines for Adding Accounts in the Same Company Hierarchy to Salesforce

Data.com Company Hierarchy searches Data.com for Dun & Bradstreet company records and displays company linkages in a hierarchical view. From the Company Hierarchy, you can add account records to Salesforce. Here are some guidelines to follow when you add Data.com records to Salesforce from Company Hierarchy.

- A green dot (●) appears in the search results next to records already in Salesforce. These records can't be added again unless they have first been deleted from Salesforce, or your organization allows duplicates.



**Tip:** If a record is already in Salesforce, hover over the green dot and click the link to go directly to the record.

- You can add only one record at a time from Company Hierarchy.
- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. When a duplicate record is added, it isn't counted against your record addition balance.
- If you can't add a record to Salesforce because of errors, we'll notify you and provide the error details in a .csv file.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

## Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce

Check out some guidelines to follow when prospecting for new companies and contacts with Data.com.



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

- A green dot (●) appears in the search results next to Salesforce records that have a value in the `Data.com Key` field (records that were imported or cleaned by Data.com). These records can't be added again unless they have first been deleted from Salesforce, or your organization allows duplicates.



**Tip:** If a record is already in Salesforce, hover over the green dot and click the link to go directly to the record.

- A blue checkmark (✓) appears in search results next to records you've already purchased (added or exported) from Data.com. When you add Data.com contacts or accounts, each one counts against your record addition balance. If you add records you've already exported from Data.com, the added records don't count against your record addition balance.
- Regardless of your record addition limit or your record addition balance, you can't manually select more than 1,000 records at a time.
- Regardless of your record addition limit or your record addition balance, you can't add more than 100,000 records at a time.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. This includes records that were added from Data.com as both contacts and leads. When a duplicate record is added, it will *not* be counted against your record addition balance.
- If you can't add one or more records to Salesforce because of errors, we'll notify you and provide the error details in a .csv file.
- If your search produces a large number of results, you won't see any data past page 10. If this happens, you can refine your search to get the results you want. See [How can I see complete, relevant information for Data.com search results?](#)
- If you export Data.com contacts or accounts *instead of* adding them to Salesforce, each exported record counts against your record addition balance. If you export records you've already added to Salesforce or re-export records you previously exported, the exported records don't count against your record addition balance.
- If you export a group of Data.com contacts, you can still add those contacts back into Salesforce as contacts or leads without affecting your record addition balance.
- Regardless of your addition limit or the number of records you have left to add, you can't export more than 100,000 records at a time. Records will be exported in batches of 50,000. If two batches are needed, the records will be sent in a .zip file.
- If numeric values, such as phone numbers, are cut off in the .csv file, change the format of the field's column in the .csv file to *General* or *Text*, or open the file in a text editor such as WordPad.
- You can import a list of exported records back into Salesforce using Data Loader. Unless your Data.com preferences are set to allow duplicate records, the import process checks for duplicates using the Data.com ID number from the `Data.com Key` field. These records won't be imported from Data Loader.
  - Any record that has the same Data.com ID (from the `Data.com Key` field) as another record within the .csv file.
  - Any record that has the same Data.com ID (from the `Data.com Key` field) as a record already in Salesforce.

### [Narrow Your Prospecting Search Results to Target What You're Interested In](#)

With a Data.com Prospector license, you can use search fields and modifiers to target just the companies, industries, and locations that you're interested in. Then, it's easy to save your searches.

### [Using Data.com FAQ](#)

Check out answers to some frequently asked questions about Data.com for users.


### SEE ALSO:

[Prospect for Companies, Contacts, and Leads Right in Salesforce](#)

[Considerations for Prospecting for Companies in Salesforce](#)

## Narrow Your Prospecting Search Results to Target What You're Interested In

With a Data.com Prospector license, you can use search fields and modifiers to target just the companies, industries, and locations that you're interested in. Then, it's easy to save your searches.

-  **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### Understand Data.com Searches

Learn how the Data.com search features work, what fields are searched, and how to refine your search results using filters and location criteria so you can easily find the records most valuable to your business.

### Understand Data.com Search Modifiers

When searching for Data.com accounts and contacts, you can use modifiers to target and narrow your search results. Here's how modifiers work, field by field.

### How Is Industry Determined for Records in Data.com?


We use the primary SIC (Standard Industry Classification) code to determine the value of the `Industry` field on account cards and account records in Data.com. By using only the primary SIC code for this industry mapping, we're able to provide a more consistent and accurate value in the `Industry` field, which leads to more relevant search results, regardless of the industry classification system you use in your search query.

### Data.com Industry Selector

When searching for accounts and contacts in Data.com, use the industry selector to add industries and subindustries to your search criteria.

## Understand Data.com Searches

Learn how the Data.com search features work, what fields are searched, and how to refine your search results using filters and location criteria so you can easily find the records most valuable to your business.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Searching Data.com for CRM records is simple. Start your search by entering search criteria in the fields on the Data.com tab. You can also [use search modifiers to target and narrow your search results](#). Depending on your entries and selections, you may end up with a large list of accounts or contacts. To find out how many, check the results list's header or footer. Click the **Reset Search** link if you need to clear all your entries and selections. You'll see your search results until you start a new search or refresh your browser page.

For account searches, the Data.com search results you get are based on the company name, the website of the parent company, and the websites of the parent company's subsidiaries and branch locations, if any, so your results may include companies that you didn't actually search for. For example, if you want to find Sun Microsystems and you enter either *Sun Microsystems* or *sun.com* in the `Company` or `Website` field, the results will also include Oracle Corporation because Oracle is the parent company of Sun Microsystems.

Also, account searches are based on both the `Account Name` field and the `Tradestyle` field. So, for example, if you are looking for United Parcel Services, you can search on its tradestyle, *UPS*, and still see *United Parcel Services, Inc.* in your search results.

Once you have a set of records, you can narrow your list by using filters if you need to. Just look for the filter categories at the left of the page, and select the checkboxes for the filters you need. Some searches generate filter options that are specific to your results. For example, if you want leads in `Healthcare, Pharmaceuticals & Biotech` industry—specifically `Doctors & Health Care Practitioners`—the list of filters in the `Title` category might include `Doctor`, `Chiropractor`, `Dentist`, and `Office Manager`. For searches that generate a large list of results for `Title`, `Company Name`, and `Website Domain Type` filters, we show the 25 filters with the most search results. To see a shorter list of filters, narrow your initial search.

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Some filter categories are expanded automatically when you run a search, but you can click the links at the top of the Filters panel to expand or collapse them all. As you select filters, the search results list is updated automatically.

For example, if you search for contacts from your IBM account detail page, the Data.com tab will open and automatically enter IBM's URL, *www.ibm.com*, in the **Company or Website** field on the Find Contacts subtab. The search will generate a list of thousands of IBM contacts all over the world. That's probably more than you need, so you can either:

- Refine your initial search by selecting location criteria (such as *Australia* or *United States*) or industry options (like *Computers & Electronics* or *Financial Services*)
- Narrow your search results list by selecting filters such as *Human Resources*, *C-Level*, or *Program Manager* or
- Select *IBM* in the **Company Name** filter category.


By refining your search criteria and filtering your results, you can narrow your list from more than 30,000 contacts to the 25 or so you want to call or email.

SEE ALSO:

[Understand Data.com Search Modifiers](#)

### Understand Data.com Search Modifiers

When searching for Data.com accounts and contacts, you can use modifiers to target and narrow your search results. Here's how modifiers work, field by field.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### Company or Website

- To search for or exclude multiple companies, separate them with commas: *.* For example, *Salesforce, Apple* returns results for both Salesforce and Apple (for example, Apple Computer, Inc. and Apple Inc.), or either one, depending on Data.com data.
- To search for the exact name of a company, type the name within quotation marks: *" "*. For example, *"Apple, Inc."* returns only results with the exact company name Apple, Inc.
- To exclude a company from your results, before the company name, type a minus sign: *-*. For example, *-Oracle* returns a list of results that excludes Oracle. For company names with more than one word, after the minus sign, type the first part of the name. For example, *-Adobe* returns a list of results that excludes Adobe Systems.
- You can also use mixed search modifiers. For example, *salesforce, -Microsoft, "GE Healthcare"* returns all results including salesforce (for example, salesforce and salesforce, inc.); it excludes all results containing Microsoft; and it finds GE Healthcare but not GE Health Care.

### Title

- To exclude a title, before the title, type a minus sign: *-*. For example: *-buyer*.
- To search for exact titles, type them within quotation marks: *" "*. For example: *"Managing Director"*.
- To search for multiple titles, separate them with commas: *.* For example: *CEO,-Dr,"managing director"*.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To search Data.com for accounts:

- No permissions required

To search Data.com for contacts:

- No permissions required

### Name or Email

- To search for results for an individual element in this field—just Name or just Email—type that element followed by a colon (:), and a space, then type the name, or email you're looking for. For example, *Name: Marc Benioff* returns results with only the name Marc Benioff. *Email: marcbenioff@salesforce.com* returns results with only the email address marcbenioff@salesforce.com.
- Modifiers will not work if you don't include "name:" or "email:", and you can't mix and match these modifiers (for example, using "name:" and "email:" in the same search).
- To search for multiple names or emails, separate them with commas: ,.
- To search for exact titles, names, or emails, type them within quotation marks: "".
- To exclude a title, name, or email from your results, before the element, type a minus sign: -.

### Location | City

- To search for multiple cities, separate them with commas: ,. For example, *San Francisco, San Jose* returns results for both San Francisco and San Jose, or either one, depending on Data.com data.
- To search for exact cities, type them within quotation marks: "". For example, "San Francisco", won't return results for South San Francisco. Similarly, "South San Francisco" won't return any results for San Francisco.

### Location | Postal/ZIP Code

- To search for multiple postal or ZIP codes, separate them with commas: ,. For example, *94105, 94122* returns results for both 94105 and 94122, or either one, depending on Data.com data.
- To exclude a postal or ZIP code from your results, before the code, type a minus sign: -. For example, *-94122* returns a list of results that excludes 94122.

### Location | Area Code

- To search for multiple area codes, separate them with commas: ,. For example, *312, 708* returns results for both 312 and 708, or either one, depending on Data.com data.
- To exclude an area code from your results, before the area code, type a minus sign: -. For example, *-708* returns a list of results that excludes 708.

SEE ALSO:

[Understand Data.com Searches](#)

### How Is **Industry** Determined for Records in Data.com?

We use the primary SIC (Standard Industry Classification) code to determine the value of the **Industry** field on account cards and account records in Data.com. By using only the primary SIC code for this industry mapping, we're able to provide a more consistent and accurate value in the **Industry** field, which leads to more relevant search results, regardless of the industry classification system you use in your search query.

A limited number of Data.com accounts show **Data.com - Jigsaw** as the value of the **Source** field on their account card. These accounts do not have a value for the SIC code, and so their **Industry** value is determined using a different system. Contact Salesforce Customer Support for details.



**Example:** You're searching Data.com for accounts with a SIC industry value of *Computer Peripheral Equipment*, which maps to **Electronics** in Data.com. Your Data.com search results will include all accounts with a value of **Electronics** in the **Industry** field. If you use the Data.com Industry Categories classification system and select the *Computers and Electronic* industry, which also maps to **Electronics**, your results will again include all accounts with a value of **Electronics** in the **Industry** field.

### Data.com Industry Selector

When searching for accounts and contacts in Data.com, use the industry selector to add industries and subindustries to your search criteria.

Here's how it works.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

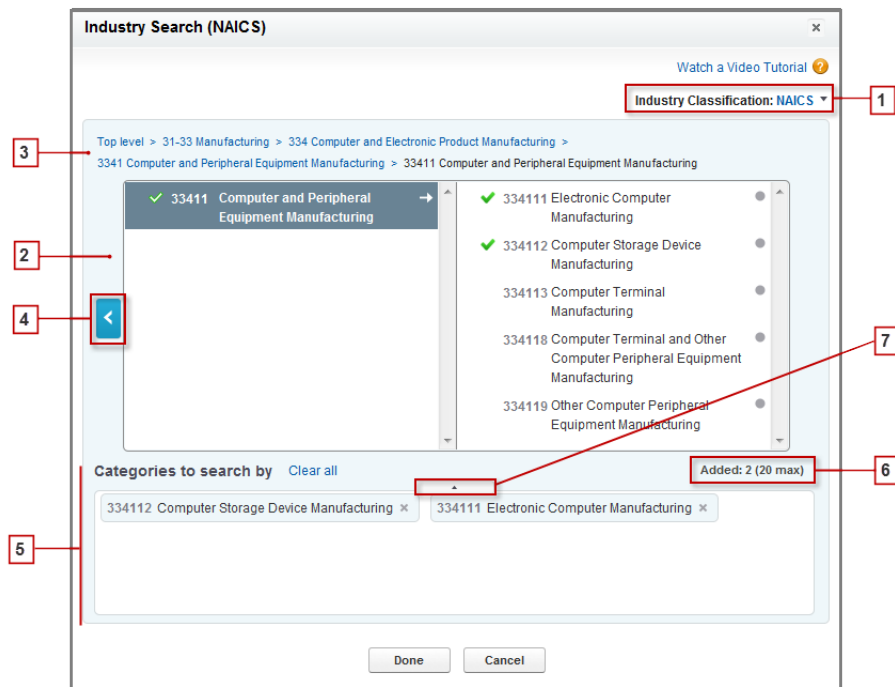
Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions





1. Select the industry classification system your organization uses.
  - *NAICS* (North American Industry Classification System): Used by business and government to classify North American business establishments according to the type of economic activity. This system includes 20 industry sectors, each with multiple levels of subindustries. Industries and subindustries are identified by numeric code, up to six digits.
  - *SIC* (Standard Industry Classification): Used by the United States government to classify business establishments according to the type of economic activity. This system includes 10 industry sectors, each with multiple levels of subindustries. Industries and subindustries are identified by numeric code, up to four digits.
  - *Data.com Industry Categories*: The Data.com system of classifying business establishments by industry and subindustry.


You can select a different industry classification system at any time, but doing so will clear your selections.

2. Use the selection panels to explore industries and their subindustries and add them to your search. If an industry has a numeric classification code, you'll see it here. When you hover over an industry name, you'll get two options.
  - Click the industry name to view its subindustries, if any, in the right panel. If an industry has any available subindustries, you'll see an arrow → to the right of the industry name.
  - Click **Add** to add the industry (including all its subindustries) to the **Categories to search by** (Categories) box.

When you click an industry name in the right panel, it moves to the left panel and its subindustries appear in the right panel. You can continue moving through the industry levels in this manner, adding any industries and subindustries you want to search on as you go. A circle ● to the right of a subindustry name means you have reached the final level of subindustries. When you add an industry to your search criteria, it appears in the Categories box and all of its subindustries are automatically included. You'll also see a solid green checkmark ✓ next to its name. Only the industry, however, appears in the Categories box.

To remove industries from the Categories box, hover over the industry name and click the ✕. If you remove any subindustries from the selection panel, the industry is removed from the Categories box, and its remaining subindustries appear instead. (This

partial selection is denoted by an outlined green checkmark  next to the industry name.) Keep in mind that if you select some but not all subindustries within an industry, the number of selections in the Categories box increases.

3. Use the navigation links at the top of the page to keep track of where you are within the industry levels. Click any link to return to that industry level in the selection panels.
4. Click the **Back** arrow to move up one industry level.
5. All industries and subindustries that you add to your search appear in the **Categories to search by** box. You can remove individual selections by clicking the  next to the industry or subindustry name. Clicking **Clear all** removes *all* your selections.
6. There's a limit on how many industries and subindustries you can add to one search. If you exceed the limit, you'll need to remove selections in order to continue your search.
7. If the **Categories to search by** box includes a long list of industries, you may need to click the arrow to expand the box to view them all.


Here's an example of how the industry selector works. John is looking for companies that manufacture computers. He decides to use the North American Industry Classification System (NAICS) and begins by clicking the **Manufacturing** industry to reveal its subindustries, which include **Food Manufacturing**, **Machinery Manufacturing**, and lots more. He finds **Computer and Electronic Product Manufacturing**, and clicks it, moving it to the left panel to reveal its subindustries in the right panel. He continues to navigate deeper in to the industry levels in this manner, clicking through subindustries until he ultimately finds what he's looking for: **Computer and Peripheral Equipment Manufacturing**. John clicks **Add** to add two subindustries, **Electronic Computer Manufacturing** and **Computer Storage Device Manufacturing**, to the **Categories to search by** box. Those selections remain in the Categories box even if he navigates to other levels in the selection panel and adds other industries. When he is finished adding industries to the Categories box, he does a last review of his selections, then happily clicks **Done** to return to the Data.com tab to complete his search.

SEE ALSO:

[Understand Data.com Searches](#)

## Using Data.com FAQ

Check out answers to some frequently asked questions about Data.com for users.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

[How can I see complete, relevant information for Data.com search results?](#)

We've limited the number of details available for search results that exceed ten pages, to ensure data security.

[Which Data.com user type am I?](#)

It's easy to find out. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**. The *Data.com User Type* field identifies you as either a Data.com User or a Data.com List User. If the field is blank, you do not have a Data.com user license.

[How can I improve my Data.com search results?](#)

It's easy. Use search modifiers.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### [Why do I see companies I didn't search for in my Data.com search results?](#)

For account searches, the Data.com search results you get are based on the company name, the website of the parent company, and the websites of the parent company's subsidiaries and branch locations, if any, so your results can include companies that you didn't actually search for.

### [What's the limit of Data.com records I can add to Salesforce?](#)

From Setup, in the Quick Find box, enter *users* and then select **Prospector Users**. In the Data.com Users section, find your name and see what your monthly limit is and how many records you've already added or exported during the month. Your administrator sets the monthly allowance, which expires at the end of each month, regardless of whether you've met your limit.

### [When I add CRM records from Data.com, how do I know which field values have Data.com data?](#)

Check the help topics that define the fields on those records.

### [What does the Account Site field value on an Account record mean?](#)

*Headquarters/Parent* indicates that a company is a legal entity with other locations. *Single location* indicates that a company is a headquarters with no other locations, and that it also could be a distinct legal entity. *Branch* indicates that a company is not a distinct entity. Rather, a branch is a location of a headquarters or parent company.

### [Why does the Ownership field have a value of Private for companies I know are public?](#)

Dun & Bradstreet (D&B), who provides this data, only tracks ownership information for headquarters or parent companies. If a publicly traded headquarters or parent company has any subsidiaries, such as branch locations, those subsidiaries show a value of *Private* unless they are traded independently. The value is also *Private* if the ownership type is unknown.

### [I'm seeing a discrepancy between the numbers in the Employees and Contacts fields on an Account record. Why?](#)

Here's why the number of employee records can be different than the number of contact records.

### [I use Data.com, and I'm seeing a blank or zero \(0\) value in the Employee and Revenue fields. Why?](#)

Dun & Bradstreet (D&B) collects revenue data for headquarters and single locations only, so records associated with branch locations don't have a value for the *Annual Revenue* field on account and leads records or the *Annual Sales Volume* field on D&B Company records.

### [When I use the Employees or Revenue filter to refine my account search results, I get far fewer results than I expect. Why?](#)

Dun & Bradstreet (D&B) doesn't collect revenue data for branch locations and doesn't always have confirmed employee counts for branches or single locations. Therefore, if you enter *1* as your minimum range in the Revenue filter, your search results exclude all records that have a zero (0) Revenue value. Similarly, if you enter *0* as your minimum range in the Revenue filter, your search results exclude all records that have a blank Revenue value. The Employee filter works the same way.

### [Why do some account and D&B Company records have an identical D-U-N-S Number?](#)

If a company operates within a single country, its Global Ultimate (highest entity within an organization) and Domestic Ultimate (highest entity within an organization in a country) are the same entity, and therefore the values in their D-U-N-S Number fields are the same.

### [What is the difference between the Account Site and Location Type fields?](#)

Account Site is the field found on account records and the Data.com account card. Location Type is the field found on D&B Company records.

### [Why did I receive a message that says I have limited access or need permissions?](#)

Ask your Salesforce admin to give you edit access.

[Why did I receive a message that says, You can't clean this record because you have limited data access, as set by your administrator?](#)

If you don't have appropriate access to the `D&B Company` object, you see this message when you use Data.com Clean to manually clean an account. Ask your administrator to make sure you have read access to the `D&B Company` object.

SEE ALSO:

[Understand Data.com Searches](#)

How can I see complete, relevant information for Data.com search results?

We've limited the number of details available for search results that exceed ten pages, to ensure data security.


To see complete, relevant account information in search results:

- Narrow your search using the search filters on the left of the page. Filtering out results that aren't the focus of your search gives fewer, more targeted results. For example, selecting Director-level accounts in a company's Sales department reduces the results from 50 pages to 4, listing only the accounts you're looking for.
- Sort your search results so that the target of your search appears in the first few pages. For example, sorting the Updated column lists the most recently updated accounts first.

When you've identified the accounts you're looking for, purchase the accounts by adding or exporting them to Salesforce from Data.com. You can see full details of the accounts you purchase and add to your organization.

Which Data.com user type am I?

It's easy to find out. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**. The `Data.com User Type` field identifies you as either a Data.com User or a Data.com List User. If the field is blank, you do not have a Data.com user license.

For a quick definition of your Data.com user type, click the info icon () next to the field.

SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

[Using Data.com FAQ](#)

How can I improve my Data.com search results?

It's easy. Use search modifiers.

To learn more, see [Understand Data.com Search Modifiers](#) on page 106.

To see examples, click the info icon () above each Data.com search field. It's also helpful to save searches you use frequently.

SEE ALSO:

[Understand Data.com Searches](#)

Why do I see companies I didn't search for in my Data.com search results?

For account searches, the Data.com search results you get are based on the company name, the website of the parent company, and the websites of the parent company's subsidiaries and branch locations, if any, so your results can include companies that you didn't actually search for.

For example, if you want to find Sun Microsystems and you enter either *Sun Microsystems* or *sun.com* in the **Company** or **website** field, the results also include Oracle Corporation because Oracle is the parent company of Sun Microsystems.

SEE ALSO:

[Understand Data.com Searches](#)

[Using Data.com FAQ](#)

What's the limit of Data.com records I can add to Salesforce?

From Setup, in the Quick Find box, enter *users* and then select **Prospector Users**. In the Data.com Users section, find your name and see what your monthly limit is and how many records you've already added or exported during the month. Your administrator sets the monthly allowance, which expires at the end of each month, regardless of whether you've met your limit.

If you're a Data.com List User, your name also appears in the Data.com List User section of the page. After you've used your monthly record additions, you'll share record additions from a pool with all other List Users in your organization. Your organization's pool has a limit, so if one Data.com List User reaches the limit, other Data.com List Users can't add records. List pools expire one year after purchase.

If adding a set of records causes you to exceed your addition limit, you see a message that tells you how many additions you have remaining. If you still need to add more records, contact your administrator.

SEE ALSO:

[Using Data.com FAQ](#)

When I add CRM records from Data.com, how do I know which field values have Data.com data?

Check the help topics that define the fields on those records.

All fields that are enabled for Data.com data are identified.

- [Account Fields](#)
- [Contact Fields](#)
- [Lead Fields](#)

SEE ALSO:

[Using Data.com FAQ](#)

What does the **Account Site** field value on an Account record mean?

**Headquarters/Parent** indicates that a company is a legal entity with other locations. **Single location** indicates that a company is a headquarters with no other locations, and that it also could be a distinct legal entity. **Branch** indicates that a company is not a distinct entity. Rather, a branch is a location of a headquarters or parent company.

SEE ALSO:

[What is the difference between the Account Site and Location Type fields?](#)

[Using Data.com FAQ](#)

Why does the **Ownership** field have a value of **Private** for companies I know are public?

Dun & Bradstreet (D&B), who provides this data, only tracks ownership information for headquarters or parent companies. If a publicly traded headquarters or parent company has any subsidiaries, such as branch locations, those subsidiaries show a value of **Private** unless they are traded independently. The value is also **Private** if the ownership type is unknown.

SEE ALSO:

[What does the Account Site field value on an Account record mean?](#)

[Using Data.com FAQ](#)

I'm seeing a discrepancy between the numbers in the **Employees** and **Contacts** fields on an Account record. Why?

Here's why the number of employee records can be different than the number of contact records.



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

There are a number of possible reasons.

- The number of employees is only available on records that have a value of **Headquarters/Parent** in the **Account Site** field. This value means that a branch location often shows a value of zero in the **Employees** field but still have a number of contacts.
- The **Employees** field on Account records shows the total number of employees within a company, including all subsidiary and branch locations. The number of contacts, however, reflects only the contacts at that specific location. So a headquarters location that has 5,000 employees throughout its various locations can only have 3,000 contacts at the headquarters location.
- *Employee* totals come from Dun & Bradstreet (D&B) and usually *do not* include contract employees. *Contact* totals and related data come from the Data.com community and often *do* include contract employees as long as they have a valid company email address.

SEE ALSO:

[Using Data.com FAQ](#)

I use Data.com, and I'm seeing a blank or zero (0) value in the Employee and Revenue fields. Why?

Dun & Bradstreet (D&B) collects revenue data for headquarters and single locations only, so records associated with branch locations don't have a value for the **Annual Revenue** field on account and leads records or the **Annual Sales Volume** field on D&B Company records.

Similarly, D&B doesn't always have confirmed employee counts for branches and single locations, so there possibly isn't a value for the **Number of Employees** field on lead records, the **Employee** field on account records, or the **Number of Employee-Total** field on D&B Company records.

SEE ALSO:

[Using Data.com FAQ](#)

When I use the Employees or Revenue filter to refine my account search results, I get far fewer results than I expect. Why?

Dun & Bradstreet (D&B) doesn't collect revenue data for branch locations and doesn't always have confirmed employee counts for branches or single locations. Therefore, if you enter `1` as your minimum range in the Revenue filter, your search results exclude all records that have a zero (0) Revenue value. Similarly, if you enter `0` as your minimum range in the Revenue filter, your search results exclude all records that have a blank Revenue value. The Employee filter works the same way.



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

If you want all records with a zero (0) or blank Revenue or Employee value included in your filtered search results, be sure to leave the `min` field blank.

SEE ALSO:

[What does the Account Site field value on an Account record mean?](#)

[Using Data.com FAQ](#)

Why do some account and D&B Company records have an identical D-U-N-S Number?

If a company operates within a single country, its Global Ultimate (highest entity within an organization) and Domestic Ultimate (highest entity within an organization in a country) are the same entity, and therefore the values in their D-U-N-S Number fields are the same.

SEE ALSO:

[Using Data.com FAQ](#)

What is the difference between the Account Site and Location Type fields?

Account Site is the field found on account records and the Data.com account card. Location Type is the field found on D&B Company records.

(D&B Company records are available to customers who have purchased Data.com.) Both fields contain the same values: `Single location`, `Headquarters/Parent`, and `Branch`.

SEE ALSO:

[Using Data.com FAQ](#)

Why did I receive a message that says I have limited access or need permissions?

Ask your Salesforce admin to give you edit access.



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### If your company is using Data Integration

If your company is using Data Integration and you try to update an account, contact, or lead, you can see this message: You don't have the field-level permissions required by this data integration rule, so you can't update this record.

Ask your Salesforce admin to give you edit access to all fields updated by the data integration rule. (If your company uses Professional Edition, your admin must also add the fields to the page layout.)

### If your company is using Data.com Clean

If your company is using Data.com Clean and you try to update an account, contact, or lead, you can see this message: You have limited access to data, so you can't completely clean this record. You can still update the fields that you can edit.

Ask your Salesforce admin to make sure you can edit the [Salesforce fields affected when cleaning records](#), including D&B fields.

- For Data.com Clean, in Contact Manager and Group editions, the fields must be on the appropriate page layout.
- For Professional, Enterprise, Performance, and Unlimited editions, field-level security must be set to Visible for the fields.

SEE ALSO:

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)


[Using Data.com FAQ](#)

Why did I receive a message that says, You can't clean this record because you have limited data access, as set by your administrator?

If you don't have appropriate access to the D&B Company object, you see this message when you use Data.com Clean to manually clean an account. Ask your administrator to make sure you have read access to the D&B Company object.

## Get Critical Industry, Financial, and Competitive Insights for Your Accounts

Need detailed information about account businesses? Click the Prospecting Insights button on the account detail page to get data about your prospects' businesses and financials, as well as competitive and industry details—directly from Data.com in real time.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Prospecting Insights is available with Data.com licenses. Insights data is available for accounts that were imported from, or cleaned by, Data.com.

Before you begin, make sure that your administrator has added the `Prospecting Insights` button to the Account page layout.

1. Open the account detail page for a prospect.
2. Click **Prospecting Insights**.

#### EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited Editions**

#### USER PERMISSIONS

To get Data.com prospecting insights for an account:

- Read on accounts



If you click **Prospecting Insights** for an account that hasn't been imported from or cleaned by Data.com, a message recommends that you first clean the account.

### [Prospecting Insights Data Details](#)

Data.com Prospecting Insights combines D&B company details and industry intelligence in a quick-view snapshot, to help you start smart conversations with your prospects and customers.

### [Prospecting Insights in Lightning Experience](#)


Data.com Prospecting Insights combines Dun & Bradstreet company details and industry intelligence in a snapshot. Tabs with company information, account hierarchies, and links to related industries help you start smart conversations with your prospects and customers.

#### SEE ALSO:

[Prospecting Insights Data Details](#)

## Prospecting Insights Data Details

Data.com Prospecting Insights combines D&B company details and industry intelligence in a quick-view snapshot, to help you start smart conversations with your prospects and customers.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).


Prospecting Insights is available with Data.com licenses.

### EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited Editions**


Insights Category	Details
Business Details	<ul style="list-style-type: none"> <li>Description of the company supplied by the Hoover's, Inc. subsidiary of Dun and Bradstreet</li> <li>Company address, phone, and website</li> <li>Location type—headquarters or a branch office</li> <li>Location size in square feet, identified as the actual measurement or estimated</li> <li>Location ownership—owned or rented</li> <li>Tradestyle, if the company uses one</li> <li>Year the company was founded</li> </ul>
Financial Details	<ul style="list-style-type: none"> <li>Fiscal year end, identified by month</li> <li>Stock market exchange and symbol</li> <li>Standard &amp; Poor's 500 index indicator</li> <li>Fortune 1000 rank</li> <li>Delinquency risk—the likelihood of this company paying 90 or more days late over the next 12 months*</li> </ul>

Insights Category	Details
	<p> <b>Important:</b> Use this information for marketing pre-screening purposes only.</p> <ul style="list-style-type: none"> <li>• Annual revenue for the most recent and prior year, and growth percentage</li> <li>• Net income for the most recent year*</li> <li>• Employee number for the most recent and prior year, and growth percentage</li> </ul>
Contacts from Data.com	<ul style="list-style-type: none"> <li>• Graphical view of contact distribution at the company</li> <li>• Links to contacts at the company, by department—clicking a link takes you to the Data.com Find Contacts page</li> </ul>
Top Competitors	<ul style="list-style-type: none"> <li>• Links to websites for the company's top competitors</li> <li>• Primary competitors listed by revenue</li> </ul>
Industry Details	<ul style="list-style-type: none"> <li>• Primary NAICS and SIC classifications</li> <li>• Industry selector for industries related to the primary NAICS and SIC classifications</li> <li>• Sample call-prep questions</li> <li>• Competitive landscape analysis*—an overview of the industry's competitive environment</li> <li>• Industry trends* and industry opportunities*—how events and issues are affecting industry businesses</li> <li>• Links to selected industry websites</li> </ul>

\* Available only with a Premium license

## Prospecting Insights in Lightning Experience


Data.com Prospecting Insights combines Dun & Bradstreet company details and industry intelligence in a snapshot. Tabs with company information, account hierarchies, and links to related industries help you start smart conversations with your prospects and customers.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Prospecting Insights is available with a Data.com Prospector license.

 **Important:** If you use Professional Edition, add the Data.com Key field to the Accounts page layout.

## Company

View a company overview, financial details, a list of top competitors, and a breakdown of account contacts. View and add contacts by level or department. Read details about key competitors. Understand company linkages.

### EDITIONS

Available in: **Essentials, Contact Manager, Group, Professional, Enterprise, Performance, Unlimited Editions**

## Hierarchy

Get a complete hierarchical view of a company and its linkages. Click the plus (+) sign next to a company to add it as an account.

## Industry

Critical industry insights help you intelligently engage with an account.

### Industry Details

View details about the accounts industry as identified by Standard Industrial Classification (SIC) and North American Industry Classification System (NAICS) codes and descriptions.

### Competitive Landscape

Understand the potential of the account in its related industry.

### Trends

Understand the account's financial situation and identify potential growth areas.

### Opportunities

Review various account opportunities.

### Call Prep

Prepare for a call with detailed Q&A.

### Industry Websites

See the websites of the account's top competitors.


## SEE ALSO:

[Manage Access to Data.com Search Results and Related Features](#)

[Display Data.com Prospecting Insights in Lightning Experience](#)


## Set Up Data.com Prospector

Set up Data.com Prospector to let your sales team prospect for companies, leads, and contacts right in Salesforce.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Important:** You need to assign a Data.com license directly to a user in order for that user to add and export files from Data.com.

### 1. [Set Up Data.com Users](#)

Give users access to Data.com and set their record addition limits so they can start taking advantage of Data.com's rich database of accounts, contacts, and leads. The number of Data.com users you can set up—within Salesforce or via the Data Loader—depends on the number of Data.com licenses you purchased.

### 2. [Enable Data.com Clean](#)

Let users manually clean account, contact, and lead records. You can even clean records that were added from another source. Clean is automatically enabled when you use Data.com, and you can manually clean D&B Company records that are linked to account or lead records.

### 3. [Configure Data.com Prospector](#)

With Data.com Prospector, you get Dun & Bradstreet fields for accounts and leads you add to Salesforce from Data.com.

### 4. [Manage Access to Data.com Search Results and Related Features](#)

Use the **Add to Salesforce** and **Export Results** to limit what users can do with Data.com search results for Data.com features that use the search results.

### 5. [Respect Do-Not-Contact Settings in Data.com Search Results and Exports](#)

In Data.com search results and export files, you can prevent certain contact information from being displayed.

### 6. [Enable or Disable Data.com API Functionality](#)

Data.com API functionality is enabled by default.

### 7. [Guidelines for Letting Your Users Prospect for Companies with Data.com Prospector](#)

We offer two versions of Data.com Prospector. Both let you search and add data from Data.com: Check out some guidelines for implementing both versions.

#### SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

#### USER PERMISSIONS

To implement Data.com:

- Customize Application

To enable Data.com users:


- Manage Internal Users

To install AppExchange packages:

- Download AppExchange Packages

## Set Up Data.com Users

Give users access to Data.com and set their record addition limits so they can start taking advantage of Data.com's rich database of accounts, contacts, and leads. The number of Data.com users you can set up—within Salesforce or via the Data Loader—depends on the number of Data.com licenses you purchased.


 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Important:** You need to assign a Data.com license directly to a user in order for that user to add and export files from Data.com.

1. From Setup, enter *Manage Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** for a user.
3. Select a *Data.com User Type*. (You can [review the types of Data.com users](#) on page 123.)
4. Select the *Data.com Monthly Addition Limit* for the user.
5. Save the user.

 **Tip:** You can also use the Apex Data Loader to set up Data.com users, select the Data.com user type, and set the monthly addition limit, if applicable. To do so, export your user records to a `.csv` file, change the necessary fields for each user you want to set up, and then import the `.csv` file into Salesforce. The fields to export from the User object are `LastName`, `FirstName`, `UserPermissionsJigsawProspectingUser`, `JigsawImportLimitOverride`, and `UserPreferencesJigsawListUser`. For more information about the User object, see the *Object Reference for Salesforce and Lightning Platform*.

### [How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

User types, licenses, and record addition limits control what users can access Data.com and what Data.com users can do.

#### SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

#### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

#### USER PERMISSIONS

To implement Data.com:

- Customize Application

To enable Data.com users:


- Manage Internal Users

To install AppExchange packages:

- Download AppExchange Packages

## How Do Data.com User Types, Licenses, and Record Addition Limits Work?

User types, licenses, and record addition limits control what users can access Data.com and what Data.com users can do.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### [Check Data.com License Information, Record Addition Balances, and Limits](#)

Check important license, record addition, and limits information from the Data.com Licenses & Limits page in Setup. This page also shows daily API limits for Data.com.

### [How Do Licenses Work for Data.com Prospector?](#)

Data.com Prospector user licenses let users search Data.com for accounts and add them as records to Salesforce. Users can be assigned one of two types of licenses—Data.com User and Data.com List User—and each type has its own characteristics.

### [How Do Licenses Work for Data.com Clean?](#)

If your org uses Data.com Prospector, users with those licenses can manually update the account records they have access to. With a Data.com Clean license, you can use Data.com Clean jobs to update records. You can also use Data Integration to update records as they are added or saved. Users who have a Data.com Clean license can manually update records, even if they don't have a Data.com Prospector license.

#### SEE ALSO:

[Set Up Data.com Users](#)

[Using Data.com FAQ](#)

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in:  
**Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Check Data.com License Information, Record Addition Balances, and Limits

Check important license, record addition, and limits information from the Data.com Licenses & Limits page in Setup. This page also shows daily API limits for Data.com.

**Important:** The Data.com API Limits section has information on calls to the Data.com Match API and calls to the Data.com Search API. You can only see the information on Match calls if your organization has Data.com Clean. You can only see the information on Search calls if you are assigned a Data.com Prospector user license.

1. From Setup, in the Quick Find box, enter *Licenses & Limits*.

To see how many records each user has added or exported, check the All Data.com Users page. From Setup, in the Quick Find box, enter *Users*, and then select **Prospector Users**. Or, if your organization has access to custom report types, you can use the Data.com Usage object to create a report that shows more detailed usage information.

SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

How Do Licenses Work for Data.com Prospector?

Data.com Prospector user licenses let users search Data.com for accounts and add them as records to Salesforce. Users can be assigned one of two types of licenses—Data.com User and Data.com List User—and each type has its own characteristics.

**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

**Important:** You need to assign a Data.com license directly to a user in order for that user to add and export files from Data.com.

### Data.com User

Data.com Users get a limited number of account records to add or export per month. The default number of records per licensed user is 300. The record addition limit for each licensed user refreshes at midnight on the first of the month (based on the time zone of the organization) regardless of your contract start date. Unused record additions expire at the end of each month, *do not* rollover to the next month, and are not refundable. You can select the **Data.com Monthly Addition Limit** for each user. This is the number of account, contact, and lead records the user can add each month. You can select up to the organization limit for any user or all users, but once the organization's monthly limit is reached, users won't be able to add more records.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS


To view Data.com Setup pages:

- Customize Application

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))


Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

 **Example:** The sales division of Universal Telco has 14 sales reps, and they purchase 20 Data.com Prospector licenses, each of which has a record addition limit of 300. This means that Data.com Users within the organization can add as many as 6,000 records per month. The Universal Telco administrator distributes the Data.com Users' monthly record addition limits as follows.

- Ten of the sales reps have limits of 300 each
- Two of the sales reps have limits of 500 each
- Two of the sales reps have a limit of 1,000 each

### Data.com List User

Data.com List Users get a limited number of account records to add or export per month. Unused record additions expire at the end of each month and *do not* rollover to the next month. After the monthly limit is used, List Users draw record additions from a pool that is shared by all List Users in the organization. Unused pool additions expire one year from purchase. Only Data.com List Users can draw from the organization's pool limit. If a Data.com User wants to draw from the organization's pool limit, you need to change that user to a Data.com List User.


 **Example:** The marketing division of Universal Telco has four marketing reps. Each rep has a Data.com Prospector license and each is a Data.com List User. Universal Telco purchases enough monthly record additions so that each Data.com user has a monthly default limit of 300 records. The company also purchases a record addition pool of 5,000 records. This means that after each marketing rep uses his monthly limit, he can start using the pool limit. Together, all four marketing reps can add 5,000 records from the pool. One rep might add 2,500 records, leaving 2,500 to be added by one or more of the other three users.

#### SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

#### How Do Licenses Work for Data.com Clean?

If your org uses Data.com Prospector, users with those licenses can manually update the account records they have access to. With a Data.com Clean license, you can use Data.com Clean jobs to update records. You can also use Data Integration to update records as they are added or saved. Users who have a Data.com Clean license can manually update records, even if they don't have a Data.com Prospector license.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

The Data.com Licenses & Limits page in Setup describes the options available for each type of license.

 **Note:** If your org purchased only Data.com Prospector, only users with licenses can update records.

#### SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience


Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance,** and **Unlimited** Editions



## Enable Data.com Clean

Let users manually clean account, contact, and lead records. You can even clean records that were added from another source. Clean is automatically enabled when you use Data.com, and you can manually clean D&B Company records that are linked to account or lead records.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:**

- If you've purchased Data.com Clean, you can clean account, contact, and lead records manually *and with automated jobs*. You can also use automated jobs to clean D&B Company records that are linked to account or lead records. For complete details, see [Set Up Data.com Clean](#).
- Enabling Clean does not clean your records immediately. You can click **Disable** to turn off the feature.
- Data Integration is not automatically available with Data.com.

1. From Setup, enter *Clean Settings* in the **Quick Find** box, then select **Clean Settings**
2. Confirm that Data.com Clean is enabled.

### [Considerations for Custom Mapping of Data.com Clean and Salesforce Fields](#)

Custom mappings for Data.com Clean put Data.com values in the Salesforce account, contact, and lead fields where you want those values. Before mapping fields, make sure that you understand how mapping works, what preparations to make, and what kind of results to expect.

### [Considerations for Allowing Duplicate Data.com Records in Salesforce](#)

Organizations that use a sharing model may want to allow Data.com users to add duplicate account, contact, or lead records to Salesforce.

#### SEE ALSO:

- [Use Data.com Clean to Keep Your Data Current and Complete](#)
- [Integrate Third-Party Data with Your Records](#)
- [Set Up Data.com Clean](#)

#### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions


#### USER PERMISSIONS

To enable or disable Data.com Clean:

- **Customize Application**

## Considerations for Custom Mapping of Data.com Clean and Salesforce Fields

Custom mappings for Data.com Clean put Data.com values in the Salesforce account, contact, and lead fields where you want those values. Before mapping fields, make sure that you understand how mapping works, what preparations to make, and what kind of results to expect.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Not all Data.com fields are available for all Salesforce fields. To be mappable, the new Salesforce field must be the same data type as the default field. For example, the `DESCRIPTION` field can be mapped to a long text area field with 1,000 characters or more.

Data.com Clean custom field mappings apply when:

- You add records to Salesforce using Data.com Prospector.
- You clean a single record, clean records in a list, or clean records with automated jobs.

Before you map fields, make sure you understand these potential outcomes and the related actions you should take.

- Mapping fields or updating mappings forces a full sync with Data.com: all records of enabled CRM objects (accounts, contacts, and leads) are updated, even if no records have changed.
- Data.com field mappings may conflict with any Salesforce field customizations (such as approvals, workflow rules, or Apex triggers) you use for accounts, contacts, leads, or D&B Company records. Review and edit your customizations as needed so they will work with the values supplied by your mappings.
- You can skip mapping individual Data.com fields, but values for skipped fields won't be added, exported, or considered when we calculate a record's clean status.
- Skipping or changing mappings for fields used to match Salesforce and Data.com records may change some records' clean status to `NOT FOUND`.
- For account records, skipping or changing the mapping for the `D-U-N-S NUMBER` field will cause all account jobs to use the Data.com matching service, rather than the `D-U-N-S NUMBER` field, to rematch account records.
- If you map fields and also set Clean job preferences to flag, auto-fill, or overwrite Salesforce fields, you'll see any *custom-mapped* fields when you set those preferences. Default mappings (such as from the Data.com `PHONE` field to the Salesforce `PHONE` field) do not appear.
- If you export Data.com search results, the column headers in your Excel file will show the mapped field names. For example, if you map the Data.com `PHONE` field to the Contact object's `MOBILE` field, you'll see a header called "Mobile" for contacts, not "Phone".
- If you map Data.com fields that do not have values, some Salesforce records might revert to `NOT FOUND` clean status.
- If you map a Data.com field to a custom Salesforce field, the custom field's label will appear on the Clean comparison page.
- If you want to track changes to field mappings, you'll find them in the Setup Audit Trail. From Setup, enter *View Setup Audit Trail* in the `QUICK FIND` box, then select **View Setup Audit Trail**.

### Default Data.com-to-Salesforce Field Mappings

When you add records with Data.com Data.com or update records with Data.com Clean, some Salesforce Account fields get values from Data.com. Salesforce admins can customize these field mappings.

#### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

[Customize Salesforce Field Mappings](#)

You can create custom mappings to put Data.com values in particular Salesforce fields.

## SEE ALSO:

[Default Data.com-to-Salesforce Field Mappings](#)

[Customize Salesforce Field Mappings](#)

[Review Triggers and Workflow Rules for Data.com Compatibility](#)

## Default Data.com-to-Salesforce Field Mappings

When you add records with Data.com Data.com or update records with Data.com Clean, some Salesforce Account fields get values from Data.com. Salesforce admins can customize these field mappings.

Default fields are available under the **Page Layouts > Fields** section for Account.



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Data.com Field	Account Field
Annual Revenue (in US dollars)*	Annual Revenue
Company Description	Description
D-U-N-S Number	D-U-N-S Number
Facsimile Number	Fax
Location Type	Account Site
Mailing Address**	Shipping Address
Number of Employees-Total	Employees
Ownership Type Indicator	Ownership
Primary Address	Billing Address
Primary Business Name	Account Name
Primary NAICS Code	NAICS Code
Primary NAICS Description	NAICS Description
Primary SIC Code	SIC Code
Primary SIC Description	SIC Description
Primary Tradestyle	Tradestyle
Telephone Number	Phone


## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance,** and **Unlimited** Editions

Data.com Field	Account Field
Ticker Symbol	Ticker Symbol
URL	Website
Year Started	Year Started

 **Tip:** Not all Data.com fields are mapped by default to the Account page. To map more Data.com fields to Account fields, see [Customize Data.com-to-Salesforce Field Mappings](#) on page 129.

\* You can't access the Data.com Annual Revenue field. It's used only to populate the Annual Revenue field in Salesforce.

\*\*Data.com Clean does not use the Mailing Address mapping for accounts. It uses only the Primary Address value to update accounts.

SEE ALSO:

[Customize Salesforce Field Mappings](#)

[Default Data.com-to-Salesforce Field Mappings](#)


## Customize Salesforce Field Mappings


You can create custom mappings to put Data.com values in particular Salesforce fields.

Data.com Clean custom field mappings apply when:

- You add records to Salesforce using Data.com Prospector.
- You clean a single record, clean records in a list, or clean records with automated jobs.

Before you change field mappings, it's important to [understand how mapping works, what preparations to make, and what kind of results you should expect](#).

 **Note:** Not all Data.com fields are available for all Salesforce fields. To be mappable, the new Salesforce field must be the same data type as the default field. For example, the `Description` field can be mapped to a long text area field with 1,000 characters or more.

1. From Setup, enter the name of the object you want to map the Data.com fields to, for example, **Accounts**, then select **Fields**.
2. Click **New** next to Custom Fields & Relationships for the object you want to map the fields to, for example, **Accounts Custom Fields & Relationships**.
3.  **Tip:** It's best to create all the fields in the object that you are adding fields to before mapping them from **Data.com Administration**.  
Follow the steps in the New Custom Field wizard. When your finished, be sure to click **Save**.
4. From Setup, enter **Data.com Administration**, then click **Field Mapping**.
5. Find the field you want to map, and select the custom mapping from the list box next to the field.
6. Click **Save**.


SEE ALSO:

[Default Data.com-to-Salesforce Field Mappings](#)

[Considerations for Custom Mapping of Data.com Clean and Salesforce Fields](#)

## Considerations for Allowing Duplicate Data.com Records in Salesforce

Organizations that use a sharing model may want to allow Data.com users to add duplicate account, contact, or lead records to Salesforce.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Keep these considerations in mind when setting your duplicate preferences.

- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. This includes records that were added from Data.com as both contacts and leads.
- You can allow duplicates by object for the entire organization—not for individual users. If, however, you want to prevent a user or profile from being able to add duplicates, you can create a trigger.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To implement Data.com:

- Customize Application

To enable Data.com users:

- Manage Internal Users

To install AppExchange packages:

- Download AppExchange Packages

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

- A green dot (●) appears in the search results next to Salesforce records that have a value in the `Data.com Key` field (records that were imported or cleaned by Data.com). These records can be re-added by any Data.com user if your organization allows duplicates for the object.
- Records that have been added to Salesforce from Data.com are marked with a blue checkmark (✔) in search results. These records can be re-added by any Data.com user if your organization allows duplicates for the object. Adding a record affects the record balance only the first time that record is added to Salesforce: adding duplicates *does not* affect the record balance.
- If your Data.com preferences are set to allow duplicates but your organization also uses duplicate rules to prevent the creation of duplicate records, the duplicate rule will determine if the duplicate record is allowed or blocked.

## Configure Data.com Prospector

With Data.com Prospector, you get Dun & Bradstreet fields for accounts and leads you add to Salesforce from Data.com.

- ✔ **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

- ✔ **Note:** To find out more about the Data.com Prospector product your organization has, from Setup, enter *Licenses & Limits* in the Quick Find box, then select **Licenses & Limits**. On the Licenses & Limits page, check the Data.com Prospector Licenses section.

Here's how to configure Data.com Prospector.

1. Make sure you've [implemented Data.com Premium Prospector](#).
2. [Confirm that Data.com Clean is enabled, so your users can manually clean account, contact, and lead records](#).
3. [Configure your account, contact, and lead page layouts with the buttons and fields you need](#).
4. If you use Professional, Enterprise, Unlimited, or Performance Editions, [update your field-level security so users see fields provided by D&B](#).
5. Add the D&B Companies tab to user profiles.
6. Verify that profiles have `D&B Companies` read and delete permissions selected under Standard Object Permissions.
7. (Optional) We've created a default layout for D&B Company records, but you can use the Enhanced Page Layout Editor to customize the page layout.

## Best Practices for Your Configuration

- You can let your users view and delete D&B Company records. Assign permissions to standard and custom profiles.  
For standard profiles, assign the permission `Delete D&B Company records` in addition to the preassigned permission `Read D&B Company records`.  
For custom profiles, assign both of the permissions `Read D&B Company records` and `Delete D&B Company records`.
- If you create validation rules for the fields that the product provides, disable any validation rules using those fields, because those rules still run even if you stop using the product. Data.com Prospector fields are identified in the help topics "Account Fields" and "Lead Fields".

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions


### USER PERMISSIONS

To implement Data.com Prospector:

- [Customize Application](#)

## Manage Access to Data.com Search Results and Related Features


Use the **Add to Salesforce** and **Export Results** to limit what users can do with Data.com search results for Data.com features that use the search results.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

The checkboxes under **Button Preferences** settings control whether specific Data.com features are visible to users in your org.

 **Warning:** Changing button preferences impacts all features associated with `Find Contacts` and `Find Accounts` for both Classic and Lightning features.

1. From Setup, enter *Prospector Preferences* in the Quick Find box, then select **Prospector Preferences**.
2. In the **Button Preferences** section of the page, deselect what you want to hide or select what you want to show.
3. Click **Save**.

### [Display Data.com Prospecting Insights in Lightning Experience](#)

Display Data.com Prospecting Insights on account and opportunity pages.

### [Enable Get More Contacts Button in Lightning Experience for an Existing Org](#)

The Get More Contacts button shows up on the account details page only when the Button Preferences in Data.com Prospector Preferences are selected.

## Display Data.com Prospecting Insights in Lightning Experience

Display Data.com Prospecting Insights on account and opportunity pages.

1. From Setup, use the Quick Find box to find Lightning App Builder.
2. Next to the account or opportunity page where you want to add Prospecting Insights, click **Edit**.
3. Drag the Data.com Insights component to the page layout.
4. Save your change.

## Enable Get More Contacts Button in Lightning Experience for an Existing Org

The Get More Contacts button shows up on the account details page only when the Button Preferences in Data.com Prospector Preferences are selected.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To implement Data.com:

- [Customize Application](#)


Already have a Data.com Prospector license, but don't see the Get More Contacts button on account detail pages? Make sure to select **Button Preferences** under Data.com Prospector Preferences.

Here is what to do to make the Get More Contacts button show up on your org's account details pages.

1. From Setup, in the Quick Find box, enter *Prospector Preferences* and then scroll to the Button Preferences section.
2. Select **Add to Salesforce** for both Find Contacts and Find Accounts.
3. Click **Save**.

## Respect Do-Not-Contact Settings in Data.com Search Results and Exports

In Data.com search results and export files, you can prevent certain contact information from being displayed.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

In particular, you can mask out or remove:

- Email and phone values for contact and lead records already in Salesforce that have `Do Not Call` or `Email Opt Out` selected; and
- Email values for all contact and lead records with Canada addresses (to support Canada's privacy requirements)

For example: You have a lead record in Salesforce for Sally Larkin and on that record the `Do Not Call` checkbox is selected. You search for Sally Larkin as a contact on the Data.com tab and her record appears in the search results list, marked as already in Salesforce (●). The `Phone` field is masked in the search results list, and also on Sally's contact card. If you export the record, its `Phone` field is blank in the `.csv` file.

1. From Setup, enter *Preferences* in the `Quick Find` box, then select **Prospector Preferences**.
2. Select **Respect Do-Not-Contact Settings and Canada's Privacy Requirements**.  
For records that have `Do Not Call` or `Email Opt Out` selected, `Phone` or `Email` field values are masked in the search results and on the contact card, and blank in `.csv` files created when you export records. For records with Canada addresses, `Email` field values are masked in the search results and on the contact card, and blank in `.csv` files created when you export records.

## Enable or Disable Data.com API Functionality

Data.com API functionality is enabled by default.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. From Setup, in the Quick Find box, enter *Data.com Administration* and then select **Prospector Preferences**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To implement Data.com:


- **Customize Application**




2. Select or deselect **Allow Data.com API Access**.
3. Save the page.

## Guidelines for Letting Your Users Prospect for Companies with Data.com Prospector

We offer two versions of Data.com Prospector. Both let you search and add data from Data.com: Check out some guidelines for implementing both versions.

-  **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.
 

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).
-  **Note:** If a search produces many results, you don't see data past page 10. Contact Salesforce Customer Support to enable unlimited view.
- If your organization uses validation rules on fields that are mapped to Data.com, either deactivate the rules or make sure that they match Data.com field names to avoid errors when adding records.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### [Resolve Data.com Record Addition Errors](#)

If errors prevent you from adding one or more Data.com records to Salesforce, we'll provide a .csv error log file to help you fix any record addition errors.

### [Create a Custom Report Type for Account Clean Info](#)

Create custom report types to report on clean information for accounts. Clean Info custom report types can help you easily see clean information for multiple records in one report. Use that information to identify patterns and trends in your data and to manage or modify how your records are cleaned.

### [How Does Data.com Clean Match Your Records?](#)

If you clean your account data with Data.com Clean, it's important to understand how your records are compared and matched with records from Data.com.

### [Guidelines for Using D&B Company Records](#)

Review some guidelines so your organization gets the most out of D&B Company records, which contain over 100 fields of industry, financial, and competitive information from Dun & Bradstreet.

### [D&B Company Fields](#)


When you add or update an account or lead, a D&B Company record is created and linked to that account or lead via the `D&B Company` field. Click the link in the `D&B Company` field to access the associated D&B Company record, which has over 100 fields of industry, financial, and competitive information from Dun & Bradstreet.

### [Administering Data.com FAQ](#)

Check out answers to some frequently asked questions about Data.com for administrators.

## Resolve Data.com Record Addition Errors

If errors prevent you from adding one or more Data.com records to Salesforce, we'll provide a .csv error log file to help you fix any record addition errors.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

How we provide the error log depends on what you were trying to do. If you were trying to add:

- Fewer than 200 records, you'll see a message with a link to the error log on the Files tab.
  - Two hundred records or more, you'll receive an email with a link to the error log on the Files tab.
  - Any number of records and you *do not* have Chatter enabled, you'll receive an email with the error log attached.
1. Open the record addition error log and review the errors, then take one of these actions.
    - If you see errors regarding duplicate records, you don't need to do anything. *Duplicate* errors mean that the records are already in Salesforce, so you don't need to add them again. If your Data.com preferences are set to allow duplicates, the error log will not include any *duplicate* errors. If your Data.com preferences are set to allow duplicates but your organization also uses duplicate rules to prevent the creation of duplicate records, the duplicate rule will determine if the duplicate record is allowed or blocked. Records that are blocked by the duplicate rule will appear in the error log.
    - If you see errors regarding your organization's custom configurations, such as triggers, validation rules, or workflow, let your administrator know because they may need to correct these configurations.
    - If your organization uses state and country/territory picklists and you see errors regarding available states, countries, or territories, notify your administrator, who will need to add the particular state, country, or territory to the picklist.
    - For all other errors, contact your administrator, who may need to contact Salesforce Customer Support.
  2. After your administrator resolves the errors, try again to add the Data.com records to Salesforce.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To add accounts from Data.com:

- Create on accounts

To add contacts from Data.com:

- Create on contacts

To add Data.com Data.com contacts from an account


- Read on accounts AND Create on contacts

To add Data.com Data.com contacts as leads

- Create on leads

## Create a Custom Report Type for Account Clean Info

Create custom report types to report on clean information for accounts. Clean Info custom report types can help you easily see clean information for multiple records in one report. Use that information to identify patterns and trends in your data and to manage or modify how your records are cleaned.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. From Setup, enter *Report Types* in the *Quick Find* box, then select **Report Types**.
2. Click **New Custom Report Type**.
3. For Primary Object, select *Accounts* and define the other required fields.
4. For Category, select *Accounts & Contacts*.
5. Click **Next**.
6. Relate the Account Clean Info object to the Accounts object. Accept the default for *A to B Relationship*.
7. Select a deployment status.
8. Click **Save**.

Now you can create custom reports based on your new custom report types.

### SEE ALSO:

[Salesforce Help: Create a Custom Report Type](#)  
[Report on Records with a Specific Data.com Clean Status](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To create or update custom report types:


- Manage Custom Report Types

To delete custom report types:

- Modify All Data


## How Does Data.com Clean Match Your Records?

If you clean your account data with Data.com Clean, it's important to understand how your records are compared and matched with records from Data.com.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Tip:** For complete details about how the Data.com Clean matching service works, including a graphic overview and extensive examples, see the white paper [Data.com Clean Record Matching in Salesforce](#).

Watch a Demo:  [Understanding Matching Rules](#)

Using Data.com Clean, your records and Data.com records can be compared and matched in two ways.

- Manually, when a user clicks **Clean** on an individual account record.
- Via Clean jobs, which automatically attempt to match all your account records.

*Automated* clean jobs are only available to orgs that purchase Data.com Clean. *Manual* clean is available to all licensed Data.com Prospector users.

The first time one of your records is cleaned, either manually or via an automated job, the matching service searches Data.com for similar records. It examines the field values in each record and looks for enough identical or similar information to indicate that the two records represent the same entity (that is, the same account). If Data.com finds a match, the two records are linked by a numeric value in the `Data.com Key` field. Every time your record is cleaned, the `D-U-N-S Number` field is used to match (or look up) the record. If the `D-U-N-S Number` field is blank, the matching service is used to find a match. If your record changes substantially the next time it is cleaned, the matching service sometimes looks for a better match from other Data.com records.

 **Note:**

- If you prefer to rematch account records with the matching service, regardless of whether a D-U-N-S Number is present, contact Salesforce Customer Support. Doing so, however, can cause some account records to have their Data.com Clean status set to Not Found.
- If you've remapped or skipped mapping for the `D-U-N-S Number` field, or if you purchased Data.com before December 16, 2011, the matching service is used to rematch account records.
- Accounts sourced from Data.com Connect show Data.com - Jigsaw as the value of the Source field. These records don't have a D-U-N-S Number value and thus don't appear in DUNSRight Matching results.

The important fields are:

- `Account Name`
  - Make sure that the account name doesn't contain any unrelated artifacts, such as numbers (1002), special characters (!#@#), or unrelated words. (These symbols are acceptable if they are part of the company's name.)
  - Try to avoid country and state names as values unless they are part of the company's name.
  - If the account name contains more than one word, like DSGI Business (PC World Business), try both.
  - If an account name is also a Website (like `salesforce.com`), try leaving off the subdomain (for example, `.com`).
- `Billing Address`

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience


Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

- Use a full address, if possible.
  - To optimize match rates, specify a value for the `COUNTRY` field.
  - Try to specify a value for the `STATE` or `ZIP_CODE` field.
  - If you know the account’s street name but not its street number, use the street name only. A street name without a street number is better than no value.
- Website
  - Phone

## Guidelines for Using D&B Company Records

Review some guidelines so your organization gets the most out of D&B Company records, which contain over 100 fields of industry, financial, and competitive information from Dun & Bradstreet.

- If your company has Data.com Prospector or Data.com Clean, you have access to the `DandBCompany` object, which provides Dun & Bradstreet data for accounts and leads that you add to Salesforce.
-  **Note:** The `DandBCompany` object is also available when you use the Company Info for Accounts or Company Info for Leads data integration rules.
- Make sure you add the D&B Companies tab to user profiles. That’s how users access a list of all D&B Company records. The D&B Companies tab lists all the D&B Company records you have in Salesforce.
  - To let your users delete D&B Company records, create a permission set with the “Delete D&B Company records” and “Read D&B Company records” permissions and assign the permission set to users. Also, make sure to add the Delete button to page layouts.
  - If your company also uses Data.com Clean, you can use automated jobs to update your D&B Company records.
  - Add the Refresh button to your D&B Company page layouts, so you can manually update D&B Company records to get the latest data from Dun & Bradstreet. You can also use automated jobs to update D&B Company records.
  - D&B Company records linked to account records are not cleaned along with linked account records.
  - For accounts or leads not added from Data.com (for example, created manually), if a corresponding D&B Company record exists, it is added to Salesforce and linked to the account or lead record the first time that record is cleaned.
  - SIC8 code fields (for example, `PRIMARY_SIC8_CODE`) are not updated when existing D&B Company records are refreshed—either manually or as part of a job. These fields are only populated when the D&B Company record is created. To get SIC8 code values for an existing D&B Company record, you can delete the record and then clean its corresponding account. This recreates the D&B Company record, and it now includes values for the SIC8 code fields. Alternatively, you can get SIC8 values from the Data.com Search API, and add them to the D&B Company record.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Premium Clean license in: **Professional, Enterprise, Performance, and Unlimited Editions**




### USER PERMISSIONS

To implement D&B Companies:

- Customize Application

## D&B Company Fields

When you add or update an account or lead, a D&B Company record is created and linked to that account or lead via the `D&B Company` field. Click the link in the `D&B Company` field to access the associated D&B Company record, which has over 100 fields of industry, financial, and competitive information from Dun & Bradstreet.

-  **Example:** If you add an account record for Starbucks from Data.com, when you open its record, the `D&B Company` field value is Starbucks Corporation. The value is underlined to identify it as a link. Click it to open the Starbucks Corporation D&B Company record.
-  **Example:** If you update an account record for Google, when you open its record, the `D&B Company` field value is Google. The value is underlined to identify it as a link. Click it to open the Google D&B Company record.
-  **Note:** Some D&B field labels are different from the object field labels they are mapped to. For example, the `Account Site` field on account records maps to the `Location Type` field on the linked D&B Company record. For a list of default mappings, see [Default Data.com-to-Salesforce Salesforce Field Mappings](#) on page 127


Field	Description
<code>Annual Sales Volume</code>	The total annual sales revenue in the headquarters' local currency. Dun & Bradstreet tracks revenue data for publicly traded companies, Global Ultimates, Domestic Ultimates, and some headquarters. Dun & Bradstreet does not supply this data for branch locations.
<code>Annual Sales Volume Indicator</code>	The reliability of the Annual Sales Volume figure. Available values are <i>Actual number</i> , <i>Low</i> , <i>Estimated (for all records)</i> , <i>Modeled (for non-US records)</i> . A blank value indicates this data is unavailable.
<code>Company Description</code>	A brief description of the company, which may include information about its history, its products and services, and its influence on a particular industry. This data is supplied by Hoover's.
<code>Delinquency Risk</code>	The probability that a company will pay with a significant delay compared to the agreed terms. The risk level is based on the standard Commercial Credit Score, and ranges from low risk to high risk. Also known as marketing prescreen. Available values are <i>High risk of delinquency</i> , <i>Low risk of delinquency</i> , and <i>Moderate risk of delinquency</i> . Dun & Bradstreet

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available with a Data.com PremiumProspector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Premium Clean license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Field	Description
	supplies this data for US and Canadian organizations only.  <b>Important:</b> Use this information for marketing pre-screening purposes only.
Domestic Ultimate Business Name	The primary name of the Domestic Ultimate, which is the highest ranking subsidiary, specified by country, within an organization's corporate structure.
Domestic Ultimate D-U-N-S Number	The D-U-N-S Number for the Domestic Ultimate, which is the highest ranking subsidiary, specified by country, within an organization's corporate structure.
D-U-N-S Number	The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the Dun & Bradstreet database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking.
Facsimile Number	The company's facsimile number.
Fifth NAICS Code	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
Fifth NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code.
Fifth SIC8 Code*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Fifth SIC8 Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Fifth SIC Code	An additional SIC code used to further classify an organization by industry.
Fifth SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code.
Fifth Tradestyle	An additional tradestyle used by the organization.
FIPS MSA Code	The Federal Information Processing Standards (FIPS) and the Metropolitan Statistical Area (MSA) codes identify the organization's location. The MSA codes are defined by the US Office of Management and Budget. Dun & Bradstreet supplies this data for US organizations only.
FIPS MSA Code Description	A brief description of an organization's FIPS MSA code. Dun & Bradstreet supplies this data for US organizations only.
Fourth NAICS Code	An additional NAICS code used to further classify an organization by industry.

Field	Description
Fourth NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code.
Fourth SIC8 Code*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Fourth SIC8 Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Fourth SIC Code	An additional SIC code used to further classify an organization by industry.
Fourth SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code.
Fourth Tradestyle	An additional tradestyle used by the organization.
Fortune 1000 Rank	The numeric value of the company's Fortune 1000 ranking. A null or blank value means that the company isn't ranked as a Fortune 1000 company.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. Available values include <i>Rooftop level, Street level, Block level, Census tract level, Mailing address level, ZIP code level, Geocode could not be assigned, Places the address in the correct city, Not matched, State or Province Centroid, Street intersection, PO BOX location, Non-US rooftop accuracy, County Centroid, Sub Locality-Street Level, and Locality Centroid</i>
Global Ultimate Business Name	The primary name of the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries.
Global Ultimate D-U-N-S Number	The D-U-N-S Number of the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries.
Import/Export	Identifies whether a business imports goods or services, exports goods or services, and/or is an agent for goods.
International Dialing Code	The required code for international calls.
Latitude	The geographical coordinates that specify the north-south position of a point on the Earth's surface. Used with longitude to specify a precise location, which is then used to assess the Geocode Accuracy.
Legal Structure	Identifies the legal structure of an organization. Available values include <i>Cooperative, Nonprofit organization,</i>



Field	Description
	<i>Local government body, Partnership of unknown type, and Foreign company.</i>
Local Currency Code	The currency in which the company's sales volume is expressed. The full list of values can be found at the Optimizer Resources page maintained by Dun & Bradstreet.
Local Currency ISO Code	The code used to represent a company's local currency. This data is provided by the International Organization for Standardization (ISO) and is based on their three-letter currency codes. For example, USD is the ISO code for United States Dollar.
Location Ownership Indicator	Indicates whether a company owns or rents the building it occupies.
Location Type	Identifies the organizational status of a company. Available values are <i>Single location, Headquarters/Parent, and Branch.</i>
Longitude	The geographical coordinates that specify the east-west position of a point on the Earth's surface. Used with latitude to specify a precise location, which is then used to assess the company's Geocode Accuracy.
Mailing Address	The address where a company has its mail delivered. If the mailing address is the same as the primary address, this field will be blank.
Marketing Segmentation Cluster	Twenty-two distinct, mutually exclusive profiles, created as a result of cluster analysis of Dun & Bradstreet data for US organizations. Available values include <i>High-Tension Branches of Insurance/Utility Industries, Rapid-Growth Large Businesses, Labor-Intensive Giants, Spartans, Main Street USA.</i> Dun & Bradstreet supplies this data for US organizations only.
Minority-Owned Indicator	Indicates whether an organization is owned or controlled by a member of a minority group. Dun & Bradstreet supplies this data for US organizations only.
National Identification Number	The identification number used in some countries for business registration and tax collection. This field does not apply to US organizations.
National Identification System	Identifies the type of national identification number used. The full list of values can be found at the <a href="#">Optimizer Resources</a> page maintained by Dun & Bradstreet.
Number of Business Family Members	The total number of family members, worldwide, within an organization, including the Global Ultimate, its subsidiaries (if any), and its branches (if any).

Field	Description
Number of Employees—Global	The total number of employees at the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries.
Number of Employees—Location	The number of employees at a specified location, such as a branch location.
Number of Employees—Location Indicator	The reliability of the Number of Employees—Location figure. Available values are <i>Actual number</i> , <i>Low</i> , <i>Estimated (for all records)</i> , <i>Modeled (for non-US records)</i> . A blank value indicates this data is unavailable.
Number of Employees—Total	The total number of employees in the company, including all subsidiary and branch locations. This data is only available on records that have a value of <i>Headquarter/Parent</i> in the <i>Location Type</i> field.
Number of Employees—Total Indicator	The reliability of the Number of Employees—Total figure. Available values are <i>Actual number</i> , <i>Low</i> , <i>Estimated (for all records)</i> , <i>Modeled (for non-US records)</i> . A blank value indicates this data is unavailable.
Out of Business Indicator	Indicates whether the company at the specified address has discontinued operations.
Ownership Type Indicator	Indicates whether ownership of the company is public or private. The subsidiaries of a publicly traded parent company will show a value of <i>Private</i> unless the subsidiaries are independently traded.
Parent Company Business Name	The primary name of the parent or headquarters company.
Parent Company D-U-N-S Number	The D-U-N-S Number for the parent or headquarters.
Primary Address	The address where a company is physically located. This field is <i>Billing Address</i> on account records.
Primary Business Name	The primary or registered name of a company.
Primary NAICS Code	The six-digit North American Industry Classification System (NAICS) code is the standard used by business and government to classify business establishments according to their economic activity for the purpose of collecting, analyzing, and publishing statistical data related to the US business economy. The full list of values can be found at the <a href="#">Optimizer Resources</a> page maintained by Dun & Bradstreet.
Primary NAICS Description	A brief description of an organization's line of business, based on its NAICS code.
Primary SIC Code	The four-digit Standard Industrial Classification (SIC) code is used to categorize business establishments by industry. The full list of

Field	Description
	values can be found at the <a href="#">Optimizer Resources</a> page maintained by Dun & Bradstreet.
Primary SIC Description	A brief description of an organization's line of business, based on its SIC code.
Primary Tradestyle	A name, different from its legal name, that an organization may use for conducting business. Similar to "Doing business as" or "DBA".
Prior Year Employees	The total number of employees for the prior year.
Prior Year Revenue	The annual revenue for the prior year.
Second SIC8 Code*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Second SIC8 Code Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Second NAICS Code	An additional NAICS code used to further classify an organization by industry.
Second NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code.
Second SIC Code	An additional SIC code used to further classify an organization by industry.
Second SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code.
Second Tradestyle	An additional tradestyle used by the organization.
Sixth NAICS Code	An additional NAICS code used to further classify an organization by industry.
Sixth NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code.
Sixth SIC8 Code*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Sixth SIC8 Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Sixth SIC Code	An additional SIC code used to further classify an organization by industry.
Sixth SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code.
Small Business Indicator	Indicates whether the company is designated a small business as defined by the Small Business Administration of the US government. Dun & Bradstreet supplies this data for US organizations only.

Field	Description
Stock Exchange	The corresponding exchange for a company's ticker symbol. For example: NASDAQ or NYSE.
Subsidiary Indicator	Indicates whether a company is more than 50 percent owned by another organization
S&P 500	A true or false value. If <code>true</code> , the company is listed in the S&P 500 Index. If <code>false</code> , the company isn't listed in the S&P 500 Index.
Telephone Number	A company's primary telephone number.
Third NAICS Code	An additional NAICS code used to further classify an organization by industry.
Third NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code.
Third SIC8 Code*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Third SIC8 Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Third SIC Code	An additional SIC code used to further classify an organization by industry.
Third SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code.
Third Tradestyle	An additional tradestyle used by the organization.
Ticker Symbol	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol.
URL	An organization's primary website address.
US Tax ID Number	The identification number for the company used by the Internal Revenue Service (IRS) in the administration of tax laws. Also referred to as Federal Taxpayer Identification Number. Dun & Bradstreet supplies this data for US organizations only.
Woman-Owned Indicator	Indicates whether a company is more than 50 percent owned or controlled by a woman. Dun & Bradstreet supplies this data for US organizations only.
Year Started	The year the company was established or the year when current ownership or management assumed control of the company. If the company establishment or ownership year is unavailable, then the year the Dun & Bradstreet record was created will be used. Dun & Bradstreet does not supply this data for branch locations.

\* Available with Data.com Prospector license only.

## Administering Data.com FAQ

Check out answers to some frequently asked questions about Data.com for administrators.

[How do I know which Data.com product my organization has?](#)

You can find out by going to the Data.com Licenses & Limits page.

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

When you use Data.com to update a record, the record's fields are updated with Data.com data.

[What do I do if my Data.com Users reach their addition limits and we need more prospecting capacity?](#)

If you need to purchase additional licenses for Data.com Users, contact your Salesforce account executive.

[Can I prevent Data.com Clean Data.com Clean jobs from automatically updating records?](#)

You sure can. Follow the guidelines in Prevent Data.com Clean Jobs from Updating Records.

[Why did I receive a message that says I have limited access or need permissions?](#)

Ask your Salesforce admin to give you edit access.

[How Often Are All My Accounts and D&B Companies Updated with Data.com Clean Jobs?](#)

You choose when you want jobs to run using the Clean Jobs page.

How do I know which Data.com product my organization has?

You can find out by going to the Data.com Licenses & Limits page.

From Setup, in the Quick Find box, enter *Licenses & Limits* and then select **Licenses & Limits**. If you purchased Data.com, you see "Corporate" in the heading for this section of the page. If you purchased Data.com, you see "Premium" in the heading.

### SEE ALSO:

[Use Data.com Clean to Keep Your Data Current and Complete](#)

[Integrate Third-Party Data with Your Records](#)

### EDITIONS


Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

## Which Fields Are Affected by Data Integration Rules and Data.com Clean?

When you use Data.com to update a record, the record's fields are updated with Data.com data.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:**

- If you use customized field mappings in your data integration rules, the fields affected by Data.com can differ from the ones that are listed.
- If you receive one of the following messages, contact your Salesforce admin. *You have limited access to data, so you cannot completely update this record or You have limited access to account fields, so you cannot update all the fields shown here.*

### Account Fields

The following fields are available with Data.com Clean and with the Company Info for Accounts data integration rule. An asterisk (\*) indicates fields that **aren't** available with the Company Info for Accounts data integration rule.

Account Name	Industry
Account Site	NAICS Code
Annual Revenue	NAICS Description
Billing Address	Ownership
Clean Status*	Phone
D&B Company	SIC Code
Data.com Key	SIC Description
D-U-N-S Number	Ticker Symbol
Description	Tradestyle
Employees	Website
Fax	Year Started

### Geocodes for Account Billing Address Fields

The following fields are available with the Geocodes for Account Billing Address data integration rule.

BillingLatitude	BillingLongitude
BillingGeocodeAccuracy	

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions


Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

 **Note:** These fields are not visible on records.

### Geocodes for Account Shipping Address Fields

The following fields are available with the Geocodes for Account Shipping data integration rule.

ShippingLatitude	ShippingLongitude
ShippingGeocodeAccuracy	

 **Note:** These fields are not visible on records.

### Geocodes for Contact Mailing Address Fields

The following fields are available with the Geocodes for Contact Mailing Address data integration rule.

MailingLatitude	MailingLongitude
MailingGeocodeAccuracy	

 **Note:** These fields are not visible on records.

### Geocodes for Geocodes for Lead Address Fields

The following fields are available with the Geocodes for Lead Address data integration rule.

Latitude	Longitude
GeocodeAccuracy	

 **Note:** These fields are not visible on records.

SEE ALSO:

[Why did I receive a message that says I have limited access or need permissions?](#)

[Use Data.com Clean to Clean Individual Account Records in Salesforce Classic](#)

What do I do if my Data.com Users reach their addition limits and we need more prospecting capacity?

If you need to purchase additional licenses for Data.com Users, contact your Salesforce account executive.

SEE ALSO:

[How Do Data.com User Types, Licenses, and Record Addition Limits Work?](#)

Can I prevent Data.com Clean Data.com Clean jobs from automatically updating records?

You sure can. Follow the guidelines in [Prevent Data.com Clean Jobs from Updating Records](#).

For more details, see [Prevent Data.com Clean Jobs from Updating Records](#).

SEE ALSO:

[Use Data.com Clean to Keep Your Data Current and Complete](#)

[Prevent Data.com Clean Jobs from Updating Records](#)

Why did I receive a message that says I have limited access or need permissions?

Ask your Salesforce admin to give you edit access.



**Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### **If your company is using Data Integration**

If your company is using Data Integration and you try to update an account, contact, or lead, you can see this message: `You don't have the field-level permissions required by this data integration rule, so you can't update this record.`

Ask your Salesforce admin to give you edit access to all fields updated by the data integration rule. (If your company uses Professional Edition, your admin must also add the fields to the page layout.)

### **If your company is using Data.com Clean**

If your company is using Data.com Clean and you try to update an account, contact, or lead, you can see this message: `You have limited access to data, so you can't completely clean this record.` You can still update the fields that you can edit.

Ask your Salesforce admin to make sure you can edit the [Salesforce fields affected when cleaning records](#), including D&B fields.

- For Data.com Clean, in Contact Manager and Group editions, the fields must be on the appropriate page layout.
- For Professional, Enterprise, Performance, and Unlimited editions, field-level security must be set to `visible` for the fields.

SEE ALSO:

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

[Using Data.com FAQ](#)

How Often Are All My Accounts and D&B Companies Updated with Data.com Clean Jobs?

You choose when you want jobs to run using the Clean Jobs page.




 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

There are two types of jobs.

- Full Sync Job—All records are cleaned, regardless of their clean status.

 **Note:** If your jobs are set to bypass skipped records, records with a `Skipped` clean status are not cleaned.

- Incremental Sync Job—Only records with a `Not Compared` clean status are cleaned.

For a full sync job to run, you must have jobs scheduled for at least one day of the week.

For D&B Company records, a full sync job runs every 14 days. D&B Company records are cleaned using only a full sync job.

For accounts, how often a full sync job runs depends on the matching service you select and whether accounts have a value for the `Company D-U-N-S Number` field. For accounts *with* a D-U-N-S number, a full sync job runs every 14 days, regardless of the matching service. For accounts *without* a D-U-N-S number, check out this table.

Matching Service	How often can a full sync job clean accounts <i>without</i> a D-U-N-S number?
Data.com matching	Every 14 days
DUNSRight matching	Every 30 days  You must set the <code>Full Sync With Next Job</code> option on the Clean Jobs page to <code>On</code> each time you want to run a full sync job for accounts without a D-U-N-S number. After a full sync job runs, this option changes to <code>Off</code> , and it can't be toggled to <code>On</code> for 30 days from the time the last full sync job finished.


SEE ALSO:

[Schedule Data.com Clean Jobs](#)

[Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean](#)


## Use Data.com Clean to Keep Your Data Current and Complete

Use Data.com Clean to keep your Salesforce data current and complete with data from Dun & Bradstreet and crowd-sourced data from Data.com. Using Clean jobs, you can clean all your records regularly. You can also clean a single record or a list of records.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields will be removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:** This information applies to Data.com Clean and not to Data Integration.

Data.com Clean compares your account, contact, and lead records with records from Data.com and creates a link between your records and matching Data.com records. Clean also provides [clean status information for accounts, contacts, and leads](#) on page 158.

In Salesforce Classic, your users can do the following.

- Manually compare individual account, contact, and lead records side by side to matched Data.com records, and update records field by field .
- Select account, contact, and lead records from a list, and update them all at once.
- Manually refresh D&B Company records linked to accounts.

As a Salesforce admin, you can also do the following.

- Configure and run automated Clean jobs to flag field value differences on Salesforce records, fill blank fields, and overwrite field values. Configuring and scheduling Clean jobs is only available in Salesforce Classic.
- Use the [Data.com Match API](#) to create a custom solution for specific business purposes like updating leads as they are created and updating custom objects.

There are two versions of Data.com Clean: Corporate Clean and Premium Clean. Premium Clean includes more Dun & Bradstreet fields for adding to or manually cleaning account, contact, or lead records. The Salesforce Help refers to Data.com Premium Clean unless otherwise noted. For more information on Premium Clean, contact your Salesforce account manager.

Data.com Clean Version	Dun & Bradstreet (D&B) Fields
Data.com Corporate Clean	Basic set of Dun & Bradstreet fields.
Data.com Premium Clean	Basic set of Dun & Bradstreet fields, plus the <code>D&amp;B Company</code> field. This field links to an associated <code>D&amp;B Company</code> record with over 70 additional Dun & Bradstreet fields that are accessible on the <code>D&amp;B Companies</code> tab.

Data.com Clean doesn't support person accounts.

 **Note:** Data.com Clean must be purchased 1:1 for Sales Cloud and Service Cloud seats.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Clean license in: **Professional, Enterprise, Performance, and Unlimited** Editions

[Keep Your Salesforce Data Current and Complete](#)

Spend less time updating Salesforce and more time growing your business. Data.com Clean updates your accounts, contacts, and leads with valuable company information from Dun & Bradstreet and crowd-sourced data from Data.com.

[Set Up Data.com Clean](#)


Make your sales teams more productive. Set up Data.com Clean to keep your Salesforce data current and complete.

## SEE ALSO:

[Integrate Third-Party Data with Your Records](#)[Set Up Data.com Clean](#)[Confirm That Data.com Clean Is Enabled](#)[Integrate Third-Party Data with Your Records](#)[Using Data.com FAQ](#)[Use Data.com Clean to Clean Individual Account Records in Salesforce Classic](#)[Use Data.com Clean to Clean a List of Records in Salesforce Classic](#)

## Keep Your Salesforce Data Current and Complete

Spend less time updating Salesforce and more time growing your business. Data.com Clean updates your accounts, contacts, and leads with valuable company information from Dun & Bradstreet and crowd-sourced data from Data.com.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

[Use Data.com Clean to Clean Individual Account Records in Salesforce Classic](#)

Use Data.com Clean to manually clean an account record. With a manual clean, you do a side-by-side comparison of a single account record with its matched Data.com record, followed by a field-by-field update.

[Use Data.com Clean to Clean a List of Records in Salesforce Classic](#)

With Data.com Clean, you can select account records from a list and clean them all at one time. A Data.com Clean license is required to clean records from a list.

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

When you use Data.com to update a record, the record's fields are updated with Data.com data.

[What Does the Clean Status Tell Me About a Record?](#)

The Clean Status field on account records indicates how the record's data compares with data from Data.com. If you click the icon next to the status, you get more status details, plus options for refreshing the status. Depending on the status, you can also clean some records right from the Clean Status field.

[How Does Data.com Clean Match Your Records?](#)

If you clean your account data with Data.com Clean, it's important to understand how your records are compared and matched with records from Data.com.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance, and Unlimited** Editions

[Data.com Update Statuses](#)

For Data.com Prospector and Data.com Clean, an update status field on your accounts indicates your record's status compared with Data.com data.

[Updating Records with Data.com Clean](#)

When you clean a record, you're comparing your data with information in Data.com. There are a few important concepts to understand about this process, including how to select matching records and mark Data.com records as incorrect.

## Use Data.com Clean to Clean Individual Account Records in Salesforce Classic

Use Data.com Clean to manually clean an account record. With a manual clean, you do a side-by-side comparison of a single account record with its matched Data.com record, followed by a field-by-field update.

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance**, and **Unlimited** Editions


### USER PERMISSIONS

To clean account records:


- Edit on accounts

Manual Clean is available in orgs with a Data.com Clean license and to any Salesforce user in an org with a Data.com Prospector license. You can manually clean all the account records you have access to in Salesforce—not just the records you previously added from Data.com.

Data.com Clean offers several ways to clean account records. Users can clean individual records manually or clean groups of records from a list view. You can also clean batches of records in your org using automated Clean jobs.


 **Note:** If you clean your account records with Data.com Prospector or Data.com Clean, Data.com converts non-USD currencies to USD every month. This conversion can cause the values in the `Annual Revenue` field to change. For orgs that use non-USD currencies, we ignore the `Annual Revenue` field when determining a record's clean status (so the `Clean Status` field's value does not change). We also remove the value from the `Annual Revenue` field on account records and the Clean comparison page.

1. Open the record and check the Clean Status field. Even if its status is In Sync, you can manually clean the record. If you use Dun & Bradstreets' DUNSRight matching service, you can match some records to a different one from Data.com.

 **Tip:** From the **Clean Status** field, you can get more status information (such as which fields have different data in Data.com) and then clean the record. Click the status icon (🚩) and the popup guides you.

2. Click **Clean** to open the comparison page and compare the Salesforce record with the Data.com record.
3. Compare the records. A check mark appears next to any Data.com field value that matches the corresponding value in your Salesforce record.
4. Select the checkbox next to any Data.com value you want to accept.
5. If you use DUNSRight Matching and want to look for a different match from Data.com, click **Wrong Match?**
6. When you're satisfied that the record is accurate, click **Save**, even if you don't accept any data from Data.com.

The **Clean Status** field reflects the record's status, and its time stamp is updated to reflect your activity.

 **Note:** On an account, if you update the Company D-U-N-S Number field value while cleaning manually, delete the D&B Company field value. Otherwise, Clean can't add updated values for those two fields or link the correct D&B Company record to the account.

If you click **Cancel**, your Salesforce record isn't updated, but if Data.com finds a better match for the record, the values in its `Clean Status` and `Data.com Key` fields can change. These two fields always reflect the best match from Data.com as of the most recent Clean process, regardless of the method used to clean the record.

Suppose that you use Data.com Clean or Data.com Prospector and you've manually cleaned an account or lead record that isn't linked to a D&B Company record. When you click **Save**, Salesforce creates a D&B Company record (if available) and links it to the account or lead record. The next time you open the comparison page, the linked record is identified by its D-U-N-S Number in the `D&B Company Record Linked` field.


#### SEE ALSO:

[Data.com Update Statuses](#)

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

## Use Data.com Clean to Clean a List of Records in Salesforce Classic

With Data.com Clean, you can select account records from a list and clean them all at one time. A Data.com Clean license is required to clean records from a list.


 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Data.com Clean offers several ways to clean records. Users can clean individual records manually or clean groups of records from a list view. You can also clean batches of records using automated Clean jobs.

Cleaning from a list works for all the account records you have access to, not just the ones you previously added from Data.com Prospector. When you click the Accounts tab, you can select a view to see a list of the records you're allowed to view. The results you see are called a *list view*. From the list view, simply select the records you want to clean and Data.com Clean does the rest.

 **Note:** If you're cleaning records from a standard list view, make sure that your Salesforce admin adds the `Clean Status` field to the view. If you're cleaning records from a custom list view you've created, add the `Clean Status` field yourself.

1. Click the Accounts tab.
2. Select a view from the dropdown that contains the `Clean Status` field and click **Edit**.
3. From the list, select the records you want to clean, and click **Clean**.
4. Select one of these Clean options.
  - `Update Clean Status` updates each record's `Clean Status` field.
  - `Update Clean Status and Fill Blank Fields` updates each record's `Clean Status` field and fill blank fields with Data.com data.
5. Click **Update**.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To clean account records:

- Edit on accounts

To create custom list views:

- Read on the type of record included in the list

To create, edit, or delete public list views:

- Manage Public List Views

You see a confirmation message telling you how many records were matched and updated, and whether any errors occurred.

**6.** Review the changes to your records.

If you selected the option to update only the `Clean Status` field and now find records with a clean status of `Different`, you can manually clean each record from its detail page.


SEE ALSO:

[Data.com Update Statuses](#)

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

## Which Fields Are Affected by Data Integration Rules and Data.com Clean?

When you use Data.com to update a record, the record's fields are updated with Data.com data.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:**

- If you use customized field mappings in your data integration rules, the fields affected by Data.com can differ from the ones that are listed.
- If you receive one of the following messages, contact your Salesforce admin. `You have limited access to data, so you cannot completely update this record` or `You have limited access to account fields, so you cannot update all the fields shown here`.

### Account Fields

The following fields are available with Data.com Clean and with the Company Info for Accounts data integration rule. An asterisk (\*) indicates fields that **aren't** available with the Company Info for Accounts data integration rule.

Account Name	Industry
Account Site	NAICS Code
Annual Revenue	NAICS Description
Billing Address	Ownership
Clean Status*	Phone
D&B Company	SIC Code
Data.com Key	SIC Description
D-U-N-S Number	Ticker Symbol
Description	Tradestyle

#### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

Employees	Website
Fax	Year Started

### Geocodes for Account Billing Address Fields

The following fields are available with the Geocodes for Account Billing Address data integration rule.

BillingLatitude	BillingLongitude
BillingGeocodeAccuracy	

 **Note:** These fields are not visible on records.

### Geocodes for Account Shipping Address Fields

The following fields are available with the Geocodes for Account Shipping data integration rule.

ShippingLatitude	ShippingLongitude
ShippingGeocodeAccuracy	

 **Note:** These fields are not visible on records.

### Geocodes for Contact Mailing Address Fields

The following fields are available with the Geocodes for Contact Mailing Address data integration rule.

MailingLatitude	MailingLongitude
MailingGeocodeAccuracy	

 **Note:** These fields are not visible on records.

### Geocodes for Geocodes for Lead Address Fields

The following fields are available with the Geocodes for Lead Address data integration rule.

Latitude	Longitude
GeocodeAccuracy	

 **Note:** These fields are not visible on records.


SEE ALSO:

[Why did I receive a message that says I have limited access or need permissions?](#)

[Use Data.com Clean to Clean Individual Account Records in Salesforce Classic](#)

## What Does the Clean Status Tell Me About a Record?

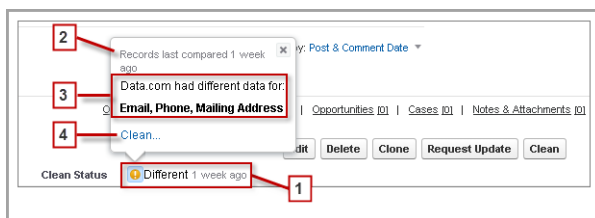
The Clean Status field on account records indicates how the record's data compares with data from Data.com. If you click the icon next to the status, you get more status details, plus options for refreshing the status. Depending on the status, you can also clean some records right from the Clean Status field.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Here's an example that shows some of your options.



1. This record's status is `Different` because when it was last compared, one week before, the records in Salesforce and Data.com had different values for some or all of their fields. The user who compared the records previously can have:

- Decided not to accept any of the Data.com values.
- Accepted some values from Data.com and kept some Salesforce values.
- Clicked **Cancel** on the comparison page.

Click the icon to view the popup, which provides additional information and Clean options.

2. This line tells you about the Salesforce record's most recent comparison activity. In this case, a user compared the Salesforce account record with Data.com's version one week ago.

3. This section provides more details about the comparison. In this case, Data.com had *different* `Email`, `Phone`, and `Mailing Address` values for the record.

4. You can click the **Clean...** link to compare the Salesforce and Data.com records yourself.

If you click **Cancel**, the record's clean status remains `Different`. If you click **Save**, even if you haven't accepted any Data.com values, the record's clean status is `Reviewed`.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience


Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions




## How Does Data.com Clean Match Your Records?

If you clean your account data with Data.com Clean, it's important to understand how your records are compared and matched with records from Data.com.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Tip:** For complete details about how the Data.com Clean matching service works, including a graphic overview and extensive examples, see the white paper [Data.com Clean Record Matching in Salesforce](#).

Watch a Demo:  [Understanding Matching Rules](#)

Using Data.com Clean, your records and Data.com records can be compared and matched in two ways.

- Manually, when a user clicks **Clean** on an individual account record.
- Via Clean jobs, which automatically attempt to match all your account records.

*Automated* clean jobs are only available to orgs that purchase Data.com Clean. *Manual* clean is available to all licensed Data.com Prospector users.

The first time one of your records is cleaned, either manually or via an automated job, the matching service searches Data.com for similar records. It examines the field values in each record and looks for enough identical or similar information to indicate that the two records represent the same entity (that is, the same account). If Data.com finds a match, the two records are linked by a numeric value in the `Data.com Key` field. Every time your record is cleaned, the `D-U-N-S Number` field is used to match (or look up) the record. If the `D-U-N-S Number` field is blank, the matching service is used to find a match. If your record changes substantially the next time it is cleaned, the matching service sometimes looks for a better match from other Data.com records.

 **Note:**

- If you prefer to rematch account records with the matching service, regardless of whether a D-U-N-S Number is present, contact Salesforce Customer Support. Doing so, however, can cause some account records to have their Data.com Clean status set to Not Found.
- If you've remapped or skipped mapping for the `D-U-N-S Number` field, or if you purchased Data.com before December 16, 2011, the matching service is used to rematch account records.
- Accounts sourced from Data.com Connect show Data.com - Jigsaw as the value of the Source field. These records don't have a D-U-N-S Number value and thus don't appear in DUNSRight Matching results.

The important fields are:

- **Account Name**
  - Make sure that the account name doesn't contain any unrelated artifacts, such as numbers (1002), special characters (!#@#), or unrelated words. (These symbols are acceptable if they are part of the company's name.)
  - Try to avoid country and state names as values unless they are part of the company's name.
  - If the account name contains more than one word, like DSGI Business (PC World Business), try both.
  - If an account name is also a Website (like `salesforce.com`), try leaving off the subdomain (for example, `.com`).
- **Billing Address**

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience


Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

- Use a full address, if possible.
  - To optimize match rates, specify a value for the `COUNTRY` field.
  - Try to specify a value for the `STATE` or `ZIP_CODE` field.
  - If you know the account's street name but not its street number, use the street name only. A street name without a street number is better than no value.
- Website
  - Phone

## Data.com Update Statuses


For Data.com Prospector and Data.com Clean, an update status field on your accounts indicates your record's status compared with Data.com data.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

The status field is called Clean Status.





Status	Definition	API Value	Notes
 Not Compared	<p>The current version of the Salesforce record has not been compared with Data.com. This status may occur because:</p> <ul style="list-style-type: none"> <li>• The record was <i>created manually</i> in Salesforce (not <i>added from Data.com</i>) and has not yet been compared with Data.com.</li> <li>• The Salesforce record was previously compared with Data.com but later edited by a user and not compared again.</li> <li>• The Salesforce record was previously compared with Data.com but later updated by a workflow or other automated process (such as lead conversion) and not compared with Data.com again.</li> </ul>	Pending	<p>Records you add from Data.com are always <code>In Sync</code> until the data changes in one or both of the records.</p> <p>After you clean the record and a match is found in Data.com, the record's <code>Clean Status</code> changes to <code>Reviewed</code> until one of these conditions is met.</p> <ul style="list-style-type: none"> <li>• The two records are identical (<code>In Sync</code> status).</li> <li>• The record is updated in Salesforce or Data.com (<code>Different</code> status).</li> </ul>





### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Status	Definition	API Value	Notes
	<ul style="list-style-type: none"> <li>You map Data.com fields to Salesforce fields and one or more newly mapped Data.com fields has no value.</li> </ul>		<ul style="list-style-type: none"> <li>The record becomes inactive in Data.com (<i>Inactive</i> status).</li> </ul>
 <i>In Sync</i>	When your Salesforce record was last compared with the Data.com record, the two were identical. Records with <i>In Sync</i> status are considered to be clean.	<i>Matched</i>	<p>Records in <i>In Sync</i> status are considered to be clean, but you can repeat the clean process.</p> <p>Click the icon in the <i>Clean Status</i> field and check the time stamp to see when the record was last compared.</p>
 <i>Reviewed</i>	<p>When your Salesforce record was last compared with the Data.com record, the user who compared them:</p> <ul style="list-style-type: none"> <li>Kept one or more values from the Salesforce record.</li> <li>May have also flagged a field value as <i>wrong</i> to Data.com.</li> <li>Marked a record as <i>Inactive</i>.</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>Your Clean jobs are set to overwrite values for one or more fields, and one or more values were overwritten during the most recent job.</li> </ul>	<i>Acknowledged</i>	<p>Records in <i>Reviewed</i> status are considered to be clean, but you can repeat the clean process.</p> <p>After you clean the record and a match is found in Data.com, the record's <i>Clean Status</i> remains in <i>Reviewed</i> status until one of these conditions is met.</p> <ul style="list-style-type: none"> <li>The two records are identical (<i>In Sync</i> status).</li> <li>The record is updated in Salesforce or Data.com (<i>Different</i> status).</li> <li>The record becomes inactive in Data.com (<i>Inactive</i> status).</li> <li>Any fields previously flagged as <i>wrong</i> to Data.com have been reflagged as <i>right</i>.</li> </ul>
 <i>Different</i>	<p>The Salesforce record has different data from the corresponding Data.com record.</p> <p> <b>Note:</b> It's important to remember that a record's clean status can change from <i>In Sync</i> or <i>Reviewed</i> to <i>Different</i> when values change in the matched Data.com record. This may happen regularly as updated information from Data.com and D&amp;B is made available.</p>	<i>Different</i>	<p>After you clean the record and a match is found in Data.com, the record's <i>Clean Status</i> remains in <i>Different</i> status until one of these conditions is met.</p> <ul style="list-style-type: none"> <li>The two records are identical (<i>In Sync</i> status).</li> <li>A user reviews the two records and keeps one or more values</li> </ul>

Status	Definition	API Value	Notes
			<p>from the Salesforce record (<i>Reviewed</i> status).</p> <ul style="list-style-type: none"> <li>The record becomes inactive in Data.com (<i>Inactive</i> status).</li> </ul>
 <b>Select Match</b>	Data.com does not have a record qualified for an <i>automatic</i> match but does have one or more potential matches. You can select one from up to five (5) match candidates.	SelectMatch	This status is available with the Data.com Clean product and D&B DUNSRight matching service only.
 <b>Not Found</b>	The Salesforce record has no similar records in Data.com record.	NotFound	The record can't be cleaned in Salesforce because Data.com could not find a record to match it with.
 <b>Inactive</b>	The Data.com record corresponding to the Salesforce record has been reported as inactive by either Data.com or a user in your organization. An account record is inactive if D&B has marked it as out of business.	Inactive	<p><i>Inactive</i> records are hidden from Data.com Prospector search results by default, but you can use filters to show them.</p> <p>If clean the record and report it as <i>Active</i> to Data.com, the record's clean status changes to <i>Reviewed</i>.</p>
 <b>Skipped</b>	<p>Either:</p> <ul style="list-style-type: none"> <li>The Salesforce record encountered an error related to a validation rule or trigger when it was last saved, causing the next incremental sync Clean job to set the record's status to <i>Skipped</i>.</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>The record's clean status was set to <i>Skipped</i> via the API.</li> </ul> <p><i>Incremental sync</i> Clean jobs <i>do not</i> process records with <i>Skipped</i> clean status.</p> <p><i>Full sync</i> Clean jobs process records with <i>any</i> clean status that encountered errors related to validation rules, triggers, or other customizations when last saved, but those</p>	Skipped	<p>Work with your administrator to either:</p> <ul style="list-style-type: none"> <li>Modify the trigger, validation rule, or API customization that caused the error and the <i>Skipped</i> status, and then clean the record again manually or with Clean jobs.</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>Ask your administrator to consider selecting the <i>Skipped Records Clean Job Bypass</i> preference, which causes <i>both incremental and full sync jobs</i> to skip processing</li> </ul>

Status	Definition	API Value	Notes
	records' <code>Clean Status</code> field values do not change until the errors are resolved.		for records in <code>Skipped clean</code> status.

## SEE ALSO:

[Use Data.com Clean to Clean Individual Account Records in Salesforce Classic](#)


[Use Data.com Clean to Clean a List of Records in Salesforce Classic](#)

[What Does the Clean Status Tell Me About a Record?](#)

[Report an Account as Inactive or Active to Data.com](#)

## Updating Records with Data.com Clean

When you clean a record, you're comparing your data with information in Data.com. There are a few important concepts to understand about this process, including how to select matching records and mark Data.com records as incorrect.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

[Report an Account as Inactive or Active to Data.com](#)

When you use Data.com Clean to clean a Salesforce record, if you know the related account is out of business, you can report that information to Data.com. If an account has been reported as `Inactive` to Data.com, we let you know. If you believe that the account is `Active`, you can tell us that, too.

[Guidelines for Selecting an Account Matching Service](#)

If you use Data.com Prospector or Data.com Clean, you can select the matching service that your org uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

### EDITIONS


Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Geocode clean rules available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Other Clean rules available with a Data.com Clean license in: **Professional, Enterprise, Performance, and Unlimited** Editions

## Report an Account as Inactive or Active to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know the related account is out of business, you can report that information to Data.com. If an account has been reported as *Inactive* to Data.com, we let you know. If you believe that the account is *Active*, you can tell us that, too.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

An account can be designated as *Active* or *Inactive* by either Data.com or a Data.com Clean user. *Inactive* means out of business,

If a record is *Inactive*, we let you know the source of that status, and if the source is Data.com, we tell you why.

1. From the account record, click **Clean** to open the comparison page.
2. If the account is inactive, click **Report as Inactive**.
3. Click **Save**.  
The record's `Clean Status` field now shows that it's *Inactive*.
4. If an account has been reported as inactive, but the company remains in business, you can clean its record again. On the comparison page, you see a message telling you the record's current reported status—*out of business*—and who reported it: Data.com or a user.
5. Click **Report as Active**.  
The record's `Clean Status` field reverts to the value it had before the record was reported as *Inactive*. For example, if an account's `Clean Status` is *Reviewed*, and then the account is reported as *Inactive*, its Clean status changes to *Inactive*. If the account is later reported as *Active*, its Clean status reverts to *Reviewed*.

SEE ALSO:

[Data.com Update Statuses](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To clean account records:

- Edit on accounts

## Guidelines for Selecting an Account Matching Service

If you use Data.com Prospector or Data.com Clean, you can select the matching service that your org uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

The available matching services are:

### Data.com matching

Data.com's own matching technology, which matches on the `Account Name`, `Billing Address`, `Website`, and `Phone` fields.

The Data.com matching service is always used when cleaning accounts that have a valid `D-U-N-S Number`, even if the DUNSRight matching service is selected.

### D&B DUNSRight™ matching

D&B's proprietary data-quality technology, which uses a rigorous process to normalize data and match D&B company records to your account records. The process also employs the D&B Confidence Code, which ranks Data.com match candidates based on how similar they are to your record, from 1 (not similar) to 10 (identical or highly similar). D&B also provides letter-coded match grades for individual fields. For details about how D&B DUNSRight matching works, see [D&B Entity Matching](#).

Attribute	Data.com matching	DUNSRight™ matching
Default matching service	✓	
Includes D&B's Confidence Code		✓
Supports broad international matching <sup>1</sup>		✓
Supports non-English speaking countries		✓
Requires default mapping for <code>D-U-N-S Number</code>		✓

<sup>1</sup>D&B DUNSRight matching provides matching records for over 200 more countries than Data.com matching. DUNSRight matching *does not* support these countries and regions: Admiralty Islands; Åland Islands; Antarctica; Ascension Island; Bonaire; Bouvet Island; British Indian Ocean Territory; Caroline Islands; Cocos (Keeling) Islands; Cuba; Curaçao; French Southern Territories; Guernsey; Heard Island and McDonald Islands; Isle of Man; Jersey; Korea, Democratic People's Republic of; Mayotte; Micronesia, Federated States of; Midway Islands; Mongolia; Niue; Palau; Palestinian Territory Occupied; Pitcairn; Saint Barthélemy; Saint Eustatius and Saba; Saint Martin (French part); Sint Maarten (Dutch part); South Georgia; South Sandwich Islands; Svalbard and Jan Mayen; Timor Leste; Turkish Cyprus; United States Minor Outlying Islands; Wake Island; Wallis and Futuna; Western Sahara.

#### SEE ALSO:

[Set Up Data.com Clean](#)

[Considerations for Scheduling Data.com Clean Jobs](#)

[Guidelines for Selecting Data.com Clean Job Preferences](#)

[Set Up Data.com Clean Jobs](#)

[Define Your Preferences and Select an Account Matching Service for Data.com Clean](#)

[How Does Data.com Clean Match Your Records?](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions


Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

## Set Up Data.com Clean

### USER PERMISSIONS


To implement Data.com Clean:	Customize Application
To enable Data.com Clean users:	Manage Internal Users
To define triggers:	Author Apex
To define workflow rules:	Customize Application
To install AppExchange packages:	Download AppExchange Packages

Make your sales teams more productive. Set up Data.com Clean to keep your Salesforce data current and complete.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:** If you're using Data.com Prospector together with Data.com Clean, see [Set Up Data.com Prospector](#) on page 120.

#### 1. [Confirm That Data.com Clean Is Enabled](#)

Learn how to enable Data.com Clean so you can start keeping your records up to date.

#### 2. [Configure Page Layouts for Data.com Prospector and Data.com Clean](#)

When you implement Data.com Prospector and Data.com Clean, make the features available to your users by adding buttons and fields to your account page layout. If you use Data.com Prospector or Data.com Clean, you can add a button to your D&B Companies page layouts so users can refresh linked D&B Company records.

#### 3. [Set Field-Level Security for Data.com Clean](#)

If you use Data.com Prospector or Data.com Clean, you can view various D&B fields on account records. Those fields are included when users manually clean records. To make sure that your users can read and edit the fields and their values and that the fields appear on the Account Card, set field-level security.

#### 4. [Define Your Preferences and Select an Account Matching Service for Data.com Clean](#)

Data.com Clean preferences control the records you want to update and how you want to update them. The preferences include selecting the matching service used to update accounts.

#### 5. [Set Up Data.com Clean Jobs](#)

If your org has a Data.com Clean license, you can set up automated jobs to update your records.

#### 6. [Review Triggers and Workflow Rules for Data.com Compatibility](#)

If you use triggers or workflow rules on objects that you update with Data.com, review the triggers and workflows. Consider adjusting them or bypassing them so that users don't encounter unexpected results when records are updated.

#### 7. [Configure List Views for Data.com Clean](#)

Before your Data.com Clean users can clean records from a list, add the `Clean Status` field to your org's list views.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Geocode clean rules available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Other Clean rules available with a Data.com Clean license in: **Professional, Enterprise, Performance, and Unlimited Editions**



8. [Report on Records with a Specific Data.com Clean Status](#)

Create a custom report to show Salesforce account records that have a specific clean status (such as `Different`).

9. [Determine How Well Data.com Clean Is Working](#)

Data.com Clean metrics and analytics tell you how your org's accounts have been matched and updated with Data.com data, so it's important to check your match and update rates on a regular basis.


## SEE ALSO:

[Use Data.com Clean to Keep Your Data Current and Complete](#)

[Integrate Third-Party Data with Your Records](#)

## Confirm That Data.com Clean Is Enabled

Learn how to enable Data.com Clean so you can start keeping your records up to date.


 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Data.com Clean ensures that your records are always up to date. You can use Clean with all your account, contact, and lead records—not just records added from Data.com. When you purchase a Data.com license, Clean is automatically enabled. You can set up automated Clean jobs, and users can clean individual records manually or groups of records from a list view.

After you enable Clean, you can set preferences and control Clean jobs. The Preferences and Jobs links appear in Setup in the Clean section.

 **Note:** Enabling Clean does not clean your records immediately. You can click **Disable** to turn off the feature.

1. From Setup, enter *Clean Settings* in the Quick Find box, then select **Clean Settings**.
2. Confirm that Data.com Clean is enabled.

## SEE ALSO:

[Use Data.com Clean to Keep Your Data Current and Complete](#)

[Set Up Data.com Clean](#)

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance,** and **Unlimited** Editions


### USER PERMISSIONS

To enable or disable Data.com Clean:

- Customize Application


## Configure Page Layouts for Data.com Prospector and Data.com Clean

When you implement Data.com Prospector and Data.com Clean, make the features available to your users by adding buttons and fields to your account page layout. If you use Data.com Prospector or Data.com Clean, you can add a button to your D&B Companies page layouts so users can refresh linked D&B Company records.


 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:** If you use Professional Edition, add *all* available Data.com fields and buttons to your page layout for each object (accounts and D&B Companies). Custom page layouts aren't available in Professional Edition.

1. From the object management settings for accounts, go to Page Layouts.
2. From the list of page layouts, edit each layout to be used by your Data.com Prospector or Data.com Clean users.
3. On the Account Layout page, from the list of page element categories, click **Fields**.
4. Drag the `Clean Status` field into place on the page where you want it to appear.
5. Add D&B fields that you want users to see. These include `Account Site`, `D-U-N-S Number`, `NAICS Code`, `Tradestyle`, and more.

 **Tip:** We recommend creating a section for D&B fields and grouping them there. To create a section, from the **Fields** group, drag the `Section` element into place on the page.

6. If you want your users to be able to refresh D&B Company records, add the **Refresh** button to D&B Company page layouts.
7. From the list of page element categories, click **Buttons**. Drag the **Clean**, **Prospecting Insights**,\* and **Company Hierarchy**\* buttons into place on the page.
 

\* Available only with a Data.com Prospector license
8. Click **Save**.
9. If you use Data.com Prospector, from the object management settings for D&B Companies, go to Page Layouts.
10. Add the **Search Global Ultimate D-U-N-S** button.

### SEE ALSO:

[Set Up Data.com Clean](#)

[Prevent Data.com Clean Jobs from Updating Records](#)

[Find Object Management Settings](#)

### EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in:  
**Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in:  
**Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To customize page layouts:

- Customize Application

To view page layouts:

- View Setup and Configuration

## Set Field-Level Security for Data.com Clean


If you use Data.com Prospector or Data.com Clean, you can view various D&B fields on account records. Those fields are included when users manually clean records. To make sure that your users can read and edit the fields and their values and that the fields appear on the Account Card, set field-level security.

Set field-level security for these fields.

- Account Site
- D&B Company (Data.com Prospector only)
- D-U-N-S Number
- NAICS Code
- NAICS Description
- Ownership
- SIC Code
- Ticker Symbol
- Tradestyle
- Year Started

There are multiple ways to set field-level security (such as by profile or permission set). However, in this case, field-level security is needed for only 10 fields. We therefore recommend starting from the fields and choosing the user profiles for users who use Data.com.

1. From the management settings for accounts, go to the fields section.
2. Click the field label to open the detail page for each of the fields.
3. On each field's detail page, click `Set Field-Level Security`. For each profile whose users read and edit the fields, select **Visible**. For example, if you want users in the Standard User profile to use Data.com Clean, select **Visible** for that profile.

 **Note:** These fields are maintained by Data.com Clean. For that reason, making them editable by setting the field-level security to **Visible** can create mismatched data when a Clean job is run.

SEE ALSO:

[Set Up Data.com Clean](#)

[Find Object Management Settings](#)

### EDITIONS

Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To set field-level security:

- **Customize Application**

## Define Your Preferences and Select an Account Matching Service for Data.com Clean

Data.com Clean preferences control the records you want to update and how you want to update them. The preferences include selecting the matching service used to update accounts.

If you don't have a Data.com Clean license for your Salesforce org, you can't select preferences for jobs.

1. Review the [guidelines](#) for selecting a matching service used to update accounts.
2. From Setup, enter *Preferences* in the **Quick Find** box, then select **Preferences** under the Clean section.
3. Select the matching service for updating accounts. If you select D&B DUNSRight™ matching service, adjust your confidence code if needed.  
D&B's Confidence Code ranks Data.com match candidates based on their similarity to your record, from 1 (not similar) to 10 (identical or highly similar). Data.com doesn't automatically match its records if the similarity score is less than the code you select here. If multiple records match with a similarity score at or above your selection, Data.com returns the best match. When you manually update some records, you can select a match between the preset confidence code (5) and the code you select here.
4. Review the [guidelines](#) for selecting job preferences.
5. Make sure that the **Enable Clean jobs** option is selected for each object that you want to update. If you have a Data.com Clean license and you want to update D&B Company records, select the **Enable Clean jobs for D&B Companies** checkbox.
6. For each object you've enabled, select your Clean preference.
7. Click **Save** to save your preferences.

### [Guidelines for Selecting an Account Matching Service](#)

If you use Data.com Prospector or Data.com Clean, you can select the matching service that your org uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

### [Guidelines for Selecting Data.com Clean Job Preferences](#)

Review the preferences you can set before you define your Data.com Clean jobs.

#### SEE ALSO:

[Set Up Data.com Clean](#)

[Set Up Data.com Clean Jobs](#)

[Track Field History for Standard Objects](#)

#### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Geocode clean rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Other Clean rules available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

#### USER PERMISSIONS

To implement Data.com:

- Customize Application

## Guidelines for Selecting an Account Matching Service

If you use Data.com Prospector or Data.com Clean, you can select the matching service that your org uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

The available matching services are:

### Data.com matching

Data.com's own matching technology, which matches on the `Account Name`, `Billing Address`, `Website`, and `Phone` fields.

The Data.com matching service is always used when cleaning accounts that have a valid `D-U-N-S Number`, even if the DUNSRight matching service is selected.

### D&B DUNSRight™ matching

D&B's proprietary data-quality technology, which uses a rigorous process to normalize data and match D&B company records to your account records. The process also employs the D&B Confidence Code, which ranks Data.com match candidates based on how similar they are to your record, from 1 (not similar) to 10 (identical or highly similar). D&B also provides letter-coded match grades for individual fields. For details about how D&B DUNSRight matching works, see [D&B Entity Matching](#).

Attribute	Data.com matching	DUNSRight™ matching
Default matching service	✓	
Includes D&B's Confidence Code		✓
Supports broad international matching <sup>1</sup>		✓
Supports non-English speaking countries		✓
Requires default mapping for <code>D-U-N-S Number</code>		✓

<sup>1</sup>D&B DUNSRight matching provides matching records for over 200 more countries than Data.com matching. DUNSRight matching *does not* support these countries and regions: Admiralty Islands; Åland Islands; Antarctica; Ascension Island; Bonaire; Bouvet Island; British Indian Ocean Territory; Caroline Islands; Cocos (Keeling) Islands; Cuba; Curaçao; French Southern Territories; Guernsey; Heard Island and McDonald Islands; Isle of Man; Jersey; Korea, Democratic People's Republic of; Mayotte; Micronesia, Federated States of; Midway Islands; Mongolia; Niue; Palau; Palestinian Territory Occupied; Pitcairn; Saint Barthélemy; Saint Eustatius and Saba; Saint Martin (French part); Sint Maarten (Dutch part); South Georgia; South Sandwich Islands; Svalbard and Jan Mayen; Timor Leste; Turkish Cyprus; United States Minor Outlying Islands; Wake Island; Wallis and Futuna; Western Sahara.

SEE ALSO:

[Set Up Data.com Clean](#)

[Considerations for Scheduling Data.com Clean Jobs](#)

[Guidelines for Selecting Data.com Clean Job Preferences](#)

[Set Up Data.com Clean Jobs](#)

[Define Your Preferences and Select an Account Matching Service for Data.com Clean](#)

[How Does Data.com Clean Match Your Records?](#)

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

## Guidelines for Selecting Data.com Clean Job Preferences

Review the preferences you can set before you define your Data.com Clean jobs.

- Data.com Clean offers three options for cleaning your data with jobs. Jobs can do the following:
  - Flag all differences per record to *only identify* fields whose values are different from Data.com values
  - Flag differences and auto-fill blank fields to identify fields whose values are different *and fill blank fields* with values from Data.com.
  - Customize settings field by field.
- If you select the `Customize` option for any object, you can do the following:
  - Flag fields on your Salesforce records that have different values from matched Data.com records.
  - Flag different field values on your Salesforce records and automatically fill blank fields with Data.com values.
  - Overwrite different field values on your Salesforce records with Data.com values. If you overwrite Salesforce record values, set history tracking for those fields.
- You can set flag-only and flag and auto-fill preferences for entire records or by field. You set overwrite preferences by field.
- If you use Data.com Clean, you can also clean D&B Company records that are linked to accounts and leads. D&B Company Clean jobs automatically fill or overwrite field values on D&B company records, but do not change data on linked account or lead records.
- Your preferences take effect when the next scheduled Clean job runs, and users see the flags, as appropriate, when they clean records manually.
- If, after changing matching services, you want to do a one-time rematch using the new matching service, you can manually remove the `D-U-N-S Number` on account records to force the matching service to rematch the records. Be aware that this can affect your match rates.
- We don't recommend mapping a custom field or skipping mapping for either matching service.
- Converted leads are excluded from Lead Clean jobs.
- If you select a field to be overwritten by Clean jobs, and a user marks that field as *wrong* on a record, jobs don't overwrite that field on that record.
- Person accounts are excluded from Account and Contact Clean jobs.

### SEE ALSO:

[Set Up Data.com Clean](#)

[Set Up Data.com Clean Jobs](#)

[Define Your Preferences and Select an Account Matching Service for Data.com Clean](#)

[Guidelines for Selecting an Account Matching Service](#)

### EDITIONS


Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:

**Professional, Enterprise, Performance, and Unlimited** Editions

## Set Up Data.com Clean Jobs

If your org has a Data.com Clean license, you can set up automated jobs to update your records.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### [Considerations for Scheduling Data.com Clean Jobs](#)

Review considerations for scheduling your records to be updated automatically using Data.com Clean jobs.

### [Schedule Data.com Clean Jobs](#)

To keep your records' clean status up to date, schedule automated jobs to compare your records with Data.com. Jobs are only available to organizations with a Data.com Clean license.

### [Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean](#)

If you use the D&B DUNSRight™ Matching service, you can schedule a full sync of your account records with Data.com's the next time your account clean jobs run. The full sync compares all of your account records with records from Data.com, and may find matches for records that were not matched during previous jobs.

### [Prevent Data.com Clean Jobs from Updating Records](#)


You can prevent individual account records from being updated with Data.com data when automated jobs run.

### [Review Data.com Clean Job History](#)

The Data.com Clean Job History table lets you review your current jobs and access job error logs.


## Considerations for Scheduling Data.com Clean Jobs

Review considerations for scheduling your records to be updated automatically using Data.com Clean jobs.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Important:** If you have set up triggers to run when account records are updated, and your triggers perform SOQL queries, the queries may interfere with jobs for those objects. Your Apex triggers (combined) can't exceed 200 SOQL queries per batch. If they do, your job for that object will fail. In addition, if your triggers are @future methods, they are subject to a limit of 10 @future calls per batch.

- Jobs are only available to organizations with a Data.com Clean license.
- You must have jobs scheduled for at least one day in a week them to run.
- Jobs only process records of enabled objects
- In a full sync job, all records are cleaned, regardless of their clean status. In an *incremental sync* job, only records with a `Not Compared` clean status are cleaned.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Available with a Data.com Clean license

Available in: **Professional, Enterprise, Performance, and Unlimited** Editions

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Available with a Data.com Clean license in:

**Professional, Enterprise, Performance, and Unlimited** Editions

- When a full sync job runs, it runs instead of an incremental sync job.
- If a full sync job is scheduled to run, it runs even if no records have changed.
- The duration between jobs is counted from the time the previous job finishes to the start of the next job.
- Jobs are queued according to your scheduling settings.
- How long it takes for a job to complete depends on several things, including which matching service you've selected, how many records your job cleans, and overall Salesforce performance. Using Data.com Clean matching, it takes about a day for jobs to clean 3,000,000 records. Using DUNSRight™ matching, it takes about a day for jobs to clean 750,000 records.
- Use your sandbox environment to try out automated Clean jobs before running them in your production org with live data. After Data.com Clean is provisioned in your production org, refresh your sandbox so it has the same permissions and data. Then follow the steps in [Implementing Data.com Clean](#) to set up Data.com Clean in your sandbox. If everything runs smoothly in your sandbox environment, follow the same implementation steps in your production org.
- Jobs scheduled in a sandbox environment expire after 30 days.
- For best results, include a valid value for the `Country` and `State/Province` fields.
- Before scheduling jobs, schedule regular backups of your account data. It's always a good practice, and if your Salesforce records are ever matched inappropriately, you can revert to previous versions.
- Set up field history tracking for accounts. Field history tracking helps you identify changes to field values, and tracks who made changes and when. If you use field history tracking, make sure you add the Account History related list to your account page layout.
- Jobs do not process person account records.
- The Company Info for Accounts data integration rule conflicts with Clean jobs. To avoid conflicts, see [Considerations for Setting Up Company Info Data Integration Rules](#).

## SEE ALSO:


[Things to Know About Company Info Data Integration Rules](#)

[Set Up Data.com Clean](#)

[Set Up Data.com Clean Jobs](#)

## Schedule Data.com Clean Jobs


To keep your records' clean status up to date, schedule automated jobs to compare your records with Data.com. Jobs are only available to organizations with a Data.com Clean license.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. Review the [considerations](#) before scheduling jobs.
2. From Setup, enter `Jobs` in the `Quick Find` box, then select **Jobs** under the Clean section.
3. Select the days of the week when you want jobs to run.
4. Select your preferred start time.

 **Note:** Jobs run independently, so their exact start times may vary.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:

- [Customize Application](#)



5. Click **Save**.

## SEE ALSO:

- [Set Up Data.com Clean](#)
- [Set Up Data.com Clean Jobs](#)
- [Considerations for Scheduling Data.com Clean Jobs](#)
- [Review Data.com Clean Job History](#)

## Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean

If you use the D&B DUNSRight™ Matching service, you can schedule a full sync of your account records with Data.com's the next time your account clean jobs run. The full sync compares all of your account records with records from Data.com, and may find matches for records that were not matched during previous jobs.

After the requested full sync has run, the option is turned off. You can turn it back on and schedule another full sync every 30 days. We'll let you know when your full sync is in progress, or how long it's been since your last full sync was run.


1. From Setup, enter *Jobs* in the *Quick Find* box, then select **Jobs** under Data.com.
2. Click the button next to **Full Sync With Next Job** to turn full sync **On**. After the requested full sync runs, the button changes to **Off**.

## SEE ALSO:

- [Set Up Data.com Clean](#)
- [Set Up Data.com Clean Jobs](#)

## Prevent Data.com Clean Jobs from Updating Records

You can prevent individual account records from being updated with Data.com data when automated jobs run.

-  **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

### [Use Skipped Clean Status to Prevent Data.com Clean Jobs from Updating Records](#)

Use the *Skipped records* Data.com Clean job bypass preference, which makes sure records with a *Clean Status* of *Skipped* are not updated by jobs. This is the recommended method of preventing jobs from updating records.

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance,** and **Unlimited** Editions

## USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:

- [Customize Application](#)

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance,** and **Unlimited** Editions

[Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records](#)

Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

## SEE ALSO:


[Set Up Data.com Clean Jobs](#)

[Set Up Data.com Clean](#)

[Can I prevent Data.com Clean Data.com Clean jobs from automatically updating records?](#)

Use **Skipped** Clean Status to Prevent Data.com Clean Jobs from Updating Records

Use the `Skipped records` Data.com Clean job bypass preference, which makes sure records with a `Clean Status` of `Skipped` are not updated by jobs. This is the recommended method of preventing jobs from updating records.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. From Setup, enter `Preferences` in the `Quick Find` box, then select **Preferences** under the `Clean` section.
2. Select `Skipped records` from the Job Bypass Preferences for Accounts jobs.
3. Save your preferences.
4. Set the `Clean Status` to `Skipped` for records that you don't want jobs to update.

 **Tip:** You can use the Salesforce API, the Data Loader, or an Apex trigger to set the `Clean Status` for multiple records.

5. To make sure the `Clean Status` for `Skipped` records does not change when records are updated, create an Apex trigger.  
When a record is updated, the trigger sets its `Clean Status` back to `Skipped`. Then, jobs won't update the record.

## SEE ALSO:

[Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records](#)

[Writing Your First Apex Class and Trigger](#)

## EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available with a Data.com Clean license in:

**Professional, Enterprise, Performance, and Unlimited** Editions

## USER PERMISSIONS

To set job preferences:


- `Customize Application`

To create Apex classes and triggers:

- `Author Apex`

## Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records

Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Important:** If you create a validation rule to prevent auto-updates, keep this best practice in mind.

The validation rule generates entries and related messages in Data.com Clean job logs, but your jobs may generate other entries and errors, as well, so make sure that you examine your job logs carefully.

1. Create a custom field for each object in which there are records you want to prevent Clean jobs from automatically updating.

Here's an example of how to define the custom field.

Field	Value or Selection
Field Type	Checkbox
Field Label	<i>Data.com Does Not Auto-Update</i>
Default Value	Unchecked
Description	<i>Prevents automated Clean jobs from updating fields with the matched Data.com record's values.</i>
Help Text	<i>Exclude this record from automated field updates from Data.com Clean jobs</i>

2. To block auto-updates on records that have `Data.com Does Not Auto-Update` (or whatever you've named the custom field) selected, create a validation rule.

Here's an example of how to define the validation rule.

Field	Value or Selection
Rule Name	<i>Block_autoupdate_from_Data_com</i>
Description	<i>Record-level prevention of automated Clean jobs from automatically updating field values.</i>

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance, and Unlimited** Editions

## USER PERMISSIONS

To create or change custom fields:

- Customize Application

To define or change field validation rules:

- Customize Application


To view field validation rules:

- View Setup Configuration

Field	Value or Selection
Error Condition Formula	<pre>(<b>YOUR CUSTOM FIELD API NAME</b>) &amp;&amp; (\$User.Alias = "autocln") &amp;&amp; (ISCHANGED( DunsNumber )    ISCHANGED( NumberOfEmployees )    ISCHANGED( AnnualRevenue )    ISCHANGED( TickerSymbol )    ISCHANGED( Website )    ISCHANGED( Industry )    ISCHANGED( Ownership )    ISCHANGED( BillingCity )    ISCHANGED( BillingCountry )    ISCHANGED( BillingState )    ISCHANGED( BillingStreet )    ISCHANGED( BillingPostalCode )    ISCHANGED( Phone )    ISCHANGED( Fax )    ISCHANGED( Site )    ISCHANGED( Tradestyle )    ISCHANGED( YearStarted )    ISCHANGED( Sic )    ISCHANGED( SicDesc )    ISCHANGED( NaicsCode )    ISCHANGED( NaicsDesc )    ISCHANGED( Description ) )</pre>
Error Message	<i>This record has been excluded from automated field updates from Data.com Clean jobs.</i>

- Open each record that you don't want to be auto-updated, and select `Do Not Auto-Update` (or whatever you've named the custom field).

When automated jobs run, for each record that is not updated, you see a message in the job log: "This record has been excluded from automated field updates from Data.com Clean jobs."

 **Tip:** You can use the Data Loader or a custom trigger to select this checkbox for multiple records.

#### SEE ALSO:


[Create Custom Fields](#)

[Define Validation Rules](#)

[Use Skipped Clean Status to Prevent Data.com Clean Jobs from Updating Records](#)


## Review Data.com Clean Job History

The Data.com Clean Job History table lets you review your current jobs and access job error logs.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Important:** If you use the Do Not Auto-Update validation rule to prevent selected records from being automatically updated by Data.com Clean jobs, make sure you understand its effects on Clean job logs. The rule generates entries and related messages in job logs, but your jobs may generate other entries and errors, as well. So make sure you examine your job logs carefully. The validation rule is available in the Data.com Reports AppExchange package.

1. From Setup, enter *Jobs* in the *Quick Find* box, then select **Jobs**.
2. View job details in the Clean Jobs History section.
3. If the job encountered errors when processing records, click the link in either the *Batch Errors* or *Entity Errors* columns to download the job log .csv file.

We store job logs for 21 days.

Here are the definitions for the table columns.

Column Heading	Definition
Date	The date the job was run.
Time Submitted	The time the job was submitted to the job queue. Jobs run independently, so this might not be the exact time the job was run.
Job Type	The type of job: for Accounts or D&B Companies. There are multiple types of account jobs. <i>Account (Data.com Matching)</i> : the Data.com matching service was used to match the account records. <i>Account (DUNSRight Matching)</i> : the DUNSRight matching service was used to match the account records. <i>Account (D-U-N-S Number Lookup)</i> : the D-U-N-S Number field, if present, was used to rematch (or look up) the account records.
Job Status	The status of the job: <i>Queued</i> : the job is in the queue to run. For jobs in this status, the <i>Time Submitted</i> column displays a dash (-). <i>Preparing</i> : the job is being prepared to run. <i>Processing</i> : the job is in process. <i>Completed</i> : the job has finished running (with or without errors).

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:

**Professional, Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:

- [Customize Application](#)

Column Heading	Definition
	<p><b>Failed:</b> the job failed to run.</p> <p><b>Aborted:</b> the job was aborted before or while it ran.</p>
Records	The total number of Salesforce records processed by the job.
Matched	The total number of Salesforce records the job matched to Data.com records.
Unmatched	The total number of Salesforce records the job did not match to Data.com records.
Inactive	The number of Salesforce records that are marked as <b>Inactive</b> in Data.com.
Batch Errors	The total number of batch errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces a batch error job log, click the link to download and open its .csv file.
Entity Errors	<p>The total number of entity errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces an entity error job log, click the link to download and open its .csv file. There you'll find an explanation of any entity error that was produced because a record failed to save—for example, because of a validation rule failure. Entity errors usually result from validation rule failures or required field violation. If an explanation exists, we'll provide it.</p> <p>The unique ID of a record that produced an error during the job. To open the record, append the 15-digit ID to the URL of your Salesforce domain. For example:</p> <p><code>https://MyDomainName.my.salesforce.com/0013000000hKBTq.</code></p>

## SEE ALSO:

[Set Up Data.com Clean](#)


[Set Up Data.com Clean Jobs](#)

## Review Triggers and Workflow Rules for Data.com Compatibility

### USER PERMISSIONS

To implement Data.com Clean:	Customize Application
To implement Data.com Prospector:	Customize Application
To implement Data Integration:	Customize Application
To define triggers:	Author Apex
To define workflow rules:	Customize Application

If you use triggers or workflow rules on objects that you update with Data.com, review the triggers and workflows. Consider adjusting them or bypassing them so that users don't encounter unexpected results when records are updated.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

1. If you use triggers on any object that's updated by Data.com, in Setup, from the object's management settings, go to Triggers.
2. Open and examine each trigger to make sure that your system or users don't encounter unexpected results when records are updated.

If you find that one or two triggers cause unexpected results, try adjusting those triggers.

- If you use Clean jobs and find multiple triggers that can cause unexpected results, bypass the triggers when jobs are run. Select that option on the Clean Preferences page. From Setup, enter *Preferences* in the **Quick Find** box, then select **Preferences** under Clean.
- If you use Data Integration and find multiple triggers that can cause unexpected results, bypass the triggers when data integration rules run. From Setup, enter *Data Integration Rules* in the **Quick Find** box. Select each rule, click **Edit Rule Settings**, select **Bypass triggers**, and then click **Save**.

 **Note:** AppExchange data packages include custom objects and data integration rules. When you use data packages, triggers don't bypass these custom objects, even if **Bypass triggers** is selected.

3. If you use workflows, from Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules**.
4. Open and examine each workflow rule to make sure that your system or users don't encounter unexpected results when records are cleaned.

If you find that one or two workflow rules cause unexpected results, try adjusting those rules.

- If you use Clean jobs and find multiple rules that can cause unexpected results, bypass the workflow rules when jobs are run. You can select that option on the Clean Preferences page. You can select that option on the Clean Preferences page. From Setup, enter *Preferences* in the **Quick Find** box, then select **Preferences** under Clean.
- If you use Data Integration and find multiple workflow rules that can cause unexpected results, bypass the workflow rules when data integration rules run. From Setup, enter *Data Integration Rules* in the **Quick Find** box. Select each rule, click **Edit Rule Settings**, select **Bypass workflow rules**, and click **Save**.


### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

- For all triggers and workflow rules you're using, check results on affected object records.


 **Example:** Your organization has a trigger that creates and assigns a task every time a lead record is updated by any means. If you clean leads using Clean jobs, your users could get more tasks than expected, so adjust the trigger so that tasks are only created and assigned when records are *manually edited* or *cleaned by Salesforce users*. You can determine who last updated a record by checking the `LAST_MODIFIED_BY` field. Records last updated by a Clean job show `Data.com Clean` in that field, and records updated by users show the first and last name of the user.

SEE ALSO:

[Things to Know About Company Info Data Integration Rules](#)

## Configure List Views for Data.com Clean


Before your Data.com Clean users can clean records from a list, add the `Clean Status` field to your org's list views.

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

- Click the Accounts tab.

 **Note:** If your org uses DUNSRight matching to clean account records, list view cleaning is not available.

- Select a view from the drop-down and click **Edit**.
- Scroll the Available Fields list to find the `Clean Status` field, then add it to the list of Selected Fields.  
The **Clean** button is automatically added to the list view.

SEE ALSO:

[Set Up Data.com Clean](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available with a Data.com Clean license in:  
**Professional, Enterprise, Performance, and Unlimited Editions**

### USER PERMISSIONS

To create custom list views:

- Read on the type of record included in the list


To create, edit, or delete public list views:

- Manage Public List Views



## Report on Records with a Specific Data.com Clean Status

Create a custom report to show Salesforce account records that have a specific clean status (such as `Different`).

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

Choose account fields to display. Using data from companion Clean Info objects, show Salesforce and Data.com record values side by side. Report results can help you identify consistent reasons that records have a specific clean status. Use what you learn to manage how records are cleaned in your organization.

For example, you can create a report to show all records whose clean status is `Different` side by side with their matched Data.com records. If you identify patterns in your data that cause this status, you can create triggers or API customizations to adjust your data and have more records with `In Sync` status.

Let's create an Accounts by Clean Status report.

1. Make sure your organization has a custom report type that links the Account object to the Account Clean Info object. Also check that fields from both objects are available to report on.
2. Create your report: click the Reports tab, then click **New Report**.
3. Select **Accounts by Clean Status** as the report type.
4. Click **Create**.
5. From the parent object, Accounts, select the fields you want to report on. For example, choose:
  - Account ID
  - Clean Status
  - Account Name
  - Billing Address
  - Annual Revenue
  - Employees
6. From the related object, Account Clean Info, select fields that correspond to the Account object fields. For account clean info, choose:
  - Account Clean Info ID
  - Company Name
  - Address
  - Annual Revenue
  - Number of Employees
  - Last Match Date
7. Add a field filter to the report: For the field, select **Clean Status**. For the operator, select `equals`, and for the value, select **Different**.
8. Define the remaining fields.
9. Save the report and run it.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To create, edit, and delete reports:

- Create and Customize Reports
- AND
- Report Builder


10. Examine the report to see if you can identify patterns in your data that cause certain records to have a Clean status of *Different*.

SEE ALSO:

[Create a Custom Report Type for Account Clean Info](#)

## Determine How Well Data.com Clean Is Working


Data.com Clean metrics and analytics tell you how your org's accounts have been matched and updated with Data.com data, so it's important to check your match and update rates on a regular basis.

-  **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.


For more information, see [Data.com Prospector and Clean Retirement](#).

1. From Setup, enter *Metrics* in the *Quick Find* box, then select **Metrics & Analytics** under the Clean section.
2. To find out when the last calculation occurred, check the *Last Calculated* field above the table.

-  **Note:** The data in the tables is calculated daily, but we store the time and calculate the date based on GMT, so depending on time adjustments, the date shown may be different from the date when the calculations occurred. Also, because this data is calculated once per day, it may differ slightly from the data in Data.com dashboards and reports.

3. View match and update information in the Match and Update Rates section.

The data represents records that have been matched and updated since your org implemented Data.com. Here are the definitions for the table columns.

Column	Definition
Records	The object enabled for Data.com Clean: accounts.   <b>Note:</b> If your Salesforce org uses person accounts, the figures in the <i>Total</i> and <i>Processed</i> columns may differ. Person accounts are included in the account total, but are not processed by Data.com Clean jobs.
Total	The number of account records that your org has in Salesforce.
Processed	The number of Salesforce account records processed by Data.com Clean.
Matched	The number of processed Salesforce account records that match with Data.com records.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To view Data.com Clean match rates:

- Customize Application

Column	Definition
Updated	The number of processed Salesforce account records that have been updated.

Column	Definition
Records	The object enabled for Data.com Clean: accounts
Match Rate (% of Processed)	The percentage of processed Salesforce account records that match with Data.com records.
Update Rate (% of Processed)	The percentage of processed Salesforce account records that have been updated.

## SEE ALSO:

- [Check the Match Rates for a Data Service](#)
- [How Does Data.com Clean Match Your Records?](#)
- [Guidelines for Selecting an Account Matching Service](#)

## Install and Implement Data.com AppExchange Packages

Get access to reports that help your users analyze account, contact, and lead data.

Available in: Salesforce Classic and Lightning Experience

Available with a Data.com Prospector license in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

### USER PERMISSIONS

To install packages:

- Download AppExchange Packages

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

 **Note:** These packages are designed for Data.com Clean and Data.com Prospector. If you're using Data Integration, write your own custom reports.

Multiple Data.com report packages are available on AppExchange. The report packages you install depend on which data you're interested in and which Data.com products you use. Here's a list of the different packages and instructions on how to install them.

Available Salesforce Reports Package	Contents	Considerations
<a href="#">Data.com Prospector Reports</a>	Dashboard and associated reports used primarily by sales management to see the value Data.com provides in terms of converted leads, sales forecast, and revenue.	To install this package, your company must use Data.com Prospector.
<a href="#">Data.com Clean Reports</a>	Dashboard and associated reports used primarily by sales operations and people responsible for keeping Salesforce data updated.	To install this package, your organization must use Data.com Clean.

1. Go to the Data.com reports package you want to download.
2. Click **Get it Now**.
3. Install the Data.com reports packages you want to use.
4. If your company uses Professional Edition, add these fields to your page layouts. If you don't, these fields aren't included on your reports.

Page Layout	Fields
Account	Sourced from Data.com
Contact	Sourced from Data.com
Lead	Sourced from Data.com
Opportunity	Sourced from Data.com

5. Let your users know which Data.com reports are available.


## Considerations for Using Data.com in the Salesforce Mobile App

Review considerations for using Data.com features on a mobile device.

- With Data.com Clean, you can see fields updated by Clean jobs, but the option to manually clean records isn't available.
- Data.com Prospector isn't supported in the Salesforce mobile app. You can't search for or add accounts, contacts, or leads. Nor can you see Prospecting Insights or Company Hierarchy.

# How Duplicate Management Works with Data.com Prospector and Data.com Clean

Learn how to add and updating records with Data.com Clean and Prospector

 **Note:** When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see [Data.com Prospector and Clean Retirement](#).

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Adding Records with Data.com Prospector

How duplicate rules work with Data.com Prospector depends on your org's Data.com duplicate preferences.

If your org isn't set to let duplicate records be added to Salesforce from Data.com, Data.com blocks the duplicate records, and the duplicate rule doesn't run. The user trying to add records from Data.com receives an error log detailing which records couldn't be added.

If your org allows duplicate records to be added to Salesforce from Data.com, the duplicate rules run. The duplicate rule determines whether the duplicate record is allowed or blocked. Records blocked by the duplicate rule appear in the error log.

## Updating Records with Data.com Clean

How duplicate rules work with Data.com Clean depends on your active duplicate rules are. If a duplicate rule is set to block duplicates on edit, a record can't be cleaned if cleaning creates a duplicate.

For Clean jobs, if your duplicate rule is set to block or alert, a record can't be cleaned if the cleaning creates a duplicate. An entity error appears in the Clean Jobs History table for records that can't be cleaned during a job.

If your duplicate rule is set to allow duplicates on edit, a record can be cleaned, even if it creates a duplicate. In addition, no alert displays when manually cleaning records, even if your duplicate rule is set to alert.

# INDEX

## A

- Account
  - fields [114](#)
- Account fields
  - Account Site [113](#)
  - Ownership [114](#)
- Accounts
  - Fields [113](#)

## C

- Contacts
  - getting Data.com contacts from an account [96](#)

## D

- D&B [115](#)
- Data.com
  - can't completely clean [115, 148](#)
  - can't completely update [115, 148](#)
  - error message [115, 148](#)
  - fields that can be cleaned [115, 148](#)

- Data.com (*continued*)
  - getting contacts from [96](#)
  - limited data access [115, 148](#)
  - prospecting insights for an account [118](#)
  - search results [115, 148](#)

- Data.com Clean
  - troubleshooting [115, 148](#)

- Data.com filters
  - Employees
    - [115](#)
  - Revenue [115](#)

## Y

- You have limited access to account fields, so you can't update all the fields shown here [115, 148](#)
- You have limited access to contact fields, so you can't update all the fields shown here [115, 148](#)
- You have limited access to data, so you can't completely clean this record [115, 148](#)
- You have limited access to lead fields, so you can't update all the fields shown here [115, 148](#)