



cloudingo™

chases down and eliminates duplicate data

FREE TRIAL!

Quick Start Guide

CONGRATULATIONS!

You're one step closer to working more efficiently, increasing performance, and gaining clean, enhanced data.

You'll find that Cloudingo is easy to setup, simple to use, and great at doing its job. In just a few steps you'll be connected to Cloudingo and you'll see an initial profile of your data to determine how many duplicates you have. Then dive right in with the prebuilt filters or create your own.

If you get stuck or need help, an award-winning support team is standing by to guide you.

This guide will show you how to:

- Install and connect to Cloudingo
- Dashboard overview
- Build and run filters
- Merge and Convert Duplicates
- Setup automation settings
- Import files
- Run reports



USER MANUAL

A more detailed users manual is built-in to Cloudingo.



INSTALL & CONNECT

Step 1: Install the Cloudingo Agent

Before you can get started, you must install and deploy the Cloudingo Agent inside salesforce.com. You can find the Cloudingo Agent in the Salesforce AppExchange (<http://appexchange.salesforce.com>)

Step 2: Create an Account

Setup a Cloudingo account by visiting <https://app.cloudingo.com/account/register>.

Step 3: Login to Cloudingo and Connect

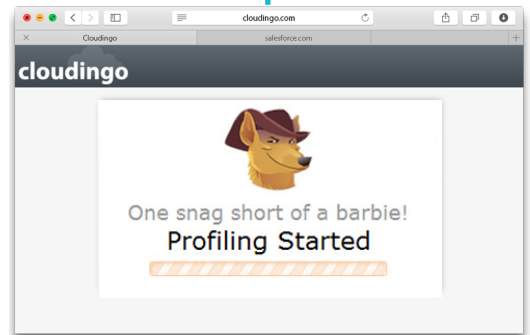
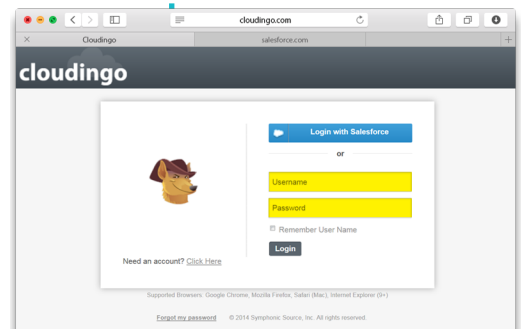
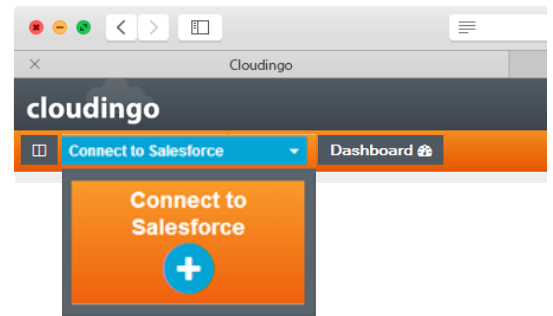
From the Cloudingo dashboard, Click **Connect to Salesforce** on the upper left corner. You must use a Salesforce Administrator account with Cloudingo. (You may have already connected to Salesforce during your initial trial setup.)

Step 4: Initial Profiling

During the initial profile, Cloudingo will search for patterns and clues that will help it to identify duplicate records. When profiling is complete, Cloudingo will run all the standard filters and show you the results. Don't worry; no changes will be made to your data at this point.

Step 5: Use Prebuilt Filters or Create Your Own

Cloudingo comes with standard filters that you can edit or you can create your own. We encourage you to experiment!





DASHBOARD & NAVIGATION

1 Grid & List Views

The dashboard has two versions - grid and list views. Within both views you can choose the order you want your filters to be displayed by dragging and dropping the filter names in the list view, and clicking **Re-Order Filters** in the Actions menu.

The grid view allows you to quickly sort, resize, and reorder the columns. You can also search within each column and set parameters.

2 Actions & Menus

Here you can create, re-order, and re-calculate filters, run reports, and manage automation jobs. Upload .csv files using the Import Wizard.

3 Activity Stream

The activity stream can be pinned or hidden. Search within the activity stream to find specific merges and track when a merge failed. Hovering over a failed message displays a popup explaining the failure.

The screenshot displays the Cloudingo dashboard interface. At the top, there is a navigation bar with the Cloudingo logo, a user account menu, and a help menu. Below this is a secondary navigation bar with a '23 Demo' dropdown and a 'Dashboard' icon. The main content area is divided into two sections:

- Activity Stream (labeled 3):** A vertical list on the left showing recent activities such as 'Merge (mass) 60d', 'Maintenance (mass) 71d', and 'Maintenance (mass) 71d'.
- Grid View (labeled 2):** A central area displaying a grid of filter cards. Each card shows a filter name, its fields, and a status summary.

Filter Name	Fields	Status	Groups	Matches
#1 Leads (email + last name)	Fields: Email, Last Name	Last ran 2 months ago	13	26
#2 Leads (full name + email)	Fields: Email, Last Name, First Name	Last ran 2 months ago	13	26
#3 Multi Table - Lead to Contact (ema...)	Fields: Email, Last Name	Last ran 2 months ago	4518	9049
#4 Multi Table - Lead to Account (co...)	Fields: Company			
#5 Accounts (account name)	Fields: Account Name			
#6 Accounts (name, state)	Fields: Account Name, Shipping State/Province			

At the top right of the grid view, there is a navigation menu (labeled 1) with options for 'Actions', 'Reports', 'Automation', and 'Imports'. A 'Dedupe Data Maintenance' button is also visible at the top left of the grid area.



FILTERS

A filter allows you to look at a bucket of records that match based on certain criteria, or fields within the record. Cloudingo comes with standard filters, but it's easy to edit or create your own.

View results by clicking on the group or matches count.

Filter Type & Name

Action Menu
Reprofile, automate, or modify the filter. Export results to a CSV file.

#3 Multi Table - Lead to Contact (email...)

CONVERT > LEAD TO CONTACT

Fields: Email, Last Name

Matching Criteria

Status: Last ran 2 months ago

GROUPS	MATCHES
4518	9049

Groups of Dupes
Click the number to drill in and being merging and converting.

Total Duplicates
Click the number to view results.

- Calculate Totals
- Schedule
- Edit
- Copy
- Delete
- View History
- Export

CREATING FILTERS

Step 1 | Define the Filter

A filter is defined by the objects it scans for duplicates. Single-table filters compare like object to like object (example: contacts to contacts). Multi-table filters compare leads to either accounts or contacts.

Step 2 | Choose Which Fields to Match

Select standard or custom fields to identify duplicate matches. The **primary field** is one that everything is grouped by to begin with. **Secondary fields** are used to further filter or match duplicates.

Step 3 | Fine Tune Your Results

By default Cloudingo will scan your entire database for duplicates. However, you can choose to limit the search by setting parameters, such as by date or record type.



3 WAYS TO MERGE & CONVERT

1 Method 1 | Manually

In the merge grid, duplicate records are displayed side-by-side. The column highlighted in blue shows a preview of how the record will appear once changes are saved. Select a master record to serve as your baseline, the correct field values, or use inline editing.

2 Method 2 | Mass Merge & Convert

Mass merge allows you to select multiple duplicate groups at one time and simply click a button to have all of the selected groups merged/converted based on Automation Rules. Select groups using the checkbox to the left of each group and click the Mass Merge / Mass Convert button.

Merge Preview
Final result you will see in Salesforce when you merge the duplicate records.

1 Master Record

2 Mass Convert
Make Changes with One Click

Inline Editing

Contact Fields	Value
Full Name	Antonio Nieto
Account *	Virginia Tech
Contact ID	002o000007oVAAAI
First Name	Antonio
Last Name *	Nieto
Company *	Virginia Tech
Email	antonio.nieto@testdata.com
Last Modified Date	Sep-17-2014 2:06:00 PM
Created Date	Sep-17-2014 12:37:24 PM
Street	100 Holden Hall
City	Blacksburg
State/Province	VA
Zip/Postal Code	24061
Mailing State/Province	United States
Mailing Zip/Postal Code	Blacksburg
Mailing Country	VA
Owner ID	24061

3 Method 3 | Automatically

To begin an automation job, select **Start Automation** from a filter drop down menu or from the Automation menu at the top of the dashboard.

Choose from the Automation Rules you have configured for the specific object. Click **Continue** to load an estimate of API resource usage and a finish time for the automation job then click **Start Job**. You will see a small spinning icon on any filter that has an automation job running.

3 Start Automation

Automation menu options: Manage Rules, Run Window & Throttle, Start Automation

Filter: #5 Account
MERGE > ACCO
Fields: Account Name



AUTOMATION SETTINGS

Automation Rules allow you to define how Cloudingo will merge records using Mass Merge or Auto-Merge. Create different rules for different filters or for different jobs. For example, you can create rules that apply to imports only and not to filters run from the dashboard. Within your automation rules, you can control things down to the field level as well as set exceptions (situations where you would not want Cloudingo to merge the records).

Manage Rules

Tab 1 (The Basics) allows you to define the primary object for a rule, name and describe the rule, and choose the kinds of jobs for which the rule will be available (dashboard filters, imports, or both).

Tab 2 (How Do You Want to Merge Records?) is where you define the specifics of how you want Cloudingo to merge your duplicate records. When defining your automation rules, Cloudingo begins at the highest level (master record selection), and works down to the individual field level and exceptions.

Run Window and Throttle

Control resources allocated to Cloudingo, and define the times in which automation can run.

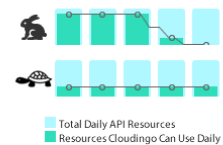
Throttling Options

- Use as many resources as available and complete as soon as possible.
- Limit resource usage with the following parameters:

Salesforce resources/24hr:

Maximum number of groups/24hr:

Maximum number of records/24hr:



Run Window Settings

Days and times to allow auto-processing to run (all times for Pacific Standard Time):

- Sunday Start Time: 3:00 am End Time: 12:00 am
- Monday Start Time: 3:00 am End Time: 12:00 am
- Tuesday Start Time: 3:00 am End Time: 12:00 am
- Wednesday Start Time: 3:00 am End Time: 12:00 am

Run Window and Throttle

This page allows you to control resources allocated to Cloudingo, and to define the timeframe in which an automation job can run. Limit resources under **Throttle Options** by defining the maximum number of API resources Cloudingo can use, and/or the maximum number of duplicate groups or records that can be processed within a 24-hour period of time.

Define when an automation job can run by setting a range of times and days under the **Run Window Settings**. Jobs can be started from the dashboard at any time, but auto-processing of the duplicate records will only happen within the hours defined. Jobs started outside of the available times will be held in queue until the defined time is reached.



cloudingo™

Quick Start Guide

IMPORT WIZARD

Import and dedupe .csv or tab delimited files using the Cloudingo import wizard by clicking the Import button on the dashboard. There are six tabs or steps to cleansing and importing a file of records. As you work through each tab, you cannot go back to a previous tab.

Tab 1 | Choose Data

Name the import, select the type of records to import and the action to take, and upload the file.

Tab 2 | Add Tracking

Assign the records you are importing to a Salesforce Campaign, set a status, and add a note if you'd like.

Tab 3 | Map Columns

Match the columns on your file to fields on your Salesforce objects. Correct any incorrectly mapped fields by clicking the down arrow to the right of the import column header. Once all fields have been correctly mapped, the **All Import Fields Mapped** button will appear in gray.

Tab 4 | Preview and Edit

This is where you can manipulate your import data before sending it to Salesforce. Delete any records

you don't want, search within any column, re-export records, or edit individual records.

Any field cells that pose problems will be highlighted with a red box, for example, if a record is missing a value that is required in Salesforce.

Tab 5 | Scan for Duplicates

The **Scan for Duplicates** option scans the file against itself and against records in Salesforce. You can choose to do nothing and manually decide what to push to Salesforce or don't scan for duplication, just push all the records automatically to Salesforce and create them as new Salesforce records.

Tab 6 | Review Data

Check the status of the import records and manage them by deleting, exporting, rescanning, pushing, or merging.

Review the Status of Each Record
Merge duplicates or push records to Salesforce

Import Wizard Import Demonstration (IB:12424)

1. Choose Data 2. Add Tracking 3. Map Columns 4. Preview and Edit 5. Scan for Duplicates 6. Review Data

Review data. If you choose to scan for duplicates, you can manually merge duplicates on the "Merge" button. Data can be pushed to Salesforce by selecting the record(s) and clicking on the "Push" button.

Loaded: 0 Prepped: 3999 Merged: 2 Pushed: 0

Import Status	Msg	Lead ID	Last Name	First Name	Title	Company	Street	City	State/Province	Zip/Postal Code	Country	Phone	Email
Prepped			Hicks	Mary	President	Livelihood	6530 Burlington J.	Twentynine Pal...	Connecticut	32374	Azerbaijan	4-4751105-8344	mhicks9@techcrunch.com
Prepped			Turner	Joseph	Manager Oper...	Slybale	1 Center Park	Rocklin	Iowa	95934	Somalia	0-6501747-1460	lumer1@arstechnica.com
Prepped			Murray	Kenneth	Salesforce Ad...	Blogspan	9 Nelson Lane	Livingston	Colorado	49043	Guinea-Bissau	3-7361815-8957	kmurray2@sohu
Prepped					Sales Coordin...	Myworks	16 Bluejay Ave...	Farmersville	New Jersey	63337-5346	Samoa	5-7601531-6149	hcooper3@army.mil
Prepped					Salesforce Ad...	Edgeblab	8 Jay Street	Brentwood	California	2647	Bulgaria	0-4661124-1002	dgreen4@china.com.cn
Prepped					Manager Oper...	Feednation	717 Mitchell Ce...	Woodland	Delaware	84658-7701	Micronesia	2-7841700-5163	ppierce5@slate.com
Merged					Sales Coordin...	Eabox	0211 7th Parkway	Hidden Hills	Colorado	51276	Peru	2-4331233-3714	dnichols6@shop-pro.jp
Prepped					President	Thoughtstorm	4 Thompson P...	Clayton	Arizona	21279-1022	American Samoa	6-1321758-6132	mboyd7@rediff.com
Prepped					Customer Serv...	Blogspan	3294 Corben R...	Bishop	Kansas	16212-0398	Antigua and Ba...	8-2111632-4121	mhenry@paralels.com
Prepped					Sales Coordin...	Yombu	8 Warner Avenue	Imperial	Louisiana	85107	Italy	8-0601866-0013	rcasley@java.com
Prepped					Director	Faltz	98 Russell Terr...	Lodi	Massachusetts	57407	Aruba	8-8231754-5625	amendezos@technorati.c...
Prepped					Director	Allane	5 Northview Co...	Orange	Wisconsin	15295	Kiribati	8-6361327-3373	cgrene8@eventbrite.com
Prepped					Customer Serv...	Geba	3515 Victoria P...	Corona	South Dakota	23727	Taiwan	2-9291900-6784	scunningham@telegrap...
Prepped					Consultant	Kaltz	0972 Reindahl ...	National City	Kentucky	56101	Ile of Man	1-787489-3891	wwashington@nydaily...
Prepped					Consultant	Kaltz	0972 Reindahl ...	National City	Kentucky	56101	Ile of Man	1-787489-3891	wwashington@nydaily...
Prepped					Director	Yombu	8 Kinloa Park	Emporia	Nebraska	64179-0288	Dubrovnik	8-2021704-6213	mcswaga@burtfeed.com

Notifications Alert You of Errors



REPORTS

Merge/Convert Report

The Merge/Convert report is a bare bones report. It shows the date, time, object, and filter that merged records. Records are listed by the Salesforce ID number. The final record is listed as a hyperlink into Salesforce. The report stores data over time and can be exported.

Audit Report

The Audit Report is very similar to the Merge/Convert Report, however it is customizable. As part of the Automation Rules, you can select fields for each of the objects to be added to this report as the records are merged. These selections must be made *before* merging records.

Automation Report

The Automation Report is more of a real time monitor than a report and allows you to view historical information about automation jobs.

Automation Summary (All times are displayed in Central Time)

Select a date range below to view the automation summary for that timeframe. Click an automation job to view its details.

Last 7 Days
 Start date End date [Run](#)

Automation Runs

Record Summary

Automation Jobs

Created	Filter	Status	Succeeded	Failed	ID	Details
09/22/14 16:13	Contacts (email + last n...	Complete	2	0	6463	View
09/21/14 11:01	Leads (email + last name)	Complete	4	0	6461	View
09/21/14 10:56	Contacts (email + last n...	Complete	5	0	6460	View
09/21/14 10:48	Contacts (email + last n...	Complete	4	0	6459	View
09/18/14 15:12	Leads (email + last name)	Complete	2	0	6454	View
09/18/14 15:09	Contacts (email + full na...	Complete	4	0	6453	View
09/18/14 15:02	Leads (email + last name)	Complete	0	0	6452	View
09/18/14 15:00	Contacts (email + full na...	Complete	4	0	6451	View
09/18/14 14:20	Leads (email + last name)	Complete	0	0	6450	View
09/18/14 14:17	Contacts (email + full na...	Complete	4	0	6449	View

1 2 Displaying 1-10 of 13, Total Pages: 2

Currently Running

Date Created	Filter	Succeeded	Job ID	Action
1 Displaying 0-0 of 0, Total Pages: 0				

Upcoming/Queued Jobs

Date	Filter	Succeeded	ID	Action
1 Displaying 0-0 of 0, Total Pages: 0				