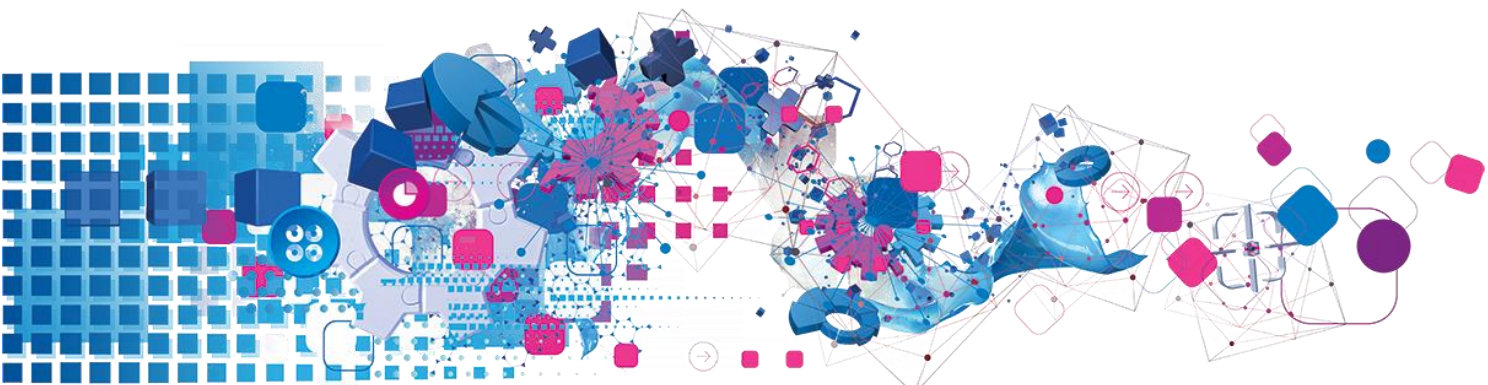
Experian Data Quality for Salesforce

Installation and Configuration Guide



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INTRODUCTION

Your organisation's data is a strategic asset and competitive differentiator, however actionable insights can only be achieved through proper data quality. Connect more effectively with your customers through accurate and clean data.

Global Data Quality for Salesforce enables users to verify addresses, email and phone numbers in real-time at the point of entry, instantly detecting and removing incorrect or incomplete contact data. Batch mode address cleansing will correct any inaccuracies that already exist in your database, ideal for cleaning list imports or running regular database audits.

This document provides an overview of the steps required for manually installing and configuring address, email and phone verification for Salesforce. It will take you through the standard manual installation, integration and configuration process.

Customers who wish to utilise EDQ service within the **Accounts, Contacts, Contracts** or **Leads** standard objects can use **The Experian Quick Start Wizard** and accompanying **Quick Start Guide** to quickly configure the solution. Using the wizard will bypass a number of steps detailed in this guide.

If you wish to manually configure and install the solution or wish to utilize EDQ service within any other standard or custom objects, follow the detailed steps outlined in this document.

See "Product Documentation" on page 4 for a full list of the other documentation available for the Global Data Quality for Salesforce solution.

What This Guide Contains

This guide walks you through the manual process of installaing and configuring the Global Data Quality for Salesforce solution.

Customers who wish to utilise EDQ service within the **Accounts, Contacts, Contracts** or **Leads** standard objects can use The Experian **Quick Start Wizard** and accompanying **Quick Start Guide** to quickly configure the solution. Using the wizard will bypass a number of steps detailed in this guide.

This guide is made up of two parts:

Installation

You can install the Global Data Quality for Salesforce application from the AppExchange. A full breakdown of installation steps can be found on page 5.

Configuration

Configuring your Global Data Quality for Salesforce solution requires the completion of four steps:

1. Add the EDQ Validation Status and Timestamp custom fields to your Objects.
2. Integrate the solution into your Visualforce pages.
3. Add custom triggers which allow EDQ to maintain the Validation Status and Timestamp custom fields you created in step 1.
4. Configure Address, Email and Phone validation settings via the Experian Data Quality Administration area.

Prerequisites

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

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

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

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

Product Documentation

This section provides a comprehensive list of the documentation available, and information about where it can be located.

Installation & Configuration Guide

The Installation & Configuration Guide provides detailed information about installing and configuring the Global Data Quality for Salesforce solution. It also provides information about administering the solution using the EDQ Administration area. The guide should be used by administrators who wish to administer EDQ service within any standard or custom object and comprehensively details the manual end to end installation and configuration process.

Quick Start Guide

The Quick Start Guide provides an overview of the solution and how to quickly get started using the Experian Quick Start Wizard. Customers who wish to utilise EDQ service within the Accounts, Contacts, Contracts or Leads standard objects can use The Experian Quick Start Wizard and accompanying Quick Start Guide to quickly configure the solution. Using the wizard will bypass a number of steps detailed within the Installation & Configuration Guide.

User Guide

The User Guide provides detailed information on the respective contact data validation modes and techniques available. It will provide users with indepth insight into how to use the solution and includes both real time address, email and phone validation and batch mode address cleansing.

All guides are available on our AppExchange listing within the Details tab – click here to view.

Data Guide

A Data Guide is available for each dataset, and provides specific information and search tips for each dataset. The Data Guide can be used in conjunction with the other documentation supplied with this product.

Data Guides are available on the Experian Data Quality support site - https://www.edq.com/support

INSTALLATION

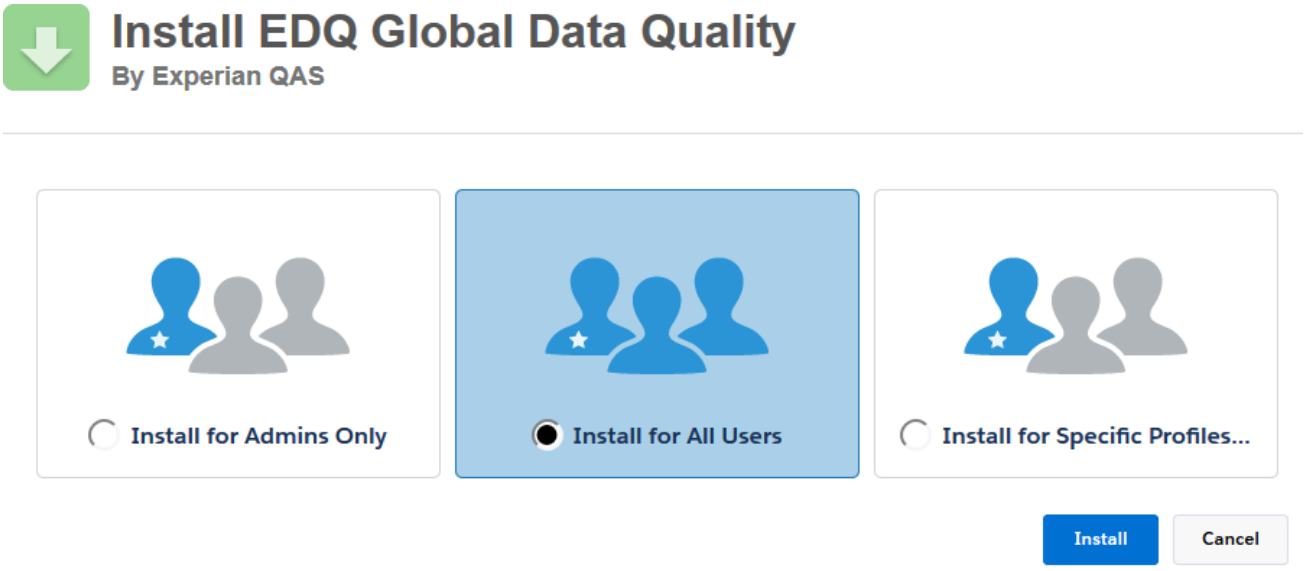
Install the Global Data Quality for Salesforce solution from the AppExchange:

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

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

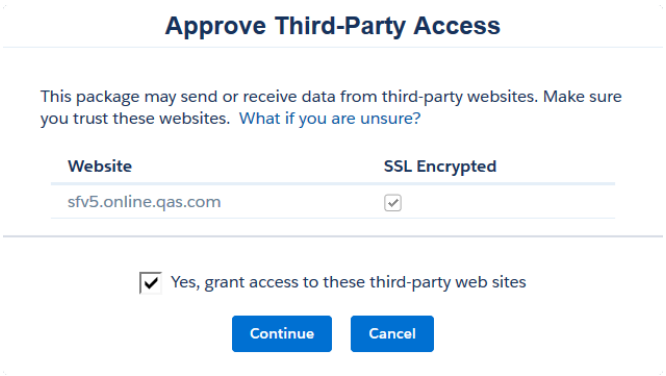
Note: You must use an account with administrator access to install this application.

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

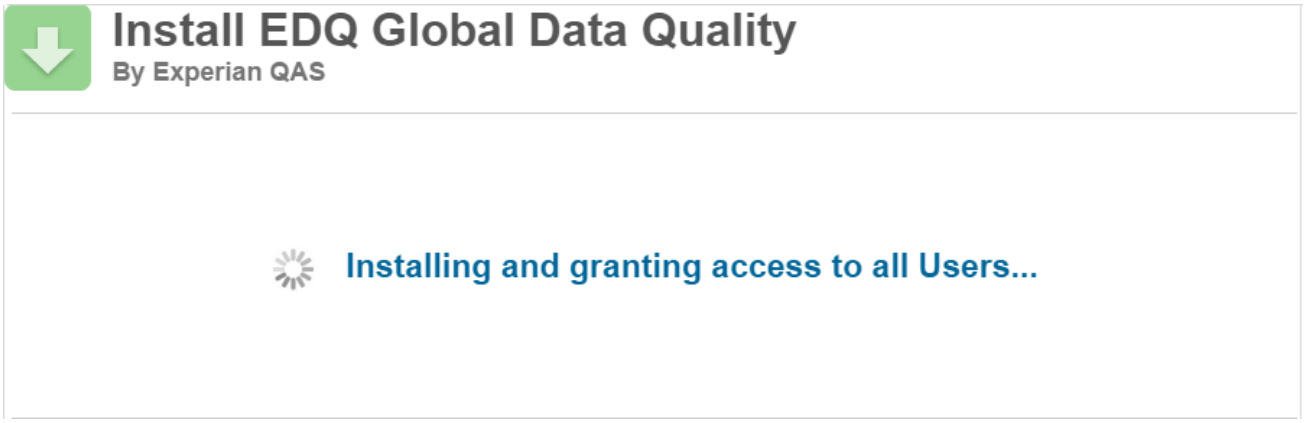


Make sure you select **Install for All Users** before you click on the Install button to proceed.

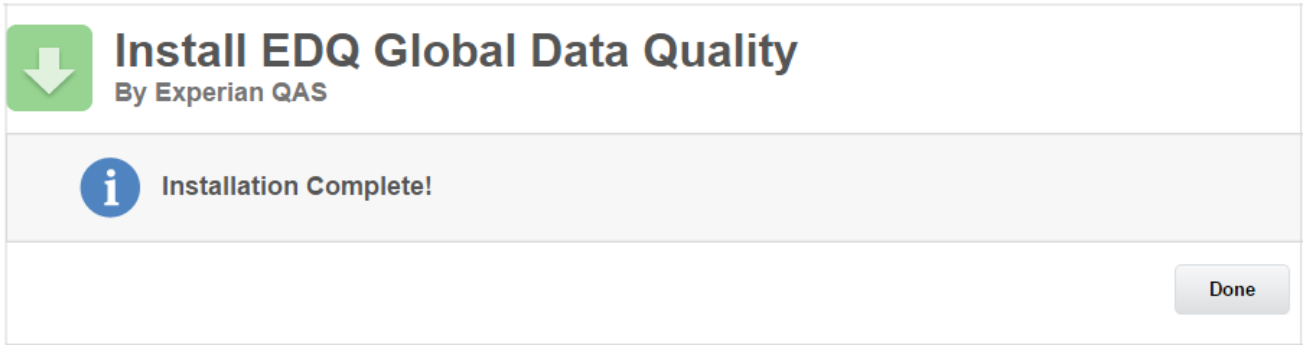
3. After clicking the Install button the Approve Third-Party Access window will appear. Check the '*Yes, grant access to these third-party web sites*' checkbox and then click **Continue**.



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



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



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

The next step is to configure the solution.

CONFIGURATION

The following steps outline the process of configuring the solution. Turn to the relevant pages for step by step instructions.

Step		Details
1.	Add Validation Status and Validation Timestamp Custom Fields to Your Objects	Page 7
2.	Add Validation Status and Validation Timestamp Custom Fields to Your Object Layouts	Page 12
3.	Integrate Global Data Quality into Your Salesforce Pages	Page 13
4.	Add Custom Trigger(s) to Maintain Validation Status and Validation Timestamp	Page 33

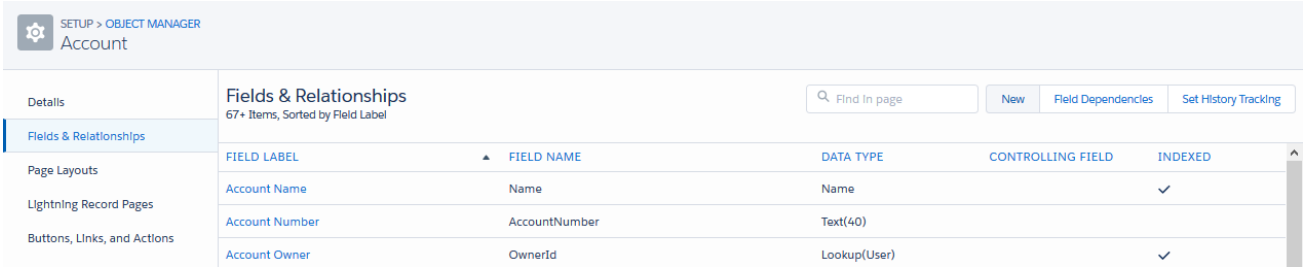
Add Validation Status and Validation Timestamp Custom Fields to Your Objects

In order to utilize the solution to its full extent, you should create custom fields to store the validation status and validation timestamp for the respective touchpoint. The process can be done for any standard or custom object (e.g. Accounts, Leads, Contacts, etc.) in your Salesforce instance.

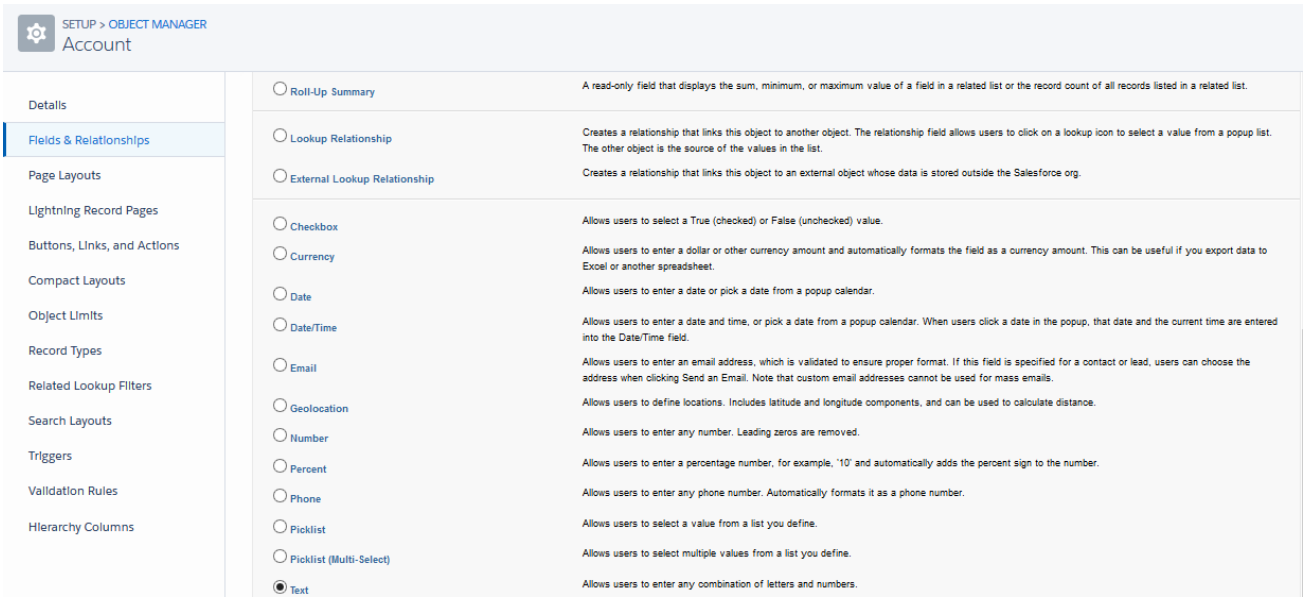
Address Custom Fields

Validation Status Field

1. Go to **Setup → Objects and Fields → Object Manager →** ***{Object Name}*** (e.g. Account).
2. Navigate to the **Fields & Relationships** section and click the **New** button at the top of the section.



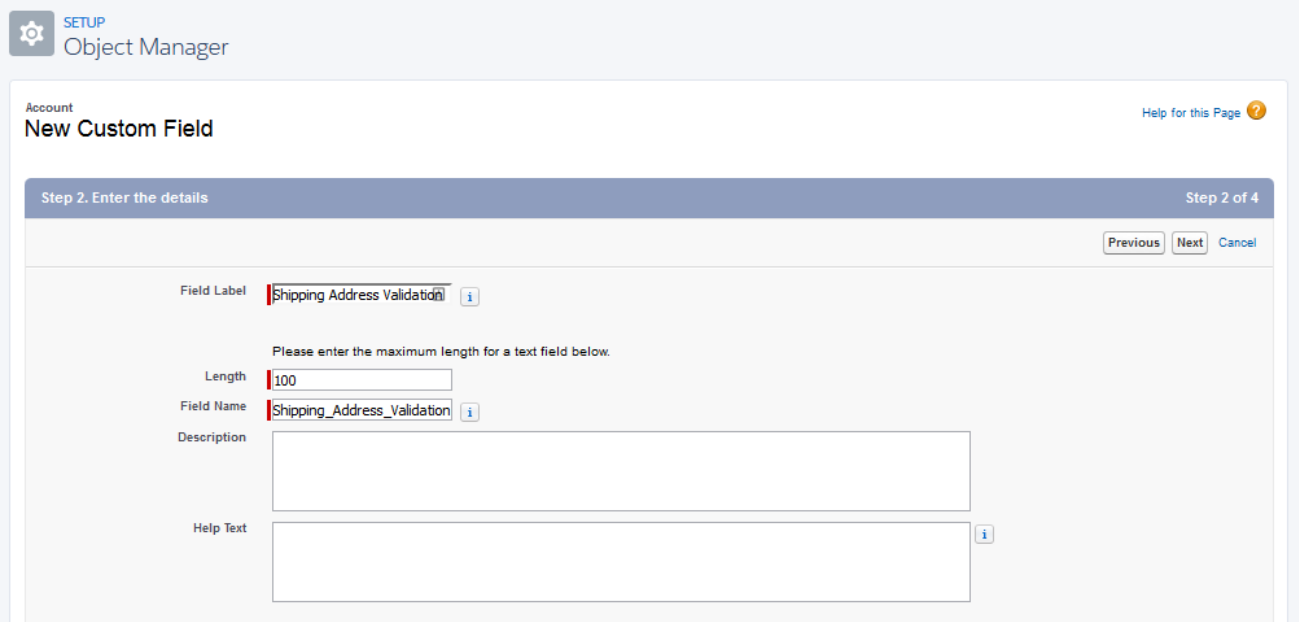
3. For Data Type choose **Text**.



4. Click **Next**.
5. Enter the following details:

Field Label: Shipping Address Validation Status
Length: 100
Field Name: Shipping_Address_Validation_Status

Note: We advise aligning **Field Label** and **Field Name** naming conventions with the respective address configuration for the required Object (in the example above the naming convention is aligned with Shipping Address). For example change "*Shipping*" to "*Billing*" or "*Mailing*" depending on the required address configuration.



6. Click **Next**.
7. You will be redirected to the **Establish Field-Level Security** page where you can select the profiles to which you want to grant/edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
8. Click **Next**.
9. You will be redirected to the **Add to Page Layouts** page.
10. Click **Save & New** to continue with the next step - creating the Validation Timestamp custom field.

Validation Timestamp Field

This custom field provides the last address validation date and time. To create the Validation Timestamp field please repeat steps **1-6** used to create the Validation Status field using the following values:

For Data Type choose **Date/Time**.
Field Label: Shipping Address Validation Timestamp
Field Name: Shipping_Address_Validation_Timestamp

Note: We advise aligning **Field Label** and **Field Name** naming conventions with the respective address configuration for the required Object (in the example above the naming convention is aligned with Shipping Address). For example change "*Shipping*" to "*Billing*" or "*Mailing*" depending on the required address configuration.

Email Custom Fields

Note: You should only follow these steps if you are going to use Email Verification.

Repeat steps **1-6** from the **Address Custom Fields** section for each Email touchpoint in order to create the Validation Status and Validation Timestamp custom fields for Email. Please use the values below when creating the fields:

Validation Status field:
For Data Type choose **Text**
Field Label: Email Validation Status
Length: 100
Field Name: Email_Validation_Status

Validation Timestamp field:
For Data Type choose **Date/Time**.
Field Label: Email Validation Timestamp
Field Name: Email_Validation_Timestamp

Note: We advise aligning **Field Label** and **Field Name** naming conventions with the respective email configuration for the required Object. For example change "*Email*" to "*Contact Email*" or "*Web Email*" depending on the required email configuration.

You may optionally store additional data pertaining to the email verification process which can be used to further enhance and improve decision making and email effectiveness.

- **Validation Message** – Descriptive message pertaining to the deliverability of the email address. (Field type: **Text** or **Text Area**, Field length: **100** characters).
- **Certainty** – Six codes that have various meanings around the deliverability of an email address. For a detailed explanation of the certainties please visit the email verification section of the User Guide. (Field type: **Text**, Field length: **35** characters).
- **Suggestion** – Potential suggested email address returned by the service, this should not be considered the corrected email however can be considered a suggested email to be utilized and should be submitted for email verification. (Field type: **Text** or **Text Area**, Field length: **255** characters).

Phone Custom Fields

Note: You should only follow these steps if you are going to use Phone Verification.

You need to repeat steps **1-6** from the **Address custom fields** section for each Phone touchpoint in order to create the Validation Status and Validation Timestamp custom fields for Phone. Please use the below values when creating the fields:

For the Validation Status field:
For Data Type choose **Text**.
Field Label: Phone Validation Status
Length: 100
Field Name: Phone_Validation_Status

For the Validation Timestamp field:
For Data Type choose **Date/Time**.
Field Label: Phone Validation Timestamp
Field Name: Phone_Validation_Timestamp

Note*:* We advise aligning **Field Label** and **Field Name** naming conventions with the respective phone configuration for the required Object. For example change "*Phone*" to "*Mobile*" or "*Home Phone*" depending on the required phone configuration.

You may optionally store additional data pertaining to the phone verification process which can be used to further enhance and improve decision making.

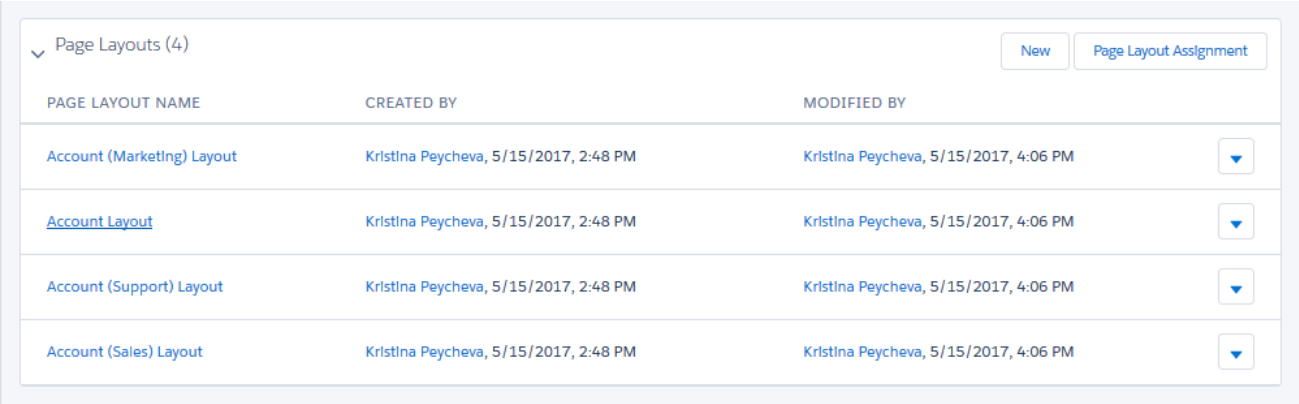
- **Validation Message** – Descriptive message pertaining to the deliverability of the phone number. (Field type: **Text** or **Text Area**, Field length: **100** characters).
- **Certainty** – Six codes that have various meanings around the deliverability of a phone number. For a detailed explanation of the certainties please review Advanced Settings for Phone. (Field type: **Text**, Field length: **35** characters).
- **CountryName -** Name of the country relating to the phone number, e.g. "United Kingdom"(Field type: **Text**, Field length: **100** characters).
- **CountryCode -** Home country relating to the phone number, e.g. "44" (Field type: **Text**, Field length: **2** characters).
- **IsRoaming -** Indicates whether the number is currently outside of the country where it is registered. (Field type: **Text**, Field length: **6** characters).
- **MCCMNC -** Mobile Country Code (MCC) and Mobile Network Code (MNC). (Field type: **Text**, Field length: **10** characters).
- **Number -** Phone number supplied. (Field type: **Text**, Field length: **20** characters)
- **OperatorName -** Company name of the MSISDN Operator, e.g. "T-Mobile" (Field type: **Text**, Field length: **100** characters).

- **Phone Type -** Type of the submitted phone number, e.g. "LandLine", "Mobile" (Field type: **Text**, Field length: **10** characters).
- **PortedCountryCode -** Home country code from which the mobile number is ported. (Field type: **Text**, Field length: **2** characters).
- **PortedCountryName -** Name of the country from which the mobile number is ported. (Field type: **Text**, Field length: **100** characters).
- **PortedOperatorName -** Operator from which the mobile number is ported. (Field type: **Text**, Field length: **100** characters).
- **Result Code -** Status code of the submitted phone (e.g. 3). (Field type: **Text**, Field length: **10** characters).
- **RoamingCountryCode -** The prefix of the country the number is currently located in. (Field type: **Text**, Field length: **2** characters).
- **RoamingNetworkName -** The network name of the Mobile Switching Centre that the number is currently connected to. (Field type: **Text**, Field length: **100** characters).
- **RoamingNetworkPrefix -** The prefix of the Mobile Switching Centre the number is currently connected to. (Field type: **Text**, Field length: **20** characters).
- **ValidatedPhoneNumber -** Verified number in international format without the leading "+", e.g. "447123456789" (Field type: **Text**, Field length: **20** characters).

Add Validation Status and Validation Timestamp Custom Fields to Your Object Layouts

After you have created your custom fields, the next step is to add the fields to your Page layouts.

1. Go to **Setup → Objects and Fields → Object Manager →** ***{Object Name}*** (e.g. Account).
2. Navigate to the **Page Layouts** section and select the layout for which EDQ service is required.

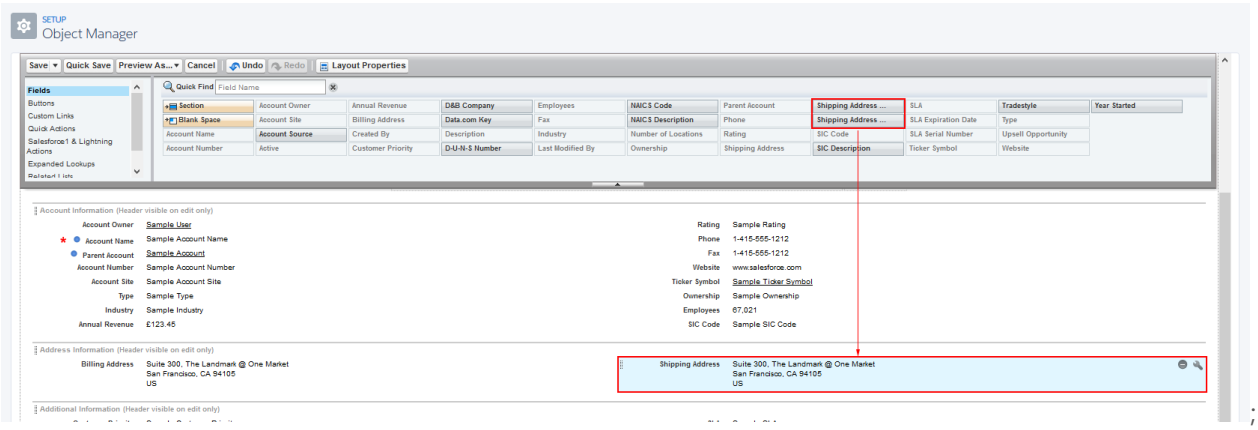


3. Drag and drop the EDQ fields from the top palette to the **Address Information** section of the page layout.

There are two EDQ fields for each address type that should be added to the layout:

- ***{type} Validation Status***
- ***{type} Validation Timestamp***

We recommend these fields be placed below the corresponding address lines on the page layout as per the screenshot below:



Integrate Global Data Quality into Your Salesforce Pages

There are two implementation methods you can use to integrate the solution as outlined in the table below. Select the required method and apply the associated steps:

Method	Details
1. Dynamic Page Override Implementation Method (Recommended)	Page 13
2. Non-dynamic Page Override Implementation Method	Page 19

Dynamic Page Override Implementation Method (Recommended)

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

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

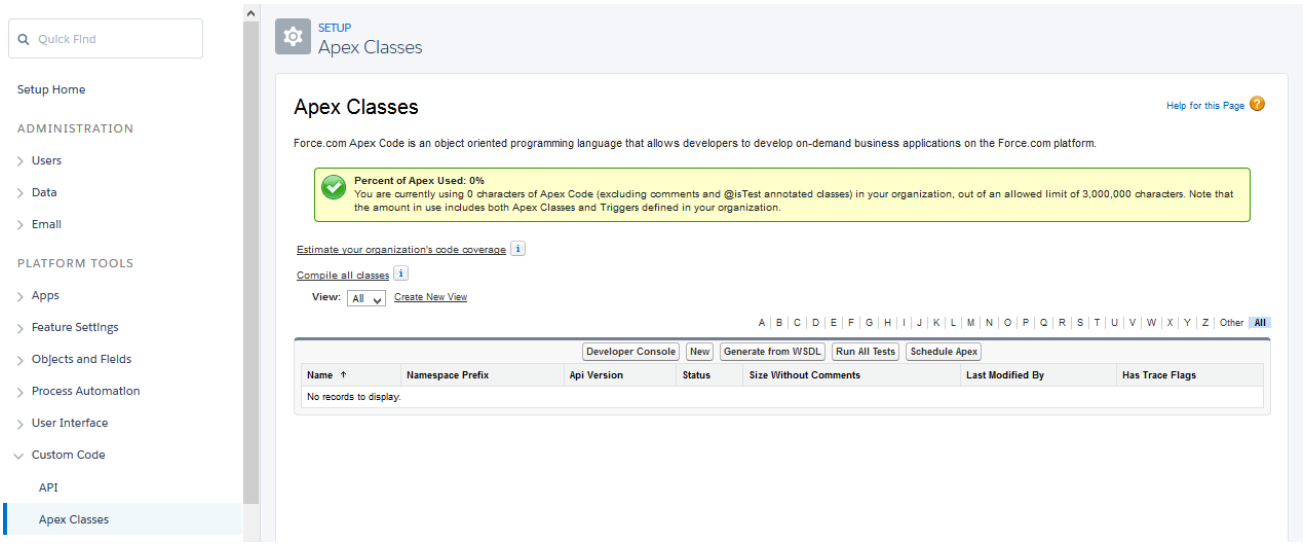
If you do not wish to override the New and Edit pages, follow the "Non-page override implementation method".

Create Apex Controller and Dynamic Visualforce Page

Note: EDQ provides default implementations of the Apex Controller and a Visualforce Page which can be used for the Accounts, Contacts, Contracts and Leads standard objects, if you wish to utilize EDQ service within these object(s) you can go straight to **"Override the "New" and "Edit" buttons on your Object layout"** section. If you require EDQ service within any other standard object or custom objects, please follow the steps below.

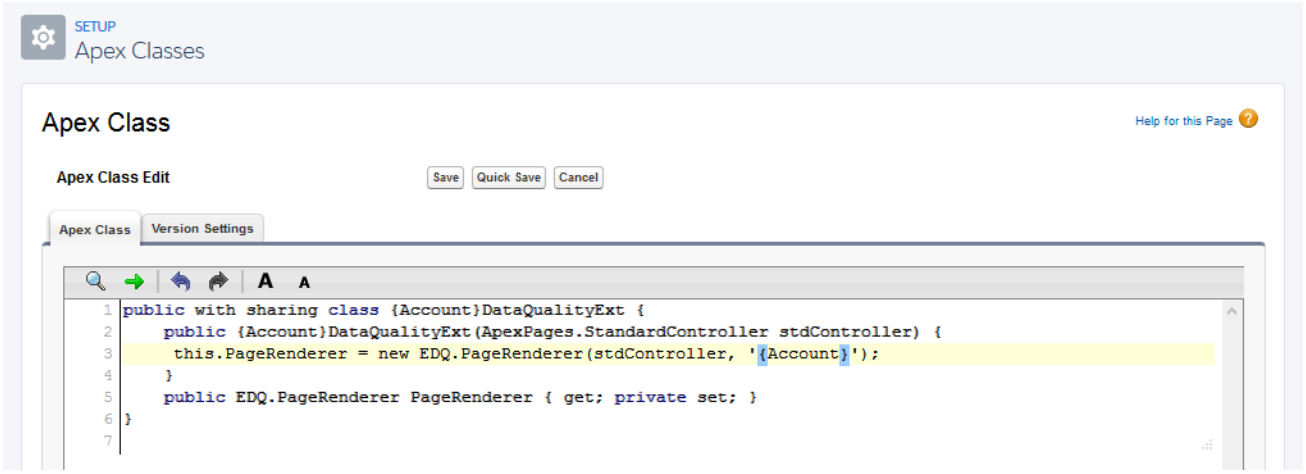
Create Apex Controller (Custom Objects Only)

1. Go to **Setup → Custom Code → Apex Classes**.



2. Click on **New** and enter the following code replacing ***{Object name}*** with the name of your Object.

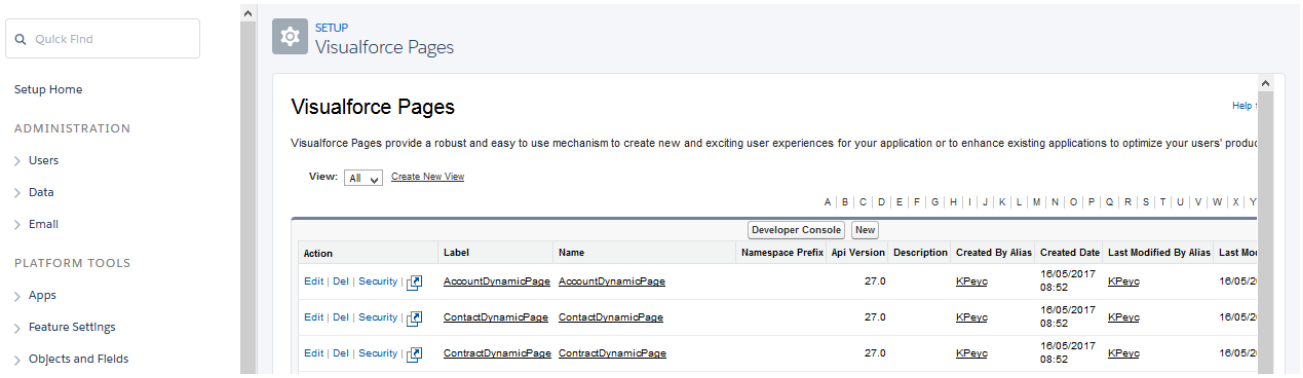
```
public with sharing class {Object Name}DataQualityExt {
    public {Object Name}DataQualityExt(ApexPages.StandardController stdController) {
     this.PageRenderer = new EDQ.PageRenderer(stdController, '{Object API Name}');
    }
    public EDQ.PageRenderer PageRenderer { get; private set; }
}
```



3. Click on **Save**.

Create Dynamic Visualforce Page (Custom Objects Only)

1. Go to **Setup → Custom Code → Visualforce Pages** and click the **New** button.

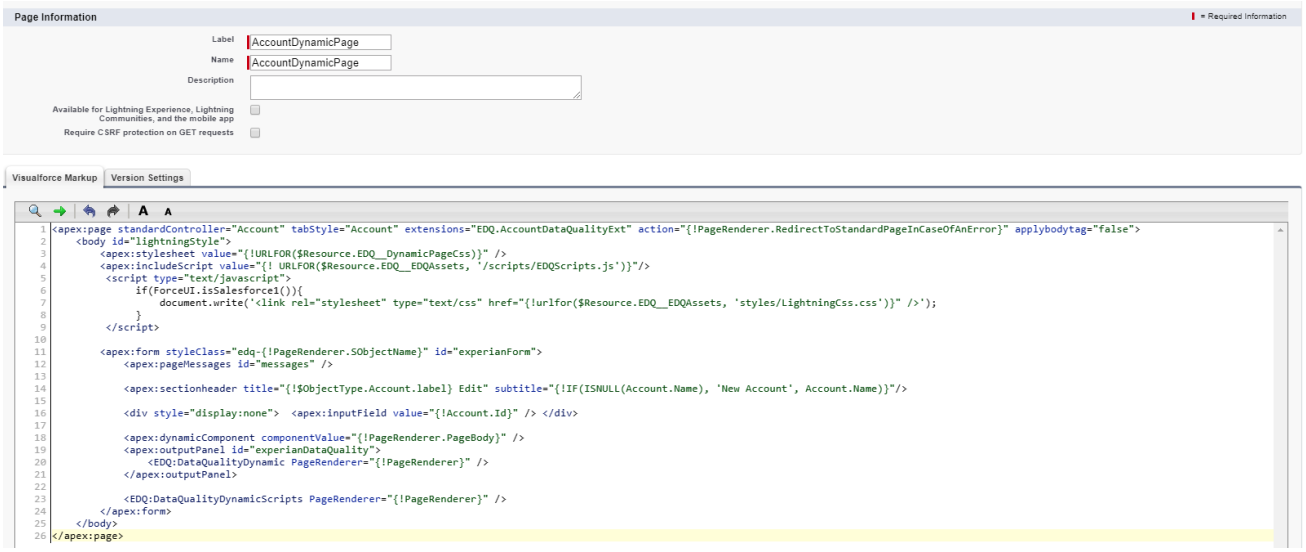


2. For **Label** and **Name** enter the name of the Apex Controller you created in the previous step.

   Label: *{Object Name}*DynamicPage
   Name: *{Object Name}*DynamicPage

3. In the Visualforce Markup tab enter the following code replacing ***{Object name}*** with the name of your Object, ***{Object API name}*** with the API name of your Object (including the package prefix if there is one) and ***{Object's Controller Name}*** with the name of the controller:

```
<apex:page standardController="{Object API Name}" tabStyle="{Object API Name}"
extensions="{Object's controller extension name you created on step 2}"
action="{!PageRenderer.RedirectToStandardPageInCaseOfAnError}" applybodytag="false">
    <body id="lightningStyle">
        <apex:stylesheet value="{!URLFOR($Resource.EDQ__DynamicPageCss)}" />
        <apex:includeScript value="{! URLFOR($Resource.EDQ__EDQAssets,
'/scripts/EDQScripts.js')}"/>
        <script type="text/javascript">
          if(ForceUI.isSalesforce1()){
              document.write
('<link rel="stylesheet" type="text/css" href="{!urlfor($Resource.EDQ__EDQAssets,
'styles/LightningCss.css')}" />');
          }
        </script>

        <apex:form styleClass="edq-{!PageRenderer.SObjectName}" id="experianForm">
            <apex:pageMessages id="messages" />

            <apex:sectionheader title="{!$ObjectType.{Object API name}.label} Edit"
subtitle="{!IF(ISNULL({Object API name}.Name), 'New {Object Name}', {Object API
name}.Name)}"/>

            <EDQ:DuplicatesTable duplicates="{!PageRenderer.Duplicates}"
pagerenderer="{!PageRenderer}" />

            <div style="display:none">  <apex:inputField value="{!{Object API
Name}.Id}" /> </div>

            <apex:dynamicComponent componentValue="{!PageRenderer.PageBody}" />
            <apex:outputPanel id="experianDataQuality">
                <EDQ:DataQualityDynamic PageRenderer="{!PageRenderer}" />
            </apex:outputPanel>

            <EDQ:DataQualityDynamicScripts PageRenderer="{!PageRenderer}" />
        </apex:form>
    </body>
</apex:page>
```



Example:

If you would like to create the page for the standard object "Order" you need to replace {Object Name} with "Order". If you would like to create the page for a custom object named "Test" you need to replace the {Object Name} with "Test".

If you would like to create the page for the standard object "Order" you need to replace {Object API Name} with "Order". If you would like to create the page for a custom object named "Test" which comes from a managed package named "EDQ" you need to replace the {Object API Name} with "EDQ__Test__c".

Note: If you're utilizing Salesforce1 you need to check the **"Available for Salesforce mobile apps and Lightning Pages"** option in the newly created custom visual force page.

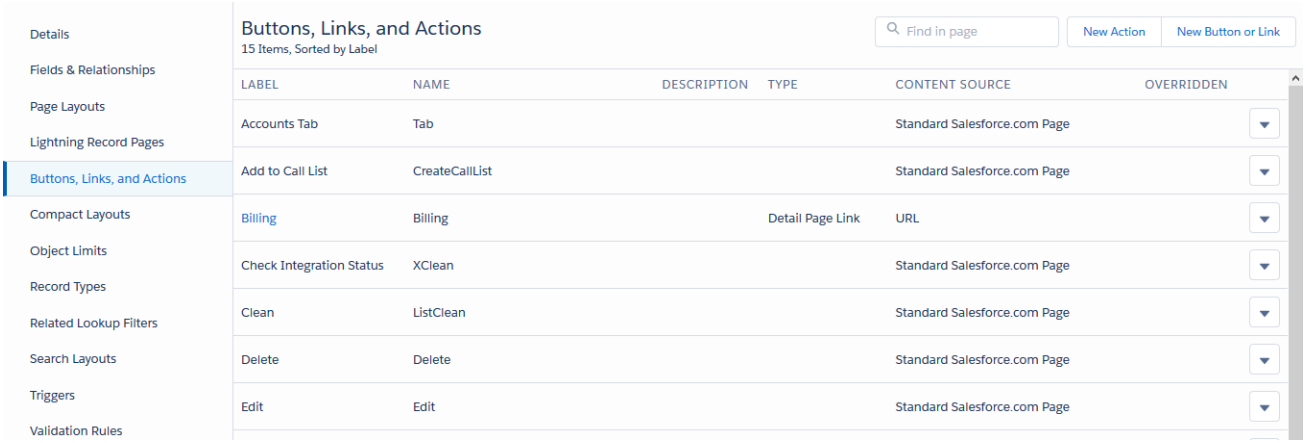
You may find the exact *{Object Name}* and *{Object API Name}* by going to **Setup Objects and Fields → Object Manager → *{Object Name}*** (e.g. Account). **→ Details**.

4. Click on **Save.** The next step is overriding the "New" and "Edit" buttons.

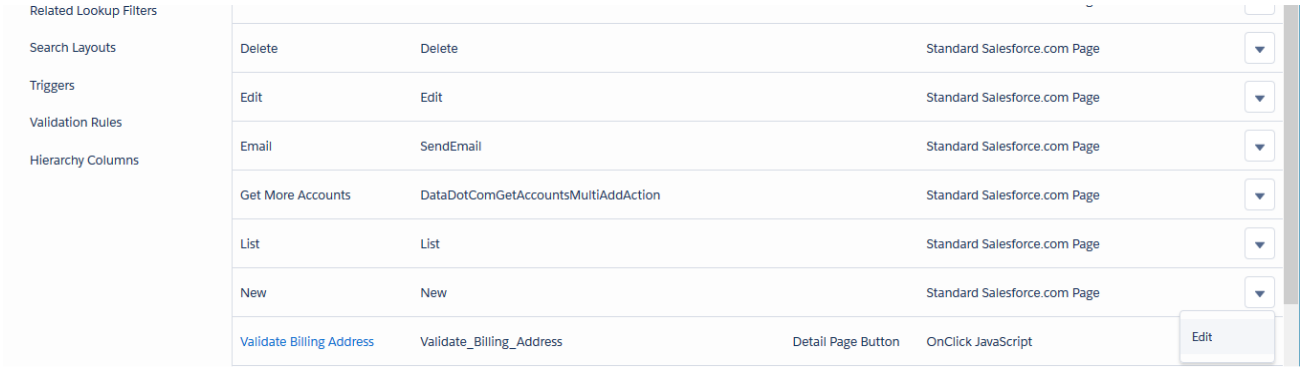
Override the "New" and "Edit" Buttons on Your Object Layout

Note: Overriding your standard "**Edit**" button will disable the inline editing of the fields in your Object's Detail page. If you wish to have this functionality enabled please see the workaround in the "*Troubleshooting*" section.

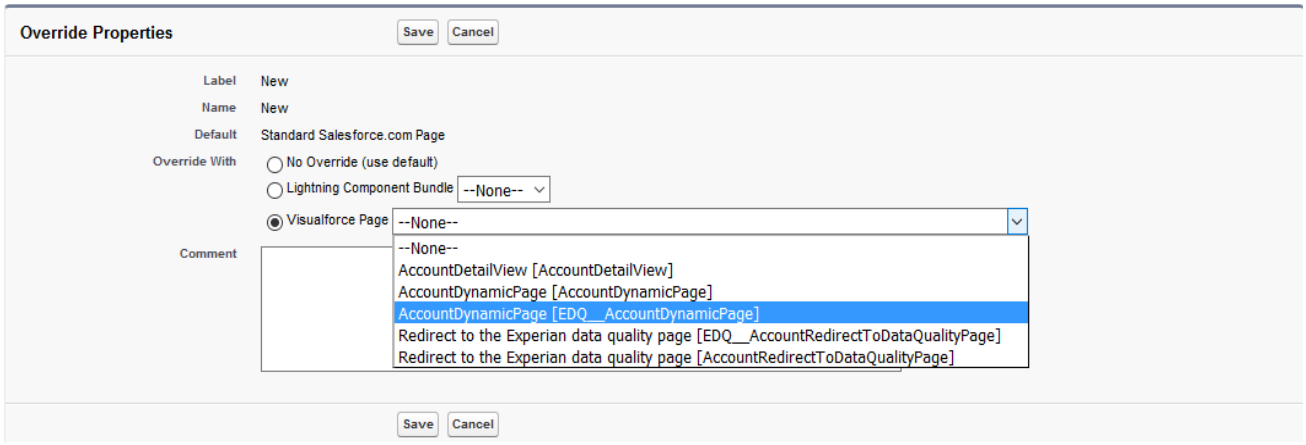
1. Go to **Setup → Objects and Fields → Object Manager → *{Object Name}*** (e.g. Account).
2. Navigate to the **Buttons, Links, and Actions** section.



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



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



5. Click **Save**.

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

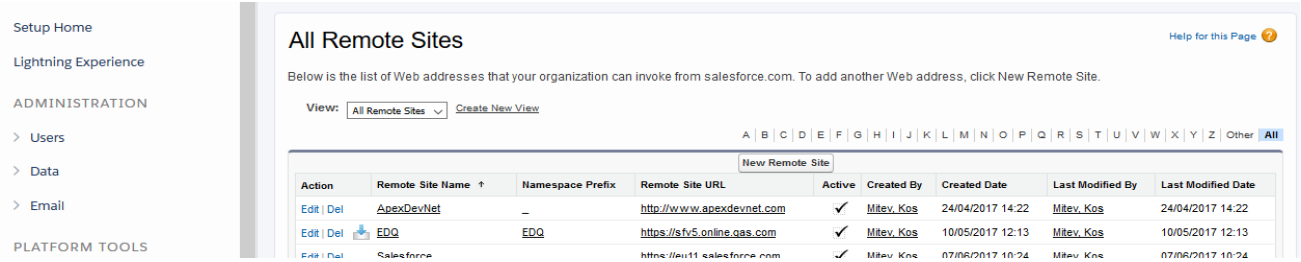
After saving you will notice that a tick (✔) appears in the tick box within the overridden column for the button you chose to override.

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

Add Your Salesforce Instance URL and the EDQ Endpoint to The Remote Site Settings

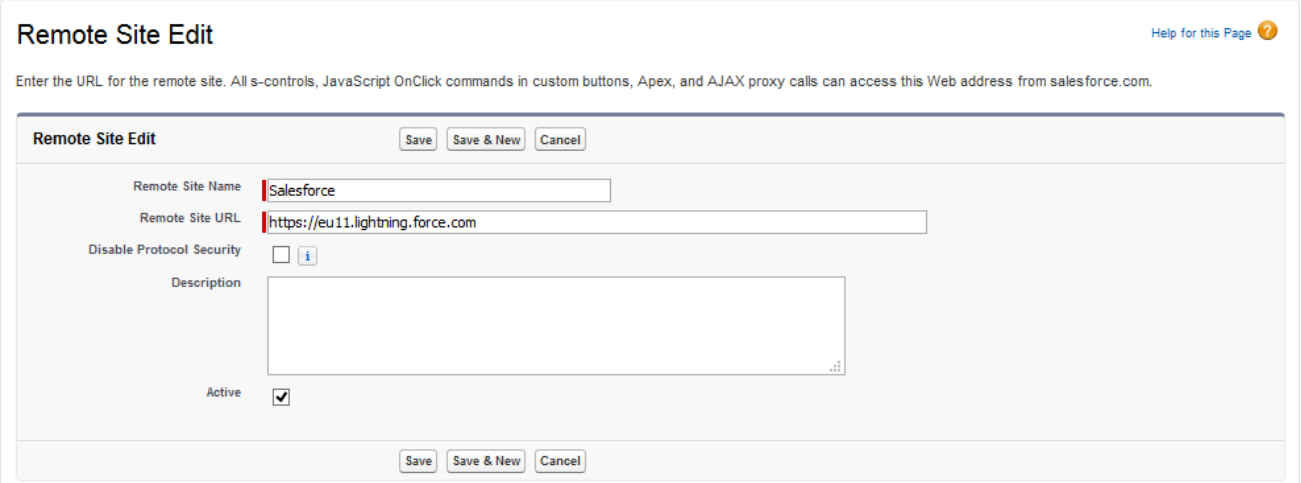
In order for the solution to be able to gather your page layout information you must create a "Remote Site" for your specific Salesforce server. To do that follow the steps below:

1. Go to **Setup → Settings → Security → Remote Site Settings** and click the **New Remote Site** button.



2. Enter the following:

   Remote Site Name: Salesforce
   Remote Site URL: Insert your Salesforce domain (e.g. https://eu5.salesforce.com).



Note: If you use a ***custom salesforce.com*** domain ***(My Domain is enabled)*** you will need to find the Salesforce instance which hosts your organization. The pattern is the following:

https://{myDomain}--c.visualforce.com (for custom Visualforce Pages)
https://{myDomain}--edq.visualforce.com (for Visualforce Pages that come from the EDQ package)
where {myDomain} should be replaced with the domain name from **Setup->Quick Find->My Domain**.

Please note that {myDomain} should be replaced with only the part before the first dot, (that means that in the above example, we should only take johnsmith).
And the URLs for the Remote Site Settings should look similar to this:

https://johnsmith--c.visualforce.com
https://johnsmith--edq.visualforce.com

3. Click **Save** to add the URL into your Remote sites.

Repeat the steps **1-3** for the EDQ Endpoint using the below details:

Remote Site Name: CustomSObjectTypeID

Remote Site URL: https://sfv5.online.qas.com

Non-page Override Implementation Method

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

For further information regarding the validation modes visit page 39 for Address validation modes, page 48 for Email and page 55 for Phone validation modes.

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

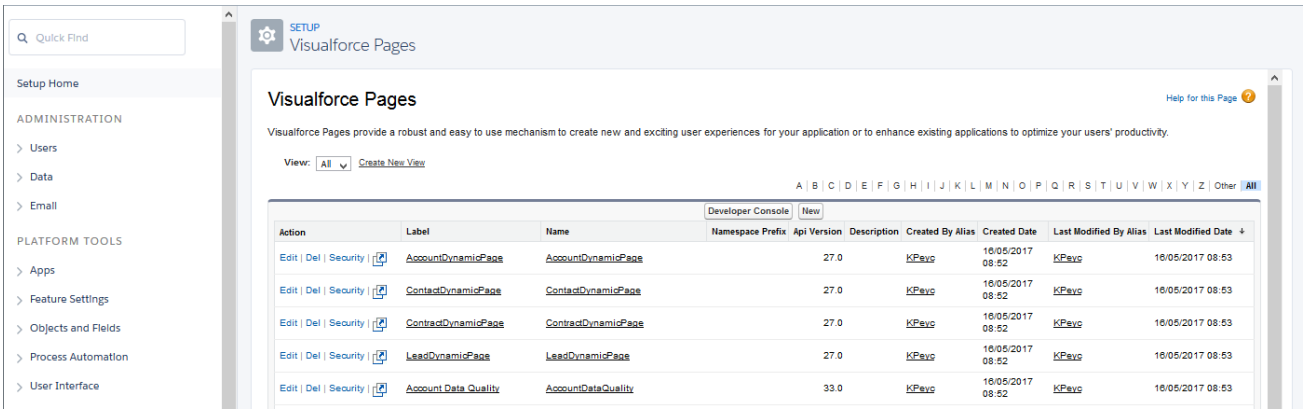
Note: You should only follow this step if you are utilizing **Interactive** address / email / phone verification and you chose **NOT** to override the "New" and "Edit" buttons as described in the previous step.

For Interactive verification mode, a Visualforce page is added to the Page Layouts which require EDQ service, on Save the Visualforce page redirects the user to the EDQ Interactive Verification Page. Depending on which object you wish to configure, you may also need to create the EDQ Interactive Verification Page. See note below.

Note: EDQ provides default implementations of the two Visualforce pages which can be used for Interactive verification mode within Accounts, Contacts, Contracts and Leads standard objects. If you wish to utilize Interactive verification mode within these object(s) you can go straight to **Add the "EDQRedirectToDataQualityPage" Visualforce page to your Object layout** section (page 24).
If you require Interactive verification mode within any other standard object or custom objects, please follow the steps below.

Create the Redirect Visualforce Page

1. Go to **Setup → Custom Code → Visualforce Pages**. Click the **New** button.



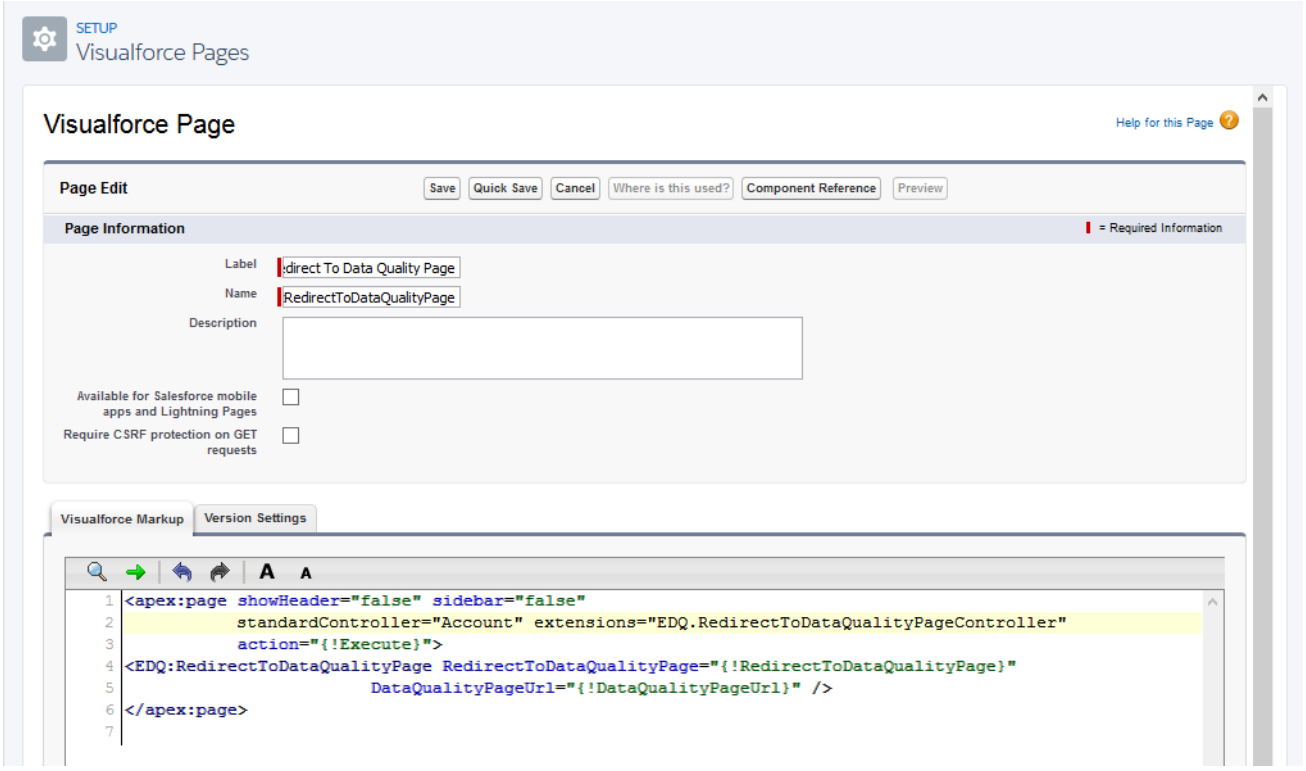
2. Enter the following values:

Label: *{Object Name}* Redirect to Data Quality Page
Name: *{Object_Name}*RedirectToDataQualityPage

3. In the Visualforce Markup tab enter the following code:

```
<apex:page showHeader="false" sidebar="false"
           standardController="{Object API Name}"
extensions="EDQ.RedirectToDataQualityPageController"
           action="{!Execute}">
<EDQ:RedirectToDataQualityPage
RedirectToDataQualityPage="{!RedirectToDataQualityPage}"
                        DataQualityPageUrl="{!DataQualityPageUrl}" />
</apex:page>
```

Replace *{Object API Name}* with the API name of your object. If your Object comes from a managed package make sure that you replace *{Object API Name}* with the full Object API name including the object's prefix and suffix.



Example:
If you would like to create the page for the standard object "Order" you need to replace {Object Name} with "Order". If you would like to create the page for a custom object named "Test" you need to replace the {Object Name} with "Test".
If you would like to create the page for the standard object "Order" you need to replace {Object API Name} with "**Order**". If you would like to create the page for a custom object named "Test" which comes from a managed package named "EDQ" you need to replace the {Object API Name} with "**EDQ__Test__c**".

You may find the exact *{Object Name}* and *{Object API Name}* by going to **Setup → Objects and Fields → Object Manager**. Select your object to navigate to the Details section.

5. After you created your Visualforce page click **Save**.

Create the Experian Data Quality Visualforce Page

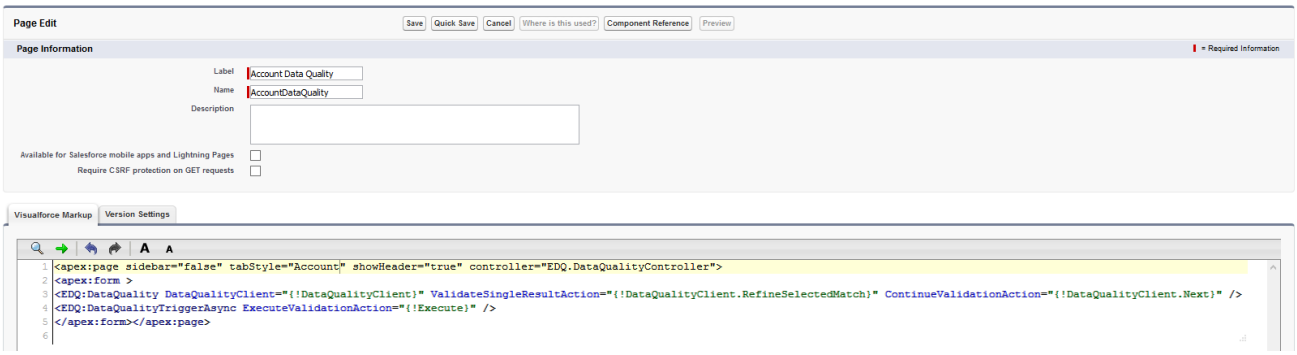
Repeat steps **1-3** from the **Create the Redirect Visualforce Page** section using the values below:

Label: *{Object Name}* Data Quality
Name: *{Object_Name}*DataQuality

And enter the following code:

```
<apex:page sidebar="false" tabStyle="{Object API Name}" showHeader="true"
controller="EDQ.DataQualityController">
<apex:form >
<EDQ:DataQuality DataQualityClient="{!DataQualityClient}"
ValidateSingleResultAction="{!DataQualityClient.RefineSelectedMatch}"
ContinueValidationAction="{!DataQualityClient.Next}" />
<EDQ:DataQualityTriggerAsync ExecuteValidationAction="{!Execute}" />
</apex:form></apex:page>
```

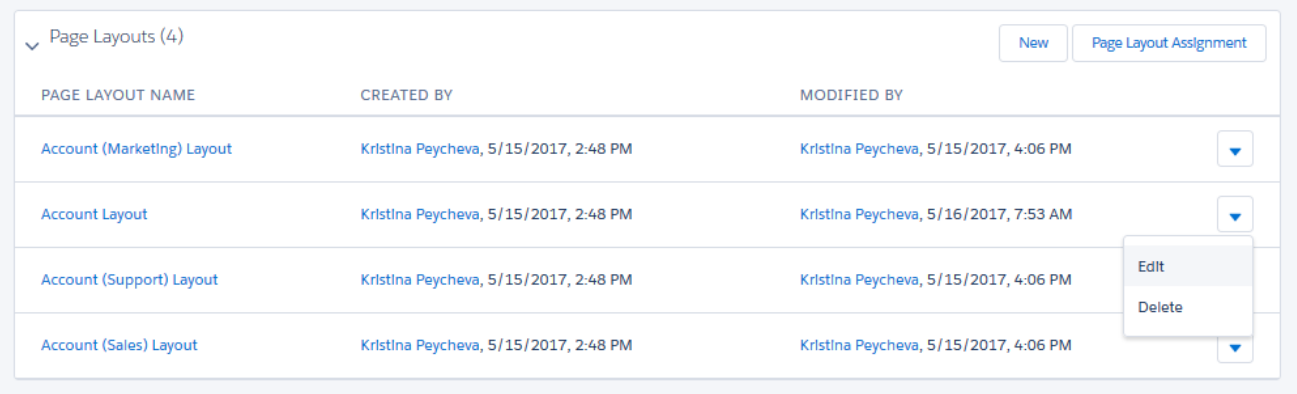
Replace *{Object API Name}* with the API name of your object. If your Object comes from a managed package make sure that you replace *{Object API Name}* with the full Object API name including the object's prefix and suffix.



Click **Save**.

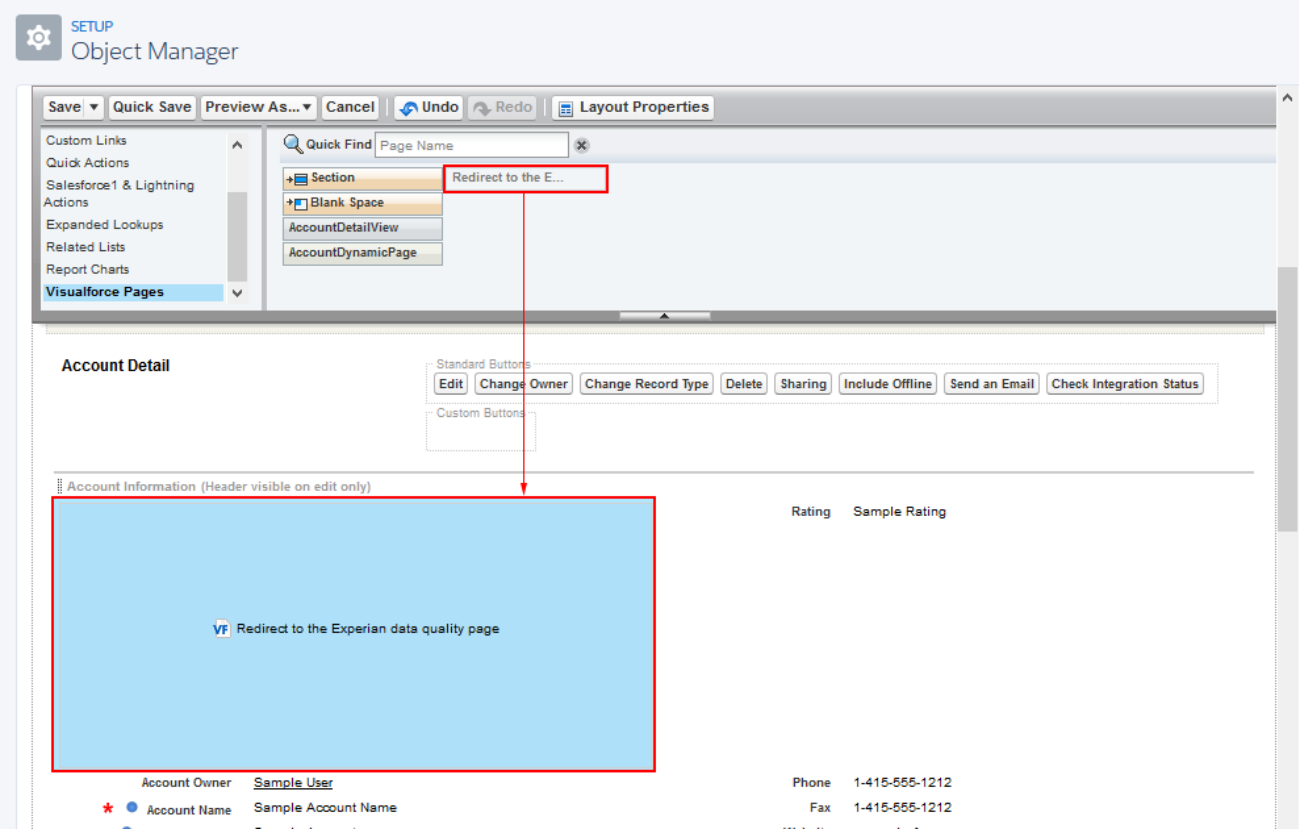
Add the "EDQRedirectToDataQualityPage" Visualforce Page to Your Object Layout

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



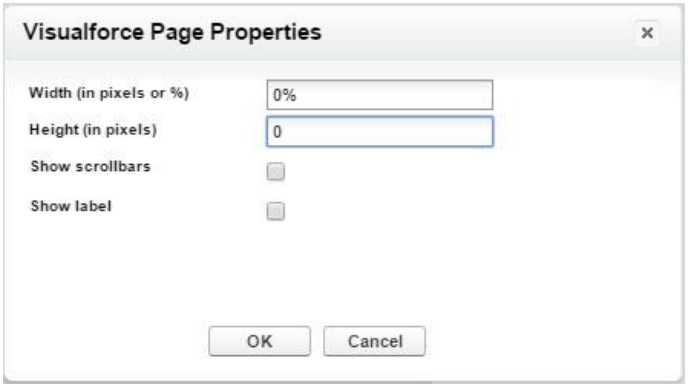
3. Select the **Visualforce Pages** item from the list on the left side of the **Account layout** table.

4. Drag the ***{Object Name}*RedirectToDataQualityPage** component somewhere on the page layout. Once it is placed, hover over it and click on the **Properties** icon which looks like a wrench (🔧) positioned in the upper right corner of the component.



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

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



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

NB! When using Interactive Address or Email / Phone Verification – Non-page Override Implementation Method in Lightning interface, for the object in which the verification service is installed, please configure

the default tab shown to be ‘Details’ when you open a record. More information on how to configure this can be found here.

Rapid Search Address or Email / Phone Verification – Enforced Usage – Non-page Override Implementation Method

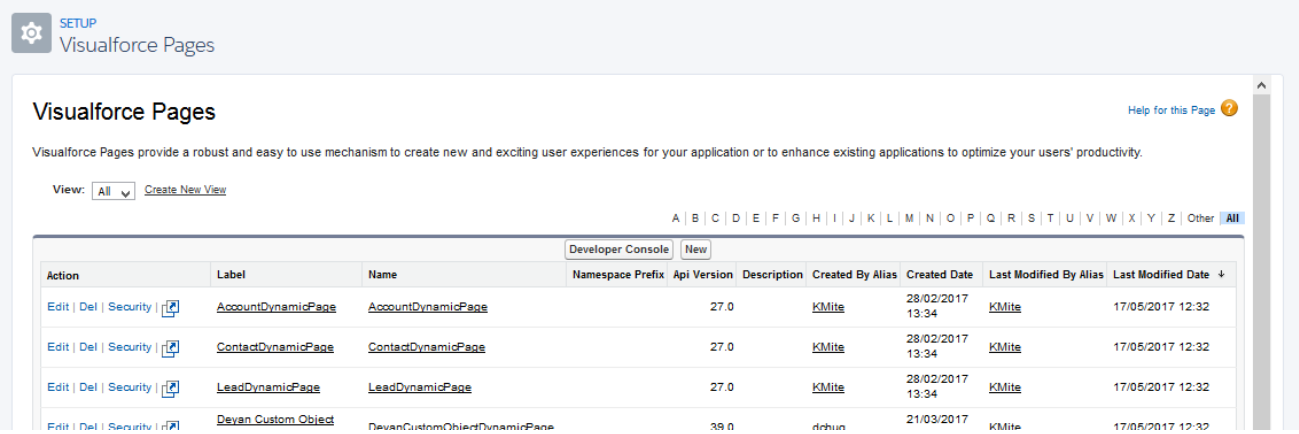
Note: You should only follow the steps described in this section if you are utilizing **Rapid Search** address or inline email / phone verification and you chose **NOT** to override the "New" and "Edit" buttons as described in the previous step.

Enforced usage enables Rapid Search address verification and / or email and phone verification services to be invoked automatically ensuring contact data verification services are utilized without relying on end user interaction. On save if the address, email or phone number does not contain a Verified status or has been edited, verification services will be automatically invoked.

To enable enforced usage when using Rapid Search address, email / phone verification (non-page override) follow the steps below

Create the Redirect Visualforce Page

1. Go to **Setup → Custom code → Visualforce Pages**. Click the **New** button at the top of the Visualforce page.



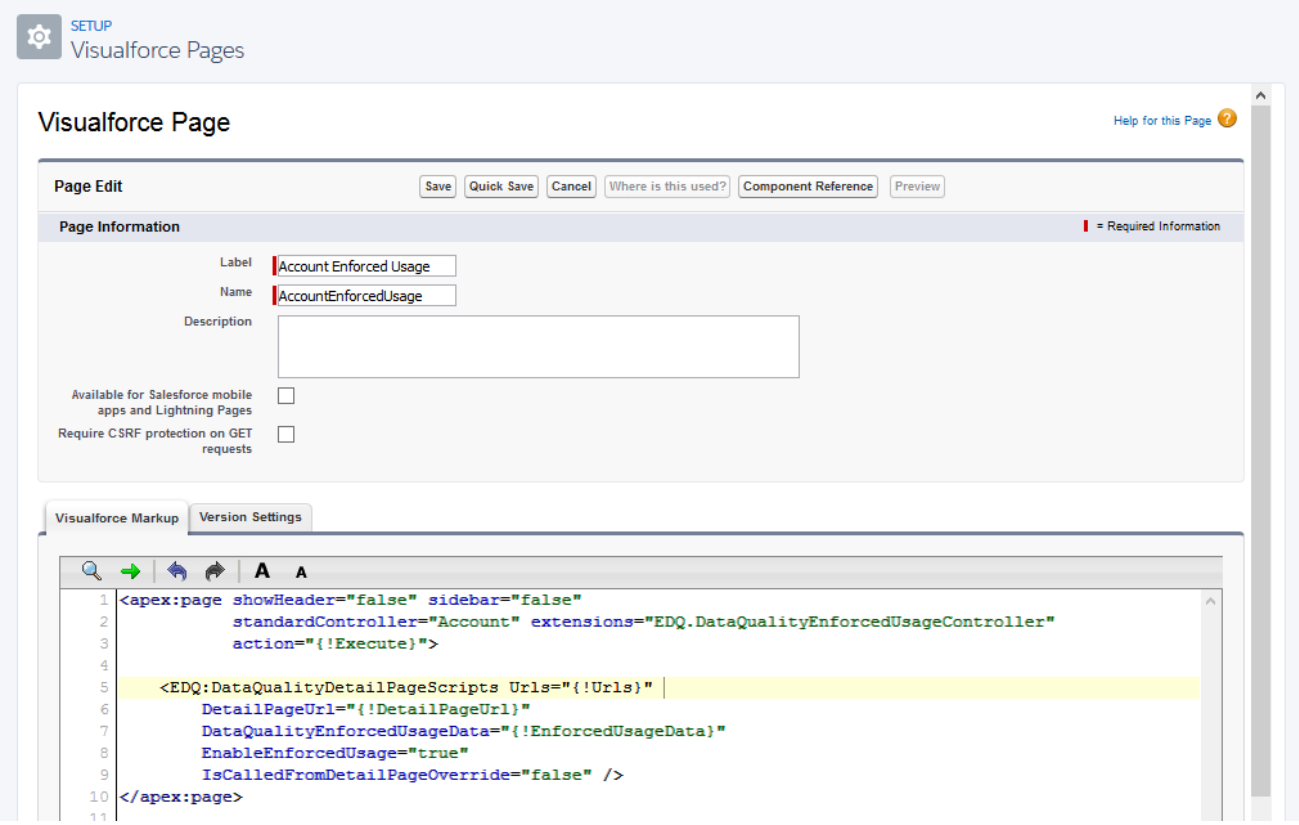
2. Enter the following values:

   Label: *{Object Name}* Enforced Usage
   Name: *{Object_Name}*EnforcedUsage

3. In the Visualforce Markup tab enter the code:

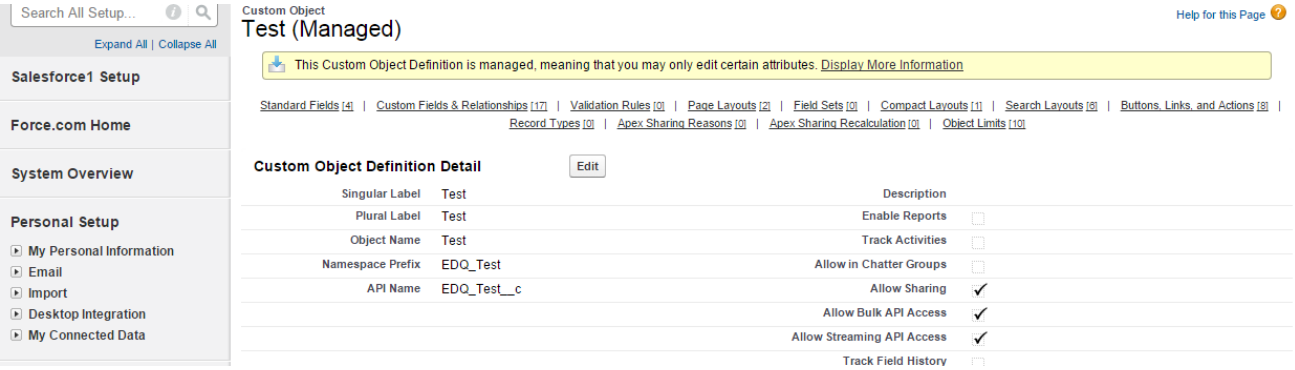
```
<apex:page showHeader="false" sidebar="false"
           standardController="{Object API Name}"
extensions="EDQ.DataQualityEnforcedUsageController"
           action="{!Execute}">

    <EDQ:DataQualityDetailPageScripts Urls="{!Urls}"
        DetailPageUrl="{!DetailPageUrl}"
        DataQualityEnforcedUsageData="{!EnforcedUsageData}"
        EnableEnforcedUsage="true"
        IsCalledFromDetailPageOverride="false" />
</apex:page>
```

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



Example:
If you would like to create the page for the standard object "Order" you need to replace {Object API Name} with "Order". If you would like to create the page for a custom object named "Test" which comes from a managed package named "EDQ" you need to replace the {Object API Name} with "EDQ__Test__c".

You may find the exact *{Object Name}* and *{Object API Name}* by going to **Setup → Objects and Fields → Object Manager**. Select your object to navigate to the Details section.

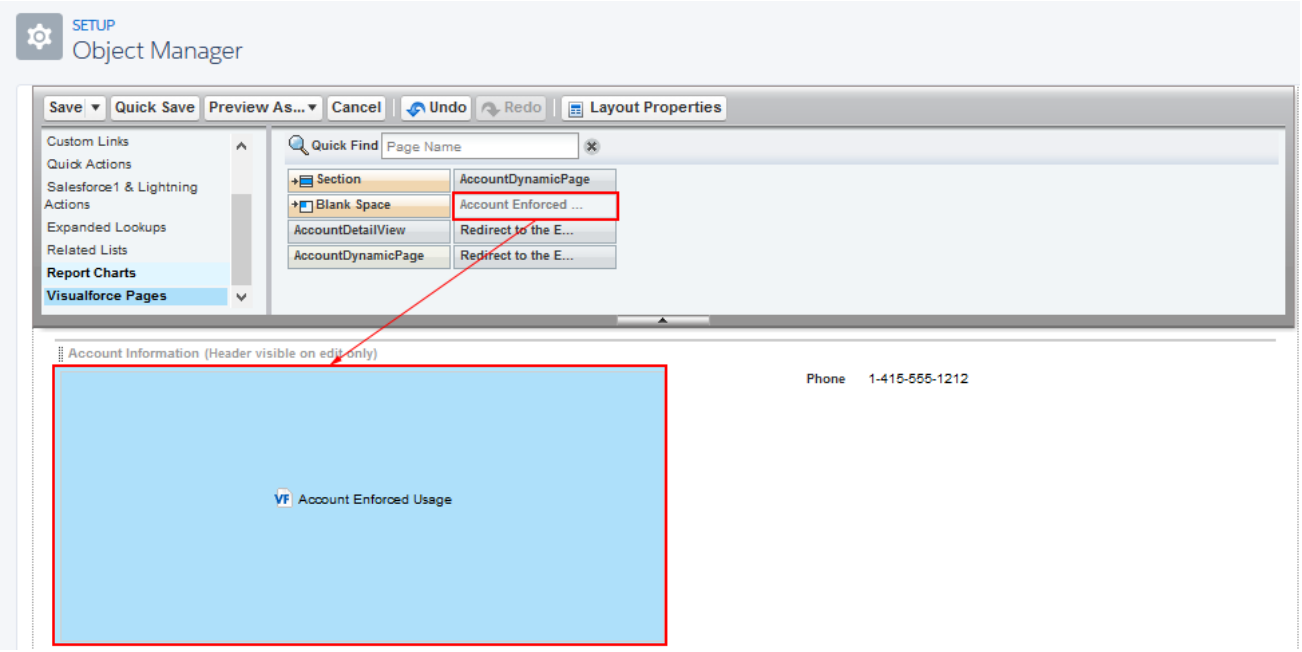


5. After you created your Visualforce page click **Save**.

Add the "{Object Name}EnforceUsage" Visualforce Page to Your Object Layout

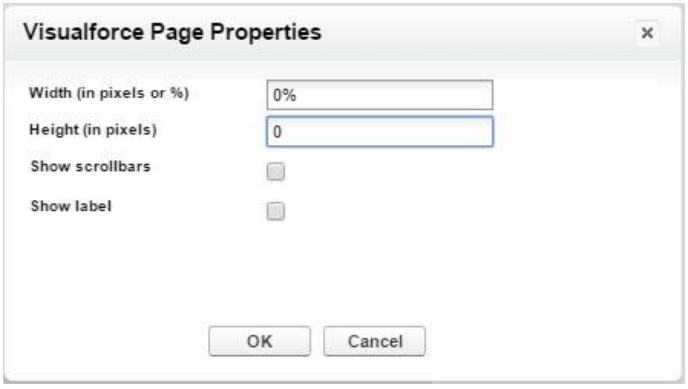
1. Go to **Objects and Fields → Object manager → {Object Name}** (e.g. Account).

2. Navigate to the **Page Layouts** section. Click on the arrow next to the desired page layout which you would like to edit and click the **Edit** link.
3. Select the **Edit** link next to your page layout.
4. Drag the ***{Object Name}*EnforceUsage** page somewhere on the page layout. Once it is placed, hover over it and click on the **Properties** icon which looks like a wrench (🔧) positioned in the upper right corner of the component.



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

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



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

NB! When using Rapid Search Address or Email / Phone Verification – Enforced Usage – Non-page Override Implementation Method in Lightning interface, for the object in which the verification service is installed, please configure the default tab shown to be 'Details' when you open a record. More information on how to configure this can be found here.

Global Intuitive Address Verification – Non-page Override Implementation Method

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

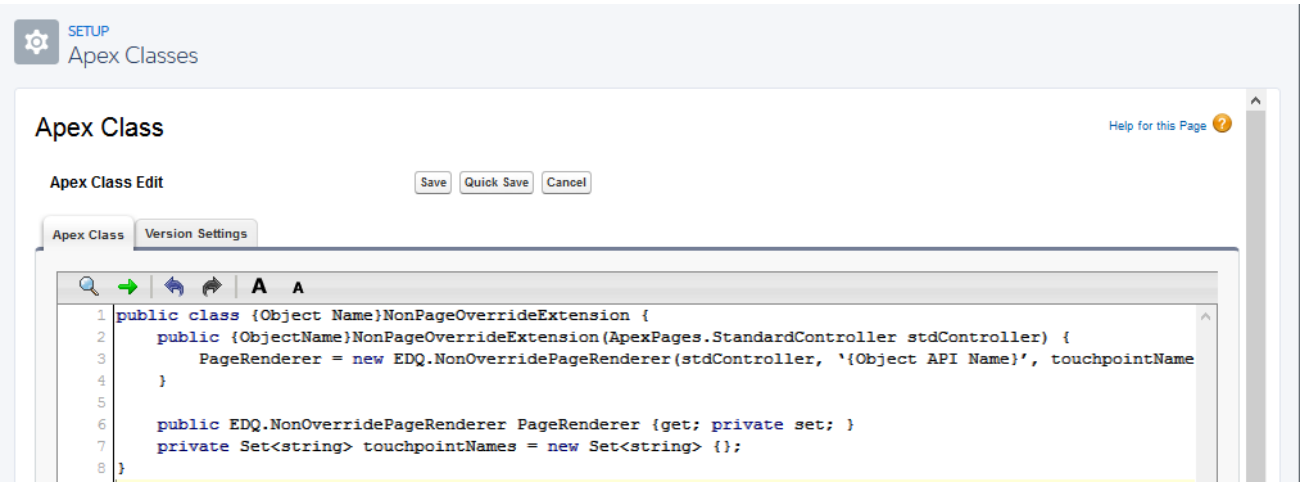
There are two non-page override workflows supported by the Experian Data Quality.

Utilize Global Intuitive Using an Action Button

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

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

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

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



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

3. Click the **Save** button.

4. Go to **Setup → Custom code → Visualforce Pages**. Click the **New** button at the top of the Visualforce page to create a new Visualforce page.
5. In the Visualforce Markup tab enter the code:

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

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

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

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

7. Click the **Save** button.
8. Go to **Setup → Objects and Fields → Object manager → {Object Name}** (e.g. Account).
9. Navigate to the **Buttons, Links, and Actions** section.
10. Click the **New Action** button.
11. Fill in the following information:

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

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

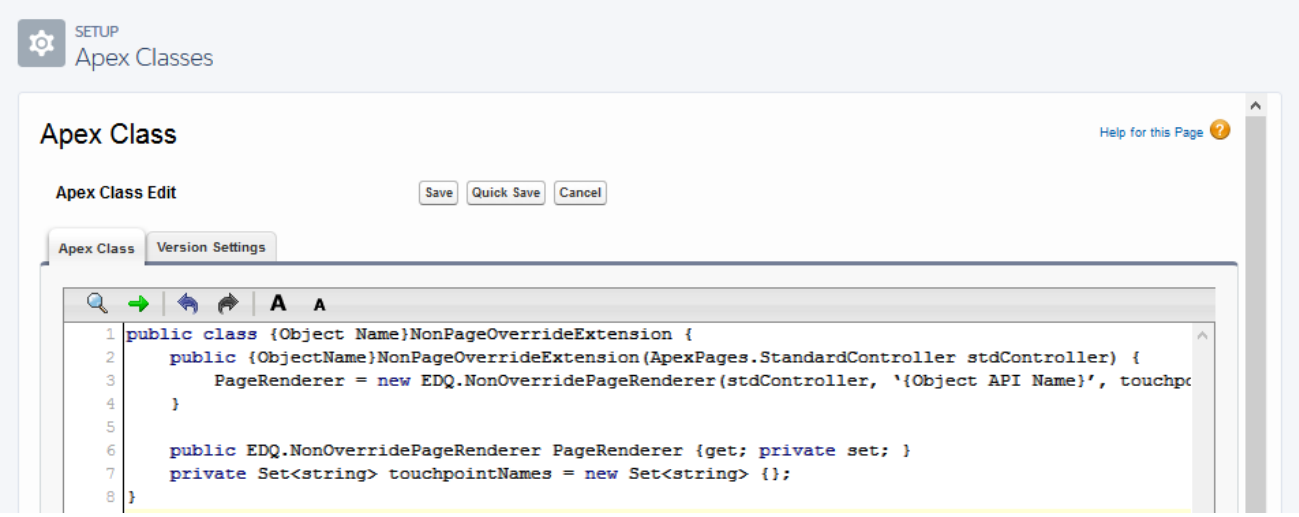
17. Click the **Save** button.

Address Verification with Global Intuitive – Using Custom Page Tab

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

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

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

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



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

3. Click the **Save** button.
4. Go to **Setup → Custom code → Visualforce Pages**. Click the **New** button at the top of the Visualforce page to create a new Visualforce page.
5. Enter the following values:

   Label: *{Object Name}* Global Intuitive
   Name: *{Object_Name}GlobalIntuitive*

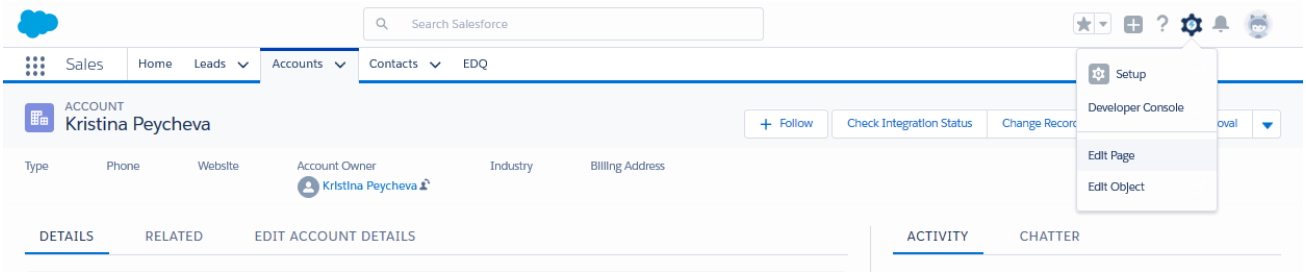
6. In the Visualforce Markup tab enter the code:

```
<apex:page standardController="{Object API Name}" title="Experian Data Quality"
tabStyle="{Object API Name}" extensions="{Object's controller extension name you
created on step 2}" applyHtmlTag="false" applyBodyTag="false" showHeader="false"
cache="false" showQuickActionVfHeader="false">
    <body id="lightningStyle">
        <apex:form id="experianForm" styleClass="edq-{!PageRenderer.SObjectName}
edqNonPageOverride">
            <apex:outputpanel id="edqNonPageOverride" rendered="{!OR(NOT
PageRenderer.IsValidationCompleted, NOT PageRenderer.IsSalesforce1)}">
                <apex:pagemessages id="messages" escape="false" />
                <apex:dynamicComponent componentValue="{!PageRenderer.PageBody}" />
                <edq:DataQualityNonPageOverride PageRenderer="{!PageRenderer}" />
            </apex:outputpanel>
            <apex:outputpanel id="edqMessageWrapper"
rendered="{!AND(PageRenderer.IsValidationCompleted, PageRenderer.IsSalesforce1)}"
styleClass="pbBody message-panel">
                <div class="{!IF(PageRenderer.IsCanceled, 'message message-cancel',
'message message-success')}">
                    {!PageRenderer.ConfirmationMessage}
                </div>
                <apex:commandbutton styleClass="edq-button left"
onclick="window.location.reload(true); return false;" value="Start a new validation"
/>
            </apex:outputpanel>
            <edq:DataQualityNonPageOverrideScripts pagerenderer="{!PageRenderer}" />
        </apex:form>
    </body>
</apex:page>
```

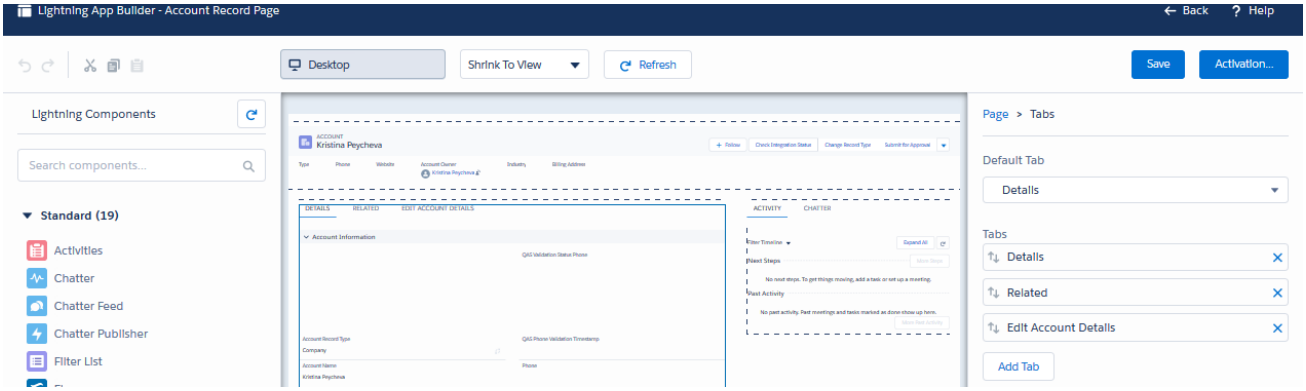
7. Replace *{Object API Name}* with the API name of your object (e.g Account). If your Object comes from a managed package make sure that you replace *{Object API Name}* with the full Object API name including the object's prefix and suffix.

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

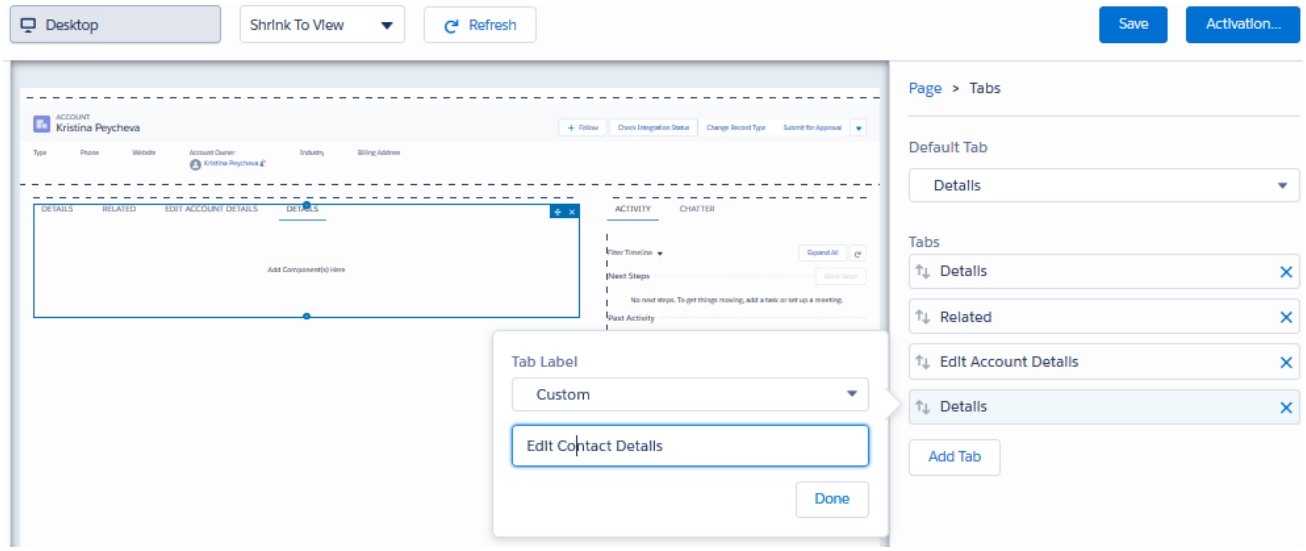
8. Click the **Save** button.
9. Navigate to the object for which you would like to utilize the Global Intuitive non-page override verification;
10. Open one of the existing records.
11. Navigate to **Settings** and click on **Edit Page**.



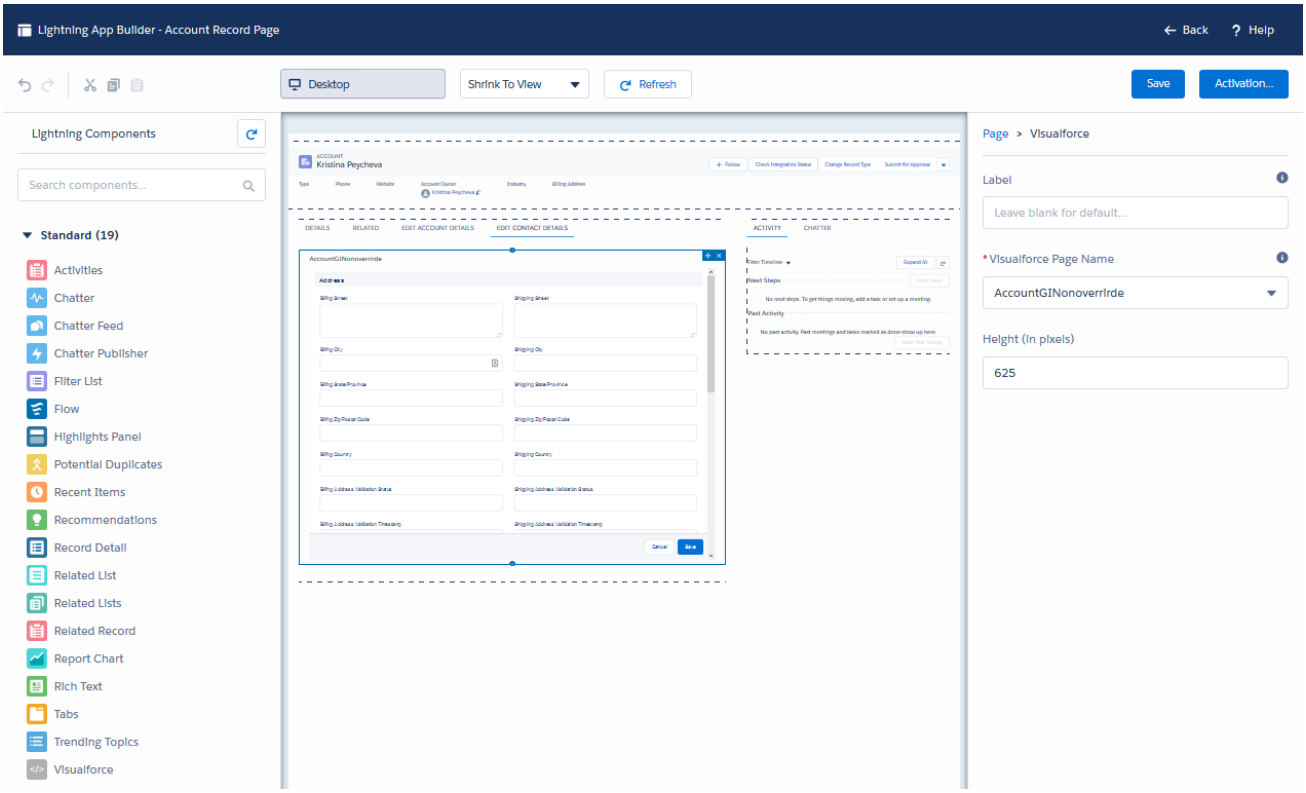
12. Select the **Tabs** section within the page editor;



13. Click the **Add Tab** button from the right-hand pane.
14. Select the newly created tab and set it to Custom.
15. Provide the new tab a meaningful name, for example Edit Contact details.



16. Click the **Done** button.
17. Select the tabs section and then select the newly created tab.
18. Click the **Add Component(s) here** link.
19. Select **Visualforce** from the left-hand pane.
20. Using the **Visualforce Page Name** dropdown on the right-hand pane, select the page you've created in step 9 and increase its height.



21. Click the **Save** button.
22. Then click on **Activation** button and select **Assign as Org Default** button. This will activate your newly created tab throughout your organization environment.

Adding Custom Triggers

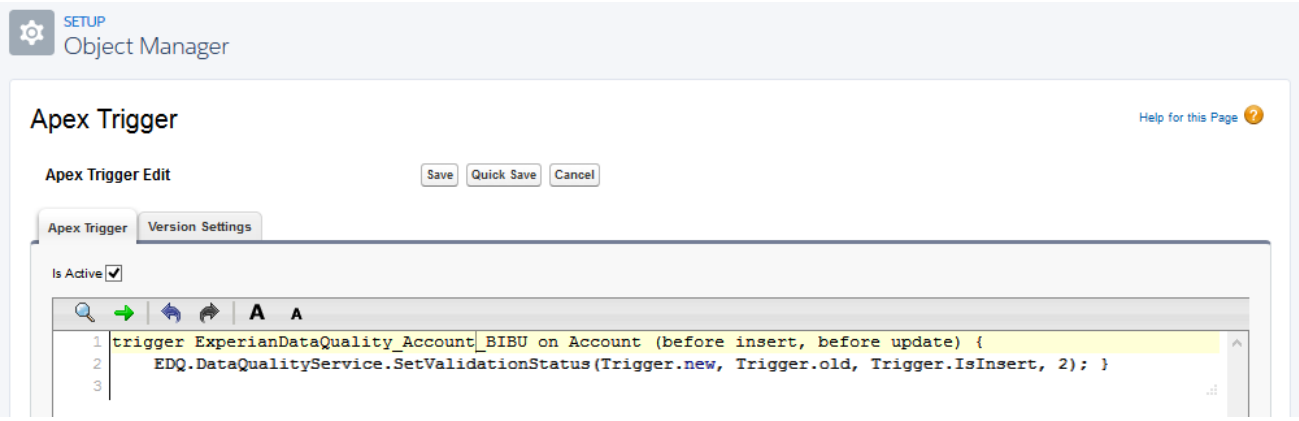
Add a Custom Trigger to Maintain Validation Status and Validation Timestamp

This trigger allows EDQ to maintain the custom fields you have created in **Adding EDQ Custom Fields to Your Objects** step. The custom trigger is responsible for maintaining the Validation status and Validation timestamp of the addresses, emails and phone numbers within Salesforce.

1. Go to **Setup** → **Objects and Fields** → **Object Manager** → ***{Object name}*** (e.g. Account).
2. Navigate to to the **Triggers** section.
3. Click **New** to create a new trigger.
4. Copy and paste the following code:

```
trigger ExperianDataQuality_{Object Name}_BIBU on {Object API Name} (before insert,
before update) {
    EDQ.DataQualityService.SetValidationStatus(Trigger.new, Trigger.old,
Trigger.IsInsert, 2); }
```

5. Replace *{Object Name}* with the name of the Object and *{Object API Name}* with the API Name of the object.



6. Click **Save** to save the trigger.

Add a Custom Trigger Which Will Enable Web-To-Object Functionality

Note: This should only be done for Objects for which you would like to use **Web-To-Object** functionality.

1. This trigger is required to utilize **Web-To-Object** verification which validates addresses, emails and phone numbers for records inserted or updated by external sources. Go to **Setup** → **Objects and Fields** → **Object Manager** → ***{Object name}*** (e.g. Account) then navigate to the **Triggers** section.

2. Click **New** to create a new trigger.
3. Copy and paste the following code:

```
trigger ExperianDataQuality_{Object Name}_AIAU on {Object API Name} (after insert, after update) {
  EDQ.DataQualityService.ExecuteWebToObject(Trigger.New, 2, Trigger.IsUpdate); }
```

4. Replace *{Object Name}* with the name of the Object and *{Object API Name}* with the API Name of the object.
5. Click **Save** to save the trigger.

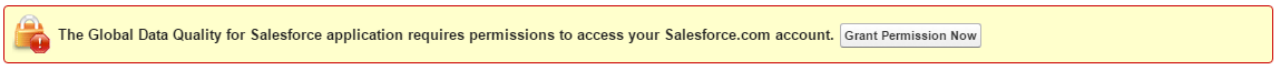
EDQ ADMINISTRATION SETTINGS

The following steps outline the process of configuring the Address, Email and Phone settings from the EDQ Administration are. Turn to the relevant pages for step by step instructions.

Step	Details
1. Address Verification settings	Page 39
2. Email Verification Settings	Page 51
3. Phone Verification Settings	Page 57

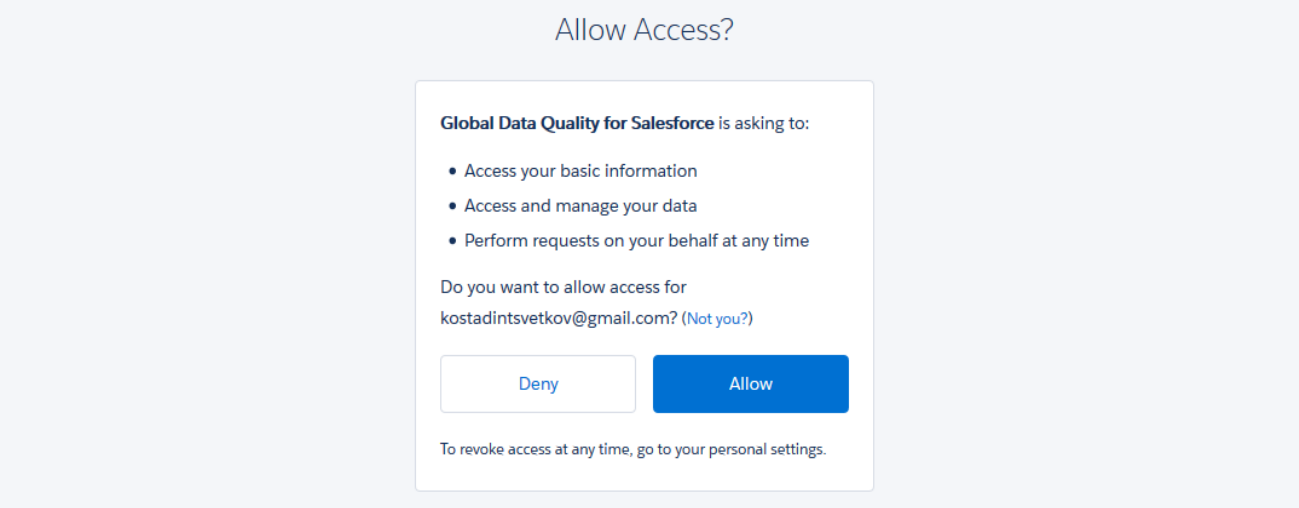
Note: Your Experian Data Quality package comes with pre-configured settings for Address, Email and Phone Verification for the **Account**, **Contact**, **Lead** and **Contract** standard Objects.

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



Note: Due to a bug in Salesforce introduced in the Summer '17 release, the EDQ tab opens in a small iframe when opened in Lighting Experience. Refer to the Troubleshooting section of this guide for a workaround of this issue until Salesforce release a fix.

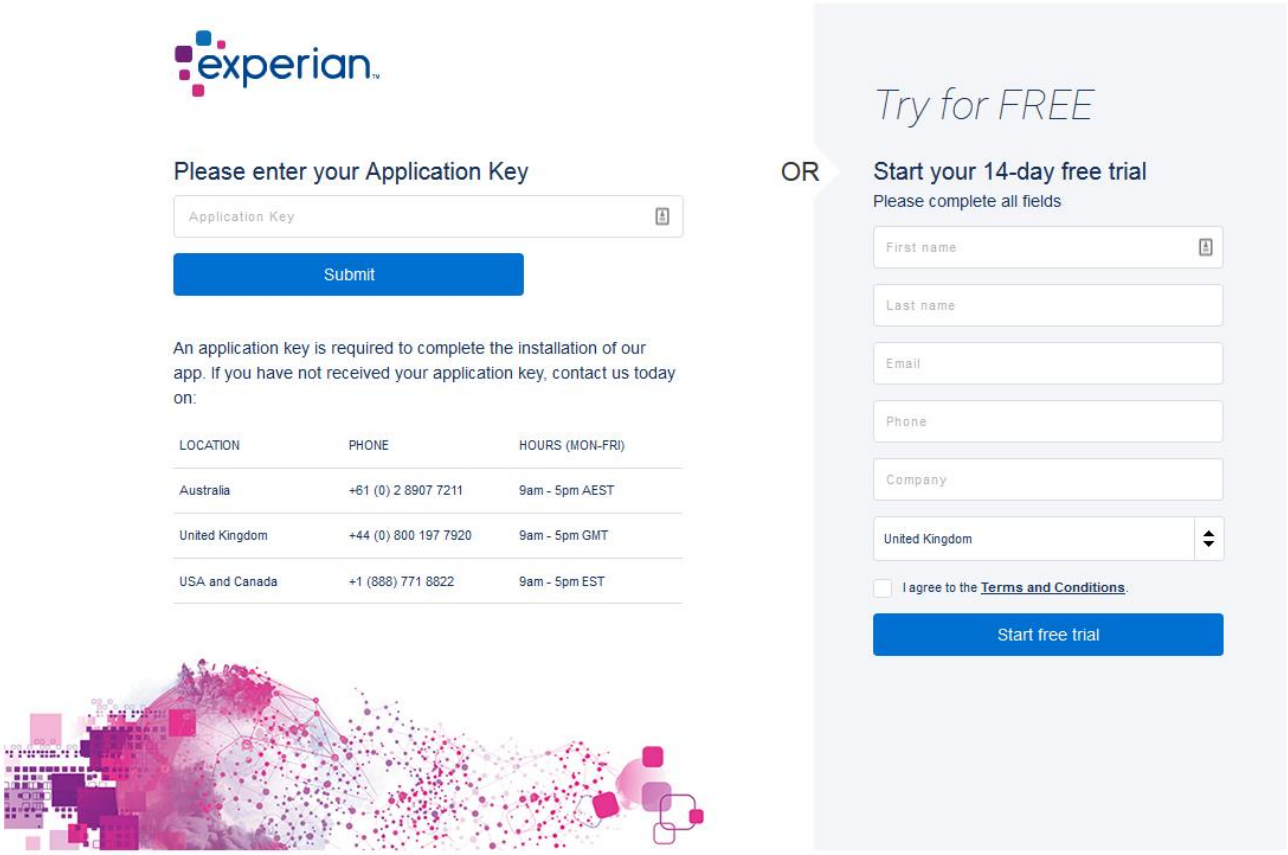
2. Click on the **Grant Permission Now** button. A pop up page will open describing the permission the application is requesting.



3. Click **Allow**.

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

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



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

The Application Key is provided by your Experian representative.

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

Signing up for a FREE Trial

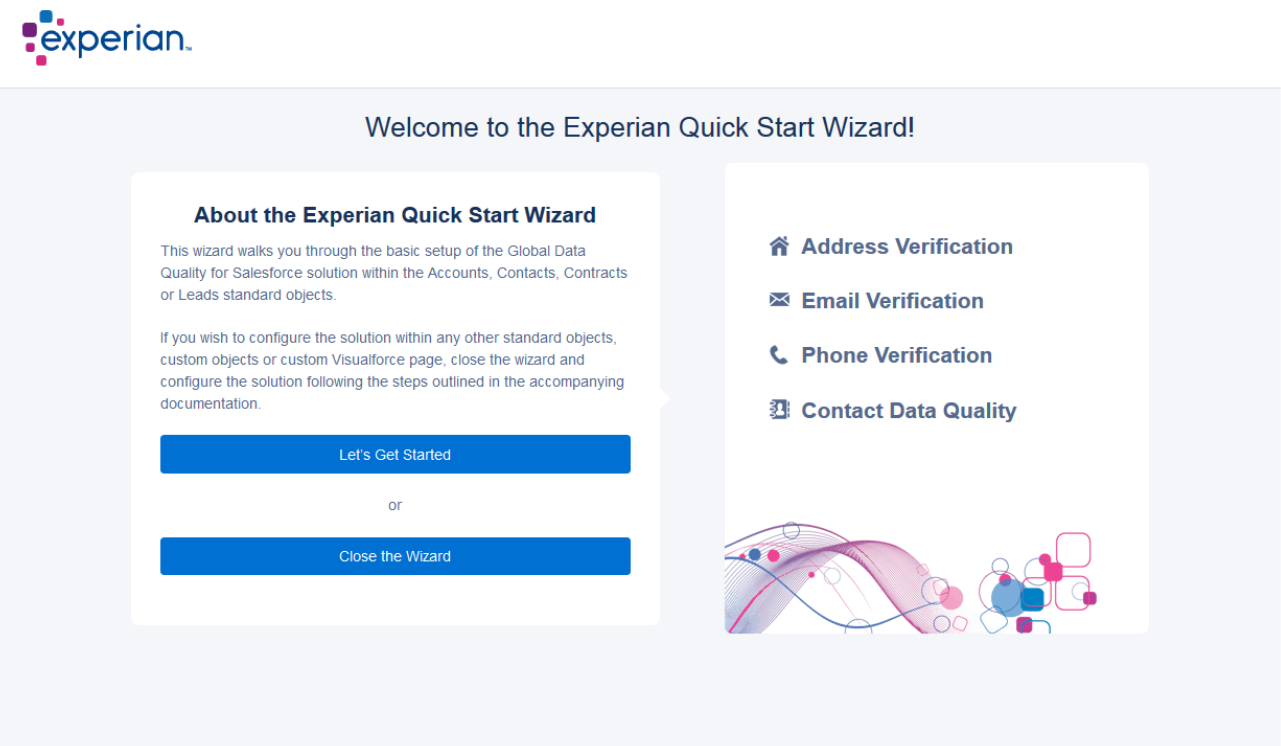
If you would like to try the app for FREE simply complete the free trial sign up form to start your free trial.

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

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

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

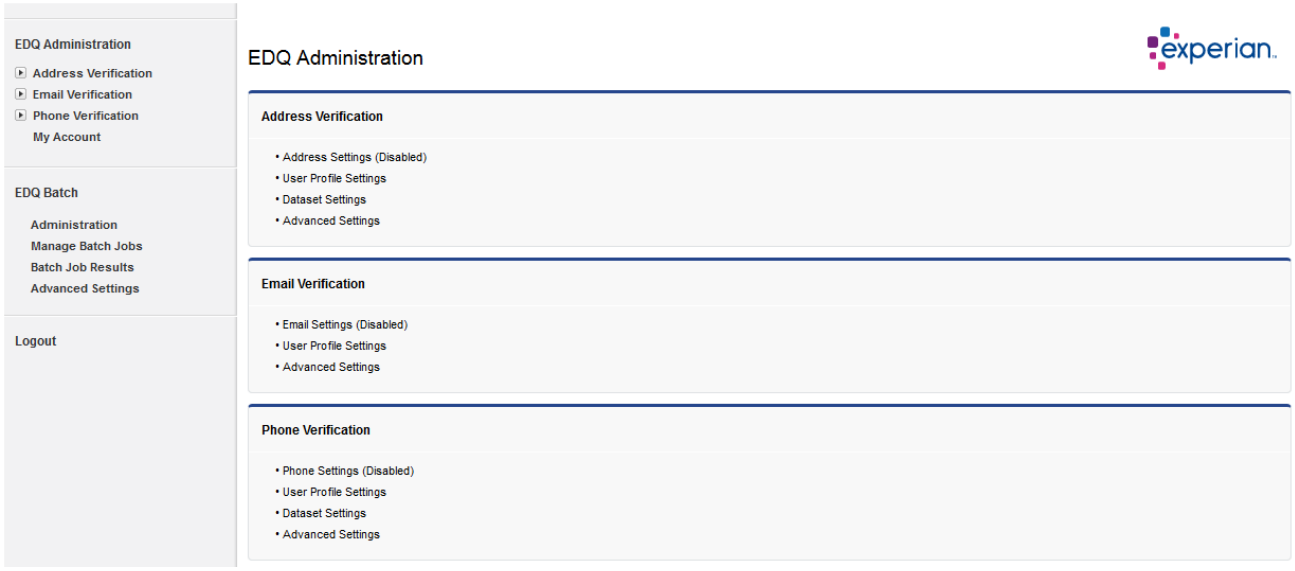
Start the wizard by clicking on the **Let's Get Started** button.



This document provides an overview of the steps required for manually installing and configuring the solution. Customers who wish to utilise EDQ service within the **Accounts, Contacts, Contracts** or **Leads** standard objects can use **The Experian Quick Start Wizard** and accompanying **Quick Start Guide** to quickly configure the solution.

1. Click the **Close the Wizard** button to proceed with manually installing and configuring the solution.

After you close the wizard you will be redirected to the EDQ Administration area. From here you can configure Address, Email and Phone Settings and also manage Batch mode functionality.


EDQ Administration
Address Verification
Email Verification
Phone Verification
My Account
EDQ Batch
Administration
Manage Batch Jobs
Batch Job Results
Advanced Settings
Logout
EDQ Administration
experian.
Address Verification
• Address Settings (Disabled)
• User Profile Settings
• Dataset Settings
• Advanced Settings
Email Verification
• Email Settings (Disabled)
• User Profile Settings
• Advanced Settings
Phone Verification
• Phone Settings (Disabled)
• User Profile Settings
• Dataset Settings
• Advanced Settings

Enable Address Verification

Configure Address Verification Settings

Address settings are configured within the Address Verification area of the EDQ Administration tab. The following steps outline the process for configuring Address verification.

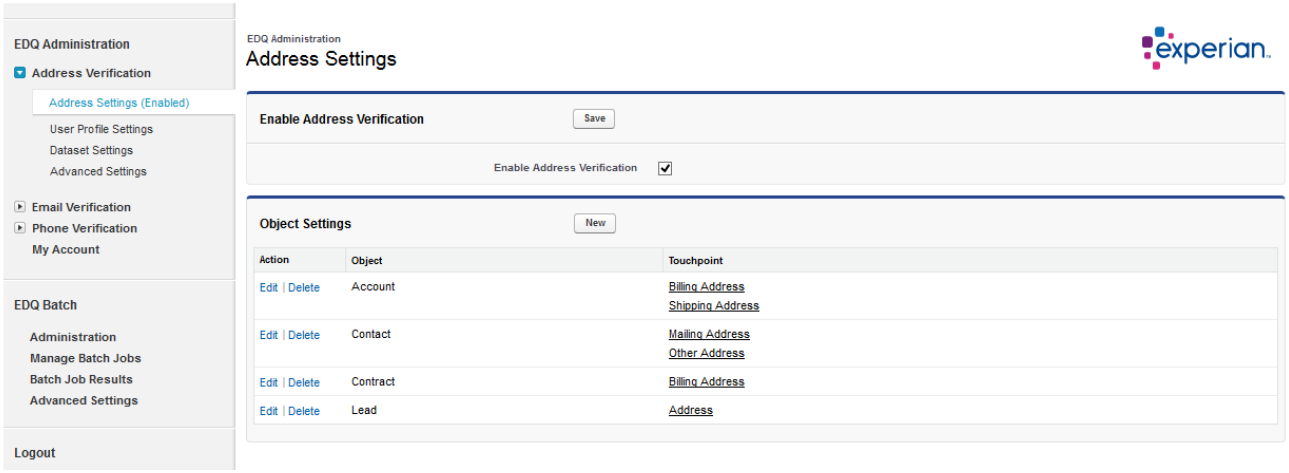
Step	Details
1. Enable Address Verification for an Object	Page 39
2. Touchpoint Creation	Page 42

Enable Address Verification for an Object

1. Click the **Address Settings ('Enabled / Disabled')**.

   The Address Settings page will open. It contains two sections: **Enable Address Verification** and **Object Settings**.

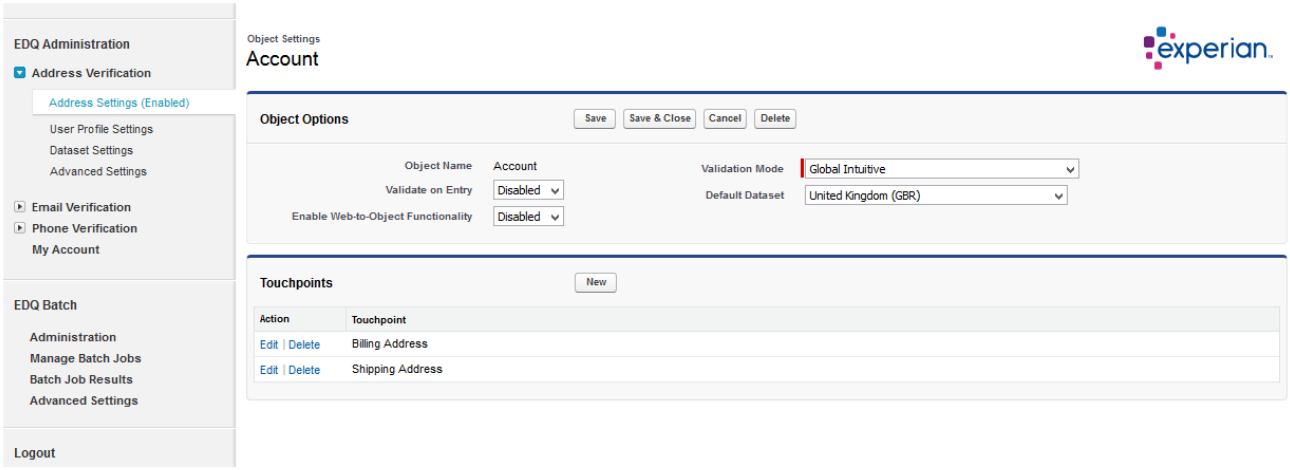
2. Check the **Enable Address Verification** checkbox. This is a master switch which turns on / off Address verification for all Objects in your Salesforce account.



3. Click **Save**.

Configure Object Settings

1. In the Object Settings section click on the **Edit** action link next to the Object you would like to configure or click the **New** button to create and configure a new Object that is not present in the Object settings table by default.
2. You will be redirected to the **Object Settings** page.



3. Configure the settings as required:

Object Name – Choose the Object you would like to configure (e.g. Account) from the drop-down list (required if you are configuring settings for a new Object).

Validate on Entry – Enables / Disables front-end Address verification for the selected Object. Address validation is controlled on per Touchpoint basis therefore you should enable Address validation for each Touchpoint where Address validation is required. Recommended mode: Enabled.

Enable Web-to-Object Functionality – This option allows you to Enable / Disable Address verification for records created by Salesforce's **Web-to-Lead** functionality or other records created from other external sources. Validation is performed automatically when the record is created and does not require user interaction. We advise you to make sure all mandatory fields in the Object are populated as a part of your **Web-to-Lead** or external entry process to ensure the best results. Recommended mode: **Enable** for the **Leads** object and **Disable** for the other objects.

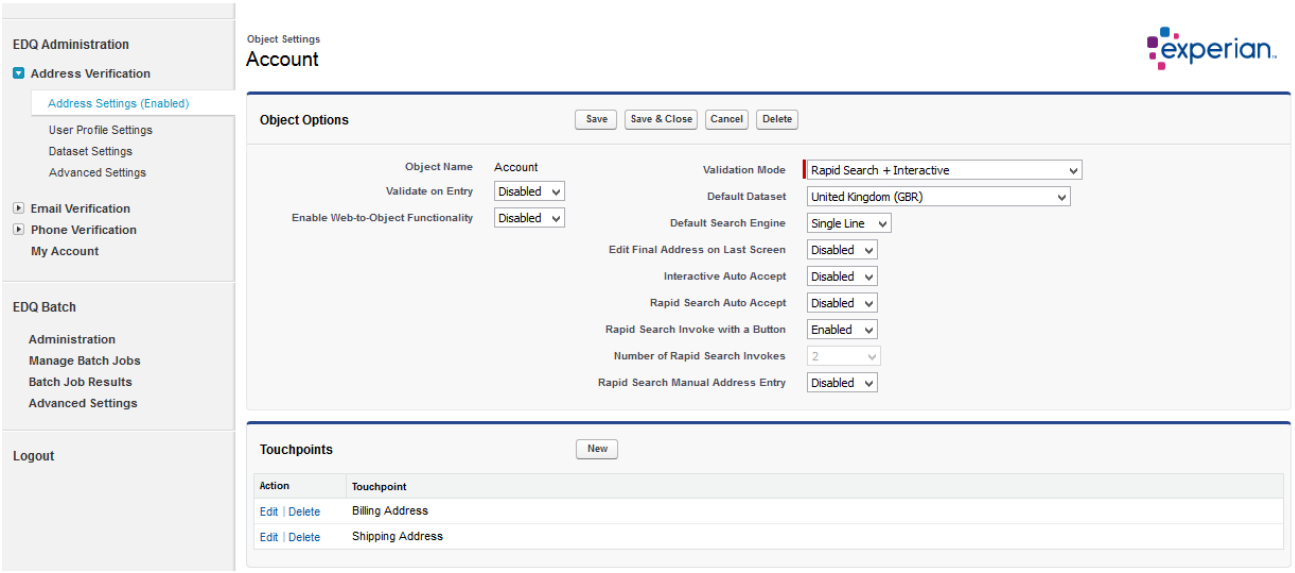
Validation Mode – This dropdown contains a picklist of available validation modes which can be used to validate an address based on your preferred workflow, we advise using the default settings for validation mode as these are aligned with general industry preferences:

> ***Rapid Search***: The Rapid Search Address Verification workflow is used for both new and edited records. Rapid Search mode allows you to validate an address at the point of entry quickly and accurately, reducing keystrokes and time.
>
> ***Interactive***: The Interactive Address Verification workflow is used for both new and edited records. EDQ service is invoked on Save, when a new record is created or edited, the user is directed to the EDQ Interactive Verification screen to verify an address.
>
> ***Passive***: Enables silent validation, EDQ service is invoked on Save however the user will not be prompted for verification or interaction as the process is silent. If an address is verified by EDQ or it matched to the building level, but the required sub-building information could not be validated the address is considered "*Verified*", in all other cases the address will be returned as "*Could not be Verified*".
>
> ***Global Intuitive***: The Global Intuitive Address Validation allows you to capture validated address in real time through a predictive engine.

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

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

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



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

After selecting an option from the validation mode dropdown several options relevant to the selected - will be displayed on the page:

Default Dataset (displays for ***Rapid Search*** and ***Global Intuitive***) – The setting allows you to choose a default Dataset for the Rapid Search and Global Intuitive Address Verification popup.

Default Search Engine (displays for ***Rapid Search***) – The setting allows you to choose a default search engine for the Rapid Search Address Verification popup. The options are: *"Singleline", "Typedown", "Verification"* and *"Intuitive"*. The solution provides a number of distinct search engines that can be used to facilitate the address capture process. For more information on the specific search engines please refer to the user guide

Single Line - The Single Line engine is designed so that the user can enter minimal information in order to produce a list of matching and close-matching addresses from which they can select the required one.

Typedown - The Typedown engine is designed to allow the user to drill down through a series of picklists to select the required address. When a user enters text into the search field, the picklist is updated a short period after the user stops typing. The more characters that the user enters, the more refinement is shown in the picklist. This 'dynamic refinement' enables searches to be initiated within the EDQ pop up without the user having to hit 'Enter' or click the 'Search' button as is the case with Single Line.

Intuitive - The Intuitive Search engine is designed so that the user can enter addresses quickly and easily, using a real-time picklist. The Intuitive Search scenario does not require further refinement after the address has been entered, as it starts with the most specific address elements. As the user types,

the picklist automatically updates with suggestions. The Intuitive Search mode only supports picklists returned in a flattened mode and is available for the following datasets only (AUS, AUG, NZL, NZG, and FRI).

Verification - The Verification engine is designed so that only minimal interaction, or none at all, is required from the user. The user enters their whole address in the same way that it would be written on an envelope, and the entire address is submitted to the engine. The engine returns a verification level which corresponds to the degree of confidence in the returned (and reformatted) match. For addresses that could not be matched with confidence, further interaction may be required.

Edit Final Address on Last Screen (displays for ***Rapid Search*** *and* ***Interactive****, plus combinations including* ***Rapid Search*** *or* ***Interactive***) – Set this option to Enabled if you would like users to be able to edit the verified address on the final screen of the address verification user interface. Editing the final address will return a Validation Status of "*User Preferred*".

Interactive Auto Accept (displays for ***Interactive***) – This setting determines whether addresses validated by EDQ are auto accepted without any intervention from the user. If you choose to enable this option addresses which are returned as "*Verified*" or as "*Could not be verified*" will automatically be accepted and pasted back to the Salesforce page. Recommended mode: **Disable**.

Rapid Search Auto Accept (displays for ***Rapid Search)*** – This setting determines whether verified addresses are automatically accepted without any intervention from the user. If this setting is set to Enabled, verified addresses will be automatically pasted back to the Salesforce page. Recommended mode: **Disable**.

Rapid Search Invoke with a Button (displays for ***Rapid Search***) – Rapid Search can be invoked in one of two ways, this setting determines how Rapid Search is invoked. If you set this option to Enabled, the Rapid Search popup will be invoked with a button, in this scenario a Validate button is positioned alongside the address fields, when clicked Rapid Search will be invoked. If you set this option to Disabled, there is no Validate button, instead Rapid Search will be invoked as soon as the user clicks into or tabs into one of the address fields.

Number of Rapid Search Invokes (displays for ***Rapid Search***) – Determines the number of times the Rapid Search pop up can be invoked when Invoke Search Engine with a Button is set to 'Disabled'. For example, setting this to 3 allows users to invoke, close and re-invoke the Rapid Search pop up a maximum three times within a single record creation or edit workflow, on the fourth attempt the pop up will not invoke. This option is only relevant if you have set **Invoke Search Engine with a Button** to Disabled.

Rapid Search Manual Address Entry (displays for ***Rapid Search***) – This setting enables users to manually enter an address within the Rapid Search pop up. If you set this option to **Enabled** a Enter Address Manually link is available on the bottom right of the Rapid Search pop up, when clicked users are able to manually enter an address. Manually entering an address will return a Validation Status of *"Manually Entered"*.

4. Click **Save** to maintain your settings.

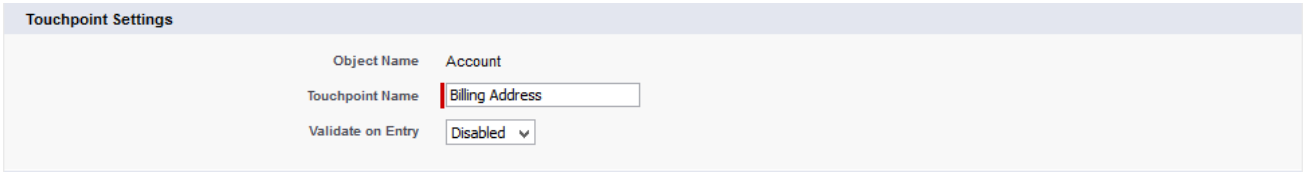
Touchpoint Creation

The next step after you have configured your Object settings is to create the Touchpoints. Touchpoints allow users to setup a point of reference between Salesforce and the EDQ service. Users define input mappings (the

address fields which contain the data to be validated) and output mappings (where the solution returns verified address data)

1. Select the **Edit** action link if you want to configure existing Touchpoint settings or click the **New** button to create a new Touchpoint. The **Touchpoint Settings** page opens.

Note: Note that the mandatory fields are marked with a **red line**.

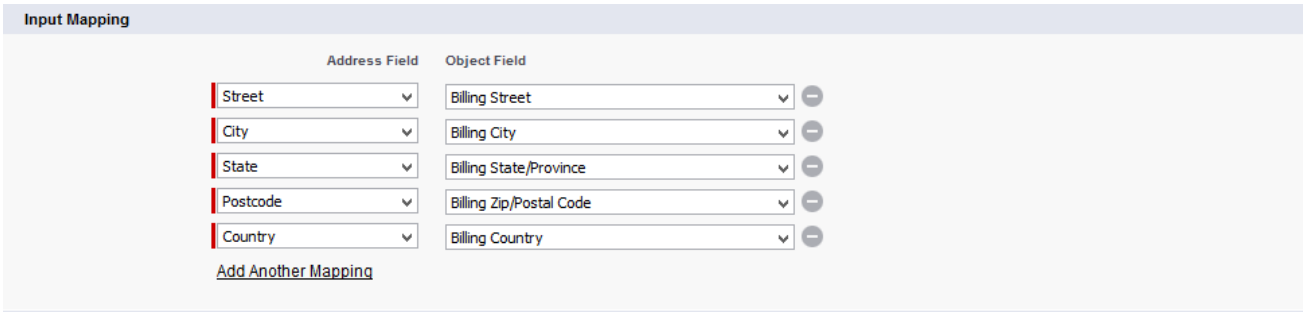


Touchpoint name: Type a unique name for your Touchpoint (e.g. Billing Address)
Validate on Entry: Select **Enabled** from the dropdown

Input Mapping

Input Mapping allows data already entered into Salesforce to be verified or used as the starting point for an Address Search. Mapping the fields of your Salesforce form to EDQ Address Fields enables the solution to find the best match against your existing address data.

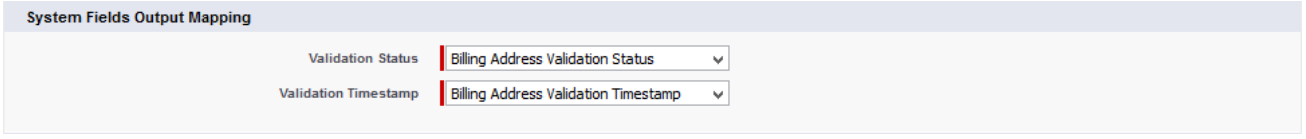
Use the Address Field picklist on the left side to select an EDQ address field and map it to the corresponding Object field from the picklist on the right side. You may use the **Add Another Mapping** link to create a new mapping if needed.



Note: Country and **Street** or **City** are mandatory fields for Input Mapping.

System Fields Output Mapping

In this section, you will be prompted to map the **Validation Status** and the **Validation Timestamp** fields. The Validation Status filed is a Text field which stores the current validation status. The Validation Timestamp field is a Date / Time field which stores the timestamp of the last validation attempt by Experian Data Quality.



Note: Validation Status field is mandatory for **Interactive** search and for **Web-to-Lead**.

Output Mapping

Output Mappings control the way the solution returns the final address results into your Salesforce fields.

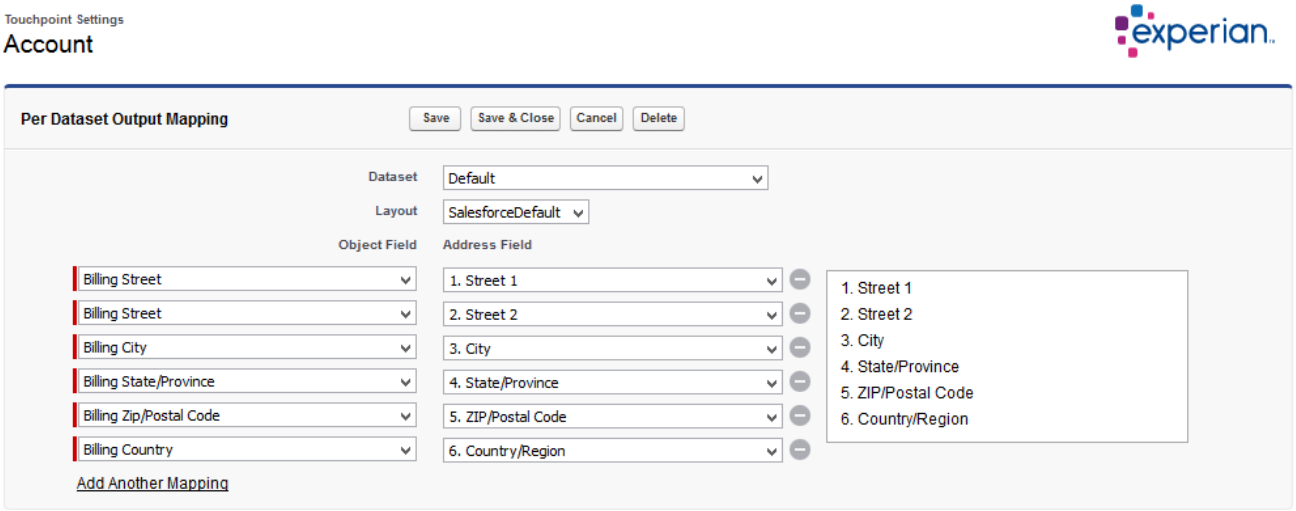
Select the **Edit** action link if you want to configure the output mapping for an existing Dataset or click the **New** button to create new dataset output mapping. You will be redirected to the **Per Dataset Output Mapping** page.

From the Dataset dropdown, you can leave Default or choose a preferred Dataset.

Default Dataset – The Default layout and associated Output mappings will be used for all datasets, if an individual dataset output mapping (Preferred dataset) is created, this will overwrite the default output mapping for that specific country

Note: If you would like to utilize the **Global Intuitive** search engine, you need to create an output mapping for the **Default Global Intuitive** dataset.

1. **Default Dataset** – If you choose the Default dataset the Layout field is automatically populated with the default layout settings.
2. The structure of the Layout is listed on the right.
3. Use the Address Field picklist to select the Layout line and the corresponding Object Field picklist to select the Salesforce field the Layout line should be mapped too.
4. **Add Another Mapping** – You may use this link to create a new mapping if needed.



Save your changes by clicking the **Save & Close** button.

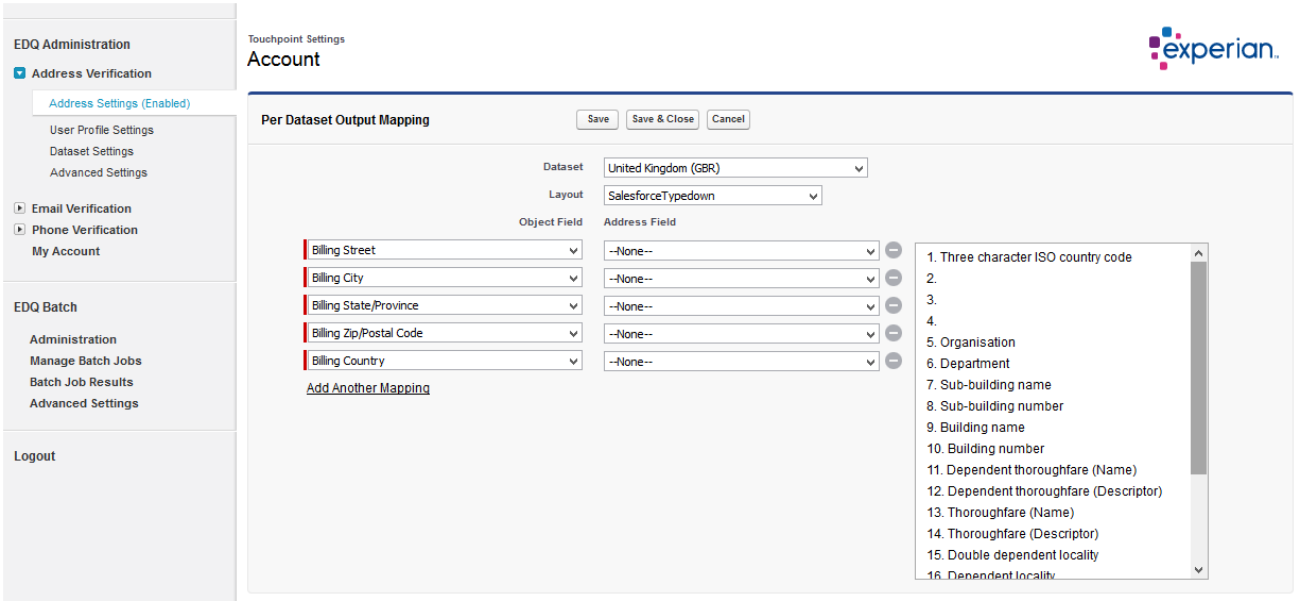
Preferred Dataset

If you would like to create a specific output mapping for a particular Dataset you can override the Default output mapping.

1. Choose your preferred Dataset from the dropdown (e.g. United Kingdom).
2. Select your **Layout** from the dropdown (e.g. Salesforce Typedown).
3. The structure of the Layout is listed on the right.
4. Use the Address Field picklist to select the Layout line and the corresponding Object Field picklist to select the Salesforce field the Layout line should be mapped too.

5. **Add Another Mapping** – You may use this link to create a new mapping if needed.

Note: You will have to create a mapping for at least one field.



6. Save your changes by clicking the **Save & Close** button and then **Save** on the **Touchpoint Settings** page.

Note: Follow the same steps to enable Address Validation for any other custom or standard Object (Contact, Contract, Lead etc.)

Additional Options

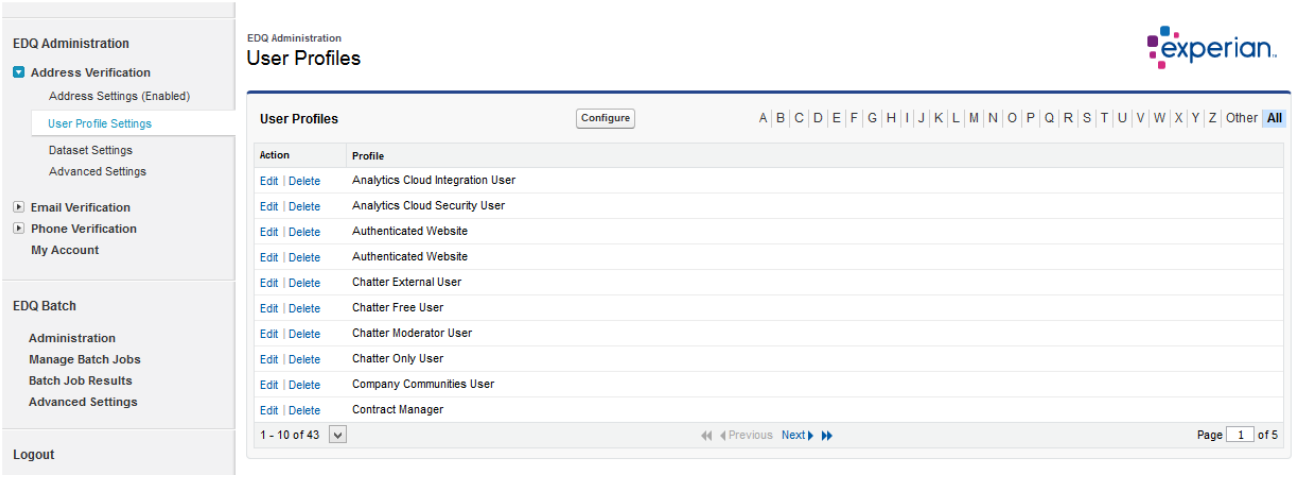
In the left-side menu of the EDQ Administration pane, under Address Verification you can also see the User Profile Settings, the Dataset Settings and the Advanced Settings links.

User Profile Settings

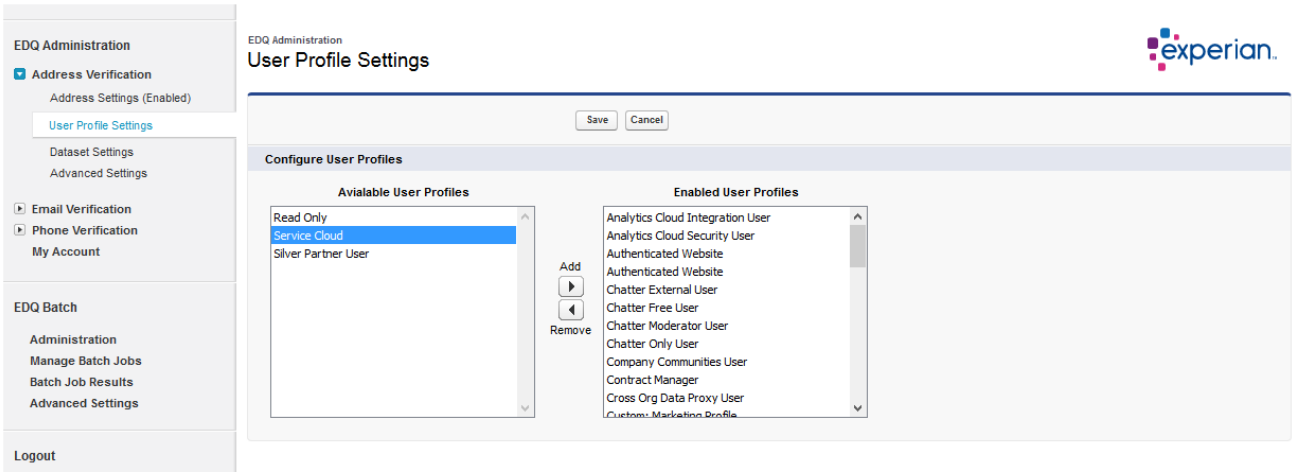
This section allows you to specify which user profiles have access to address verification functionality and allows you to configure certain settings on a per user profile basis.

To specify which user profiles, have access to address verification functionality follow the steps below:

1. Select the **User Profile Settings** link. The User Profiles page opens displaying a list of enabled User Profiles.



2. Click the **Configure** button to open the **Configure User Profiles** page.
3. From the list on the left select the User Profiles you would like to enable Address Verification for (e.g. System Administrator).
4. Click on the **Add** button to enable Address Verification for the selected User Profiles.

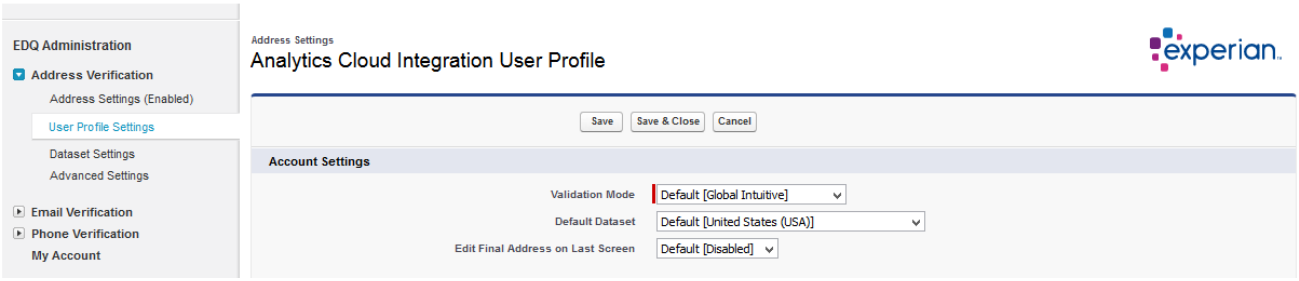


5. Click **Save**.

To configure Address Verification settings on a per User Profile basis follow the steps below:

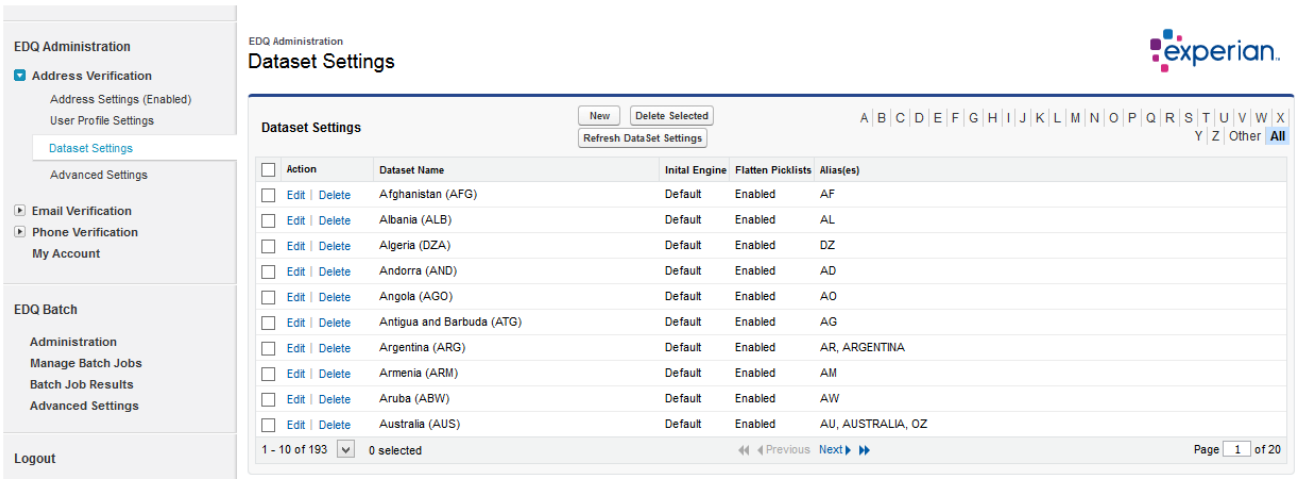
1. Click on the **User Profile Settings** link. The User Profiles page will open displaying the enabled User Profiles in a table.
2. Click on the **Edit** action link next to the required User Profile from the table.
3. The Profile page will open. From this page you can select specific settings on per User Profile basis for all Objects for which address verification Touchpoints were created.

You will notice that initially all settings are set to **Default.** If you leave the Default value for a setting, the actual setting value will be taken from the value chosen in the Object Settings. The current default value is shown in parentheses next to "*Default*".

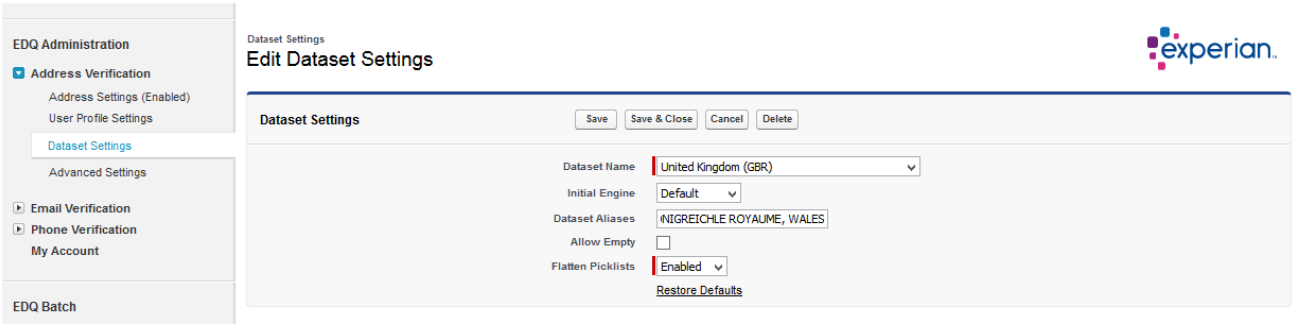


Dataset Settings

Click on the **Dataset Settings** link. The **Dataset Settings** page opens displaying a list of all available Datasets for which you are licensed.



To create a new set of **Datasets Settings**, click the **New** button, to edit an existing set of Dataset Settings select the **Edit** action link next to the specific Dataset. You will be redirected to the **Dataset Settings** page.



Dataset name – if you are editing an existing set of Dataset settings, this dropdown box will display the name of the Dataset.

If you are creating a new set of Dataset settings, this dropdown box will be populated with a list of all datasets available which do not already have a set of Dataset Settings configured.

Initial Engine – choose from the dropdown list or leave Default. If you leave the Default value the actual setting value will be taken from the value chosen in the Object Settings.

Data Set Aliases – The available aliases for the selected Dataset are displayed in this field. You can also enter additional aliases if needed.

Allow Empty – Checking this checkbox allows you to assign an empty value as an alias for the selected Dataset.

Flatten Picklists – this mode is designed to produce simple picklists from which users can easily select the correct address. This mode returns picklists that cannot be refined or stepped into (except in special circumstances) and are useful when little user interaction is needed.

> **Note:** This setting applies to the **Singleline** search engine only. Any picklists returned by the **Verification** engine will always be returned as flattened picklists.

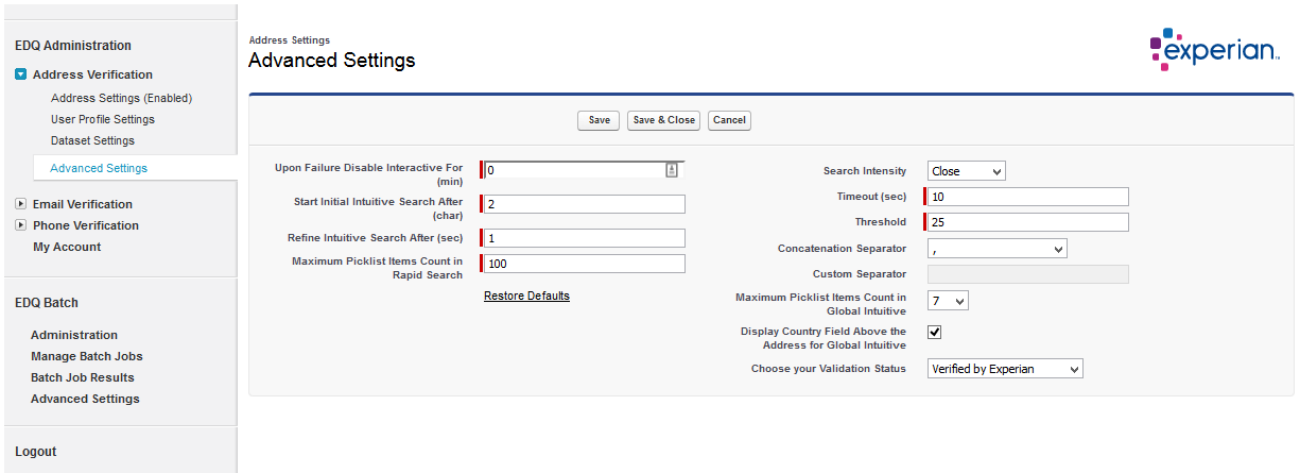
Restore Defaults – Select this link to restore all your default dataset settings if needed.

Click **Save & Close** to save your settings.

Advanced Settings

The advanced settings sections give you full control over address search behavior. We do not recommend changing these settings without consulting with your EDQ representative.

Click on the **Advanced Settings** link to be directed to the Advanced Settings page. You will see the following fields:



Upon Failure Disable Interactive For – allows you to set the number of minutes for which you would like to disable Interactive address verification in case of a failure or a timeout.

Start Initial Intuitive Search After – shows how many characters the users should enter before they start the validation process for the Intuitive engine in Rapid Search and Global Intuitive mode.

Refine Intuitive Search After – This option sets the number of seconds the intuitive search engine should wait before refining the search once a new character is entered.

This option applies to the Intuitive search engine in Rapid Search mode.

Maximum Picklist Items Count in Rapid Search – Determines the maximum number of picklist items (results) that will be displayed within the picklist for Rapid Search mode.

Search Intensity – The value of this drop-down box defines the intensity with which the search engine will work to obtain a match. A higher intensity may yield more results but will also result in longer search time. The following Search Intensity values are available:

> ***Exact***: This value allows no mistakes in the search term but is the fastest.
>
> ***Close***: (Recommended): This value allows some mistakes in the search term and is the default setting.
>
> ***Extensive***: This value allows many mistakes in the search term, but results in the longest search time.

Timeout (sec) – The timeout is a numerical value (entered in seconds) that specifies a time limit for the search. The default setting is 10 seconds.

Threshold – The threshold is a numerical value that provides a cut-off point for the number of matches returned by a search. The threshold can range from 5 to 100. The default setting is 25.

Concatenation Separator – The concatenation separator provides you with the ability to select a separator when more than one output address line is mapped to an address field.

Custom Separator – The custom separator is available only when the "Use custom separator" value is selected in the Concatenation Separator dropdown and provides you with the ability to use a custom value as a concatenation separator.

Maximum Picklist Items Count in Global Intuitive - Determines the maximum number of picklist items (results) that will be displayed within the picklist when utilizing the Global Intuitive validation mode.

Choose Your Validation Status – This option provides you the ability to choose whether your verified status to be "Verified by Experian" or "Verified by Experian QAS".

Note: If you would like to migrate your status from **Verified By Experian QAS** to **Verified by Experian** please contact EDQ and we can provide documentation and sample script guidance with that process.

Restore Defaults – Click this link If you wish to restore the default settings on the page.

Enable Email Verification

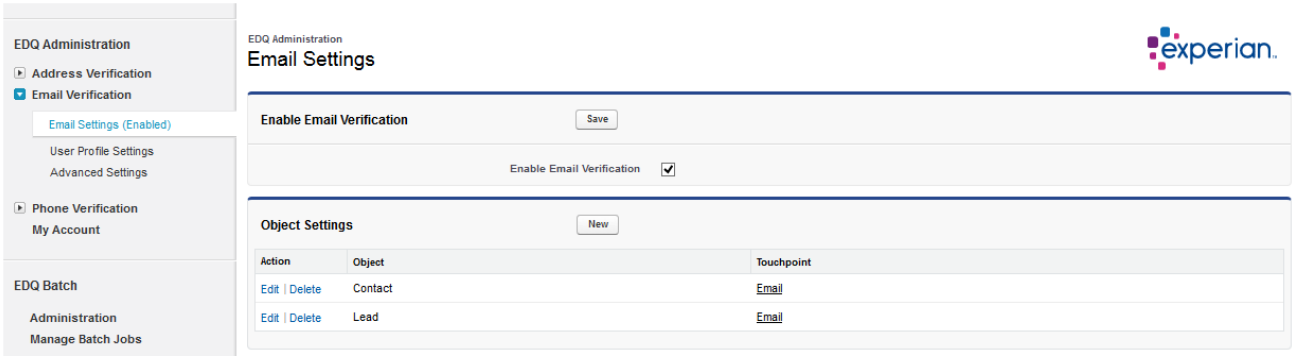
Configure Email Verification Settings

Email configuration settings is performed within the **Email Verification** area of the EDQ Administration tab. The following steps outline the process **for** configuring Email verification:

Step	Details
1. Enable Email Verification for an Object	Page 51
2. Touchpoint Creation	Page 52

Enable Email Verification for an Object

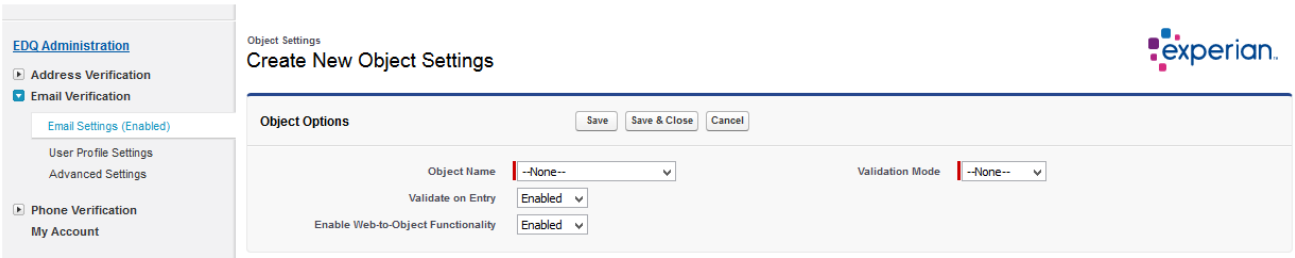
1. Click on the **Enable Email Verification** link in the EDQ Administration pane. The Email Settings page will open. It contains two sections: **Enable Email Verification** and **Object Settings**.
2. Check the **Enable Email Verification** checkbox. This is a master switch which turns on / off Email Verification in your Salesforce account for all Objects.



3. Click **Save**.

Configure Object Settings

1. In the Object Settings section click the **Edit** action link next to the Object you would like to configure or click the **New** button to create and configure a new Object that is not present in the Object settings table.
2. You will be directed to the **Object Options** page.



Object Name – Choose the Object you would like to configure (e.g. Account) from the drop-down list (required if you are configuring settings for a new Object).

Validate on Entry – Enables / Disables front-end Email verification for the selected Object. Email validation is controlled on a per Touchpoint basis therefore you should enable Email validation for each Touchpoint where Email validation is required. Recommended mode: **Enabled**.

Enable Web-to-Object Functionality – This option allows you to Enable / Disable Email verification for records created by Salesforce.com's **Web-to-Lead** functionality or other external sources. Validation is performed automatically when the object is created and does not require user interaction. Recommended mode: **Enable** for the **Leads** object and **Disable** for the other objects.

Validation Mode – This dropdown shows a picklist of the following options for setting your preferred workflow:

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

Auto Accept - (displays when Interactive Validation mode is selected) – Allows users to Enable / Disable automatic accepting of email addresses for which EDQ was able to conclusively classify as "*Verified*" or "*Not Verified*". If you enable this option the EDQ interactive email verification behaves in the following way:

If the email you enter comes back with one of the selected Verified Certainties in the **Email Verification → Advanced Settings** section in the EDQ Administration area, EDQ will automatically accept the email and mark it as "*Verified by Experian*" without further user interaction. By default, email addresses which come back with a validation certainty levels of "*Verified*" or "*Unknown*" are treated as verified.

If the email you enter comes back with one of the not selected Verified certainties in the **Email Verification → Advanced Settings** section in the EDQ Administration area, EDQ will automatically accept the email and mark it as "*Could not be Verified*" without further user interaction. By default, email addresses which come back with a validation certainty levels of "Undeliverable", "*Unreachable*", "*Illegitimate*" or "*Disposable*" are treated as not verified.

If the email you entered cannot be conclusively verified by EDQ and it comes back with suggestions you will be presented with the multiple match EDQ Verification screen (for more information refer to the User Guide) where you may choose to accept one of the suggested corrections or choose the original email you entered.

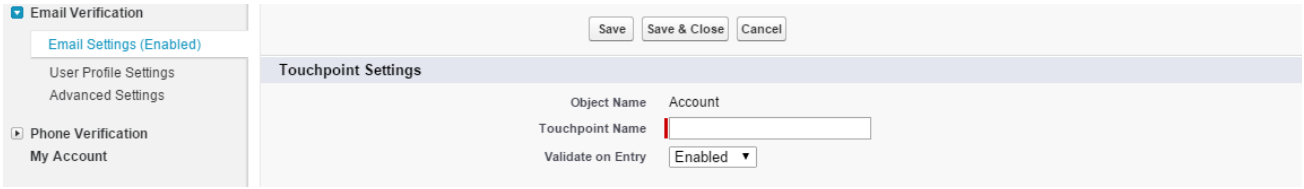
For more information on **Verified Certainties** navigate to the Advanced Settings section on page 53. Recommended mode: **Disabled**.

3. Click **Save**.

Touchpoint Creation

The next step after you have configured your Object settings is to create Touchpoints.

Select the **Edit** action link if you want to configure Touchpoint settings for an existing Touchpoint or click the **New** button to create a new Touchpoint. The **Touchpoint Settings** page opens.

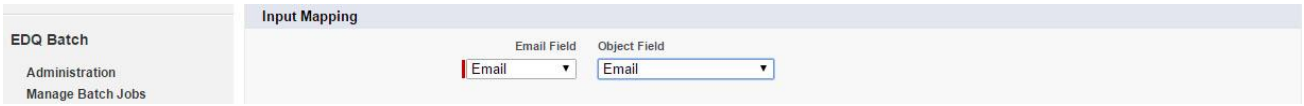


Touchpoint name: Type a unique name for your Touchpoint.
Validate on Entry: Select Enabled from the dropdown.

Input Mapping

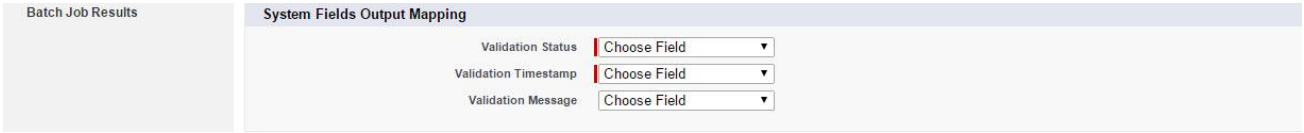
Input mapping is used to identify (map) the **email components** of your Salesforce form which are to be utilized for Email Verification.

Use the Email Field picklist on the left to select an EDQ email field and the Object Field picklist on the right to select a field which will contain the relevant email data.



System Fields Output Mapping

In this section, you will be prompted to map the Validation Status, the Validation Timestamp and the Validation Message fields. The **Validation Status** filed is a text field which stores the current validation status. The **Validation Timestamp** field is a Date / Time field which stores the timestamp of the last validation attempt by EDQ. The **Validation Message** field is used to store the returned validation message.



Note: When utilizing the **Verification** workflow the **Validation Status** field is mandatory.

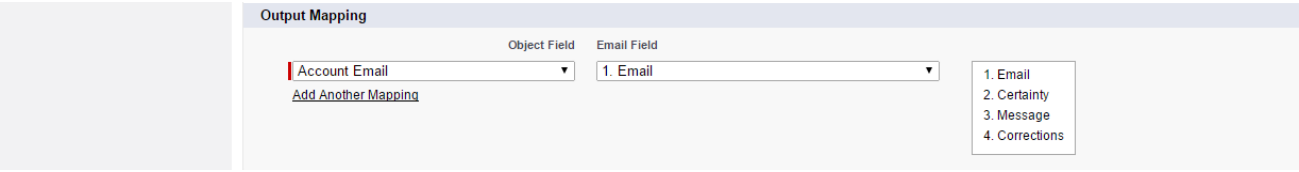
Output Mapping

The output mapping allows you to map Email address results to Salesforce fields.

Use the picklist on the left to select the available **Object** output fields in your Salesforce form and select the appropriate EDQ Email field item which should be returned to the required Salesforce field.

Add Another Mapping – select this link if you want to map more fields on your form. You can use the (⊖) icon to remove desired fields.

There is a range of additional email data which can be stored within your Salesforce fields to further enhance and improve decision making and email effectiveness. Please refer to the User Guide for detailed explanations on the additional data available.



Click **Save & Close**.

Note: You have to follow the same steps to enable Email Validation for any other custom or standard Object (Contact, Contract, Lead etc.)

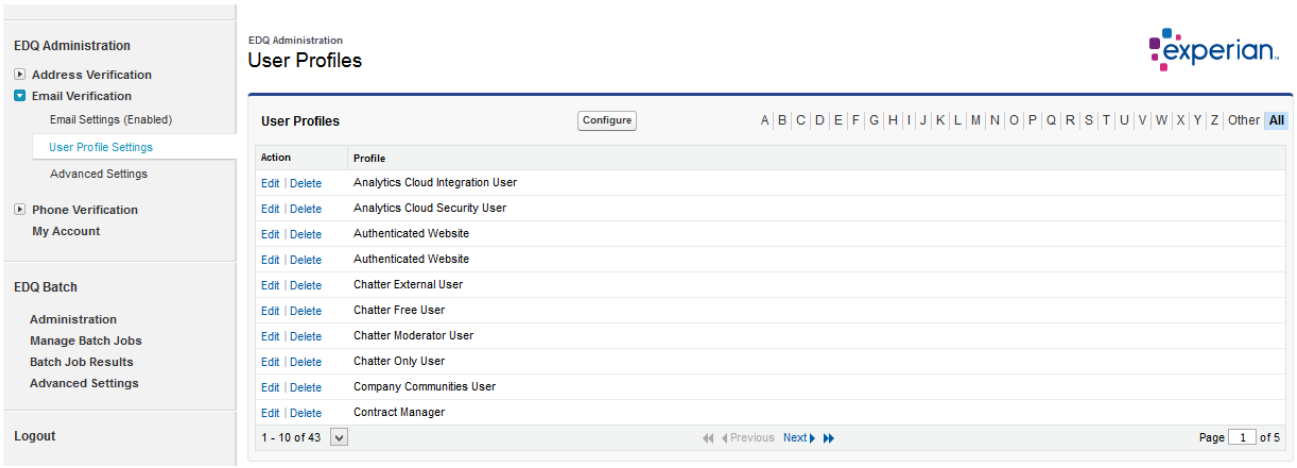
Additional Options

In the left-side menu of the EDQ Administration you can see the User Profile Settings and the Advanced Settings.

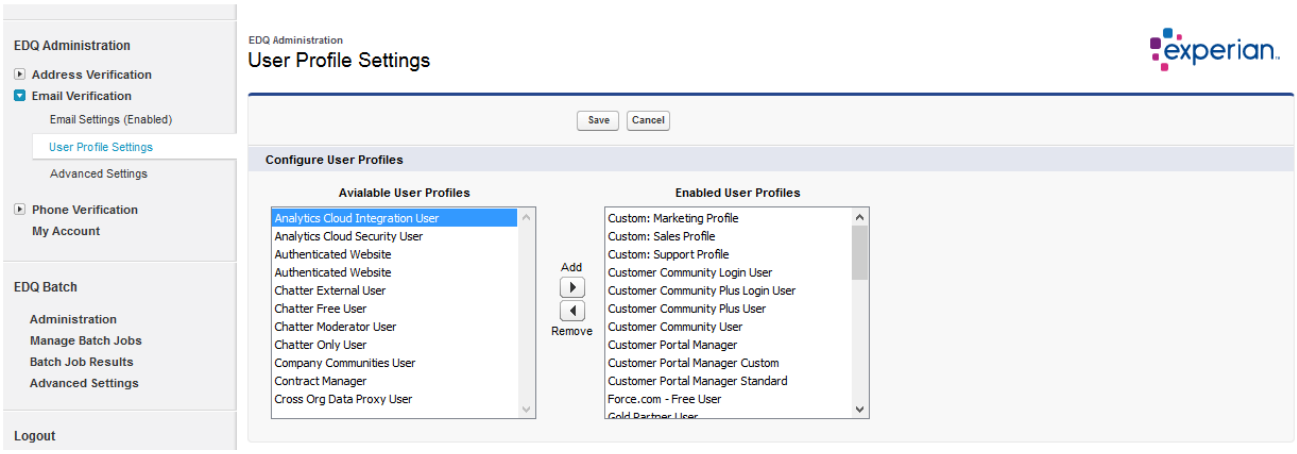
User Profile Settings

This section allows you to specify which user profiles have access to email verification functionality and allows you to configure certain settings on a per user profile basis. To specify which user profiles, have access to email verification functionality follow the steps below:

1. Select the **User Profile Settings** link. The User Profiles page will open displaying a list of enabled User Profiles.



2. Click on the **Configure** button and you will be led to the Configure User Profiles page.
3. From the list on the left select the user profiles you would like to enable Email verification for (e.g. System Administrator).
4. Click on the **Add** button to enable Email verification for the selected User Profiles.

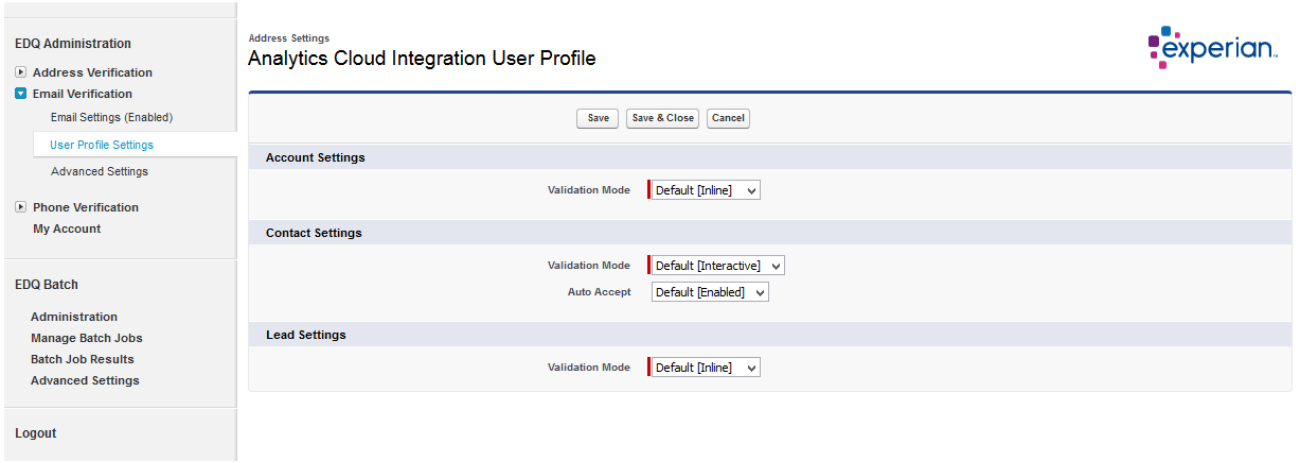


5. Click **Save**.

Configure Email Verification Settings

To configure Email Verification settings on a per User Profile basis follow the steps below:

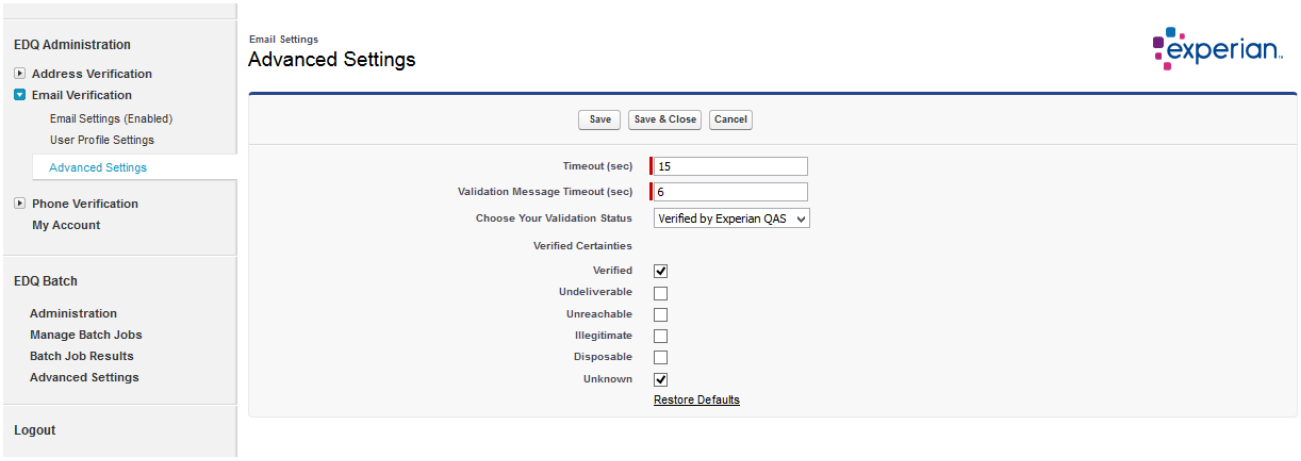
1. Click on the **User Profile Settings** link. The User Profiles page will open displaying the enabled User Profiles in a table.
2. Click on the **Edit** action link next to your User Profile from the table.
3. The Profile page will open. From that page, you can select specific settings on per User Profile basis for all Objects for which email verification Touchpoints have been created.



Advanced Settings

The advanced settings section gives you full control over Email verification behavior. We do not recommend changing these settings without consulting with your EDQ representative.

Expand **Email Verification** and click on the **Advanced Settings** link to be directed to the Advanced Settings page. You will see the following fields:



Timeout (sec) – The email validation search timeout in seconds. The default is 15 seconds

Validation Message Timeout (sec) – If the email address entered by the user is invalid, a validation message is displayed providing insight into the validation status, this setting determines how long the validation message should remain visible on the page. The default setting is 6 seconds.

Choose Your Validation Status – This option provides you the ability to choose whether your verified status to be "Verified by Experian" or "Verified by Experian QAS".

Verified Certainties – Certainty indicates the Email status. This option allows you to set certainties should be considered verified and return an Email Validation Status of "Verified by Experian". Below are the Certainty definitions. Verified and Unknown are the recommended and default values which should be checked.

> ***Verified***: Mailbox exists, is reachable and not known to be illegitimate or disposable.
>
> ***Undeliverable***: The mailbox or domain is not deliverable – it doesn't exist, it is suspended, or the mailbox is full.
>
> ***Unreachable***: Domain has no reachable mail exchangers. 'Invalid domain'; either no DNS records, invalid ones, or there isn't a mail server listing.
>
> ***Illegitimate***: Seed, spam trap, black hole, technical role account, inactive domain or other potentially harmful address.
>
> ***Disposable***: We were unable to conclusively verify or invalidate this email address. The address doesn't appear to be nefarious (as far as we know), but we can't determine if it is deliverable or not.
>
> ***Unknown***: We were unable to conclusively verify or invalidate this email address. The address doesn't appear to be nefarious (as far as we know), but we can't determine if it is deliverable or not.

Restore Defaults – select this link if you wish to restore the default settings.

Leave this page populated with Default and click **Save & Close** button.

Enable Phone Verification

Configure Phone Verification Settings

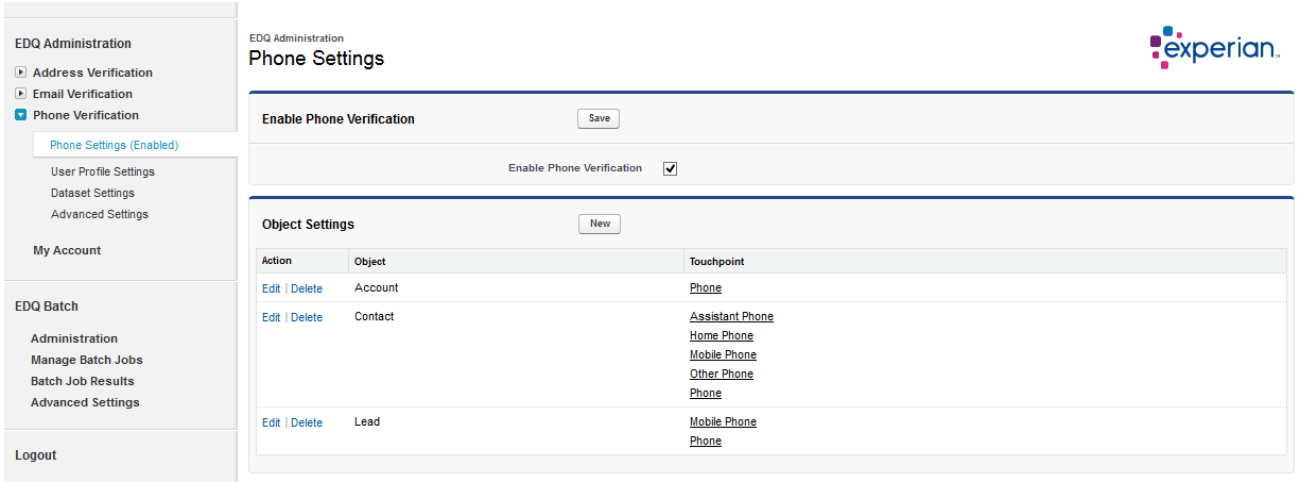
Phone settings configuration is performed within the Phone Verification area of the EDQ Administration tab. The following steps outline the process for configuring Phone verification:

Step	Details
1. Enable Phone Verification for an Object	Page 57
2. Touchpoint Creation	Page 58

Enable Phone Verification for an Object

Click on the **Enable Phone Verification** link in the EDQ Administration pane. The Phone Settings page will open. It contains two sections: **Enable Phone Verification** and **Object Settings**.

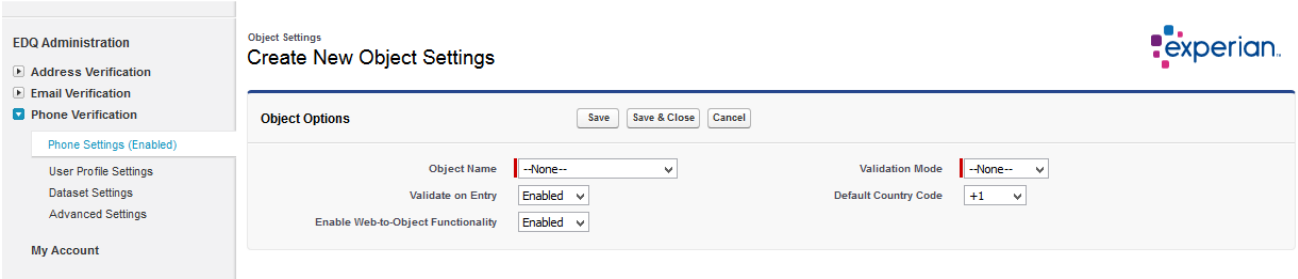
1. Check the **Enable Phone Verification** checkbox. This is a master switch which turns on / off Phone Verification in your Salesforce account for all Objects.



2. Click **Save**.

Configure Object Settings

1. In the Object Settings section click the **Edit** action link next to the Object you would like to configure or click the **New** button to create and configure a new Object that is not present in the Object settings table.
2. You will be directed to the **Object Options** page.



Object Name – Choose the Object you would like to configure (e.g. Account) from the drop-down list (required if you are configuring settings for a new Object).

Validate on Entry – Enables / Disables front-end Phone verification for the selected Object. Phone validation is controlled on a per Touchpoint basis therefore you should enable Phone validation for each Touchpoint where Phone validation is required. Recommended mode: **Enabled**.

Enable Web-to-Object Functionality – This option allows you to Enable / Disable Phone verification for records created by Salesforce's **Web-to-Lead** functionality or other external sources. Validation is performed automatically when the object is created and does not require user interaction. We advise you to make sure all mandatory fields in the Object are populated as a part of your **Web-to-Lead** or external entry process. Recommended mode: **Enable** for the **Leads** object and **Disable** for the other objects.

Validation Mode – This dropdown shows a picklist of the following options for setting your preferred workflow:

> ***Inline***: Phone verification is performed "inline" directly on the Salesforce page.
> ***Interactive***: Phone verification is invoked on **Save** and is performed via the Interactive Validation workflow.
> ***Passive***: Phone verification is invoked on **Save**, however it will be performed silently and there is not interaction with the user.

Auto Accept - (displays when Interactive Validation mode is selected) – Allows users to Enable / Disable automatic accepting of phone numbers which EDQ classifies as "*Verified*" or "*Not Verified*". If you enable this option the EDQ interactive phone verification behaves in the following way:

If the phone number you enter comes back with one of the selected Verified Certainties in the **Phone Verification → Advanced settings** section of the EDQ Administration area, EDQ will automatically accept the number and mark it as "*Verified by Experian*" without further user interaction. By default, phone numbers which come back with a validation certainty levels of "*Verified*", "*Absent*", "*Teleservice not provisioned*" or "*Unknown*" are treated as verified.

If the phone number you enter comes back with one of the not selected Verified certainties in the **Phone Verification → Advanced settings** section of the EDQ Administration, EDQ will automatically accept the number and mark it as "*Could not be Verified*" without further user interaction. By default, phone numbers which come back with a validation certainty levels of "*Unverified*" are treated as not verified.

For more information on **Verified Certainties** navigate to the Advanced Settings section on page 60. Recommended mode: **Disabled**.

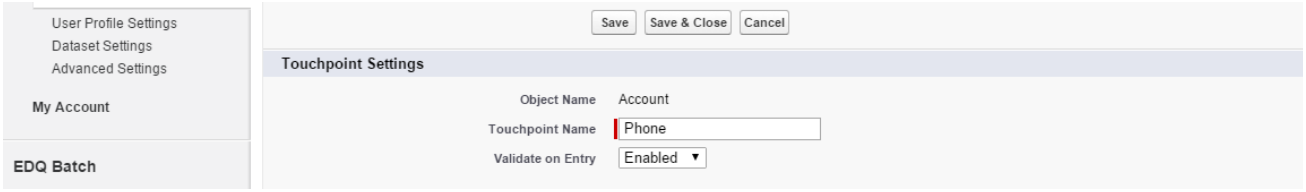
Default Country – If you do not map country in the Input Mappings for your phone touchpoint your phone numbers will be verified against the dataset specified in the Default country option. Use this option if you would like to verify phone numbers for only one country.

3. Click **Save.**

Touchpoint Creation

The next step after you have configured your Object settings is to create Touchpoints.

1. Select the **Edit** action link if you want to configure Touchpoint settings for an existing Touchpoint or click the **New** button to create a new Touchpoint. The **Touchpoint Settings** page opens.

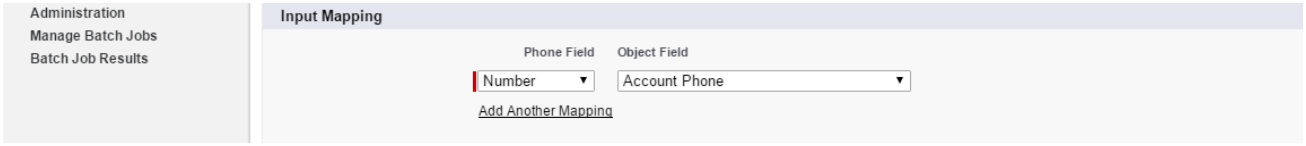


Touchpoint name: Type a unique name for your Touchpoint.
Validate on Entry: Select Enabled from the dropdown.

Input Mapping

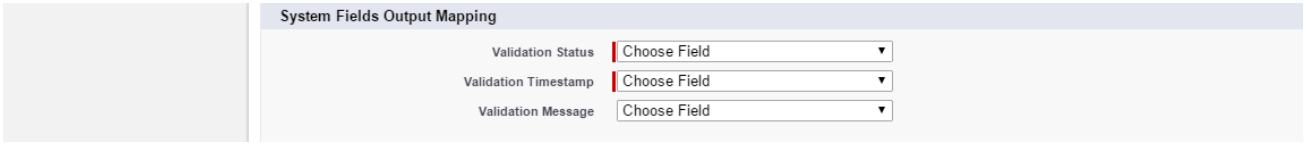
Input mapping is used to identify (map) the **phone components** of your Salesforce form which are to be utilized for Phone Verification.

Use the EDQ Phone Field picklist on the left to select a phone field and the Object Field picklist on the right to select a field which will contain the relevant phone data.



System Fields Output Mapping

In this section, you will be prompted to map the Validation Status, the Validation Timestamp and the Validation Message fields. The **Validation Status** filed is a text field which stores the current validation status. The **Validation Timestamp** field is a Date / Time field which stores the timestamp of the last validation attempt by EDQ. The **Validation Message** field is used to store the returned validation message.



Output Mapping

The output mapping allows you to map Phone results to Salesforce fields.

Use the picklist on the left to select the available **Object** output fields in your Salesforce form and select the appropriate EDQ Phone field item which should be returned to the required Salesforce field.

Add Another Mapping – select this link if you want to map more fields on your form. You can use the (⊖) icon to remove desired fields.

There is a range of additional phone data which can be stored within your Salesforce fields to further enhance and improve decision making and phone verification effectiveness. Please refer to the User Guide for detailed explanations on the additional data available.

Click **Save & Close**.

Note: Follow the same steps to enable Phone Validation for any other custom or standard Object (Contact, Contract, Lead etc.)

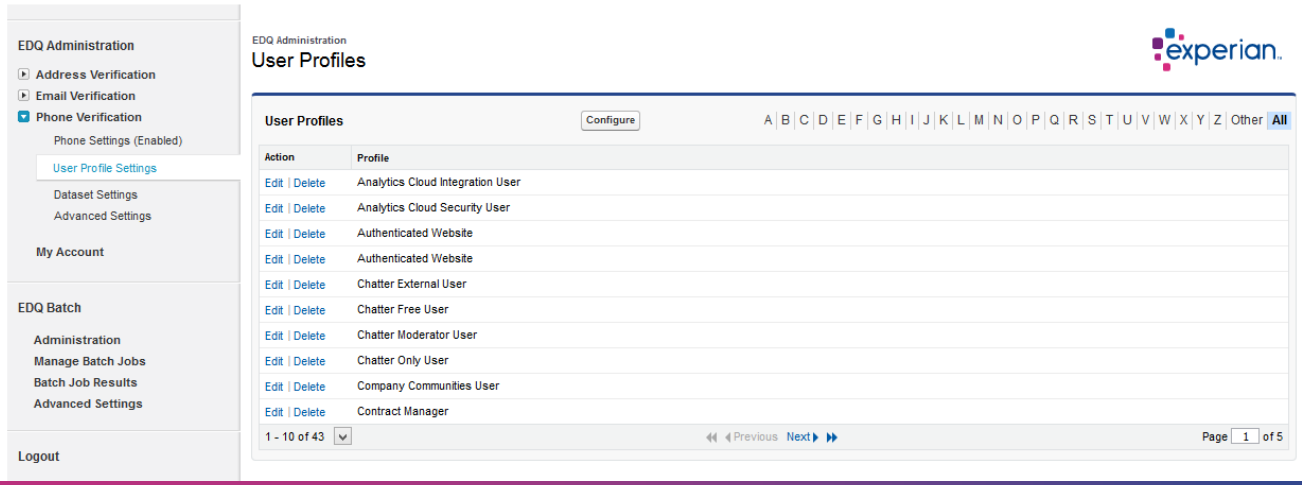
Additional Options

In the left-side menu of the EDQ Administration area you can see the User Profile Settings, Dataset Settings and the Advanced Settings.

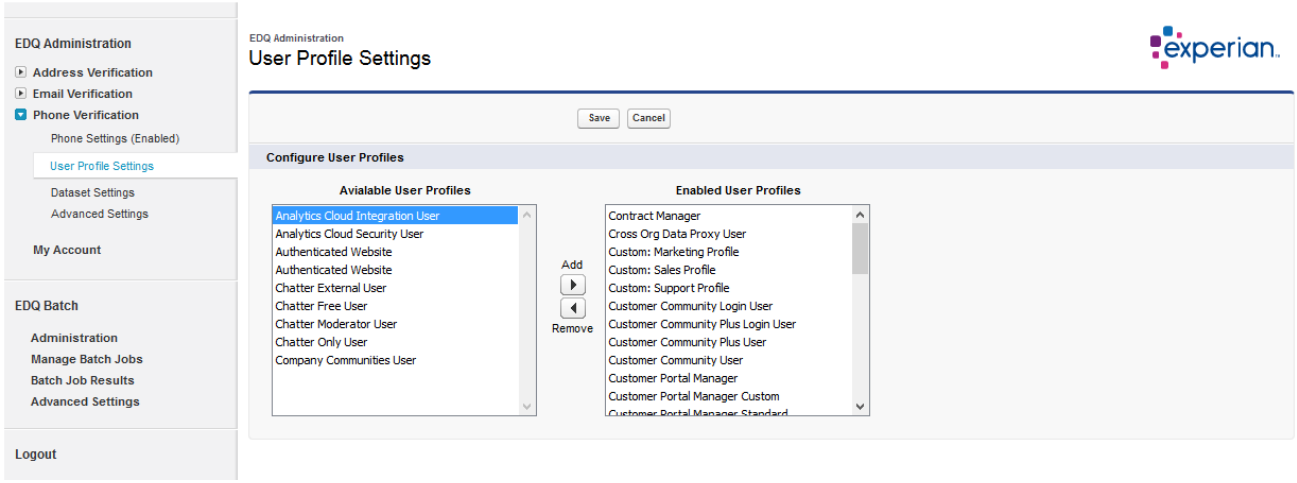
User Profile Settings

This section allows you to specify which user profiles have access to phone verification functionality and allows you to configure certain settings on a per user profile basis. To specify which user profiles have access to phone verification functionality, follow the steps below:

1. Select the **User Profile Settings** link. The User Profiles page will open displaying a list of enabled User Profiles.



2. Click on the **Configure** button and you will be led to the Configure User Profiles page.
3. From the list on the left select the user profiles you would like to enable Phone verification for (e.g. System Administrator).
4. Click on the **Add** button to enable Phone verification for the selected User Profiles.



5. Click **Save**.

Configure Phone Verification Settings

To configure Phone Verification settings on a per User Profile basis follow the steps below:

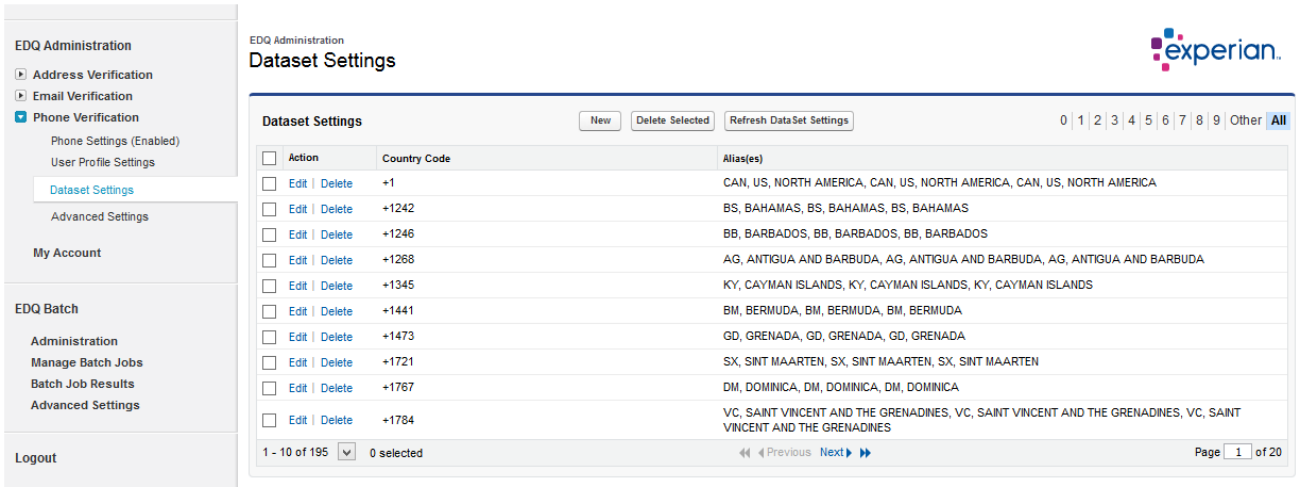
1. Click on the **User Profile Settings** link. The User Profiles page will open displaying the enabled User Profiles in a table.
2. Click on the **Edit** action link next to your User Profile from the table.
3. The Profile page will open. From that page, you can select specific settings on per User Profile basis for all Objects for which phone verification Touchpoints have been created.

Dataset Settings

The Dataset Settings additional option sets the returned phone number format based on the selected default country in the "Enable Phone Verification for an Object" section.

For example, if your Default country is United Kingdom, the solution will pick up the aliases for United Kingdom listed in the table below (see screenshot) and it will return verified phone numbers formatted according to the specific phone format for UK.

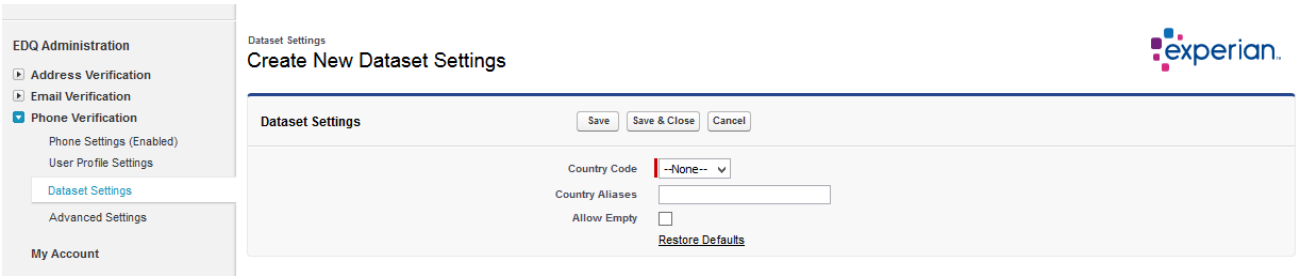
Note: Configuring Dataset Settings for Phone Verification is only necessary if you have mapped the Phone number field in the Output Mappings. If it is not mapped, EDQ phone verification service doesn't standardize the entered phone number and leaves it as entered.



1. To edit the aliases for a specific phone country code, select the **Edit** action link or click on the **New** button to create a new phone country code.
2. You will be taken to the Country Alias Settings page where you can see the following options:

   Country code – add a new country code or edit an existing one from the dropdown.

   Country aliases – add new or edit existing aliases in the Country aliases text box. To assign more than one alias to a particular Country code enter the aliases separate by a comma.



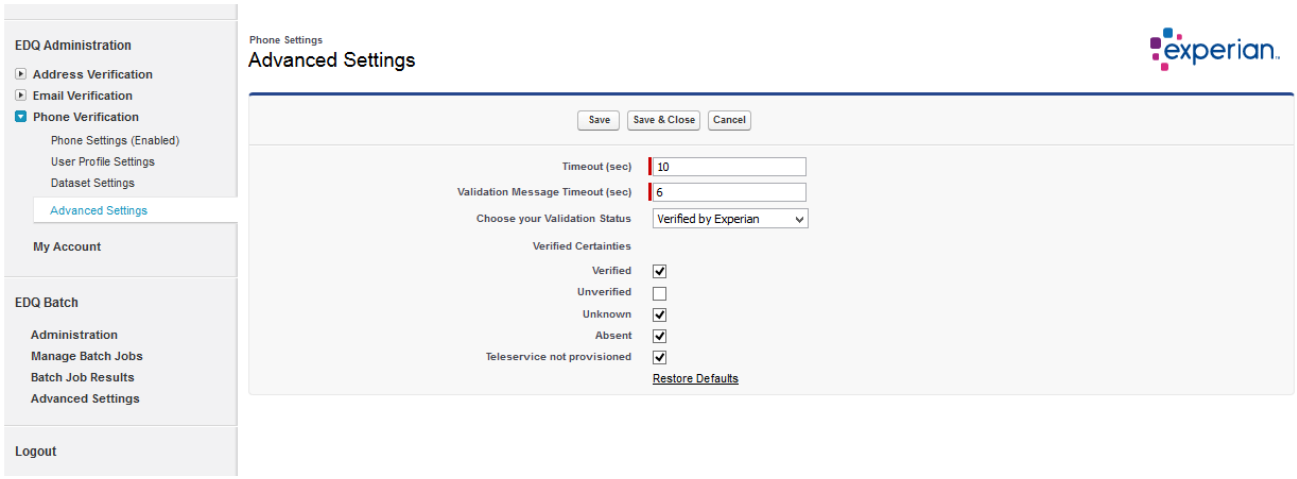
   Allow Empty – Checking this checkbox allows you to assign an empty value as an alias for the selected Dataset.

   Restore Default – clicking on this link allows you to reset the settings for this Country code.

Advanced Settings

The advanced settings give you full control over phone verification. We do not recommend changing these settings without consulting with your EDQ representative.

1. Expand **Phone Verification** and click on the **Advanced Settings** link to be directed to the Advanced Settings page. You will see the following fields:



Timeout (sec) – The phone validation search timeout in seconds. The default setting is 8 seconds.

Validation Message Timeout (sec) – If the phone number entered by the user is invalid, a validation message is displayed providing insight into the validation status, this setting determines how long the validation message should remain visible on the page. The default setting is 6 seconds.

Choose Your Validation Status – This option provides you the ability to choose whether your verified status to be "Verified by Experian" or "Verified by Experian QAS".

Verified Certainties – Certainty indicates the Phone status. This option allows you to set which certainties should be considered verified and return a Phone Validation Status of "Verified by Experian". Below are the Certainty definitions.

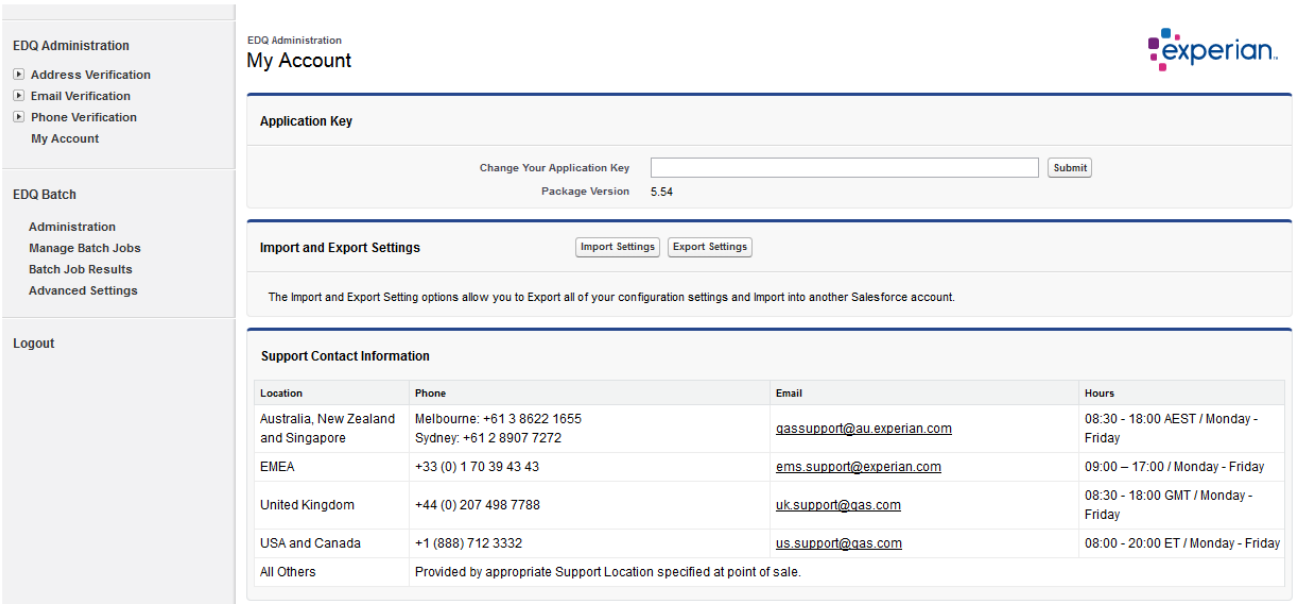
> ***Verified***: Number format validated and number verified.
>
> ***Unverified***: Invalid number format supplied.
>
> ***Unknown***: Number has been blocked from lookups.
>
> ***Absent***: Number format validated and number verified via network lookup but not currently available (i.e. phone off, out of range).
>
> ***Teleservice not provisioned:*** Valid number but not active on network.

Restore Defaults - select this link if you wish to restore the default settings on the page.

2. Leave this page populated with Default and click Save & Close button.

My Account

The **My account** section allows you to manage your application key, export and import settings and provides support contact information.



Application Key - You can register another Global Data Quality for Salesforce Application Key from this section by adding the key in the field next to **Change Your Application Key** and clicking the **Submit** button. Additionally, the version of the EDQ package will be displayed here.

Import and Export Settings – The import and export settings buttons allow users to export all configuration settings to a csv file and import settings when required. This is particularly useful when backing up configuration settings and when preparing for sandbox refresh activities. All address, email and phone configuration settings will be including in the respective export and import functions, batch mode specific settings will not be included.

Congratulations! Global Data Quality for Salesforce is now set up and ready to use. For instructions on how to use the application please refer to the user manual.

TROUBLESHOOTING

The topics in this section aim to resolve issues identified in live integrations since the release of Experian Data Quality for Salesforce version 5.0.

Issue	Details
Address / Email / Phone verification does not trigger using the new and edit button overrides You have checked that the solution is properly configured and overridden your object's Edit and New buttons, however when creating a new record or editing an existing record address / email / phone verification does not trigger.	Page 67
Address / Email / Phone verification does not trigger When you try to validate an address / email / phone within your object using either Interactive or Rapid Search or the Inline workflows, validation does not trigger.	Page 68
Interactive Address / Email / Phone verification does not trigger Interactive address / email / phone verification does not trigger on Save and the Experian Data Quality page doesn't open.	Page 71
Rapid Search Address verification or Inline Email / Phone does not work When you click on the "Validate" button the validation process fails to start.	Page 74
Validation Status and Validation Timestamp Fields do not populate correctly After validating an address using either the Interactive or Rapid Search workflows the Validation Status field value ends with an "!" (exclamation mark) and the Validation Timestamp field is not populated.	Page 76
Incorrect Address validation results in Rapid Search When verifying an address using the Rapid Search workflow the validation pastes back incorrect address data.	Page 77
Unable to grant permissions to Experian Data Quality The user receives an error "There was an error updating your configuration" after clicking on the "Allow" button on the grant permissions screen.	Page 78
Inline editing is disabled in the Detail page when overriding the "New" and "Edit" buttons Inline Editing is not available on the Detail page when using the page override implementation method.	Page 79
Rapid Search (non-page override) does not paste back values to the Detail page when using Enforced Usage Rapid Search does not paste back values to the Detail page and does not close in Internet Explorer when using Enforced Usage (Rapid Search non-page override implementation method).	Page 82
EDQ for Salesforce cannot prepopulate lookup fields EDQ for Salesforce cannot prepopulate lookup fields by passing value to the URL of the query string	Page 83
The "Change Record Type" dialog does not pass the selected record type to visualforce page overrides in Salesforce Lightning	Page 84

The EDQ Tab Does Not Appear in the Navigation Bar When the Package is Installed	Page 87
'URL No Longer Exists' Error Message is Returned on the Page Layout When Using Dynamic Page Override Implementation Method An error message 'URL No Longer Exists' is displayed on the page layout, when Dynamic Page Override implementation method is utilized for Edit/New actions on a record.	Page 88
Unable to access EDQ admin panel on Safari browser for iOS (version 13 or above) or MacOS (version 12 or above) EDQ for Salesforce's admin panel within the Salesforce org cannot be accessed (returning "Authorization failed" error or web page loading indefinitely).	Page 91

Address / Email / Phone Verification Does Not Trigger Using the “New” and “Edit” Button Overrides

Symptoms
You have checked that the solution is properly configured and overridden your object’s Edit and New buttons, however when creating a new record or editing an existing record address / email / phone verification does not trigger.

Once you have clicked the New or Edit buttons, you will notice that the browsers URL contains a **nooveride** URL query string parameter, this is an indication that the page override has not triggered as expected.

Error Messages

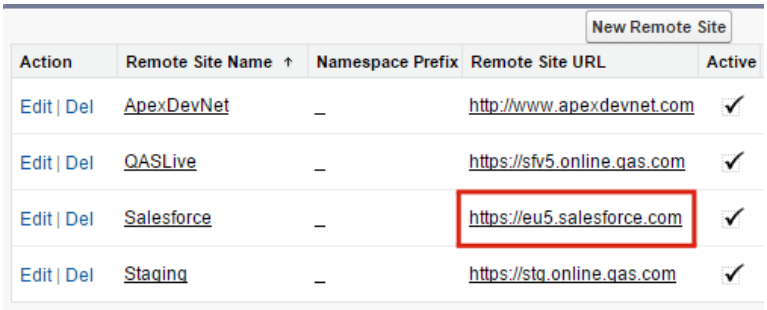
None.

Issue

Your Salesforce instance URL **is not** listed as a Salesforce Remote Site and Experian Data Quality is unable to retrieve your Object layout.

Solution

You must add your Salesforce instance URL to the Salesforce Remote Sites list.



Follow the steps from “Add your Salesforce Instance URL to Remote Site Settings” section (page 20). If you use a **custom salesforce.com** domain please refer to the Note in the same section.

Address / Email / Phone Verification Does Not Trigger

Symptoms
When you try to validate an address / email / phone using either Interactive, Rapid Search or Inline verification workflows validation does not trigger.

Error Messages

None.

Issue

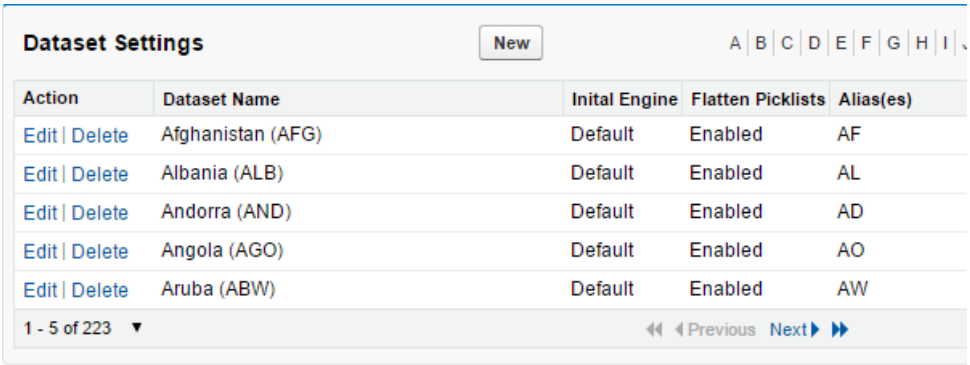
There are a few reasons why address / email / phone verification may not trigger.

Scenario 1: Your address' or phone's country cannot be mapped to a valid dataset.

If you are trying to trigger Address or Phone Validation for a country which you are not licensed for, the Validation process will not trigger.

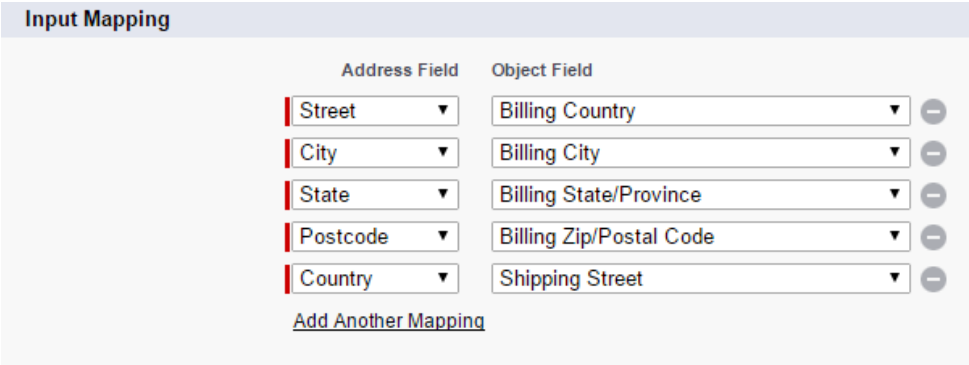
Solution 1

Check Dataset Settings in the relevant administration section. Make sure that an entry or an alias in the Dataset settings table exists with the exact value for dataset, your address country or phone country code.



Scenario 2: Wrong Input Mappings.

There is a chance you mapped the input address fields to the wrong Object fields (e.g. mapping Shipping Street to the Country address field for the Billing address touchpoint).



Solution 2

Navigate to the "Touchpoint Creation" section (page 42) and check if the Input mapping for your Object is correct.)

Scenario 3: Missing output mappings for your dataset.

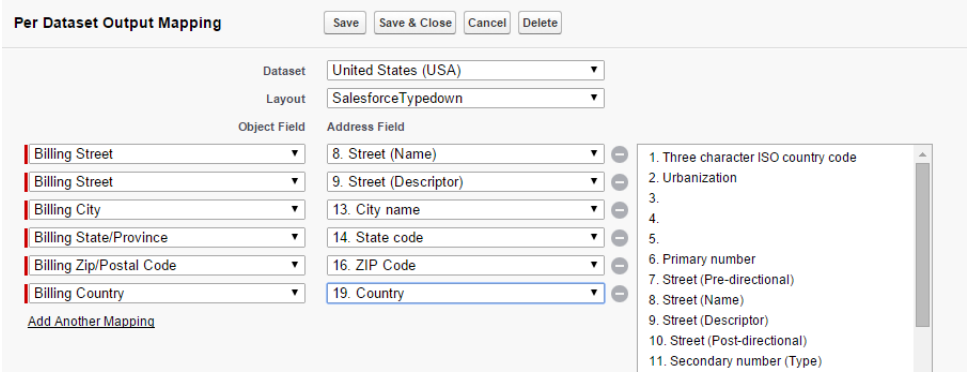
If you are verifying addresses for more than one dataset / country you may not have created an Output Mapping for some of your datasets. If there is no specific output mapping for each of your datasets you must have a Default output mapping.

Error Message

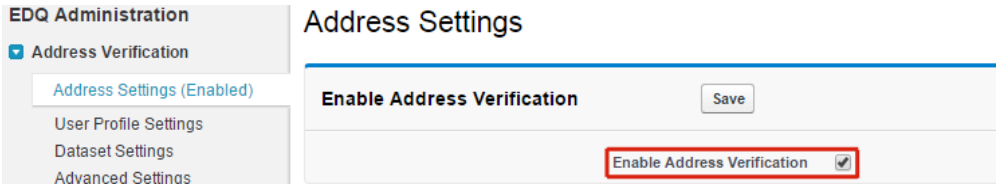
Integration information: search result was "Failed". Dataset settings for: {country name} cannot be found! Please create an Output Mapping for Dataset: {country name} in the Administration area.

Solution 3

Create an Output mapping for the specific dataset for your touchpoint in the EDQ Administration area. For more information on output mappings go to the "Touchpoint Creation" section (page 42).



Scenario 4: Address / Email / Phone on the global level, object level or touchpoint level is disabled.



Solution 4

Go to EDQ Administration and click on Address / Email / Phone Settings. Make sure that the "Enable Address / Email / Phone Verification" checkbox is checked. Click on **Edit** next to your Object and check if the "Validate on Entry" option is set to Enabled. Then click on **Edit** next to each Touchpoint and make sure if the "Validate on Entry" option is set to Enabled as well.

Interactive Address / Email / Phone Verification Does Not Trigger

Note: The issues listed below are specific for the Interactive workflow. However please make sure you check the issues listed in **Address / Email / Phone verification does not trigger** section above before proceeding.

Symptoms
Interactive address / email / phone verification does not trigger on **Save** and the Experian Data Quality page doesn't open.

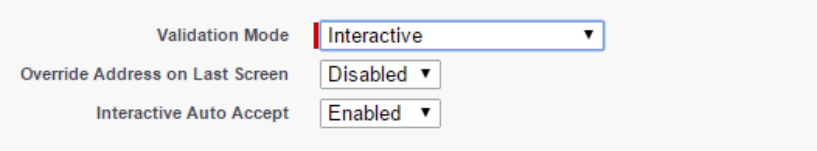
Issue

There are a few possible reasons why Interactive address / email / phone verification may fail to invoke:

Scenario 1: You may have selected the wrong Validation Mode.

Solution 1

Select "Interactive" for Validation mode in the Object Settings section for your Object in the EDQ Administration area. If you are utilizing the Interactive workflow make sure to select the Interactive validation mode. In addition, go to Profile Settings in the EDQ Administration area and make sure that you have selected "Interactive" or "Default" for your Object's "Validation Mode".



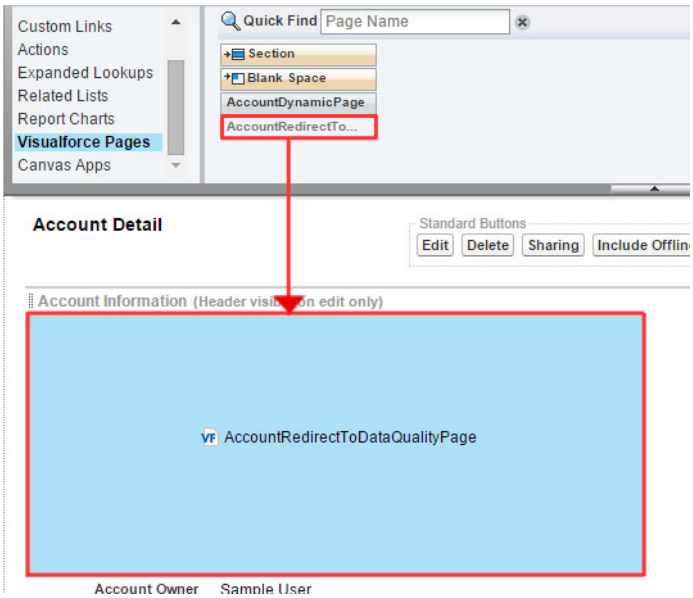
Scenario 2: You haven't created the Object's Data Quality Page and the Redirect to Data Quality Page.

This is only necessary when you use the "Non-page override implementation method" for custom objects. EDQ provides you with default implementations of these pages for the Account, Lead Contact and Contract standard objects.

Solution 2

To create the two Visualforce pages please follow the steps outlined in the "Non-page override implementation method" section (page 21).

Scenario 3: You haven't added the Redirect to Data Quality Page to your Object layout.



Solution 3

To add the Redirect to Data Quality Page to your Object layout please follow the steps outlined in the "Add the "EDQRedirectToDataQualityPage" Visualforce page to your Object layout" section (page 24).

Scenario 4: You haven't named properly your Data Quality Page.

If you are integrating with a custom object you might have misspelled the Object's name or used the **Object Name** instead of the **Object API Name** in the Visualforce page name.

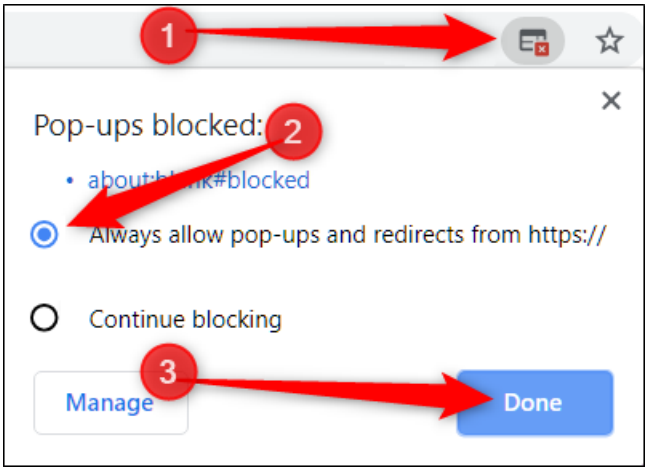
Solution 4

Check if you are using the correct object name when creating VF pages. See page 21 for "Non-page override implementation method".

Scenario 5: You have not allowed redirects in your internet browser, when using Non-page override.

Solution 5

Allow redirects so that the ExperianDataQuality page can be reached. Example screenshot from Chrome browser.



Scenario 6: Record page loads perceivably slower, preventing the DataQualilyPage from invoking using Non-page override.

When using Non-page override, the service checks for amended pages in the last **5 seconds** (default setting). If the record loads slowly, this could prevent the verification service from invoking.

Solution 6

1. Go to **Setup → Static Resources →** click on the name of **EDQGlobalSettings**
2. Click **View file**.
3. Download the 'js' file.
4. In a text editor amend the **"InvokeInteractiveIntervalFromLastUpdateInSeconds" :"5"** to a value higher than 5 (10 for example).
5. **Save** the file.
6. **Edit** the **EDQGlobalSettings** static resource and upload the file you just edited.

NB! Please note that any amends made to the EDQ Admin panel will **revert** this change to the default '5'.

Rapid Search Address Verification or Inline Email / Phone Does Not Work

Note: The issues listed below are specific for the Rapid Search workflow. However please make sure you check the issues listed in **Address / Email / Phone verification does not work** section above before proceeding.

Symptoms
When you click on the "Validate" button the Rapid Search validation process fails to start.

Issue

There are a few reasons why Rapid Search address verification may fail to invoke:

Scenario 1: You may have selected the wrong Validation mode.

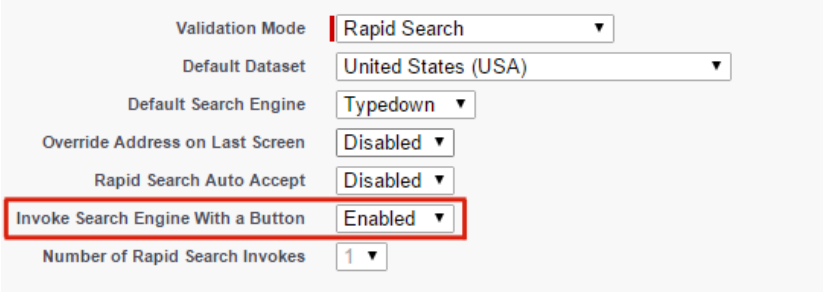
Solution 1

Select "Rapid Search" for Validation mode in the Object Settings section for your Object in the EDQ Administration area. If you are utilizing the Rapid Search workflow make sure to select the Rapid Search validation mode. In addition, go to Profile Settings in the EDQ Administration area and make sure that you have selected "Rapid Search" or "Default" for your Object's "Validation Mode".

Scenario 2: The "Invoke Search Engine With a Button" option is not enabled.

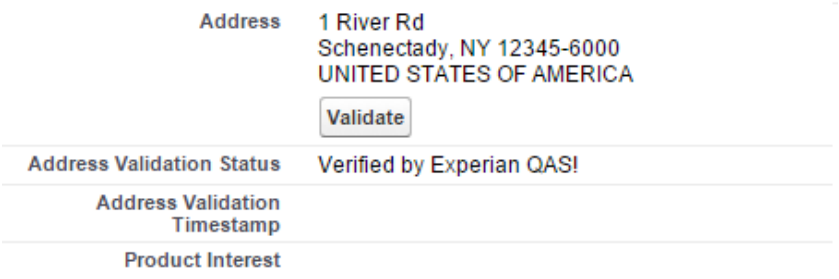
Solution 2

You need to navigate to the EDQ Administration, select **Edit** next to your Object and choose **Enable** from the dropdown next to the "Invoke Search Engine With a Button" option. This way the Rapid Search pop-up will be invoked by clicking on the "Validate" button.


Validation Mode
Rapid Search
Default Dataset
United States (USA)
Default Search Engine
Typedown
Override Address on Last Screen
Disabled
Rapid Search Auto Accept
Disabled
Invoke Search Engine With a Button
Enabled
Number of Rapid Search Invokes
1

Validation Status and Validation Timestamp Fields Do Not Populate Correctly

Symptoms
After validating an address using either Interactive or Rapid Search mode (Inline for email and phone) and clicking Save, the Validation Status field value ends with an "!" (exclamation mark) and the Validation Timestamp field is not populated.



Error Messages

None.

Issue

This problem can occur when you haven't created the before update and before insert custom trigger for your Object.

Solution

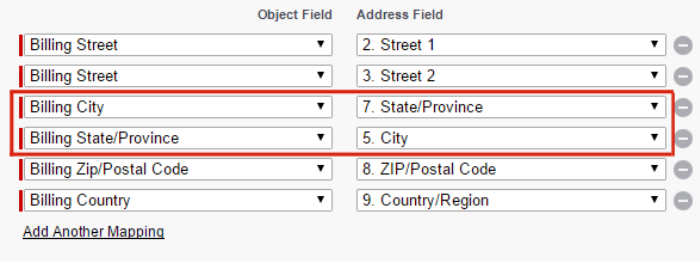
Follow the "Add a custom trigger to maintain Validation Status and Validation Timestamp" section (page 33) to create the triggers for your object.

Incorrect Address Validation Results in Rapid Search

Symptoms
When verifying an address using Rapid Search mode, address elements paste back incorrectly.

Issue

EDQ will return verified addresses in the order that you mapped in the Output mapping. If parts of the address are returned into the wrong Salesforce fields there is a possibility the output fields are mapped incorrectly.



Solution

Make sure that the output mappings are correct. For more information see section **Touchpoint Creation** (page 42).

Unable to Grant Permissions to Experian Data Quality

Symptoms
The user receives an error "There was an error updating your configuration" after clicking on the "Allow" button on the grant permissions screen.

Issue

The user has enforced IP restrictions and the EDQ server's IP is not whitelisted.

Solution

There are two solutions to this issue:

1. Go to **Administration Setup** → **Manage Apps** → **Connected Apps** and click **Edit** next to **Experian Data Quality** and set the IP Relaxation setting to "**Relax IP Restrictions**".

2. Go to **Setup** → **Administration Setup** → **Security Controls** → **Network Access** and add the **IP** of the EDQ server.

Inline Editing is Disabled in the Detail Page When Overriding the “New” and “Edit” Buttons

Symptoms
Inline Editing is not available on the Detail page when using the page override implementation method. When users double click the field to edit a record inline edit functionality is not available and when hovering over a supported field the pencil icon does not appear.

Issue

This is a limitation of Salesforce’s Inline Editor and is expected behavior when the Edit button has been overridden. If inline edit functionality is required within the Detail page follow the steps below.

Solution / Workaround

Note: Follow the described steps if you would like to edit record details.

1. Go to **Setup → Custom Code → Visualforce Pages**.
2. Click the **New** button at the top of the Visualforce page to create a new Visualforce page.
3. Enter the following values:

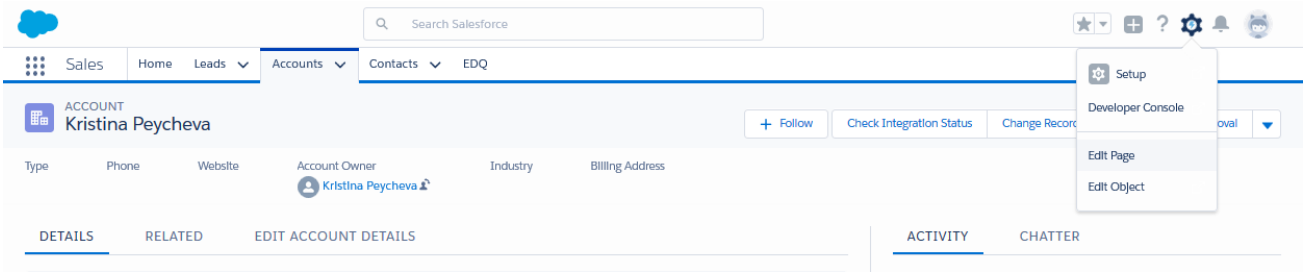
   Label: *{Object Name}* Detail Page

   Name: *{Object_Name}* DetailPage
4. In the Visualforce Markup tab enter the following code:

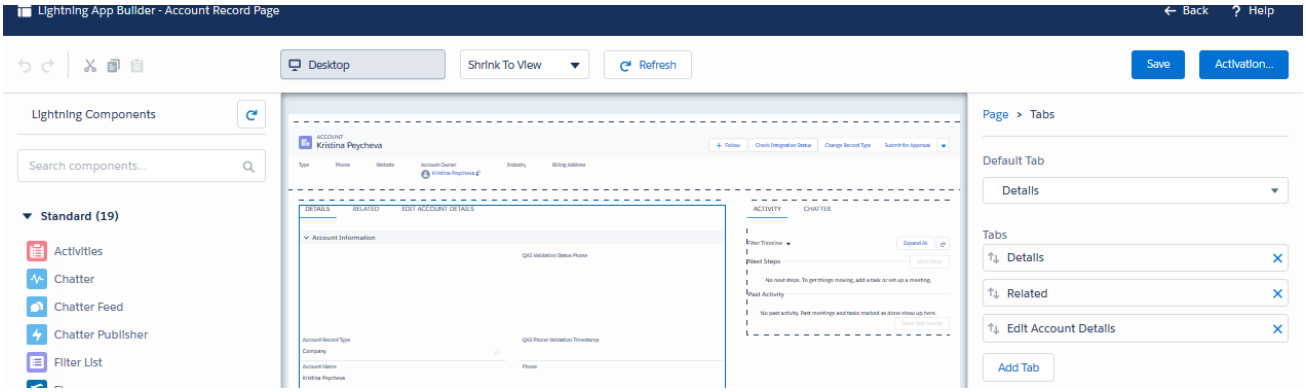
```
<apex:page StandardController="{Object API Name}" tabStyle="{Object API Name}"
sidebar="true" extensions="EDQ.DataQualityEnforcedUsageController"
action="{!Execute}">
    <body>
        <div class="loadingWrapperDivCustom"></div>
        <div id="detailsBody" style="display:none">
            <apex:stylesheet value="{!URLFOR($Resource.EDQ__DynamicPageCss)}"/>
            <apex:stylesheet value="{!URLFOR($Resource.EDQ__EDQAssets,
'styles/LightningCss.css')}" />
            <EDQ:DataQualityDetailPageScripts
EnforcedUsageRefreshTouchpointsAction="{!Execute}"
                  Urls="{!Urls}"
                  DetailPageUrl="{!DetailPageUrl}"
                  DataQualityEnforcedUsageData="{!EnforcedUsageData}"
                  EnableEnforcedUsage="false"
                  IsDetailPageLightningCompatability="true" />
            <apex:detail inlineEdit="true" relatedList="true"
oncomplete="loading(); execute();"/>
        </div>
    </body>
</apex:page>
```

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

6. Click the Save button;
7. Navigate to the object for which you would like to utilize the detail page inline editing;
8. Open one of the existing records.
9. Navigate to **Settings** and click on **Edit Page**.

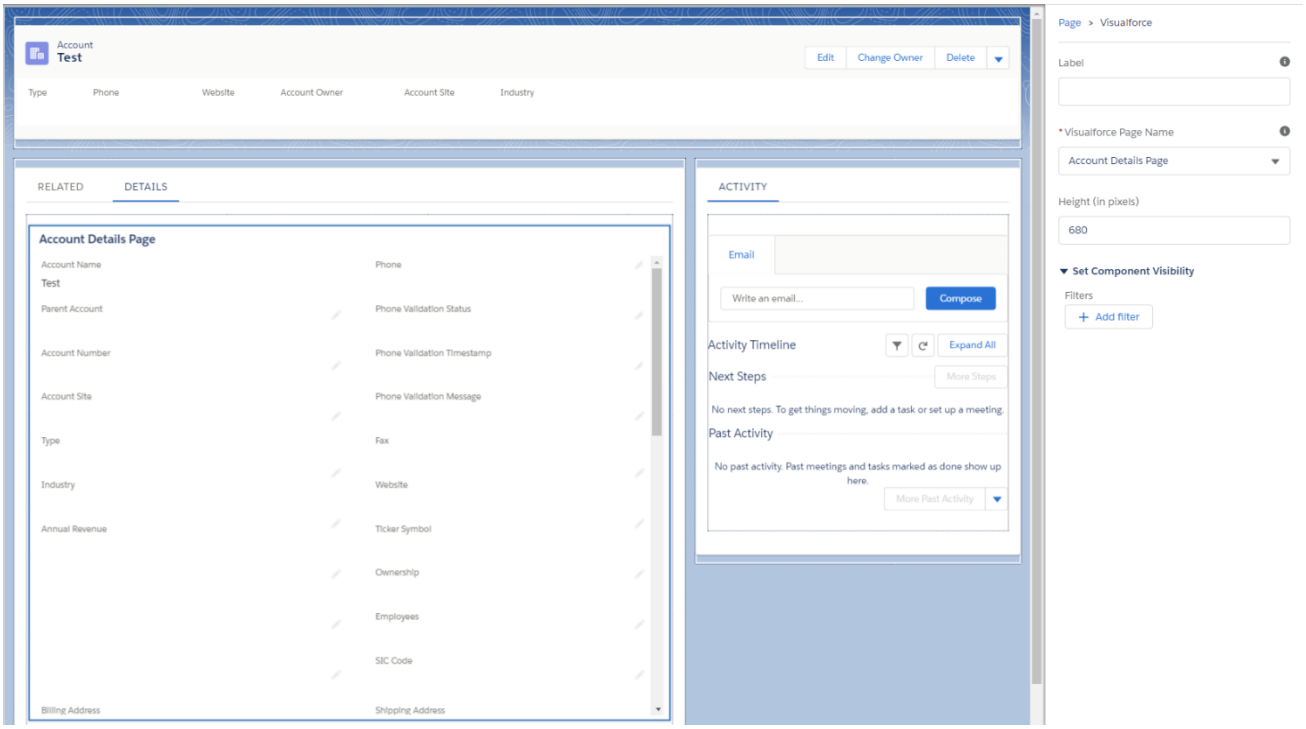


10. Select the **Tabs** section within the page editor.



11. Click on the **Details** tab and remove its content.
12. Click the **Add Component(s) here** link.
13. Select **Visualforce** from the left-hand pane.

14. Using the **Visalforce Page Name** dropdown on the right-hand pane, select the page you've created in step 2 and increase its height.



15. Click the **Save** button.

Note: Make sure the tab is available and assigned as **Org Default**. If not click on **Activation** button and select **Assign as Org Default** button. This will activate your tab throughout your organization environment.

Rapid Search (Non-page Override) Does Not Paste Back Values to the Detail Page When Using Enforced Usage

Symptoms
Rapid Search does not paste back values to the Detail page and does not close in Internet Explorer when using Enforced Usage (Rapid Search non-page override implementation method).

You have enabled Rapid Search Enforced Usage (non-page override) but the information does not paste back and the Rapid Search popup doesn't close in Internet Explorer.

Issue

There are two scenarios in which Enforced Usage (Rapid Search non-page override) will not paste back values to the page. Listed below are steps you can follow to confirm if a scenario is prevalent.

Go to Internet Options, Security tab in your Internet Explorer browser:

1. Enable Protected Mode **is unchecked**.

The Salesforce domain for your account **is added** to Trusted Sites (e.g. https://eu3.salesforce.com).

The EDQ domain **is NOT added** to Trusted Sites (e.g. https://sfv5.online.qas.com).

2. Enable Protected Mode **is unchecked**.

The Salesforce domain **is NOT added** to Trusted Sites (e.g. https://eu3.salesforce.com).

The EDQ domain is **added** to the Trusted Sites (e.g. https://sfv5.online.qas.com).

Solution

Add both the Salesforce and the EDQ domains to Trusted Sites

1. Click the Internet Explorer Settings icon and click the **Internet Options**
2. Select the **Security** tab
3. Click on the **Trusted Sites** icon
4. Click the **Sites** button
5. Add the following URLs:
    - your Saleforce domain e.g. https://eu3.salesforce.com
    - https://sfv5.online.qas.com
6. Click the **Close** button;
7. Click the **OK** button;

EDQ for Salesforce Cannot Prepopulate Lookup Fields

Symptoms
EDQ for Salesforce cannot prepopulate lookup fields by passing value to the URL of the query string Solution__c=TestSolution1&Solution__c_lkid=50124000000LTRm&Solution__c_lkold=TestSolution1

Issue

This problem can occur when you haven't passed the correct parameters in the URL.

Solution

1. To be able to set pre-populate a lookup field via passing parameters to the URL query string of the page pass the below three parameters:

   FIELD_HTML_ID=FIELD_VALUE&FIELD_HTML_ID_lkid=FIELD_ID&FIELD_HTML_ID_lkold=FIELD_VALUE

   - Replace ***{FIELD_HTML_ID}*** with the HTML element id of the lookup field on the page.
   - Replace ***{FIELD_VALUE}*** with the value you would like to pre-populate the field with.
   - Replace ***{RECORD_ID}*** with the record id of the related sObject which has a value of FIELD_VALUE.

For example, to set the value to "Burlington" of the account look up field in contacts please pass the below parameters:

```
AccountId=Burlington&AccountId_lkid=XYZ&AccountId_lkold=Burlington
```

The "Change Record Type" Dialog Does Not Pass the Selected Record Type to Visualforce Page Overrides in Salesforce Lightning

Issue

As of Spring '17 the "Change Record Type" dialog (invoked on the record detail view) does not pass the selected record type to Visualforce page overrides. Moreover this dialog cannot be overridden by custom code.

Solution

Solution 1: Use a custom global action instead of the standard “Change Record Type” action

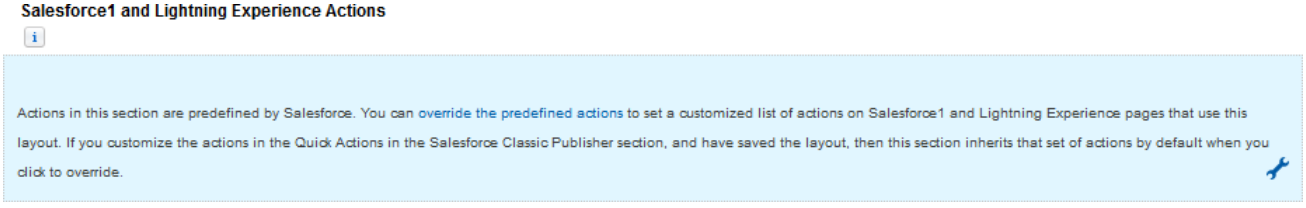
Create a new custom global action

1. Go to **Setup → User Interface → Global Actions → Global** Actions. Click the **New** Action button to create a new action.
2. Enter the following **Action Information**:

   Action Type: Lightning Component
   Lightning Component: EDQ:recordTypeSelector
   Height: 250px
   Standard Label Type: --None—
   Label: Change Record Type (EDQ)
   Name: Change_Record_Type_EDQ
3. Click the **Save** button.

Add the action to the object layout

1. Go to **Setup → Object and Fields → Object Manager → {Object Name}** (e.g. Account).
2. Navigate to the **Page Layout** section. Click on the arrow next to the desired page layout which you would like to edit and click the **Edit** link.
3. Navigate to **Salesforce1 and Lightning Experience Actions** and click the wrench icon on the right to override the defaults.



4. From the selector at the top of the page select the **Salesforce1 & Lightning Actions** category and then drag the **Change Record Type (EDQ)** action on the page layout somewhere before the standard **Change Record Type** action.
5. Click the **Save** button.
6. Make sure to use the **Change Record Type (EDQ**) action instead of the standard one.

Solution 2: Use a Visualforce page instead of the standard "Record Type" field in the layout

Follow the steps below if a record type field is used in a layout:

Standard Objects

7. Go to **Setup → Object and Fields → Object Manager → {Object Name**} (e.g. Account).
8. Navigate to the **Page Layouts** section and select a layout.
9. Remove the standard Salesforce record type field.
10. From the selector at the top of the page select the **Visualforce Pages** section, choose the page with the same name (e.g. Account Record Type) and drag it to the page layout.
11. Once it is placed, hover over it and click on the **Properties** icon which looks like a wrench (🔧) positioned in the upper right corner of the component.
12. A pop up with the Visualforce Page Properties will appear. Enter:

    Width (in pixels or %): 100%
    Height (in pixels): 40px
    Show scrollbars and **Show label** should be left **unchecked**.

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

Custom Objects

1. Go to **Setup → Custom Code → Visualforce Pages**. Click the **New** button
2. Enter the following values:

    Label: *{Custom Object Name}* Record Type
    Name: *{Custom_Object_Name}*RecordType

3. In the Visualforce Markup tab enter the following code:

```
<apex:page standardcontroller="{Custom Object Name}__c"
extensions="EDQ.RecordTypeExt" applybodytag="false">
            <body id="lightningStyle">
                <apex:stylesheet value="{!URLFOR($Resource.DynamicPageCss)}" />
                <apex:stylesheet value="{!IF(IsSalesforce1 == true,
urlfor($Resource.EDQAssets, 'styles/LightningCss.css') , '' )}" />
                <apex:form styleClass="customRecordType">
                    <span class="label">Record Type</span>
                    <span class="value">{!RecordTypeName}</span>
                    <apex:commandButton value="[Change]" oncomplete="change()"
styleClass="btn" rendered="{!hasRecordTypes}" />
                </apex:form>
```

```
            </body>
            <script>{!JS}</script>
        </apex:page>
```

Replace *{Custom Object Name}* with the name of your object.

You may find the exact *{Object Name}* and *{Object API Name}* by going to **Setup → Object Manager**. Select your object to navigate to the Details section.

4. After you created your Visualforce page click **Save**.
5. Follow the steps 1-7 as per the standard object.

The EDQ Tab Does Not Appear in the Navigation Bar When the Package is Installed

Symptoms
The EDQ Administration tab is missing in the Salesforce Lightning navigation bar.

Issue

The EDQ Address, Email and Phone Validation Package has been installed, but the EDQ Administration tab doesn't appear in the Salesforce Lightning navigation bar.

Solution

Please follow the steps below to add the EDQ Administration tab to the Salesforce Lightning navigation bar:

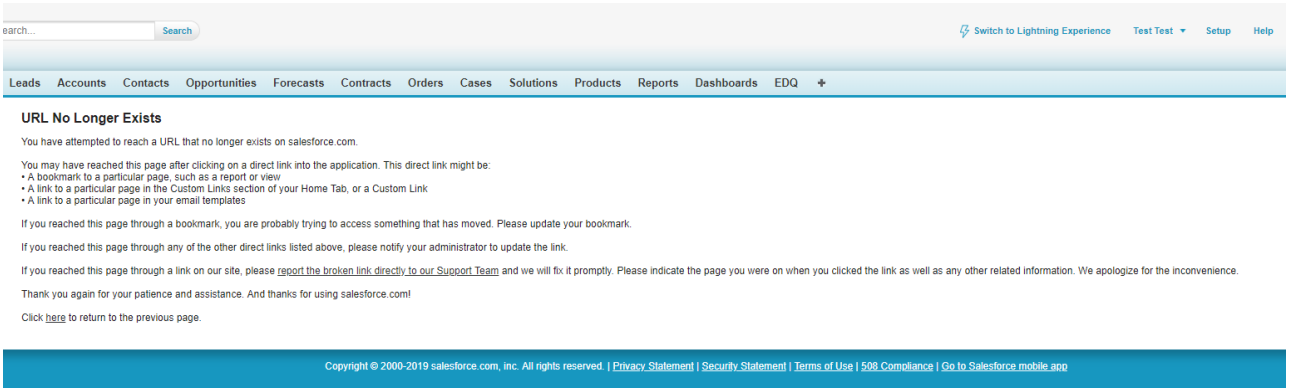
1. Go to **Setup → Apps → App manager**.
2. Navigate to the Sales for Lightning app in the Lightning Experience App Manager. Click on the arrow to edit the app.
3. Navigate to the **Select Items** link on the top.
4. Select the EDQ tab and then using the arrow add it to the **Selected Items** list.
5. Click the **Done** button.

‘URL No Longer Exists' Error Message is Returned on the Page Layout When Using Dynamic Page Override Implementation Method

Symptoms
An error message ‘URL No Longer Exists’ is displayed on the page layout, when Dynamic Page Override implementation method is utilized for Edit/New actions on a record.

Issue

Using Dynamic Page Override Implementation methods on Edit/New actions could return an error **‘URL No Longer Exists’**, when the user tries to access the page. (Please refer to the screenshot below)

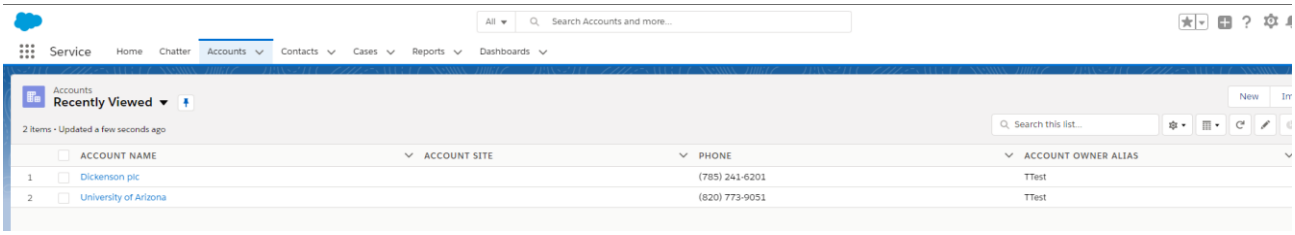


This error outlines that the remote site setting for the current domain endpoint could be missing in the environment.

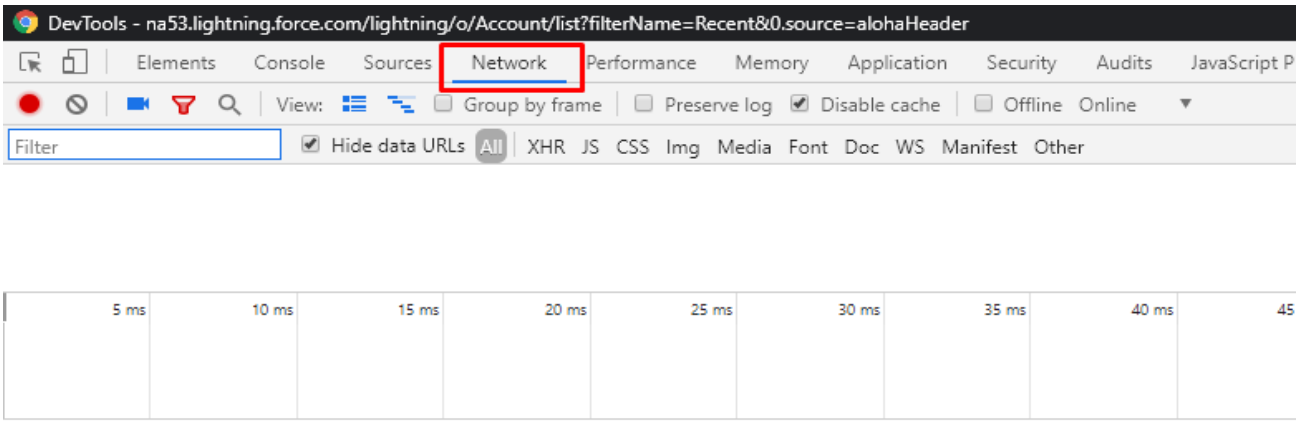
Solution

To resolve the issue, the Salesforce domain of the organization should be added as Remote Site Setting. In case the error persists please follow the steps below to review the exact endpoint, which should be added as Remote Site Setting:

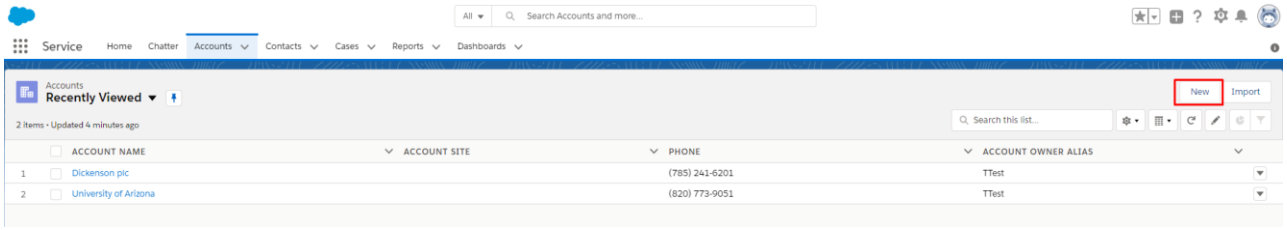
1. In Lightning Experience go to the Object tab, for which Dynamic Page Override implementation method is utilized. (e.g. Accounts)



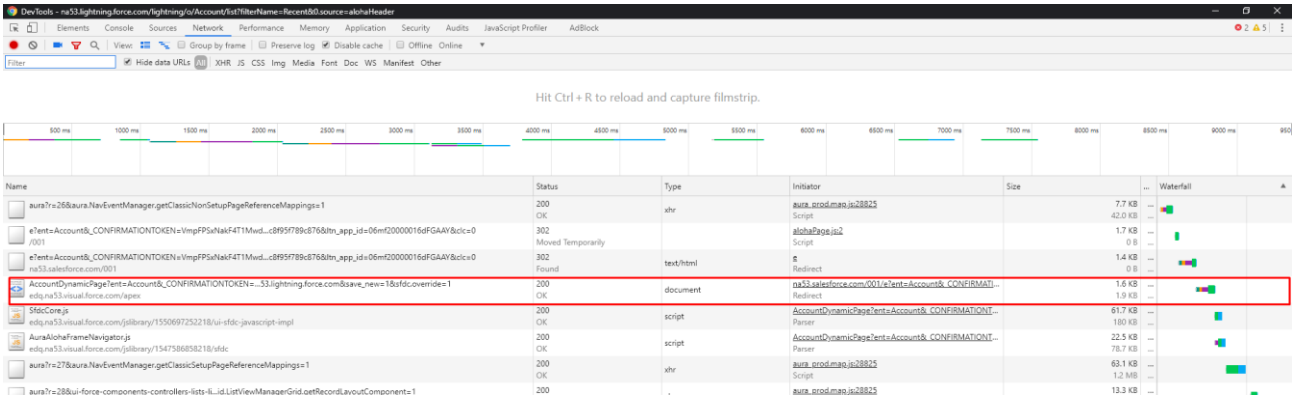
2. Open the browser console and go to the **Network** tab (**Note**: For different browsers the Network tab may differ. In this example, Chrome is used.)



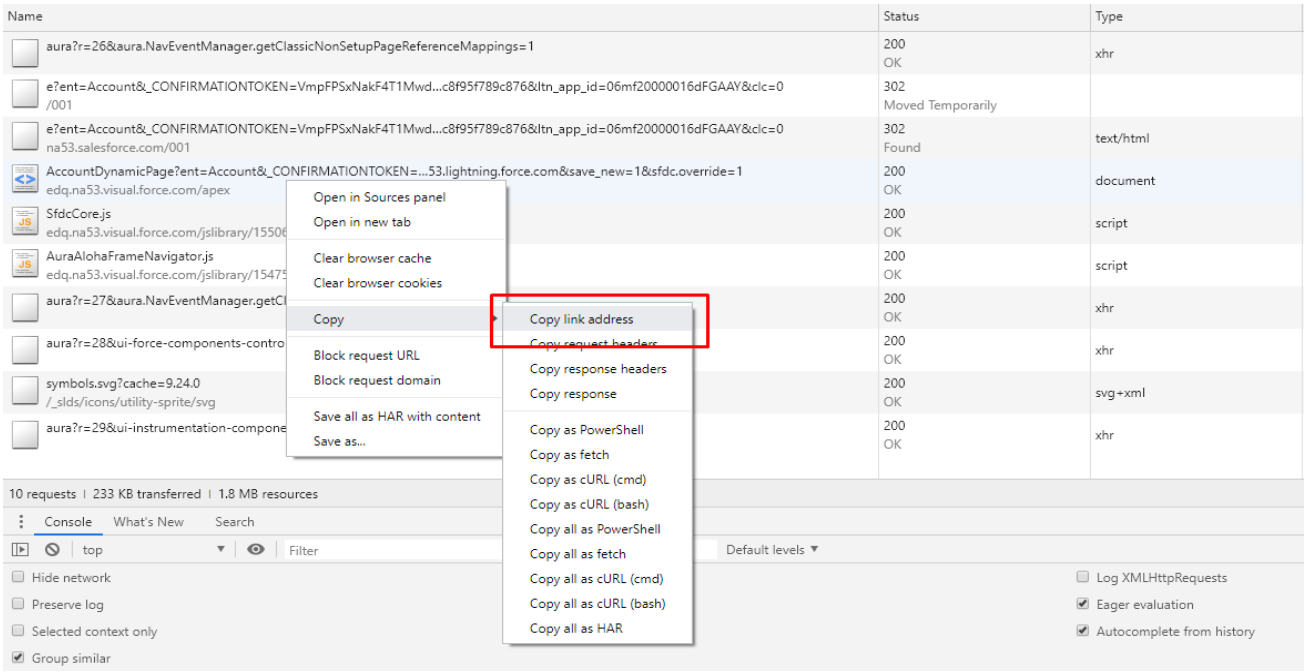
3. Without closing the browser console, return to the Salesforce window. Click the **New** button or edit a record.



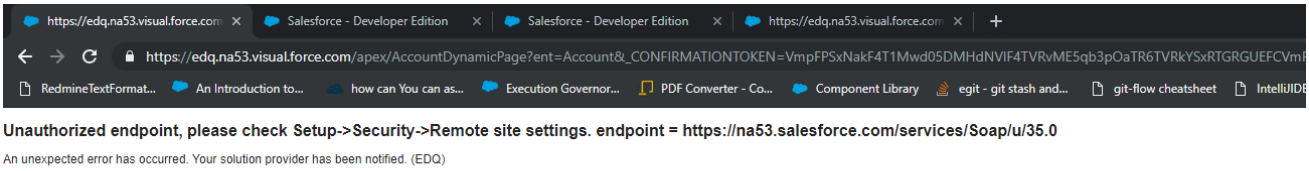
4. Return to the Network tab in the browser console. You should see a list of all resources executed by triggering the New button. Find the **{Object}**DynamicPage URL reference in the list, where **{Object}** is the object for which the Dynamic Page Override implementation method is utilized. For this example, Account object is used. (Please refer to below attached screenshot):



5. Hover over the dynamic page reference. Right click and select **Copy Link Address**



6. Return to the Salesforce window and paste the copied URL. Add parameter ***&edqShowError=true*** at the end of the URL. Press Enter. The cause of the error should appear:



7. Copy the provided endpoint from the message on the page layout and add it as Remote Site Setting.

Unable to access EDQ admin panel on Safari browser for iOS (version 13 or above) or MacOS (version 12 or above)

Symptoms
EDQ for Salesforce's admin panel within the Salesforce org cannot be accessed (returning "Authorization failed" error or web page loading indefinitely).

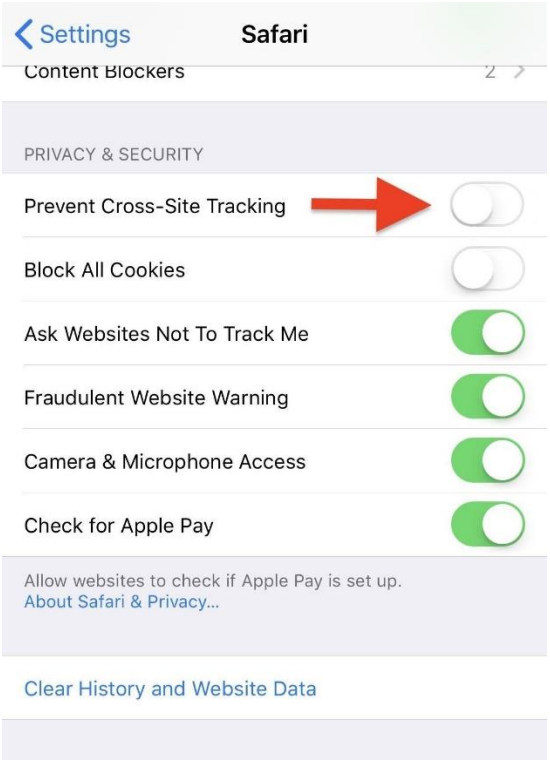
Issue

This problem can occur when Safari is set to prevent cross-site tracking which in the case of EDQ disallows the browser from sending cookies containing important session and setting data to the EDQ backend servers.

Solution

1. For *Safari* on *MacOS*: Click on Safari menu (top left of screen), click on **Preferences**, click on **Privacy**, and uncheck "**Prevent Cross-Site tracking**". After that click on **Manage Website Data** and click on "**Remove All**".

2. For *Safari* on *iOS*: Go to the iDevice's Settings (cog wheel app), tap on **Safari**, uncheck "**Prevent Cross-Site tracking**"; make sure that **Block All Cookies** is unchecked; then tap on **"Clear History and Website Data".**



3. Cleaning website data will log you out of your org and you will need to enter your credentials again. After this you should be able to access the EDQ admin panel without issue.