

IMPORTANT UPGRADE INFORMATION

As a precaution please backup your Single Table Dedupe Scenarios, Master Rules, and MassImpact Scenarios prior to upgrading. This is especially important for users who still have these files located on their C:\Program Files\DemandTools directory as these files will be copied or moved during the upgrade process.

- All folders previously stored in the C:\Program Files\DemandTools directory have been relocated to the DemandToolsData folder in your "My Documents" directory (or Application Data if My Documents is read only). Existing files have been copied to the new locations.
- This includes ALL Single Table Dedupe Scenarios, Master Rules, and MassImpact Scenarios. As a result, the full pathname for scheduled jobs will need to be updated to reflect this new location. Check the "File Paths" tab in the DemandTools Options menu for the exact path location.
- Existing Log and Restore files remain in the old directory, but any new Log and Restore files will now be created in the appropriate DemandToolsData directory.

Note: If upgrading from a 2.11 Beta or 2.2 Release Candidate version, you will need to uninstall the old version and reinstall the new production version. Also, if you are using a Single Table Dedupe Scenario where "Use Salesforce Merge" is unchecked (using beta 2.11.25 or higher), please verify that ALL objects are checked in "Merge Objects". Ideally, when available (i.e. for merging Accounts, Contacts or Leads) "Use Salesforce Merge" should be checked. This is the default for all prebuilt Account, Contact or Lead scenarios and brand new scenarios, but may have been manually unchecked.

If upgrading from 1.71 or an earlier version of DemandTools, any customizations made to prebuilt Single Table Dedupe Scenarios WITHOUT changing the name, will be overwritten with our default scenarios and moved to the DemandToolsData directory. Custom scenarios will be copied from C:\Program Files\DemandTools\Scenarios to the appropriate new DemandToolsData directory.

If upgrading from 2.00 or an earlier version, any customizations made to prebuilt Master Rules WITHOUT changing the name, will be overwritten with our default rules. Only custom rules will be copied from the C:\Program Files\DemandTools\Master Rules to the appropriate new DemandToolsData directory.

If upgrading from 2.01 or higher version of DemandTools, all custom/updated scenarios and master rules will be retained and located in the DemandToolsData directories. This applies even if the "File Path" settings in DemandTools Options for Scenarios and Master Rules had been set to the C:\Program Files\DemandTools folders.

NEW FEATURES IN THIS RELEASE

1. New Module: Reassign Ownership!

This new module is designed to replace the limited "Account Transfer" capabilities currently in MassChange which allowed the transfer of not only the Accounts but their related sub-objects. In this new module ANY OBJECT in Salesforce can be reassigned along with its sub-objects. Also, in addition to providing conditions for choosing which objects should be reassigned, a file of object ID's can also be read in for reassignment. Unlike using MassEffect to make this change, there are now options to reassign the related sub-objects at the same time. The ability to create tasks on the primary object detailing the changes that were made to the sub-objects as a result of the reassignment is also included!

Capabilities & Features:

- Ability to reassign the ownership of any object in Salesforce, with options to also reassign all or specific related sub objects
- Only reassign sub objects that matched to previous parent object owner or all sub objects (regardless of the previous owner)
- Use conditions based on any field to specify a subset of objects to be reassigned
- Read in a file of specific Object ID's/Owner ID's to be reassigned
- Ability to use multiple/complex "Match Conditions" to reassign objects to multiple owners at the same time
- Randomly distribute a group of objects to multiple owners
- Realign all sub objects to match parent object owner only (do not reassign parent)
- Create Tasks and/or Summary Events to track ownership changes on the parent object
- Schedulable through Windows Scheduled Tasks

Common Uses:

- Mass transfer Accounts to a new owner
- Redistribute Accounts based on territories
- Realign all or selected sub objects beneath an Account or other parent object ONLY updating records where the sub object owner DOES NOT currently match the parent owner

2. Single Table Dedupe now has Multi-table join capabilities as well as some new features!

- Multi-table join is now available when selecting "Fields to Show on found duplicates", using where conditions to specify which objects to search, adding mapping conditions (fields to match on), and creating master rules.
 - Customers upgrading from an older version of DemandTools will still see the old "Single-table" based where clause for any existing scenarios. To switch to the new multi-table based where clause (which also includes "Or Groups"), select the "Use New Where Clause" button in the bottom right hand corner of the screen. Existing conditions will need to be rebuilt as a result.
- New Final Results Grid Options
 - Color coding for easy identification of Active/Inactive/Queue owners.
 - Option to "Export Grid Data" to a formatted xls file (will look just like the grid). Raw data file option still available as well.
 - Grid Display Options: New dropdown includes "Show All", "Show Checked" or "Show Unchecked".
 - Count of "checked" items now displayed along with the x total number of objects in X groups, i.e. 4000 objects in 1800 groups (12 selected).
 - A count of total merged objects is reported to the user interface and tracked in the log file when merging is complete, i.e. "Deduplication by group is complete and 6 Lead objects were merged into 2 Lead's".

3. Support for Excel 2007 files (xlsx)

- Excel 2007 files can now be read directly into MassEffect and "Default Restore File Extension" in DemandTools Options can now be set to xlsx.
- When specifying input files for MassEffect, FindId's and Reassign Ownership, no longer have to specify the file type.

4. New General Settings in DemandTools Options

- Create tasks for batch processes: Uncheck this box if no tasks should be created for batch/scheduled jobs.
- Send User emails for New/Update Tasks or Leads with assignment rules: Check this box if you want emails to be generated when adding/updating Tasks via MassEffect or inserting new Leads and assigning via a Salesforce Lead Assignment rule.



5. New Date Options in Where Clause

- New Calendar and Fiscal Year options available when creating where conditions based on dates.

INSTALLATION

1. Please install Microsoft .NET Framework Version 3.5 Redistributable Package (x86) prior to installation of DemandTools. If you do not currently have this installed on your computer, the DemandTools installation wizard will automatically provide the link for download.
2. You can install new DemandTools versions over existing versions (should not need to uninstall and re-install).
3. The core components of DemandTools will be loaded on your computer under Program Files in the C:\Program Files\DemandTools directory. A DemandToolsData folder will be created in your "My Documents" folder, with the following subdirectories:
 - Restore File Directory: ...Restore\
 - Single Table Dedupe Scenario Directory: ...Scenarios\ (subfolders will be created for all the tables that have a prebuilt or custom scenario defined)
 - Master Rule Directory: ...Master Rules\ (subfolders will be created for all the tables that have a prebuilt or custom master rule defined)
 - Log File Directory: ...LogFiles\
 - Cache Directory: ...Cache\ (holds the Salesforce table and field definitions for MassEffect)
 - MassImpact Scenario Directory: ...MassImpact Scenarios\
 - Reassign Ownership Scenario Directory: ...Reassign Ownership Scenarios\
 - Replace List Directory: ...Replacelist\ (holds the ReplaceList.xml: Cleaned Account Name List and NameReplaceList.xml: Nickname List files)

LOGGING IN TO DEMANDTOOLS

Users login to DemandTools using their Salesforce user id and password. By default, DemandTools users must be System Administrators in Salesforce. Non-administrator access can be enabled by request only. Salesforce Enterprise Edition users, who have modified the default permissions for this profile, need to make sure that "Modify all data" and "View Configuration and Set-up" is still selected.

A Salesforce security token may also be required if logging in from a non-trusted network IP address.

NETWORK SETTINGS

In most cases no network settings have to be adjusted in order to use the DemandTools on your local computer. If you do have problems logging into the DemandTools (and you can login to Salesforce using the same login ID and Password) you should provide the following information to your network administrator.

- Communication: All communication is done to the Salesforce servers (salesforce.com) and an initial authentication is done to the CRMfusion authentication servers (crmfusion.com) via SSL on port 443. If you are bypassing salesforce.com on your proxy you will have to bypass crmfusion.com also in order to authenticate.
- Proxy Settings: Proxy settings can be accessed by selecting the "Proxy Settings" button on the login screen. These settings are global and will work for your communications to Salesforce and to the CRMfusion authentication servers.
- Session Settings: Ideally your session settings for salesforce.com should be set to more than 2hrs. To modify this select Setup -> Security Controls -> Session Settings. In the DemandTools Options menu, set the Relogin Session Time to the same value as your Salesforce session time.

TECHNICAL SUPPORT



If you need to reach CRMfusion technical support you can either email support@crmfusion.com which will automatically log a case on our Salesforce. If you have been enabled as a self-service user you can go to our support center at <http://www.crmfusion.com/support.html> and access our solutions database to find the answer to your question or log a case directly to our Salesforce instance.

If you need to be enabled as a self-service user, please submit a request by emailing support@crmfusion.com.

NOTE: Be sure to add support@crmfusion.com as a trusted sender on your email server, and ideally make sure that emails can also be received from salesforce.com.

The best way to reach us is by email or internet; however, if you prefer to contact us by phone you can reach us toll-free at (800) 961-8205.

WE STRIVE TO HAVE ALL ISSUES RESPONDED TO WITHIN A 12 HOUR PERIOD, ALTHOUGH MOST ISSUE ARE RESOLVED SIGNIFICANTLY QUICKER.

