EDQ for Salesforce

V4 to V5 upgrade guide

Contents

1. Introduction

EDQ for Salesforce v5 is the latest version of Experian's industry leading contact data quality solution. This document is intended to be used in conjunction with the main product manual (Installation and Configuration guide) to assist in upgrading from EDQ for Salesforce v4.

EDQ for Salesforce v5 is a major new release and it is necessary that you start afresh and carry out a new install of v5 in your Salesforce org. One of the new features and enhancements in the v5 solution includes the ability to import and export settings from either a v5 or v4 configured EDQ for Salesforce environment. This is particularly useful for existing v4 customers who wish to upgrade to v5 whilst seamlessly maintaining existing v4 configurations and settings. This document explains the setting migration process for v4 customers.

Firstly, you should check which version you are upgrading from. The document contains information on upgrading from **EDQ for Salesforce v4**.x. If you are upgrading from any versions other than v4.x, you will be unable to export settings and import into v5 therefore you will need to reconfigure the solution once installed as per Installation and Configuration guide.

If you experience problems and are unable to find help in either this document or the main product manual, then please contact Experian Technical Support for assistance.

2. New features and enhancements

This section provides a brief overview of the key features and enhancements introduced in EDQ for Salesforce v5.

2.1 General

- **New** Usage reporting
- Architecture improvements
- Error handling improvements
- Improved sandbox refresh workflow
- Documentation improvements
- Bug fixes

2.2 Installation workflow

- **New** Installation wizard
- Improved API design for custom VF pages
- Two integration methods for standard pages

2.3 Administration and configuration

- **New** Administration area
- **New** Dynamic layout's / per data set configuration
- **New** Per profile configuration
- **New** Import / export settings feature

2.4 Real time address workflow

- **New** Rapid Search mode UI
- Interactive mode enhancements
- Improved local language support

2.5 Real time email and phone workflow

- **New** Global phone verification
- Email and phone enhancements

2.6 Batch mode address cleansing

- **New** Automated Batch Jobs / Batch Scheduler
- **New** Batch UI aligned with Salesforce
- **New** Batch validation status (user accepted)
- Improved review & commit process
- Custom layout support

For a detailed list of new features and enhancements please refer to the release notes

3. Prerequisites

To proceed with upgrading to v5 you will require an EDQ for Salesforce v5 Application Key.

If you have not received your v5 Application Key from Experian Data Quality, please contact your sales representative or contact Experian Technical Support.

> **Note –** A new v5 application key is required to upgrade and utilize the EDQ for Salesforce v5 solution, an existing EDQ for Salesforce v4 application key is not compatible with v5. Please ensure you have received your new v5 Application Key before proceeding.

4. V4 to V5 upgrade summary

- Export EDQ for Salesforce v4 settings
- Uninstall the EDQ for Salesforce v4 app from your Salesforce org
- Install the EDQ for Salesforce v5 app into your Salesforce org
- Configure the EDQ for Salesforce v5 solution
- Modify the Settings.js file generated from exporting v4's settings
- Import EDQ for Salesforce v4 settings

5. V4 to V5 upgrade steps

> **Note** – Before you proceed with the steps below, make sure you have checked the "Do not filter by country" checkbox in the Country Section as shown on fig. 1.1 below.

5.1 Export EDQ for Salesforce V4 settings

The first step of the migration process is to export your V4 settings into a file stored on your local machine.To export your V4 settings

1. navigate to **QAS** -> **Administration** -> expand **Advanced Settings** and click on the **Export** button as per fig 1.0.

Fig 1.0 – export your v4 settings.

2. Save the exported **Settings.js** file on your local machine.

Fig 1.1

5.2 Add "Adminemail" section in the exported settings .JS

1. Proceed by opening the **Settings.js** file with Notepad or a similar text editor.
2. Navigate to the bottom of the file where you should find "edqGlobalSettings". Right after the "EnableDebugLogging" key, add a comma, then "AdminEmail":"**EMAIL**"
3. Replace "**EMAIL**" with a valid System Administrator account of your org. Please see the example shown in Fig 1.01.

Fig 1.01 – add your admin email to setting.js file.

4. Save the modified **Settings.js** file on your local machine.

5.3 Uninstall the EDQ for Salesforce V4 app

To uninstall your EDQ for Salesforce v4 follow the steps below <u>for each configured Object</u>:

1. Delete the QAS Apex Triggers you created as part of the v4 package installation.

   To delete the QAS Apex Triggers navigate to **Setup** -> **App Setup** -> **Customize** -> *{your Object}* (e.g. Account) -> Triggers and click on the **Del** link next to the *{ObjectName}_CA_AIAU* and *{ObjectName}_CA_BIBU* triggers as shown on Fig. 1.2.

   Fig 1.2

2. Remove the QAS Home Page Component

   Navigate to **Setup** -> **App Setup** -> **Customize** -> **Home** -> **Home Page Layouts** and click on **Edit** next to your Home page layout. Uncheck the check box next to **QAS Console Helper 15**, **QAS Console Helper**, **QAS Apex Session** as per Fig 1.3 and save your changes.

   Fig 1.3

3. If you are using Interactive address, email or phone verification remove the CA{*ObjectName*} Override Visualforce page from your object's page layout.

   Go to **Setup** -> **App Setup** -> **Customize** -> *{your Object}* (e.g. Account) -> **Page Layouts** and click edit next to your page layout. Select "Visualforce Pages" from the left-hand side menu and drag the CA{*ObjectName*} Override page element from the layout back to the palette as per Fig. 1.4.

   Fig 1.4
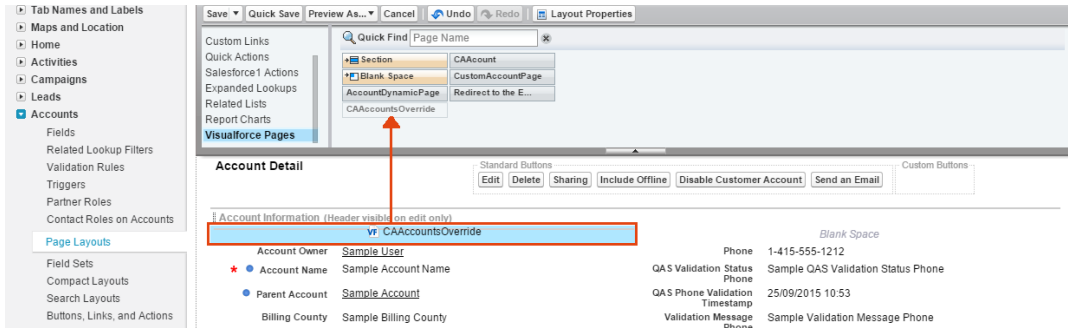
4. Uninstall the package

   To uninstall the v4 package navigate to **Setup** -> **App Setup** -> **Installed Packages** and click on the "Uninstall" action link next to your QAS for Salesforce v4 solution package as per Fig 1.5.

   Fig 1.5

   Note - If during the uninstallation process you get any errors such as those depicted in Fig. 1.6, this is due to the inability to uninstall the v4 package to a dependency in your code. Review the problem description in the Problems table and remove the dependency to the EDQ for Salesforce v4 package. Once completed repeat step 4 and uninstall the solution package

   Fig 1.6
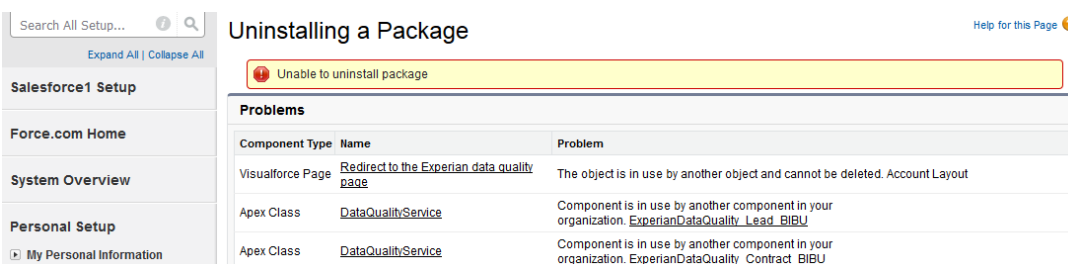
5.4 Install the latest EDQ for Salesforce V5 app

Install the latest Global Data Quality for Salesforce v5 package from the AppExchange:

To install the solution, follow the instructions on page 5 - 6 of the Installation and Configuration Guide found in the app exchange link above.

5.5 Configure the EDQ for Salesforce V5 package

There are two implementation methods you can use to integrate EDQ for Salesforce v5. Follow the "*Integrate Global Data Quality into your Salesforce pages*" section on page 15 from the *"Installation and Configuration Guide"*.

To maintain v4 workflow we recommend using the Page Override implementation.

> **Note**: If you however do not wish to override your "Edit" and "New" pages follow the steps described in the Non-page override implementation on page 21 from the "Installation and Configuration Guide". **Note**: There is a some more additional configuration steps if we want use v4 to v5 settings import and that to work as expected.

5.6 Enable EDQ administration settings

Enable the EDQ administration area by granting permission to your Salesforce account and enter your EDQ for Salesforce v5 Application Key. For detailed instructions follow steps 1, 2 and 3 on page 30 of the Installation and Configuration Guide.

> **Note –** Upon entering the v5 Application Key (step 3, page 31 Installation and Configuration Guide), the Quick Start Welcome screen will be displayed. We recommend you **DO NOT** use the Quick Start Wizard as we will be importing settings and all configuration steps should now be completed.

5.7 Import the EDQ for Salesforce V4 settings into V5

Once you have installed and configured EDQ for Salesforce v5, you can import the v4 settings exported previously

1. Navigate to the **EDQ** tab and select *My Account* from the left-hand side menu. In the *Import and Export Setting* section click on the **Import Settings** button as per Fig 1.7.

Fig 1.7
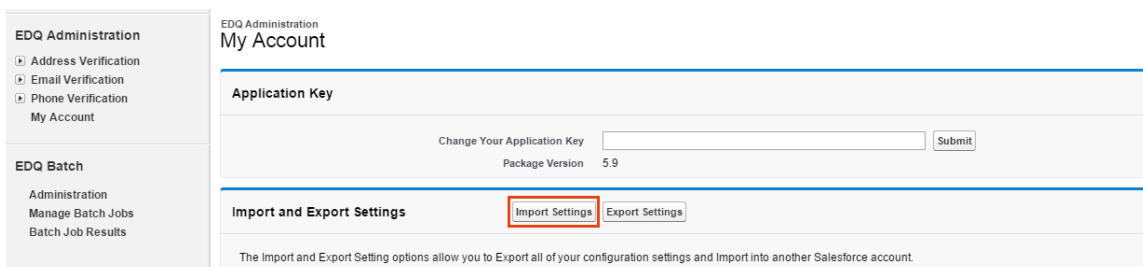
2. On the next screen choose the v4 settings file which you exported and saved locally in step 1 of this guide, by clicking on the **Choose file** button and then click the **Import Settings** button as per Fig 1.8.

Fig. 1.8
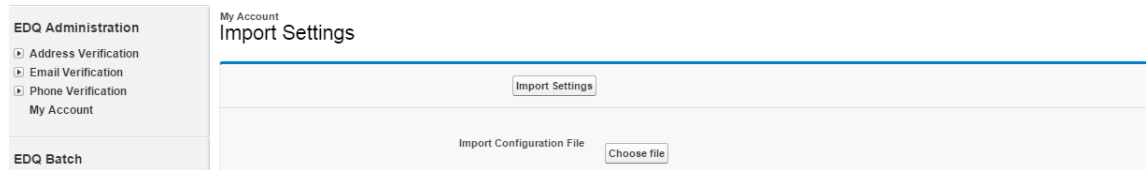
5.8 Additional configuration in EDQ V5 after importing settings from V4

Please complete these additional configuration steps in order to ensure that the v4 to v5 settings import will work as expected.

References will be made to the *"Installation and Configuration Guide for Salesforce Lightning"* found in the app exchange page of EDQ. The steps referenced here will be applicable to both Classic and Lightning.

- Add triggers for all sObjects for which validation is required. Please see page 33 of Installation and Configuration Guide for Salesforce Lightning.
- In case you elected to use the Dynamic Page override flow, you will need to add Remote Site Settings. Please see page 18 of Installation and Configuration Guide for Salesforce Lightning. Please pay attention to the blue "Note" within if you have enabled My Domain for your org.
- Go to EDQ admin panel and make sure that "Enable {Element} Verification". Where { Element } stands for the elements that the validation is configured for, e.g. Address, Email or Phone.

Fig. 1.9
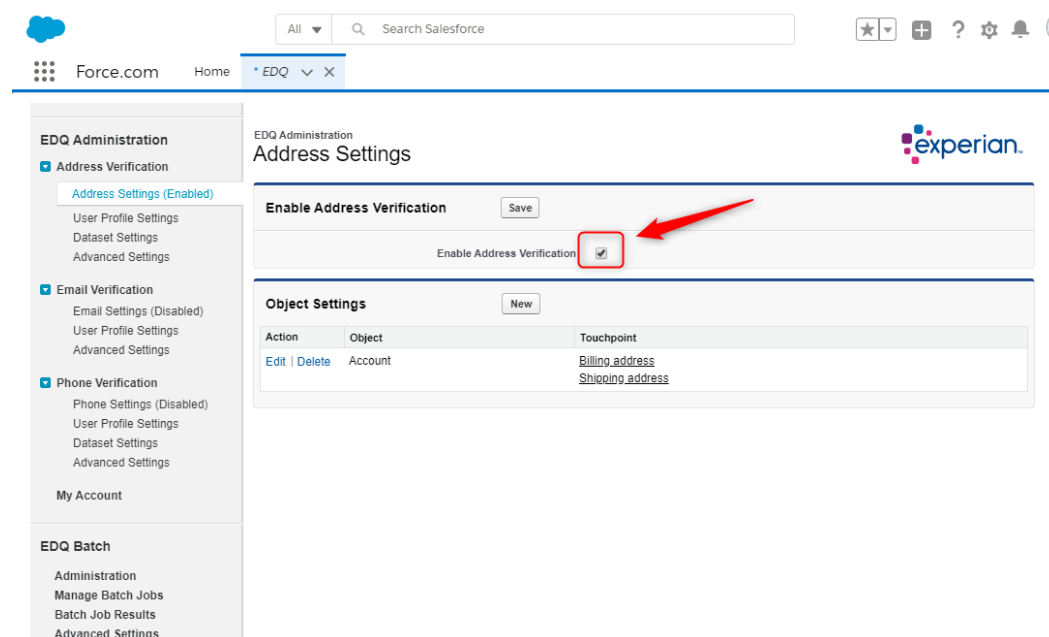
- Please make sure that all output mappings for the touchpoints are configured correctly, it is possible that the setting transfer process may have omitted some values. If you need to use a specific output layout you would need to select and configure it.
  For example, in the below screenshot (Fig 1.10) the default selected layout (after the settings import) is SalesforceTypedown.

Fig 1.10

6. Conclusion

Congratulations! You have successfully upgraded to EDQ for Salesforce v5 and migrated your v4 settings. The solution is now ready to use.

Please refer to the Installation and Configuration Guide for additional configuration options and the User Guide for detailed information on the respective contact data validation modes and techniques available.