



Test Your Knowledge- Assess Module

Assess: This module helps you to understand the hygiene of your data by providing you with a set of useful metrics that are the result of a thorough data analysis using a series of proprietary algorithms.

Use Case 1-Evaluate Assessment Results:

Your manager has already scheduled an Assess scenario to run regularly within DTV and would like you to evaluate the results. Specifically, she wants you to identify any changes that may have occurred across the last three assessment reports for the scenario titled “Assess.”

She has asked you to review the results of the 'Assess' scenario, answer the following questions, compile your responses into a Word document, and submit it for her review.

- Were there any changes in the total number of records evaluated for “Record Quality” across all objects in the last three assessments? If so, list the number of records evaluated in each report.
- How many unusable records were reported for all objects in the first assessment report compared to the last assessment report?
- In the most recent report, how many unusable records were related to the Opportunity, Contact, Lead, and Account objects?
- What is the total number of records assessed across all assessments?
- Based on the total number of records assessed within the “Assess” scenario, what is the current record quality trend?
- Based on the number of records that are listed as “unusable” in most recent assessment, how many of them are contact records that are missing engagement points?

Use Case 2- Review Record Quality Issues:

Your manager would like you to begin identifying how to address the data quality issues reported in the July assessment. As a first step, she has asked you to focus on the Contact object records that were flagged for “missing engagement points” and asked you to complete the following:

- Identify and report the total number of Contact records flagged as “missing engagement points” in the July assessment report.
- Review the records associated with the Contact object that meet the “missing engagement points” scenario criteria.
- Take a screenshot of the Scenario Preview Grid that displays examples of these flagged records and be sure to include the total count identified in step 1 in your submission to your manager.



Next, your manager would like for you to review the Contact records that were flagged for “missing business segmentation” and complete the following:

- Identify and report the total number of Contact records flagged as “missing business segmentation” in the July assessment report.
- Review the flagged records associated with the Contact object that meet the “missing business segmentation” scenario criteria.
- Take a screenshot of the Scenario Preview Grid showing examples of these records and be sure to include the total count identified in step 1 in your submission to your manager.

Lastly, your manager would like to see how many Contact object records listed as “Limited” in July are considered duplicates and asked that you complete the following:

- Identify and report the total number of duplicate Contact records from the July assessment report.
- Review the flagged Contact records that meet the “Contacts Within an Account – Rigid” scenario criteria.
- Capture a screenshot of the Scenario Preview Grid displaying examples of these duplicate records and be sure to include the total count identified in step 1 in your submission to your manager.

Use Case 3- Create New Assess Scenario:

Finally, your manager has asked you to create a new Assess scenario that considers lead, contact, and account fields currently not being utilized by your company. She also wants to consider additional fields that have not been assessed in previous assessments. This will help ensure future assessment reports produce more accurate and meaningful results.

Please complete the following steps:

- Configure a new assessment scenario with the following specifications:
 - Include the Mobile Phone field for assessment on both the Lead and Contact objects.
 - Include the Shipping Address fields on the Account object, corresponding to the Billing Address fields.
 - Exclude the Lead Source field from assessment on the Contact object.
 - Exclude the Probability field from assessment on the Opportunity object.
 - Enable the Match on Account ID option for Contacts & Opportunities.
 - Enable the option to Verify Emails.
- Schedule the new Assess scenario to run quarterly at 4:00 PM, but before saving, make sure the scenario is set to inactive.



- Take a screenshot of the updates made on each object tab within the newly created scenario, as well as a screenshot of the scheduled scenario. Insert all screenshots into a Word document, then upload the document for your manager to review.
 - If you prefer, you may instead record a video demonstrating the completion of each step and include the video link in the uploaded Word document for your manager's review.