



# DQ-Connector salesforce.com

Also for on-demand CRM systems such as salesforce.com the same rule applies: only highest address quality and duplicate-free customer data enables a single view of the customer (SVC). On this Basis sales opportunities can be identified faster and more efficiently used. Equally important is the quality of the data stocks for successfully acquiring new customers and general customer care. The Uniserv DQ Connector for salesforce.com plays a major part in improving the data quality in the salesforce.com CRM. Only then can the full performance of CRM be fully exploited.

## FEATURES

- ▶ Avoidance of additional costs and loss of image caused by incorrect addresses and returned deliveries.
- ▶ Avoidance of duplicated contact data which undermines the targets and functions of a CRM system. Because when different information about the same customer exists in different datasets, this counteracts the target of a complete and unified 360° view over the fields of sales, marketing, professional services and help desk; and thereby prevents efficient and complete implementation of CRM.
- ▶ Fast access and error tolerant search for information in the salesforce.com CRM system. Careful data input is maintained and promoted by fast processing times. The good status quo of the customer data in the CRM system remains at a permanent high level.

## ADVANTAGES

- ▶ extremely simple Plug&Play installation in the AppExchange platform at [www.uniserv.com/appexchange](http://www.uniserv.com/appexchange)
- ▶ guaranteed high quality data in the salesforce.com CRM system
- ▶ highly efficient sales and marketing processes
- ▶ satisfied customers and stronger customer loyalty
- ▶ motivated employees, who with a well maintained CRM system adequately represent the demands of corporate quality during their external contact to customers

## FUNCTIONS

For improvement and security of the data quality in salesforce.com CRM, the Uniserv Data Quality connector provides routines for:

- ▶ a qualitatively optimal search for customer data
- ▶ gathering and alteration of customer data

The quality securing functions can be used as required, either separately or together.

These quality securing functions enable:

### ▶ Check (and where necessary, correction) of addresses

The screenshot shows the 'Lead Detail' page for 'Max Mustermann' in Salesforce CRM. A 'UNISERV' connector is active, displaying a 'Change Address?' dialog. The dialog compares the current address with a proposed one. The current address is 'Rastattastr.13, Pforzheim, 75179'. The proposed address is 'Rastatter Str. 13, Pforzheim, 75179'. Buttons for 'Accept', 'Reject', and 'Check another time' are visible.

Address	Proposal
Street and house number	Rastattastr.13 / Rastatter Str. 13
City	Pforzheim / Pforzheim
Postcode	75179 / 75179

Address correction direct in the salesforce.com system

- Validation, norming and correction of addresses directly during input (real time)
- Automatically created selection lists of possible address candidates following input of an ambiguous address
- Enrichment with additional address elements
- Automatic check for correct postal details without an "extra click"

### ▶ Check for possible duplicates

The screenshot shows the 'Lead Detail' page for 'Max Mustermann' in Salesforce CRM. A 'UNISERV' connector is active, displaying a 'Similar addresses' dialog. The dialog shows a table of similar addresses with columns for Name, Phone, Web site, Street and house number, City, Postcode, Federal state, Country, and Match. Two entries are shown, both for 'Max Mustermann' at 'Rastatter Str. 13, Pforzheim 75179, DE'. The second entry has a '92%' match and is marked 'Merc'. Buttons for 'Ignore' and 'Check another time' are visible.

Name	Phone	Web site	Street and house number	City	Postcode	Federal state	Country	Match
Max Musterman			Rastatter Str. 13	Pforzheim	75179		DE	
Max Mustermann			Rastatter Str. 13	Pforzheim	75179		DE	92% Merc

Duplicate identification direct in the salesforce.com system

- Fast error tolerant check with individual parameters finds possible duplicates immediately during input
- Duplicate identification starts automatically when a new account is registered or an existing account is altered
- During duplicate matching, possible duplicates are compared error-tolerantly to each other
- In the event of possible duplicates being found, a list is created. The user then selects an alteration dialogue, from which data cleansing rules can also be set

## PRE-REQUIREMENTS

- ▶ The DQ connector salesforce.com can be used from the Salesforce Enterprise Edition upwards
- ▶ A salesforce user with administrator rights is necessary for integration

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