

DQ-Connector Microsoft Dynamics CRM

The central factor for the success of any CRM system is the quality of the data stored and used within it – in particular the customer and contact data, which is the heart of a CRM system. This also applies to Microsoft Dynamics CRM. Because only the highest level of address quality and duplicate-free customer data enables a single view of the customer (SVC). The Uniserv DQ connector for Microsoft Dynamics CRM plays a major role in improving the data quality in Microsoft Dynamics CRM. Only then can the full performance of CRM be fully exploited.

Tested by Microsoft: The Data Quality Connector connects Uniserv Real Time Data Quality with Microsoft Dynamics CRM 4.0

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 Microsoft Dynamics 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

- ▶ guaranteed high quality data in the Microsoft Dynamics 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

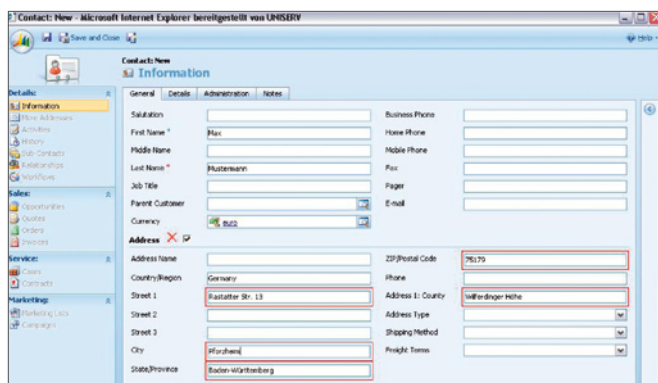
For improvement and security of the data quality in Microsoft Dynamics CRM, the Uniserv Data Quality connector provides routines for:

- ▶ 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:

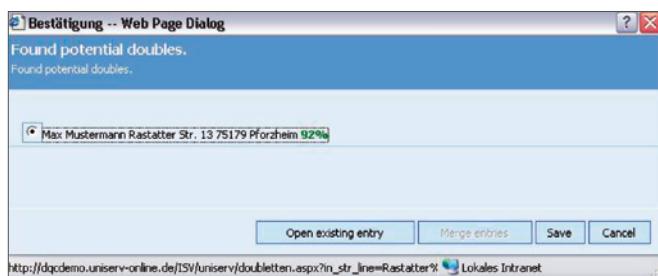
▶ Check (and where necessary, correction) of addresses

A screenshot of the Microsoft Dynamics CRM 'Contact: New' form. The 'Address' section is highlighted with a red box. The address fields are: Address Name (Rastatter Str. 13), ZIP/Postal Code (75179), Country/Region (Germany), Street 1 (Rastatter Str. 13), Street 2 (Pforzheim), City (Pforzheim), and State/Province (Baden-Württemberg). The 'Address I: Country' dropdown is also highlighted with a red box and shows 'de'.

Address correction direct in the Microsoft 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

A screenshot of a dialog box titled 'Bestätigung -- Web Page Dialog'. The message says 'Found potential doubles. Found potential doubles.' Below the message, a text box contains the address 'Max Mustermann Rastatter Str. 13 75179 Pforzheim 92%'. At the bottom, there are four buttons: 'Open existing entry', 'Merge entries', 'Save', and 'Cancel'.

Duplicate identification direct in the Microsoft 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

Before installation of the real time Data Quality Connector Real-Time Microsoft Dynamics CRM, the following software must already have been installed:

- ▶ Microsoft Dynamics 2011
- ▶ Uniserv Software
 - mailRetrieval address retrieval system (with loaded index pool)
 - post postal checking system (installation must be made individually according to country)

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