

SBC for SFDC

Extension of D&B Direct for Informatica MDM providing coordination between Salesforce CRM and Informatica MDM, allowing SFDC to be the system of creation while following the governance of MDM

Coordination of SFDC with MDM

Creation of accounts supported within SFDC

Governance provided by MDM

Minimize Error and Redundancy

Real-Time syncing of data across all systems

Supporting Informatica MDM Operations

Globalsoft's flagship connector D&B Direct for Informatica MDM provides a fast and easy solution for integration of D&B Direct services with Informatica MDM. Data stewards can selectively match internal records with D&B's vast database while creating new customer accounts, and immediately enrich with D&B's detailed business information for those new accounts.

The *SBC for SFDC* is an extension to D&B Direct for Informatica MDM for those users of Informatica MDM who employ Salesforce (SFDC) as their primary source for creating and managing internal data. It allows SFDC to be the "system of creation" for new accounts; eliminating duplicate records and creating new accounts using complete and accurate data from D&B. It does this in coordination with Informatica MDM, using defined workflow and approval process to adhere to governance policies.

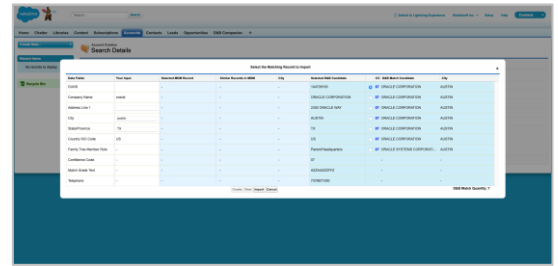
Key Features

- **SFDC as system-of-creation**
Enable account creation in the system used for managing account relationships
- **Enforced governance**
New records remain in pending state subject to approvals in MDM
- **Eliminates duplication**
Existing similar records are exposed during account creation to prevent duplication
- **Provides complete & accurate data**
Record data is provided by D&B during the creation process, minimizing creator data entry and ensuring complete and accurate data
- **Tight integration with MDM**
Changes in either SFDC or MDM are automatically reflected in the other system, keeping them in sync with each other

How it works

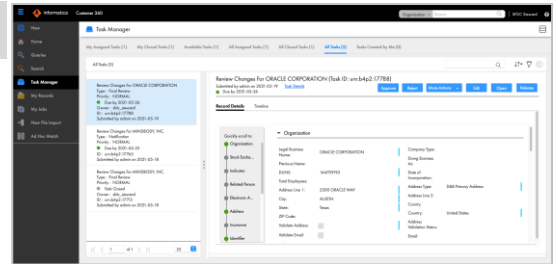
Step 1: New Account created in SFDC

- Business User creates a new account in SFDC
- Search executed in MDM and D&B for matching records
- User imports a D&B match candidate to create a new account
- New account is now created in SFDC in Pending state



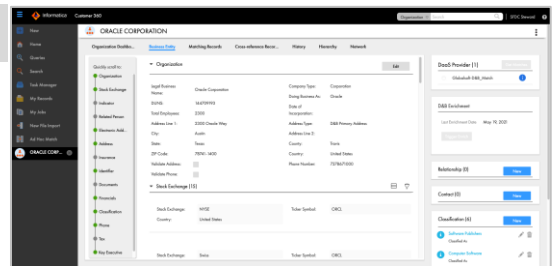
Step 2: New Account is approved in MDM

- MDM creates new account in Pending state with Task created for review and approval
- Data Steward reviews new account and approves or rejects
- Upon approval, account in both MDM and SFDC is now Active



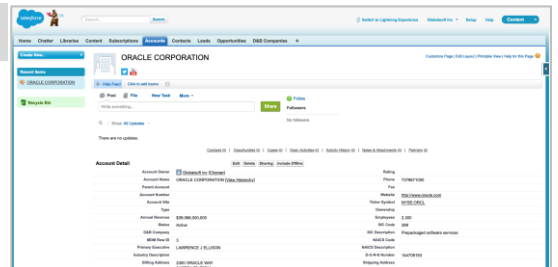
Step 3: New Account is Enriched with D&B data

- Record is Active in MDM with accurate and complete data for new account – legal business name and address
- Additional business data from D&B is available for enrichment
- Data Steward to selectively enrich account with D&B business data



Step 4: New Account is updated in SFDC

- Upon Enrichment in MDM, the SFDC record is updated with the enriched information
- Any subsequent change to record in MDM will be reflected in SFDC



Components

- SFDC Package
 - UI Enhancement
 - Data Model Extensions
 - SBC Service Interaction
- SBC Service
 - Implementation Services

Solution Requirements

- Salesforces CRM: Developer Edition
API Version: 51.0
- Informatica Customer 360
- D&B Direct for Informatica C360

About Globalsoft

Globalsoft is an MDM-focused global software consultancy with over twenty years of experience helping customers and vendors solve challenges with Data Management and Integration. For customers of Informatica MDM, Globalsoft has developed products and solutions to maximize the return from MDM, and its extensive experience makes Globalsoft a preferred provider of MDM services.

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