CRM AS A MASTER DATA MANAGEMENT SYSTEM

IN2 MDM & Microsoft Dynamics CRM 2015

The brand new IN2 solution for management of master data within Microsoft Dynamics CRM transforms customer relations into a powerful and centralized business role, based on a unified technology.

IN2 MDM solution for master data management is easily integrated into other platforms: employees who do not use CRM can access account records from the ERP system. IN2 MDM solution is also easily deployed as an Internet service, which makes it perfect for integration with various public registries and other types of databases.

IN2 MDM solution for management of master data within Microsoft Dynamics CRM enriches user data with additional information gathered from sales and marketing departments. Integrated "wizards" quickly identify all potential relationships among data sets. These relationships are displayed in a form of network, indicating their relative value. Solution identifies duplicates, warns the user that enters account that is already in the system.

CRM with MDM is one, unified, solution and does not require additional licenses.
It eliminates the need for development of dedicated systems for management of master data.

THE NEXT STEP: see how our CRM 4 Insurance or CRM 4 Utility solution can improve your business!

Accuracy and consistency of data and its conformance to regulations makes master data management exceptionally important for each and every company that bases its business on a number of different information systems.

IN2 MDM is a solution within CRM, which ensures data cohesion throughout all steps of the business process. It provides a comprehensive overview of data inter-relationships and all business interactions.

DATA MODEL: The main functions of the MDM system are management of content and relationships among data and entities, change management, and data processing.

AN EXAMPLE: account entity represents legal person records and private person records, each with its own set of attributes. Form (and its attributes) adjusts automatically, based on chosen record type. Contact entity represents 'private' persons who are representatives of legal persons (companies). It is described with a minimal set of attributes (name, contact info, role, picture, etc.). The primary contact can be tagged.

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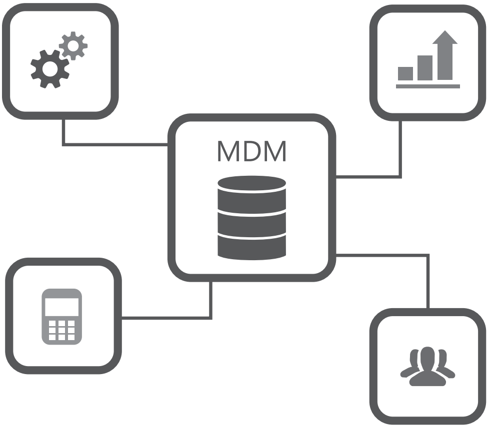

INTEGRATION

INTEGRATION IMPROVES THE ACCURACY OF RECORDS IN THE MASTER.

AN EXAMPLE: Integration with Business Register or Public Legal Records enable search of Legal Person register in real time, from within CRM, using different criteria attributes. For the selected record the integration will copy all public records available/needed from this register to the Account card in CRM and create a new Account record. Integration enables current Account information to be updated in a similar way. Information update can be executed automatically or manually. The integration can be tailored to enable communication with any Legal Person register. Register is replicated to CRM, helping CRM user to select the exact information.

FUNCTIONALITY

CREATING A NEW ACCOUNT/CUSTOMER

When enrolling new customers into CRM, the user needs to enter at least a minimal set of mandatory information, which is aligned with mandatory attributes in all other back-end systems that serve as Account / Contact registers. **CRM is using back-end systems controls to approve/ reject new customer creation.** Transactions are performed in real time. Users who do not have access to CRM are able to create a new customer within the back-end system (e.g. ERP). Integration will then sync this new customer record with CRM during night-time synchronization.

DUPLICATES DETECTION

Rules for duplicates detection are tailored for each individual client and configured (not developed!) accordingly within CRM administration panel. **For each entity (Account, Contact, Lead) several criteria are defined for each entity attribute** (e.g. check match for 'account name' on its first 4 characters). detection can be triggered upon customer creation, customer update or customer import. Detection can also be triggered periodically, creating reports which are then sent to indicated e-mail addresses.

DE-DUPLICATION (MERGE) TOOL

De-duplication tool enables user to select two records that need to be merged. It displays values for all attributes of both records, side by side. User can then choose which attribute values should be copied to the primary record. After confirming, the primary record is updated with selected values for attributes and activities and communication history from the secondary record are copied to the primary contact. The secondary record is then deactivated.

CONFIGURABLE & ADVANCED SEARCH

CRM offers Multi-Entity Quick Search function which can be configured according to client specification. **In addition to typical attributes (name, surname, address, phone), searching can be done via other attributes as well (CRM customer ID, CRM customer alternative key, customer back end system ID, private/legal person ID).** Advanced search allows users to define complex queries that can include logic operators among several attributes. The defined query can be saved for future use and shown as a personal custom view. Such views can be shared with other CRM users.

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