

# WEBMETHODS ONEDATA AND SALESFORCE®

Resolve data quality issues in real time



## Obtain that single view of Salesforce customer data

Don't let multiple versions of customer records lead to performance issues, incorrect reports or poor customer service. Rely on webMethods OneData's solution for automatically ensuring the consistency of Salesforce customer data in order to propagate good quality data across your company, whether it's on-premises or in the cloud. As a result, you'll know your customers and you'll be able to improve customer processes.

CRM and ERP integration is essential. But often the missing piece is Master Data Management (MDM), which can reconcile and synchronize disparate customer data between enterprise systems. OneData's MDM platform triggers data governance through the Salesforce user interface and mobile devices—allowing your customer data to be cleansed and governed across multiple systems in real time or batch mode.

### Why use webMethods OneData for Salesforce environments?

- Bi-directional and "round-trip" connectivity for instantaneous data quality updates between the OneData customer hub, Salesforce and ERP solutions
- Newly created customer records trigger automated governance process or workflow
- Duplicates immediately identified and reconciled between systems
- Data quality updates executed in real time or scheduled by batch
- iPad® support for timely customer data updates
- Provides direct connectivity via webMethods adaptors for leading ERP and mainframe platforms (including SAP® systems, Oracle®, Peoplesoft®, JD Edwards™, Siebel CRM™, IBM® WebSphere® and AS/400®)

## Key benefits

- Reduce process errors and failures
- Assure accurate and complete customer information
- Improve forecasting and decisions with reliable customer data
- Increase the accuracy of customer orders and deliveries
- Identify cross/up-selling opportunities
- Centrally manage customer preferences and privacy protection

## Features

### Customer data consolidation:

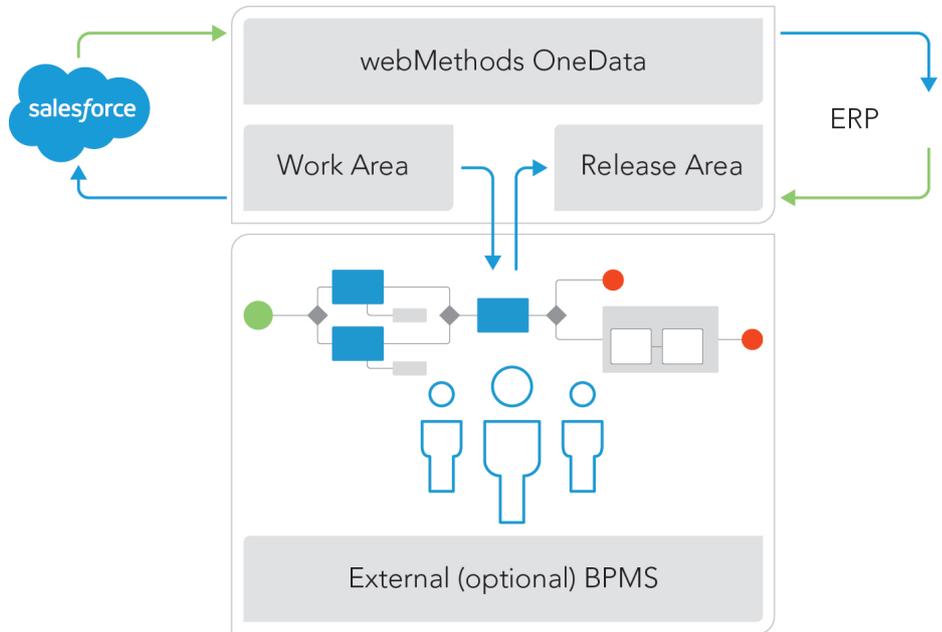
- Open data model: Import any data model you have and begin using it—there are no proprietary data structures in OneData. Existing relationships and dependencies are preserved
- DQ tools: Consolidate/merge and align customer data with OneData's internal Data Quality (DQ) cleansing and matching. Use webMethods Locate for integrated address verification and geo-coding
- Survivorship rules: Designating trusted sources for data attributes

- Workflows: Easily design workflows to ensure consistency, governance and timeliness with notifications and escalations
- Hierarchy views: See hierarchies of your customers to easily view their relationships or discover potential financial risks across business units
- Rules: Create rules to specify criteria for successful matches during data entry and integration
- Import wizard and scheduler: Schedule data to be imported into OneData or use the import wizard as your guide
- Real-world business views: Freely connect and interrelate data objects

**Five solutions in one data platform**

OneData offers five solutions in one data management platform—a highly versatile and cost-effective way of implementing single or discrete data management solutions while, at the same time, providing the option to interrelate any or all five OneData solutions. webMethods OneData is designed to manage, enrich, create and deploy any kind of shared enterprise-wide data, including:

- Master data, such as product/material-master, customer/counter-party, vendor/supplier, account and employee
- Reference data, such as enterprise hierarchies, code tables and dimensions), or technical and business metadata (terms and definitions)



OneData webMethods provides bi-directional, real-time data governance between Salesforce and enterprise systems. Once approved, governed Salesforce data is migrated to OneData’s release area and sent to downstream customer systems as scheduled jobs or in real-time. Additionally, internal OneData workflows can be externalized to a Business Process Management Suite (BPMS).

**ABOUT SOFTWARE AG**

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