



c360 Data Quality Center for Microsoft Dynamics CRM 3.0

Overview

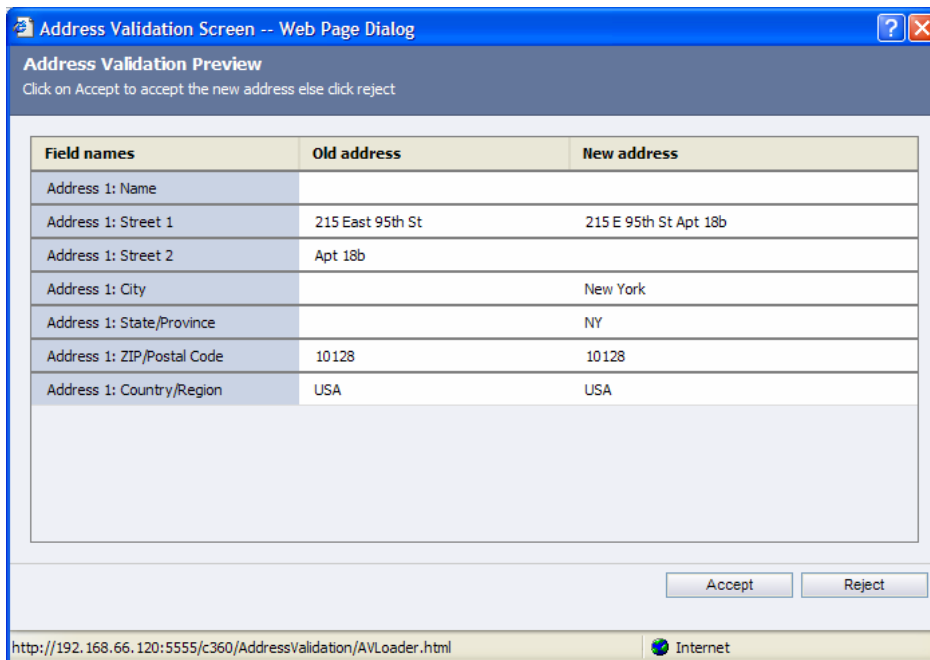
c360 Solutions Data Quality Center offers organizations a complete solution to validate, manage and keep their valuable customer data clean and up-to date. The Data Quality Center components validate your customer data in both batch and real-time modes by standardizing address information and identifying potential duplicate records.

The components of the c360 Data Quality Center are

1. Address Validation
2. Duplicate Detection

The **Address Validation** component allows Microsoft CRM users to verify and correct CRM addresses (Lead, Contact, Account, CustomerAddress) using US Postal Code standards. The Address Validation engine uses the United States Postal Service certified technology to verify, correct and enhance any address in the U.S. The service corrects street name misspellings, validates street type extensions, standardizes city name and state names, and appends missing state abbreviations. The features of Address Validation are:

- **Real-time verification** and standardization of US addresses
- Validate and correct addresses and add ZIP+4 data
- Standardize city names and state names
- **Preview Pane** (optional) where users can see the old and new address
- Automatic Auto-updating of the verified address during save of the record
- A new optional 'Validate Address' button is also available on the entity toolbar which allows users to trigger the address validation service on-demand

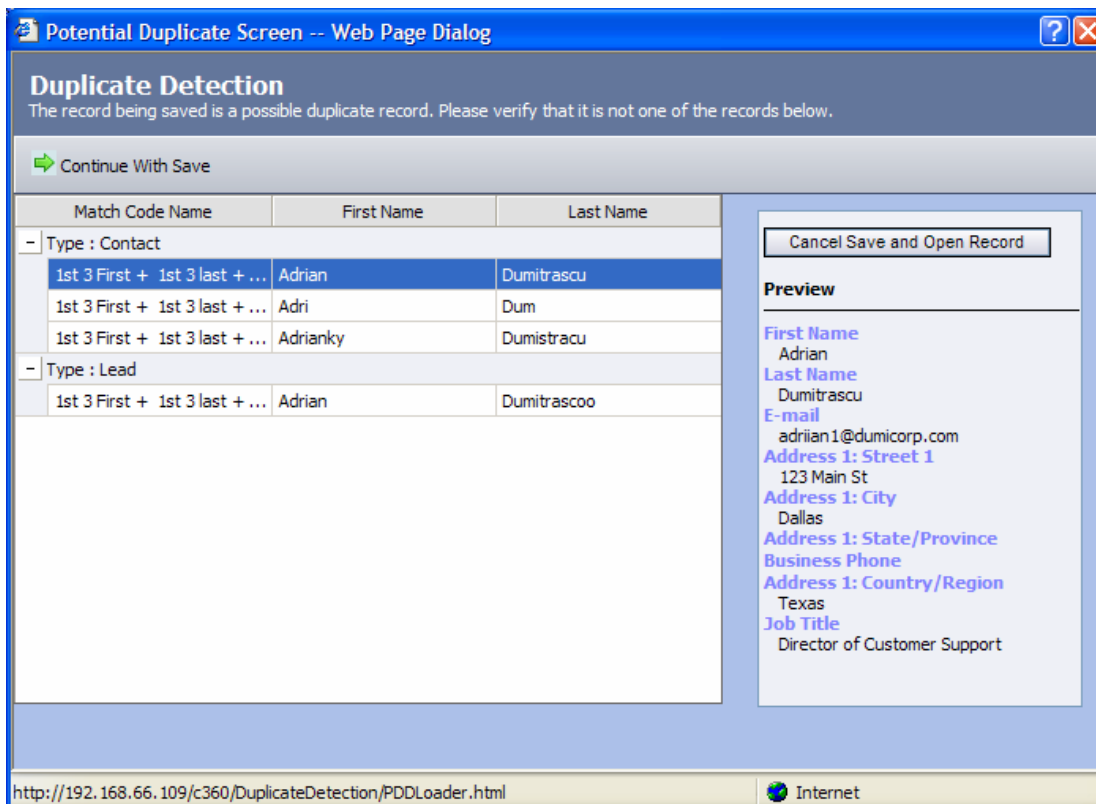


Address Validation can be triggered automatically to verify and correct customer addresses

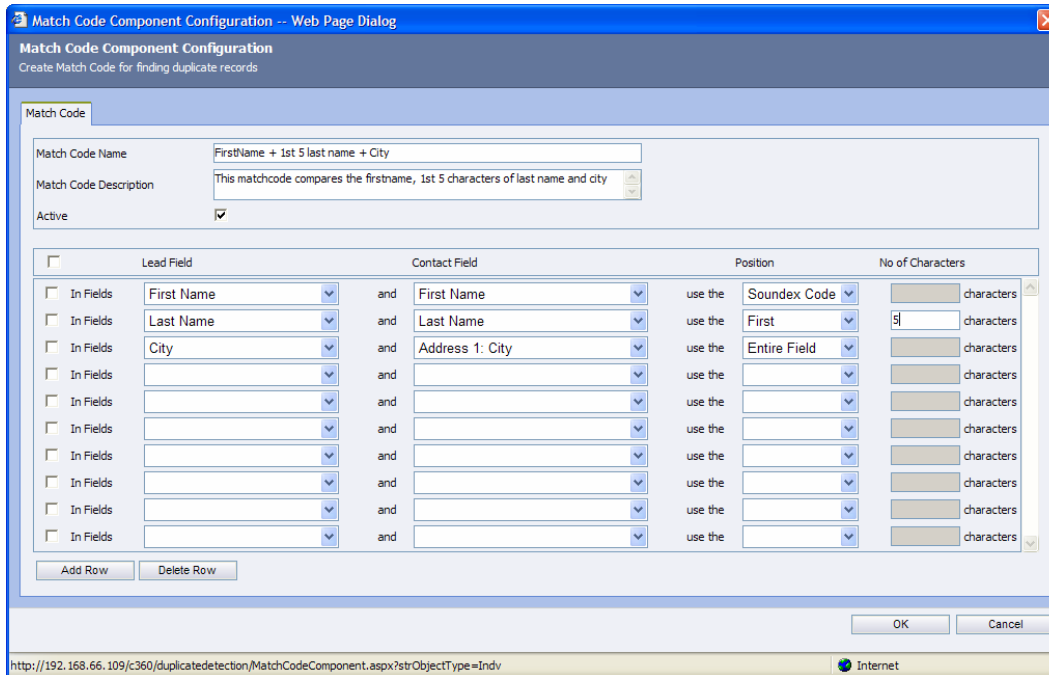


The **Duplicate Detection** component notifies Microsoft CRM users interactively when they are creating a Lead, Contact or Account record that appears to be a duplicate of an existing record. The features of Duplicate Detection are:

- Compares against Lead, Contact and Account records, using concept of 'individual' (i.e. Lead or Contact) and 'organizational' (i.e. Lead or Account) records to intelligently determine where duplicates exist
- Implements **match code technology** for rapid detection and display of potential duplicates as users are inserting and updating CRM records
- Allows administrators to define up to 5 match codes per record type (individual/organizational)
- Allows use of partial string, entire field and sound matching (Soundex) comparison options when configuring match codes
- Alternative Comparison rules can be enforced so names like **Bob** and **Robert** or letters like **e** and **é** can be compared. These rules are configurable for language and cultural subtleties
- Includes scheduled process for nightly detection of duplicates
- Includes a Potential Duplicates Queue where users can review potential duplicates that have been identified by the scheduled duplicate detection process



When Lead or Contact records are inserted or updated Duplicate Detection checks for potential duplicates from within Lead and Contact records.



Match Code Component Configuration
Create Match Code for finding duplicate records

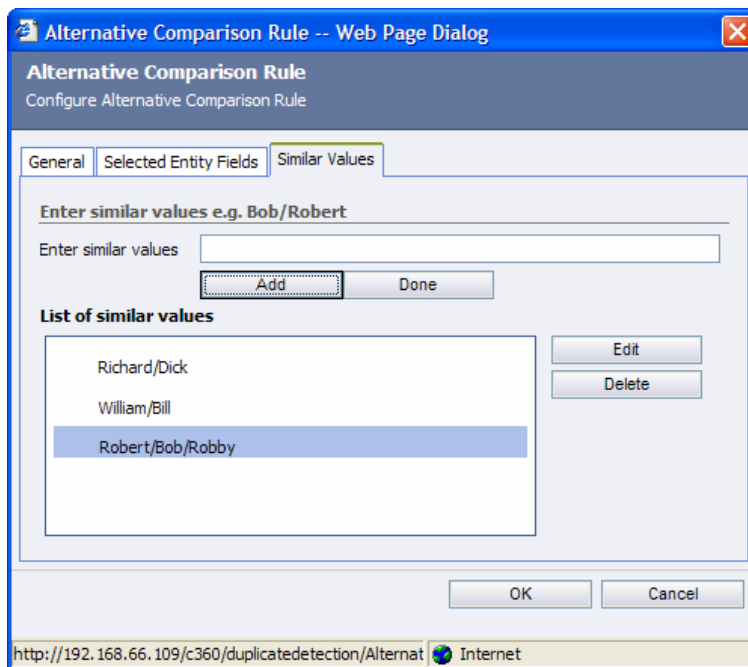
Match Code Name:
 Match Code Description:
 Active:

<input type="checkbox"/>	Lead Field	and	Contact Field	use the	Position	No of Characters
<input type="checkbox"/>	In Fields First Name	and	First Name	use the	Soundex Code	characters
<input type="checkbox"/>	In Fields Last Name	and	Last Name	use the	First	5 characters
<input type="checkbox"/>	In Fields City	and	Address 1: City	use the	Entire Field	characters
<input type="checkbox"/>	In Fields	and		use the		characters
<input type="checkbox"/>	In Fields	and		use the		characters
<input type="checkbox"/>	In Fields	and		use the		characters
<input type="checkbox"/>	In Fields	and		use the		characters
<input type="checkbox"/>	In Fields	and		use the		characters
<input type="checkbox"/>	In Fields	and		use the		characters
<input type="checkbox"/>	In Fields	and		use the		characters

Buttons: Add Row, Delete Row, OK, Cancel

URL: http://192.168.66.109/c360/duplicatedetection/MatchCodeComponent.aspx?strObjectType=Indv

Up to five match codes can be created for individual (Lead and Contact) and organizational (Lead and Account) comparison. Match codes can compare entire fields, partial strings and sound matching



Alternative Comparison Rule
Configure Alternative Comparison Rule

General | Selected Entity Fields | **Similar Values**

Enter similar values e.g. Bob/Robert

Enter similar values:
 Buttons: Add, Done

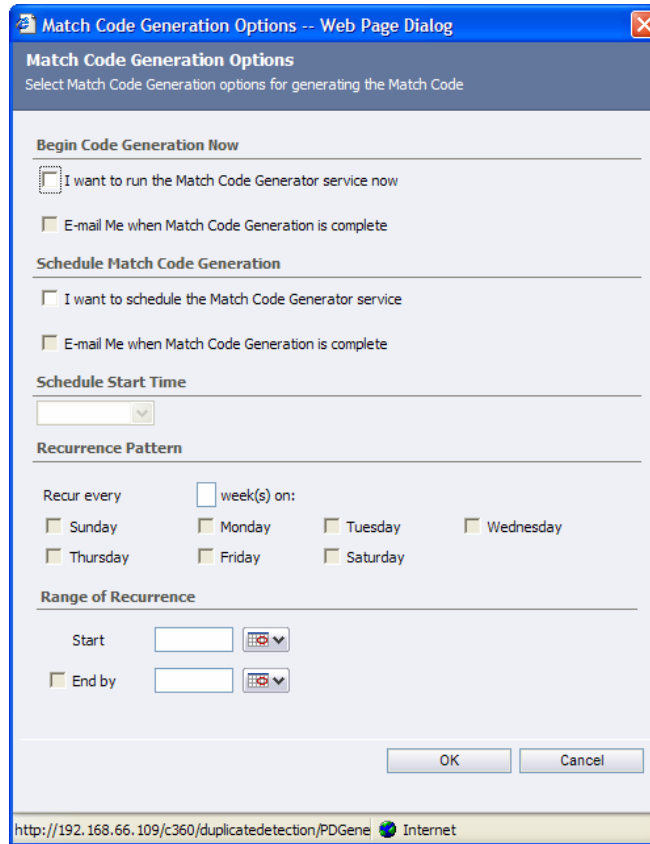
List of similar values

- Richard/Dick
- William/Bill
- Robert/Bob/Robby**

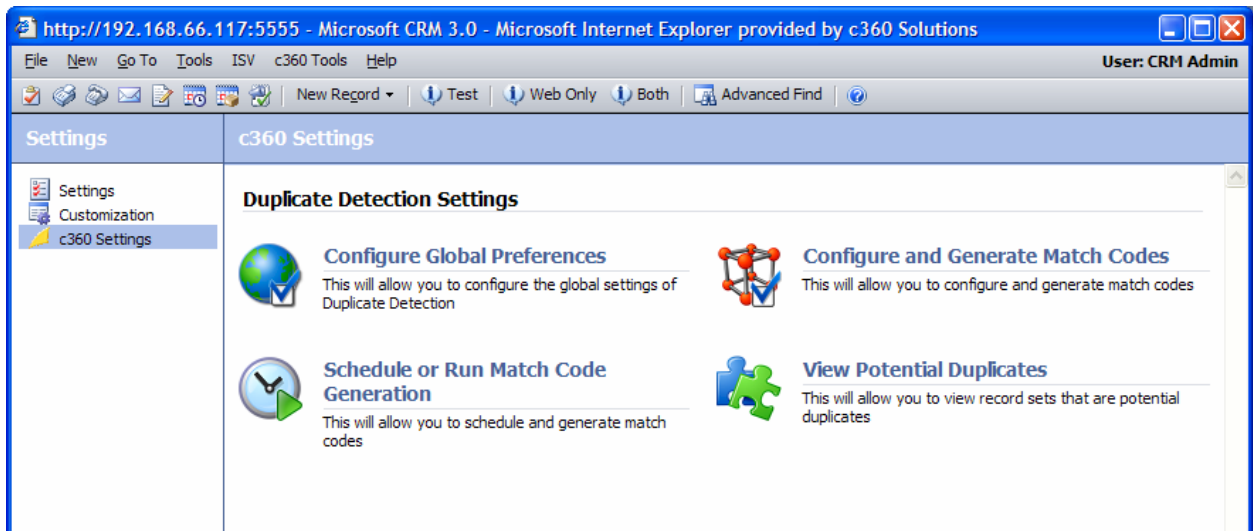
Buttons: Edit, Delete, OK, Cancel

URL: http://192.168.66.109/c360/duplicatedetection/Alternat

Administrators can create alternative comparison rules so names like Bob and Robert or letters like e and é can be compared. These rules are configurable for language and cultural subtleties



Data Quality Center includes a scheduler to allow administrators to schedule recurring proactive checks for duplicate records



Like all c360 products, Data Quality Center is fully configurable through user-friendly CRM administration screens



Evaluation Copies

Free evaluation copies of Data Quality Center can be obtained from c360 Solutions' web site for released products. Evaluation copies come with a license key that provides unlimited usage with the Adventure Works Cycle (and other) sample installations of Microsoft CRM. 15-day trial production evaluation license files are also available on the c360 web site.

Pricing

Data Quality Center is available as a standard product in the c360 Core Productivity Pack. For details on the Core Productivity Pack visit <http://www.c360.com/ProductivityPack.aspx>. Pricing information is available at <http://www.c360.com/Pricing.aspx>.

Languages

All c360 products are available in multiple languages and can be easily translated into additional languages by simply making changes to the label and caption values found in a separate .XML document. Each product's Installation and Configuration guide provides detail on making language modifications. All product downloads include language files for multiple languages.

Licensing

The number of Core Productivity Pack licenses must equal or exceed the number of assigned user licenses or Core Productivity Pack will not function for any user. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Core Productivity Pack licenses.

Support, Upgrades and Enhancements

The list price of Core Productivity Pack includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchased for 20% of the total cost of all Core Productivity Pack licenses.

c360 Partner Program

Authorized Microsoft CRM partners may inquire about the c360 partner program by visiting <http://www.c360.com/PartnerProgram.aspx>.

Information

For more information on Data Quality Center and the Core Productivity Pack, contact c360 Solutions at:

c360 Solutions Incorporated
One Dunwoody Park, Suite 130
Atlanta, GA 30338
(888) 929-3670
<http://www.c360.com>
Products@c360.com