



Data Quality For Salesforce (SFDC)

Solution Description

Salesforce (SFDC), like any CRM system, can suffer from data quality problems over time, causing problems with shipping, billing, collections, taxation, reporting, closing the books, and more. Proliferating systems and integrations, increasing data volumes, lack of governance processes and tools for master data entities like customers, contacts, products, suppliers, price lists, locations, assets, employees, etc., multiply the challenge.

ChainSys' Data Quality is a low-code, AI-driven, enterprise-class data quality engine with the capabilities your business needs to ensure your master and reference data gets clean and stays clean and builds trust in your data across the enterprise.

Why ChainSys

- **Pre-built & configurable data models** to support Oracle's Trading Community Architecture (TCA) data model, which is used as a foundation to manage complex information about the **Parties, Customers, Suppliers, Contacts etc.** including **organizations, locations**, and the network of hierarchical relationships among them.
- **No programming: Configuration-based** implementations with **flexible & configurable data models** to support and match various master data entities from Salesforce (SFDC) modules such as Inventory, Receivables, Pricing, Payables, Purchasing etc.
- **Consolidate data** between multiple systems and Salesforce (SFDC) as a one-time consolidation / migration (**get clean**), as well as ongoing governance (**stay clean**).
- **Pre-built extractors, loaders, and integration templates** for various master data entities in Salesforce (SFDC) such as Parties, Customers, Locations, Suppliers, Contacts, contact points, price lists, etc.
- **Data profiling** of various master data entities from Salesforce (SFDC) by tying master data with transactional data statistics.
- **Data quality engine** that is highly configurable, highly automated, and easy to use, speeding time to adoption and value.
- **Master data cleansing, enrichment and deduplication** based on algorithms, data dictionary along with **deduplication report dashboards** for easy data review/adjustment.

- **Configurable survivorship and attributes merging rules** for automated merging and enrichment of Golden records
- **Data Quality as a Service to Salesforce (SFDC)** to help cleanse, enrich and deduplicate master data entities across various modules.
- **Automatically post updates to Salesforce (SFDC) for merging parties, customer accounts, supplier, addresses, contacts, etc.**
- **Data Visualization:** (Report, Dashboard, Analytics)
- **End-to-End Data Reconciliation** of data during and post migration

ChainSys Approach

ChainSys Master Data Governance, powered by dataZen™, is a complete data quality system that interacts seamlessly with any enterprise application, data warehouse, and data lake in your IT ecosystem, to automate and govern the following:

1. **Data Discovery:** ChainSys can connect easily connect to Salesforce (SFDC) to extract master data, reference data, and transactional data, and generate metadata through [data profiling](#). It can help you detect data anomalies and provide a comprehensive view of data completeness and quality to data stewards, business users, and other data consumers.
2. **Data Cleansing & Standardization:** ChainSys Data Quality can help with **standardization/cleansing** by detecting, correcting, and sometimes removing undesirable data records e.g., customer or supplier names, addresses etc. It also supports standardizations and enrichments through 3rd party providers like Google, Loqate, Melissa, Dun & Bradstreet etc.
3. **Data Matching:** ChainSys master data quality identifies and resolves duplicate records with configurable business rules, which can be based on algorithms, or exact or weighted fuzzy matching. Consolidated, grouped data is then presented on comprehensive reports and dashboards along with statistics and analytics for easy data review as well as manual adjustments.
4. **Data Quality Resolution - Review & Approval Workflows:** Data stewards and custodians can approve system-generated matching groups along with suggested survivor records to automatically merge or perform manual adjustments by simply dragging and dropping records across the groups. Reviewed and approved groups can then be further routed for approval before committing to the golden hub.
5. **Master Data Merging & Source Updates:** Once master data has been cleansed and merged, ChainSys data quality can migrate the cleansed and consolidated data into Salesforce (SFDC) using pre-built migration and integration template as part of one-time migration (Get Clean) and in a steady state, as part of ongoing governance (keep it clean).
6. **Data Quality Monitoring:** After all your data quality and migration processes, ChainSys can help provide a comprehensive Data Quality Monitoring dashboard and reconciliation reports.

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