



Advanced Data Cleansing Bundles for SalesLogix



Making your **SalesLogix**
data **fit** for business use

DQ Suite for SalesLogix

Research shows that more than 80% of CRM initiatives fail due to poor data quality leading to avoidable loss in time, money and public image. To overcome this we have developed the [DQ Suite for SalesLogix](#), incorporating our proven DQ Toolkit technology, for batch de-duplication, intelligent data capture and fuzzy searching.

DQ Suite for SalesLogix

The **DQ Suite** identifies, corrects and prevents duplicates to deliver accurate, trusted data, the foundation of any successful CRM initiative.

What this means for you and your business:

- Less time wasted retrieving records or re-working data
- Improved company perception due to a deeper knowledge of your customer
- Increased efficiency and effectiveness
- Quicker access to records, leading to quicker responses and decision making
- Financial savings by avoiding data scrap and re-work

What we add to SalesLogix

- Non-exact (fuzzy) searching and retrieval using our sounds like Fonetix™ algorithms
- Advanced duplicate management
- Consistent record formatting
- Proper case management
- Salutation generation
- Optional - Address verification

Is your CRM data **fit** for business?

Features:

- Point of capture — correction
- Batch rectification
- Phonetic matching
- Duplicate identification & review
- Familiar look and feel
- No export or import of records
- Customizable merging rules
- Optional address validation
- Weighting of match thresholds
- Any entity deduplication
- Any group to group matching
- Prior non duplicates ignored
- Logging so no data ever lost

Benefits:

- **Data you can trust**
- **Perfected records**
- **Better decisions**
- **Better customer service**
- **Single Customer View**
- **Easier customer data integration**

Prevention is always better than cure!

Point of Capture (client side prevention)

Duplicated and incorrect data entry becomes a thing of the past.

Name and address-related data is standardised and phonetically processed so matching records are identified where traditional computing techniques fail.

Our proven intelligent search and retrieval technology augments the existing SalesLogix functionality to quickly find existing Account and Contact records and avoid unwanted duplicates.



The **DQ Suite** consists of two SalesLogix bundles, **Capture** and **Cleanse**. The base package combines a minimum of one **Cleanse** licence and five client seats of **Capture**, please enquire for individual bundles, .

DQ Suite base package:

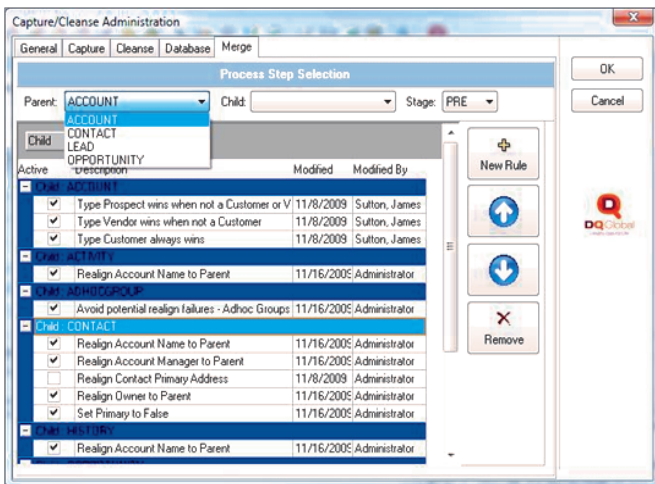
1 off **Cleanse** bundle with unlimited reviewer licences.

Additional **Capture** licenses are sold in license packs of 5, 10, 25, 50 or 100.

Working seamlessly inside SalesLogix V6.2 and above the **DQ Suite** complements SalesLogix's standard deduplication functionality to quickly and efficiently create the single customer view.

What Data Quality challenges do we overcome?

- Word reversals
- Abbreviations
- Typo's
- Phonetic similarity in 5 spoken languages
- Synonyms, homonyms and acronyms
- Superfluous noise words
- Missing data

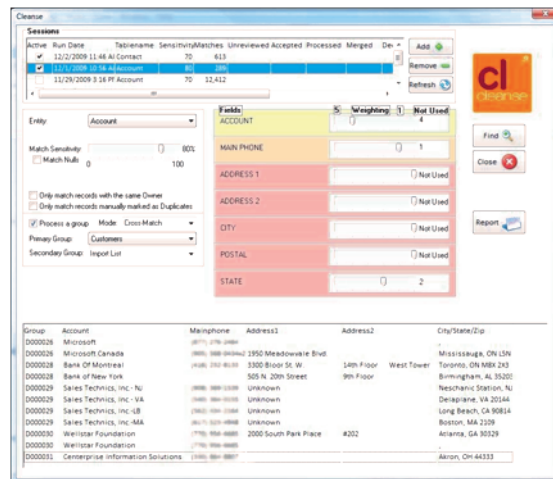


Avoid data loss:

- Provides a full trail of all data modified due to merge.
- Intelligently merge all 1:1 data
- Recover rejected 1:1 data
- Intelligent synchronisation with remotes
- Merge rules which you can customise and extend

Save time on duplicate review

- Fast review process, displayed within SalesLogix screens
- Share reviewing across multiple users
- Use ALT+ keystrokes for accelerated confirmation



Marketing List De-Duplication

The new Cross-Match feature makes dealing with marketing list imports a breeze.

Run a match session between any two groups in SalesLogix and quickly remove your customers from prospect lists, or merge together duplicate lead records to reduce qualification effort.

Master data is enhanced from each imported list and client touch points are always preserved.

The incredibly fast and simple review process means your marketing team goes from an Excel list to campaigning inside SalesLogix in rapid time, and safe in the knowledge duplicates have been eradicated.

Banish duplicates within SalesLogix!

Batch Cleansing (server side de-duplication)

- International matching capability in five languages
- Works right inside SalesLogix; there's no need to export or re-import your data

Create a single record view:

- Generate the perfect record
- Dedupe, re-assign and merge anything (Accounts, Contacts, Opportunities or Leads)
- Merge 1:1 and link all 1:Many records
- Dedupe contacts after duplicate accounts merged

Making your CRM data fit for business

De-Duplicate Anything

Now Cleanse is extensible. It can be used to find and merge duplicates for any entity inside SalesLogix. Have you ever wanted to deduplicate your leads or opportunities, maybe even a custom entity. Out of the box the cleanse tool can go beyond the normal standard of contacts and accounts and allow you to review and merge leads and opportunities too. With some minor modifications cleanse can be configured to even deduplicate and merge your custom entities.

Smart Merge – with Custom Rules

Merge anything with the new **DQ Suite** Smart Merge. Merge has always been a challenge in a relational database like SalesLogix. Not with Cleanse it's smart enough to find all SalesLogix data relationships and make sure that linked data is updated correctly.

It is totally flexible, putting an unprecedented amount of control into the hands of your SalesLogix administrators. For example one of the sample rules ensures that regardless of which record is selected as the primary a 'Customer' type record could never be changed to a type 'Prospect'. Build and maintain your own custom merge rules to accommodate even the most complex of scenarios. With Smart Merge you can be sure all records are made fit for business use and comply with yours or regulation business rules.

Pre-processing functionality

Enables users to perfect, audit, track merges and ensure your data which might otherwise be lost using the standard SalesLogix merge, is preserved and recovered.

Merging, Re-assigning and synchronising

Intelligently pre-processes records to avoid data loss before merging and prior to a synchronization cycle.

Once merged, even re-assigned records orphaned by SalesLogix can be recovered and linked to their surviving master.

Choosing fields and importance

Users are in control of matching process and sensitivity. Search on multiple fields to optimise your matching criteria.

Process a group

De-dupe a group rather than the entire database by simply picking the SalesLogix group from the drop down list. Saves a lot of time due to the ability to cross-match two groups. Critical for marketing and list imports.

Session settings saved

Session settings and configuration are saved and available for re-use. All saved sessions retain details of what settings were used.

Multiple user interaction

Reviewing duplicates is easy with our ALT+ hot key processing in a familiar split screen. And fast when shared between multiple users, regardless of their user status.



Take control of your **CRM data** with the
DQ Suite for



**SALES
LOGIX®**

Technical & Hardware requirements and benchmarks

Minimum

CPU Intel® Celeron Processor
RAM 1Gb

Recommended

CPU Intel® Quad Core Processor
RAM 4Gb

Supported versions of SalesLogix

Version 6.xx

Version 7.xx

ONLINE PERSONALISED DEMONSTRATION

Why not - from the comfort of your own desk – see a web-based demonstration of our technologies working against a sample of your data, in real time?

At the end of an assessment process we will be able to determine the potential waste caused by bad data, your potential gains through healthy data and identify if there is a genuine ROI case to be put forward.

Call us on +44 (0) 2392 988303 or visit our website www.dqglobal.com to book online.



Let us help you make your data fit for business use

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