

# FACT SHEET /



## DQ-Connector Microsoft Dynamics CRM



*Tested by Microsoft: The Data Quality Connector links Uniserv Real-Time Data Quality to Microsoft Dynamics CRM 4.0*

The key requirement for the success of any CRM system is the quality of the data used and stored in it - especially the customer and contact data, the core component of a CRM system. This also applies to Microsoft Dynamics CRM, because only the highest address quality and duplicate-free customer data provide the Single View of the Customer. The Uniserv DQ-Connector for Microsoft Dynamics CRM makes a substantial contribution to increasing the data quality in Microsoft Dynamics CRM, since it enables the productive capacity of the CRM to be utilized in full.

### 1. Provisions

- Prevention of added costs and damage to the image which can be caused by incorrect addresses and dead letters.
- Prevention of duplicates in contact data which undermine the objective target and mode of operation of a CRM system, because different information on the same customer in various data records counteracts the goal of a complete, single 360° view of sales, marketing, professional services and the help desk. The efficient overall use of the CRM system is thereby inhibited.
- High-speed access and error-tolerant searching for information in the Microsoft Dynamics CRM system. Care during data entry is guaranteed and promoted by fast processing times. The status quo of the customer data in the CRM system therefore remains at a high level in the long-term.

### 2. Advantages

- Guaranteed high quality of the data in the Microsoft Dynamics CRM system
- Highly efficient sales and marketing processes
- Increased customer satisfaction and stronger ties with the customer
- Motivated employees who outwardly represent the quality demands of the company with regard to customer contact through a well maintained CRM system

### 3. Functions

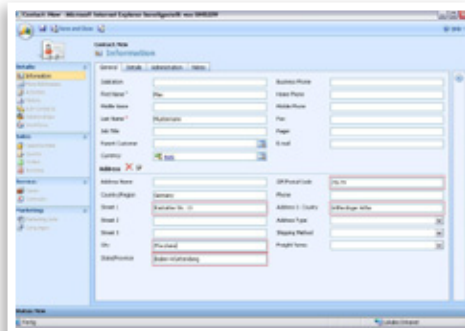
The Uniserv Data Quality Connector provides routines for increasing and securing the data quality in Microsoft Dynamics CRM:

**CUSTOMER DATA SEARCHING WITH AN OPTIMUM QUALITY LEVEL**

**ENTRY AND CHANGE OF CUSTOMER DATA**

The quality assurance functions are used as required, either separately or in combination. These quality assurance functions enable the following:

**VALIDATION AND, IF REQUIRED, CORRECTION OF THE ADDRESS:**



▲ Address correction directly in the Microsoft system

Validation, standardization and correction of addresses as they are entered (real-time)

Automatically generated select list of the possible address candidates after the input of an ambiguous address

Enhancement with additional address elements

Automatic validation of postal correctness without an „extra click“

**CHECK FOR POSSIBLE DUPLICATES**

Rapid error-tolerant and individually parameterizable check for possible duplicates - directly during saving

Duplicate recognition is automatically started for each new entry or change of an account

The duplicate candidates are error-tolerantly compared with each other in the duplicate matching

If a duplicate is suspected, a list of possible duplicates is generated. After selection, the user goes directly to the change dialog. Data cleansing cases can also be created in the duplicate dialog.



▲ Duplicate finding directly in the Microsoft system

### 4. Technical requirements

The following software must be installed before the Data Quality Connector RealTime Microsoft Dynamics CRM is installed:

**Microsoft Dynamics CRM 4.0:** The DQ Connector RT MS CRM has been tested and released for Rollup 4\* & Rollup 5\*\*

**Web extensions:** The Web extensions at <http://go.microsoft.com/fwlink/?LinkID=77296> must have been installed.

**Uniserv software:**

The address retrieval system mailRetrieval (with loaded index pool) and

the International Postal Framework add-on (IPF in the following) and

the postal validation system post (must be individually installed for each country)

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