Informatica

Informatica® Customer 360 for Salesforce
Spring 2022 Version 7.240

User Guide

Informatica Customer 360 for Salesforce User Guide
Spring 2022 Version 7.240
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Preface

See the *Informatica Customer 360 for Salesforce User Guide* to learn how to add and maintain accurate verified contact data, eliminate duplicate data, consolidate data, and maintain hierarchies.

This guide is written for business users who create and manage accounts, leads, and contacts as part of customer relationship management (CRM) activities. This guide assumes that you have access to Informatica Customer 360 for Salesforce functionality and are familiar with the Salesforce environment.

CHAPTER 1

Introduction to Informatica Customer 360 for Salesforce

This chapter includes the following topics:

Informatica Customer 360 for Salesforce Overview

Informatica Customer 360 for Salesforce (Customer 360 for Salesforce) for Salesforce is a master data management application that runs on your Salesforce organization. You can add and maintain accurate verified contact data, eliminate duplicate records, consolidate records, and maintain relationships between records. You can consolidate and enrich data in the Salesforce account objects to get a complete view of each customer in Salesforce.

Verification of data ensures that you maintain accurate contact information for each customer. Customer 360 for Salesforce eliminates duplicate and incorrect data for opportunities, existing accounts, and contacts.

You can maintain the relationships between records and view, navigate, and manage the hierarchies from different sources and perspectives. You can get a detailed view of an organization and its subsidiaries. Use Customer 360 for Salesforce to maintain a comprehensive view of each customer.

Customer 360 for Salesforce runs within a contained environment on your Salesforce organization. You can access the Customer 360 for Salesforce functionality through Visualforce pages that override the standard Salesforce screens. You can also access the Customer 360 for Salesforce functionality in Lightning Experience.

If you have Multidomain MDM integrated into your organization, you can search for matching records in the MDM Hub data sources. If duplicate or matching records exist, you can import the records from the MDM Hub data sources into CC360.

Beans, Master Beans, and External Beans

A bean record is a container for data within Customer 360 for Salesforce. A master bean is closely tied to a Salesforce account record. Master beans link the related contact beans and lead beans to the account. Master beans maintain the best version of the truth. Data from external data sources are stored in external beans.

The best version of the truth is a record that has been consolidated with the best cells of data from the source records.

Beans

A bean record is a container for data within Customer 360 for Salesforce (Customer 360 for Salesforce).

Customer 360 for Salesforce associates a bean with the following objects:

- A standard Salesforce record, such as an account, contact, or lead.
- Records from sources outside Salesforce, such as Dun and Bradstreet and SAP.
- Custom objects, such as a project or an investment record.

Master Beans

Master beans link together all the beans that relate to an account and maintain the best version of the truth. Master beans link the related contact beans and lead beans to the account.

Customer 360 for Salesforce creates a master bean when you create an account. Master beans maintain consolidated data from multiple data sources and provide enriched data to the Salesforce accounts.

External Beans

External beans store data from external data sources.

CC360 creates external beans when you import data from external data sources.

Customer 360 for Salesforce Tasks

Customer 360 for Salesforce (Customer 360 for Salesforce) runs within a contained environment on your Salesforce organization. Use Customer 360 for Salesforce to add and maintain accurate verified contact data, eliminate duplicate records, consolidate records, and maintain relationships between records.

Use Customer 360 for Salesforce to perform the following tasks:

Create records for standard and custom objects.

Create records for standard and custom objects.

If you have Multidomain MDM integrated with your organization, you can import data from MDM Hub data sources into Customer 360 for Salesforce.

Verify record details at the point of entry.

Verify record details such as addresses, email addresses, and phone numbers at their entry into the organization.

Consolidate records and enrich Salesforce records.

Consolidate data from multiple data sources into the master bean and get the best version of the truth. Enrich Salesforce records with data from the consolidated master bean records.

Convert leads.

When you start doing business with leads, convert the leads to contacts and accounts. Associate the lead with an account and create a contact for the lead.

Manage hierarchies.

Manage relationships between the records and view, navigate, and manage the different hierarchy types in Salesforce.

Customer 360 for Salesforce User Interface

Customer 360 for Salesforce (Customer 360 for Salesforce) runs within a contained environment on your Salesforce org. You can access the Customer 360 for Salesforce functionality in your Salesforce environment through Visualforce pages that override the standard Salesforce screens. You can also access Customer 360 for Salesforce in Lightning Experience. Log in to Salesforce by using your Salesforce credentials.

In Salesforce Classic, you can see the following user interface elements when Customer 360 for Salesforce is deployed in your Salesforce environment:

Standard Salesforce tabs

Standard Salesforce objects such as Accounts, Contacts, and Leads, and other features, such as Chatter have tabs. Use the tabs to view the objects and to go to the pages to perform tasks, such as create, edit, and delete. Access the Customer 360 for Salesforce functionality, such as address verification, email address verification, and phone numbers verification through Visualforce pages that override the standard Salesforce screens.

Custom objects tabs

Custom objects, such as projects, are created to meet the business needs of your organization. Custom objects have tabs. Use the tabs to view the objects and to go to the pages to perform tasks, such as create, edit, and delete.

Salesforce reports and dashboards

Use the Reports and Dashboards tabs to view and analyze your data from multiple perspectives.

CC360 buttons

Use the Consolidated View button on the Account details page to get a consolidated view from multiple beans linked to the master bean of the account.

Use the Consolidate button on the Consolidated View page to consolidate data from multiple beans linked to the master bean of the account.

Use the Convert button on the Lead details page to convert the lead.

Beans

View all the beans or a filtered list of beans. Beans are containers for data within Customer 360 for Salesforce.

Master Beans

View all the master beans or a filtered list of master beans. Master beans link together all the beans that relate to an account.

In Lightning Experience, you can see the Customer 360 for Salesforce application when Customer 360 for Salesforce is deployed in your Salesforce environment.

You can view the following user interface elements in the Customer 360 for Salesforce application:

Account Scout page

Use the Account Scout page to create account records.

Record creation page

Create records for standard and custom Salesforce objects in the record creation page.

Duplicate Accounts and Other Duplicates pages

View duplicate accounts in the Duplicate Accounts page, and view duplicate contacts and leads in the Other Duplicates page.

Beans

View all the beans or a filtered list of beans. Beans are containers for data within Customer 360 for Salesforce.

Master Beans

View all the master beans or a filtered list of master beans. Master beans link together all the beans that relate to an account.

Salesforce reports and dashboards

Use the Reports and Dashboards tabs to view and analyze your data from multiple perspectives.

Standard Salesforce pages

Access the standard Salesforce objects such as accounts, contacts, and leads from the standard pages.

Note: The Lightning components might not display properly in some browsers as the external Javascript and CSS libraries might take a long time to load.

CHAPTER 2

Creating or Searching Records for Salesforce Objects

This chapter includes the following topics:

Creating or Searching Records for Salesforce Objects Overview

In Salesforce Classic, use the Account, Contact, and Lead Scout pages to create standard objects. In Lightning Experience, use the Create Records page to create standard and custom objects. When you create a record, if duplicate records exist, the Scout pages display the duplicate records.

You can also specify search criteria in the Scout pages and search for records.

If you have Informatica Data as a Service (DaaS) enabled in your organization, you can also verify addresses, email addresses, and phone numbers. You can also search for matching records in the record creation and Scout pages.

If you have Multidomain MDM integrated in your organization, you can search for matching records in the MDM Hub data sources from the record creation page. If duplicate or matching records exist, you can import the records from the MDM Hub data sources into CC360. CC360 creates a master bean, a bean, and an external bean for that record. You can also populate the values from the matching records in the fields of the record creation page.

Addresses, Email Addresses, and Phone Numbers Verification

Verification of addresses, email addresses, and phone numbers improves the ability to contact your customers. Use the integration of Customer 360 for Salesforce (Customer 360 for Salesforce) with DaaS for data verification and correction. You can verify customer contact information at the entry into the organization. You can apply corrections or adjustments and store accurate data in the organization.

Verify that your accounts, contacts, leads, and custom objects have accurately formatted global addresses. You can analyze, verify, correct, and format addresses according to the local postal standards. Ensure that the email addresses are valid and formatted correctly. Find email domains involved with spam networks, traps, and other malicious threats and verify that the email address is valid, not valid, or malicious. Verify the phone numbers of your accounts, leads, contacts, and custom objects and ensure your ability to connect.

Customer 360 for Salesforce uses the Address Verification service to verify postal addresses, the StrikeIron email verification service to verify email addresses, and the StrikeIron phone validation service to verify phone numbers.

In Salesforce Classic and Lightning Experience, you can verify addresses, email addresses, and phone numbers in the record creation pages and in the account, contact, lead, and custom object details pages.

Note: In Lightning Experience, in the record details page, when you edit the **Address Information** section to verify the address information, you cannot reset the changes.

Address Verification

You can improve the quality of your address data. You can correct, standardize, and verify international postal addresses in the address fields of your accounts, contacts, leads, and custom objects. You can format the postal address according to the requirements of the local postal authorities.

Verify the postal addresses in real time when you create accounts, leads, contacts, and custom objects. Customer 360 for Salesforce (Customer 360 for Salesforce) verifies existing addresses and any changes you make to the address data.

You can standardize and verify the following postal addresses:

- Billing address and shipping address for accounts.
- Address for leads.
- Mailing address and other address for contacts.
- Person mailing address and person other address for person accounts.

You can standardize and verify addresses of your accounts, contacts, and leads at the point of entry based on the address verification settings configured by your Customer 360 for Salesforce administrator. Receive suggestions to complete an address and generate the most likely address based on the data you enter. You can verify an address when you click the verification icon or when you save the record.

Status Codes

Customer 360 for Salesforce (Customer 360 for Salesforce) verifies an address and returns a status code that indicates the result of the verification process. The status code indicates whether the address is deliverable, not deliverable, or whether the data is corrected.

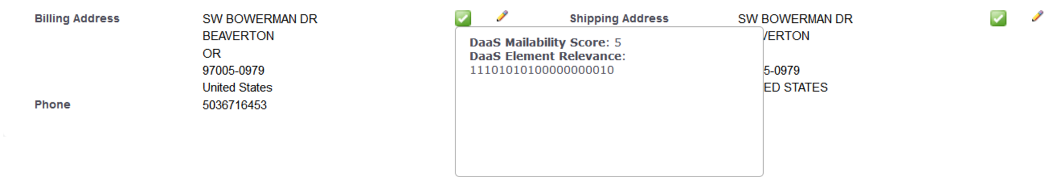
Customer 360 for Salesforce classifies the status codes into the following categories:

- Green. All postally relevant elements of the address are verified or checked.

- Yellow. Delivery status of the address is unclear.
- Red. Data could not be corrected and the address might not be deliverable.

Hover over the icon for the address verification status to see the verification details.

The following image shows the verification details:



For more information about the verification status codes, see the AddressDoctor® documentation.

Email Verification

Verify the email address in the email address fields of accounts, contacts, leads, and custom objects. You can verify whether an email address exists and is formatted correctly. You can identify known or potentially dangerous email addresses or domains.

Verify the email addresses in real time at the point of entry when you create accounts, contacts, leads, and custom objects. Customer 360 for Salesforce (Customer 360 for Salesforce) asynchronously verifies existing email addresses and any changes you make to the email address data.

You can verify and cleanse the email addresses of your contacts and leads at the point of entry based on the email verification settings configured by your Customer 360 for Salesforce administrator. You can verify an email address when you click the verification icon or when you save the record.

Status Codes

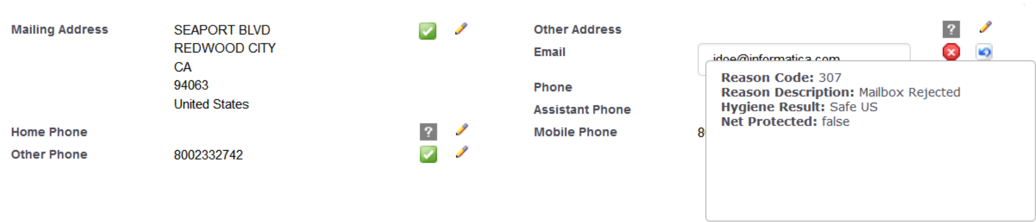
Customer 360 for Salesforce (Customer 360 for Salesforce) verifies an email address and returns a status code. The verification status indicates whether the email address is valid, not valid, or malicious.

Customer 360 for Salesforce classifies the status codes into the following categories:

- Green. The email address is valid.
- Yellow. Use caution because the email address might or might not be valid. If the email address is valid, it might be risky to contact.
- Red. The email address is not valid, not verified, or the input is not valid.

Hover over the icon for the address verification status to see the verification details.

The following image shows the email address verification details:



For more information about the verification status codes, see the StrikeIron documentation.

Phone Number Verification

You can verify customer phone numbers in the phone fields of accounts, contacts, leads, and custom objects before you make a call.

Verify phone numbers in real time when you create accounts, contacts, leads, and custom objects. Customer 360 for Salesforce (Customer 360 for Salesforce) verifies existing phone numbers and any changes you make to the phone data.

You can verify phone numbers of your accounts, contacts, and leads at the point-of-entry based on the phone validation settings configured by your Customer 360 for Salesforce administrator. You can verify a phone number when you click the verification icon or when you save the record.

Note: Phone number verification is accurate when you append the two-character ISO country code to the phone number. Use a plus sign followed by the country code and the phone number. The Customer 360 for Salesforce administrator might configure the default country code if the majority of the phone numbers are from a single country.

Status Codes

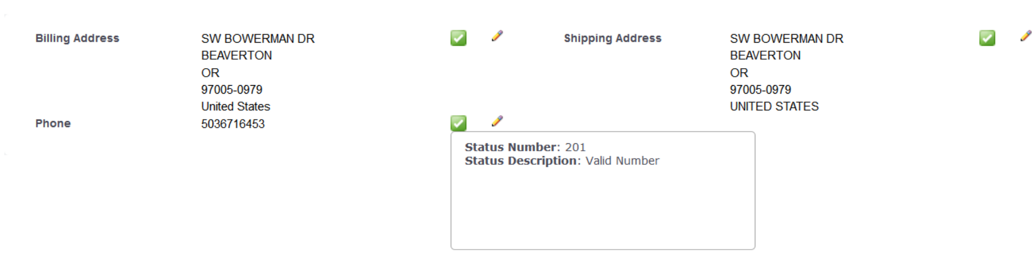
Customer 360 for Salesforce (Customer 360 for Salesforce) verifies a phone number and returns a verification status code.

Customer 360 for Salesforce classifies the status codes into the following categories:

- Green. Number is valid.
- Yellow. Validity of the phone number is unclear.
- Red. Number is not found or number is not valid.

Hover over the icon for the phone verification status to see the verification details.

The following image shows the phone number verification details:



For more information about the verification status codes, see the StrikeIron documentation.

Creating or Searching Records in Salesforce Classic Experience

You can create or search records for accounts, contacts, and leads in the Account, Contact, and Lead Visualforce Scout pages.

To create or search for records in the Account, Contact, or Lead Scout pages, perform the following tasks:

1. Open the Account, Contact, or Lead Scout page.
2. Create or search for records in the Account, Contact, or Lead Scout page.

Step 1. Open the Account, Contact, and Lead Scout Pages

You can open the Account, Contact, and Lead Scout pages from the Salesforce Classic.

Perform one of the following tasks based on the Scout page that you want to open:

- To open the Account Scout page, perform the following tasks:
    1. On the **Accounts** tab, in the **Recent Accounts** section, click **New**.
    2. If record type is enabled for your organization, select a record type for the new record. You can select from the list of supported record types of your organization.
    3. Click **Continue**. The Account Scout page appears.
- To open the Contact Scout page, on the **Contacts** tab, in the **Recent Contacts** section, click **New**. The Contact Scout page appears.
- To open the Lead Scout page, on the **Leads** tab, in the **Recent Leads** section, click **New**. The Lead Scout page appears.

Step 2. Create a Record or Search for Records in the Account, Contact, or Lead Scout Page

You can create records, search for matching records, and verify address, email addresses, and phone numbers in the Scout pages.

1. To create records, perform the following tasks:
    a. In the Scout page, configure the record details.
    b. Optionally, to verify the address, the email address, and the phone number, click the **Click to Verify** icon (?).

       You can verify addresses, email addresses, and phone numbers only if you have DaaS enabled in your organization.
    c. Based on the type of record that you create, click **Create Account**, **Create Lead**, or **Create Contact**.

       If duplicate records exist, the record creation page displays a duplicate record warning message.
    d. If you want to ignore duplicate records and create the record, click **Ignore and Create New**.

       The **Ignore and Create New** button appears only if your user profile has the permission to create duplicate records.
2. To search for matching records, perform the following tasks:
    a. Click **Search Options** to configure the search settings.
    b. Select the data sources to search for potential duplicate records.
    c. Select the search mode based on which you want to search for the matching records.

       You can use the following search modes:
       - AND. Returns records that match all the input field values.
       - CONTAINS. Returns records that contain a part of the input field values.
       - FUZZY. Returns all the relevant records that match the input field values and the match settings.
       - OR. Returns records that contain at least one of the input field values.

       Default is FUZZY.

For example, if you select AND, CC360 uses the value of all the fields and searches the database for the matching records.

d. Optionally, to remove the required field indicator, click **Hide Required Fields**.

   If you remove the required field restrictions, you can enter values for any fields and search for matching records.

e. Enter the input field values that you want to use for search.

f. Click **Search**.

   If matching records exist, the Scout pages displays the matching records.

Creating a Record in Lightning Experience

You can create records for Salesforce standard and custom objects and verify addresses, email addresses, and phone numbers in the Lightning record creation page.

1. In Lightning Experience, click the **App Launcher** icon ( ).

   The **App Launcher** page appears.

2. Click **Cloud Customer 360**.

   The **Cloud Customer 360** page appears.

3. Under **ITEMS**, click the Salesforce object for which you want to create the record.

   The object page appears.

4. In the upper-right corner of the page, click **New**.

   The record creation page appears. The record creation page displays the field sets configured for the object that you select.

   Note: You can also select the Salesforce object for which you want to create the record. The objects displayed in the list are objects that have synchronization settings or DaaS settings configured.

5. If the object type of the record you create is Account and record type is enabled for your organization, select a record type.

   You can select from the list of record types supported for your organization.

6. Configure the record details.

   Note: When you enter value for a date or a time field, use the following format:

   For date. `<yyyy>-<mm>-<dd>`

   For time. `<hh>:<mm>:<ss>`

   For example, `1982-03-21 11:20:32`

7. Optionally, to verify the address, the email address, and the phone number, click the **Click to Verify** icon ( ).

   You can verify addresses, email addresses, and phone numbers only if you have DaaS enabled in your organization.

8. Click **Create**.

   If duplicate records exist, the record creation page displays a duplicate record warning message.

9. If you want to ignore duplicate records and create the record, click **Ignore and Create New**.

   The **Ignore and Create New** button appears only if your user profile has the permission to create duplicate records.

Searching Records in Lightning Experience

You can search for duplicate records for Salesforce standard and custom objects in the record creation page.

To search for duplicate records, perform the following steps:

1. In Lightning Experience, perform one of the following tasks:
   - On the navigation menu, click the down arrow on the object for which you want to create the record, and select **New <ObjectName>**.
   - On the navigation menu, perform the following tasks:
     1. Click the object for which you want to create the record.
        The record page appears.
     2. In the upper-right corner of the page, click **New**.

   The record creation page appears. The record creation page displays the field sets configured for the object that you select.

   Note: You can also select the Salesforce object for which you want to create the record. The objects displayed in the list are objects that have synchronization settings or DaaS settings configured.
2. Under **Search Sources**, select the data sources to search for potential duplicate records.

   Note: If you have Multidomain MDM integrated in your organization, the MDM Hub data sources appear in the list of data sources.
3. Select the search mode based on which you want to search for the duplicate records.

   You can use the following search modes:
   - AND. Returns records that match all the input field values.
   - CONTAINS. Returns records that contain a part of the input field values.
   - FUZZY. Returns all the relevant records that match the input field values and the match settings.
   - OR. Returns records that contain at least one of the input field values.

   Default is FUZZY.

   Note: To search for duplicate records in the MDM Hub data sources, ensure that the search mode you select is FUZZY.

   For example, if you select AND, CC360 uses the value of all the fields and searches the database for the duplicate records.
4. Optionally, to remove the required field indicator, click **Hide Required Fields**.

   If you remove the required field restrictions, you can enter values for any fields and search for duplicate records.
5. Enter the input field values based on which you want to search for duplicate records.

   Note: When you enter value for a date or a time field, use the following format:

   For date. `<yyyy>-<mm>-<dd>`

   For time. `<hh>:<mm>:<ss>`

For example, `1982-03-21 11:20:32`

6. Click **Search**.

   If duplicate records exist, the record creation page displays the duplicate records based on the source.

7. If duplicate records exist in the MDM Hub data sources, perform one of the following tasks:
   - To import the duplicate record from MDM Hub into CC360, click **Import**.

     Note: If you want to import a contact record, you must enter an account ID to associate the contact record with an account.

   - To populate the values from a duplicate record in the fields of the record creation page, perform the following tasks:
     1. Click **Autofill**.
     2. In the **Select Fields to be Automatically Filled** dialog box, select the fields that you want to use in CC360.

        Note: The **Select Fields to be Automatically Filled** dialog box displays the record fields that are mapped to the bean fields.

     3. Click **Accept**.
        The fields are populated with the values from the duplicate record.
     4. Click **Create**.

   The record is created and the record details page appears.

CHAPTER 3

Managing Duplicate Records

This chapter includes the following topics:

Manage Duplicate Records Overview

Duplicate leads and accounts might result in account ownership conflicts, incorrect opportunities, and inaccurate forecasts. Duplicate record management is available for accounts, leads, and contacts to maintain clean and accurate data. Customer 360 for Salesforce (Customer 360 for Salesforce) prevents the creation of duplicate records when you enter the account, lead, or contact details.

When you attempt to save a new record, Customer 360 for Salesforce searches for potential duplicate records. Customer 360 for Salesforce displays a warning if it finds a duplicate record. You can choose to override the warning and create the record.

You can also view duplicate records in the record details page. Each duplicate pair consists of a master record and a duplicate record. You can view the duplicate information in the details section of a record.

Customer 360 for Salesforce considers records as duplicates if the records have a match score that meets or exceeds the duplicate threshold. If the match threshold is closer to the configured duplicate threshold, review the records to manually merge the records or flag the duplicate pair as unique records.

Identifying Duplicate Records

Customer 360 for Salesforce (Customer 360 for Salesforce) identifies duplicate data and compiles a list of duplicate pairs of accounts, contacts, leads, and custom objects.

1. In Lightning Experience, select the account, or contact record for which you want to find duplicate records.

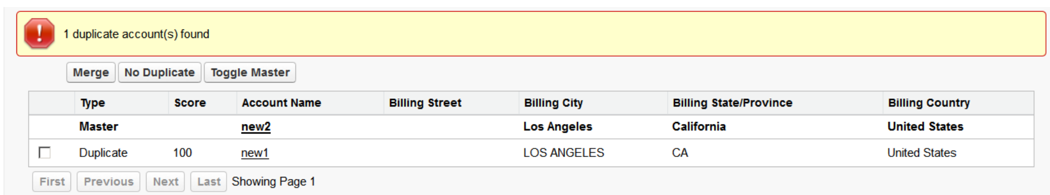
2. In the upper-right corner of the page, click the down arrow, and select **Find Duplicates**.
   The record creation page appears with the values from the selected record. The page displays the list of potential duplicates for the record based on the populated field values.

Considerations before Manually Merging Duplicate Records

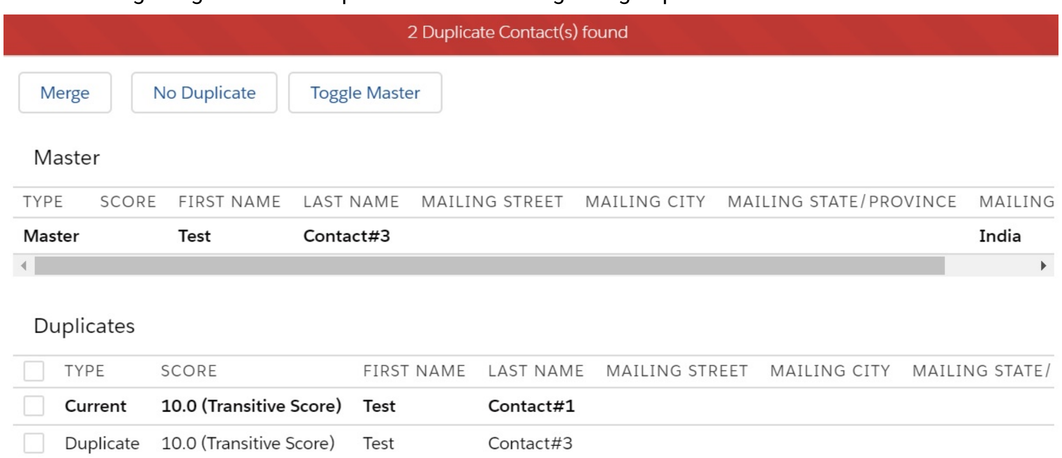
You can merge duplicate pairs to eliminate the duplicate records and retain the master records. Analyze the duplicate pairs to ensure that the records are duplicate. You cannot undo a merge operation.

In a duplicate pair of records, Customer 360 for Salesforce (Customer 360 for Salesforce) considers the merge rule to eliminate the duplicate record. Use the **Toggle Master** button to specify the master record ID that you want to survive in the merge process.

The following image shows a duplicate account in Salesforce Classic:



The following image shows a duplicate account in Lightning Experience:



Merging the Duplicate Records

You can merge a duplicate pair to eliminate the duplicate record and retain the master record. Specify the record that provides the surviving data when you merge the two records.

1. Select the account, lead, or contact record that has a duplicate.
2. Select the check box next to the record that you want to merge with the record you are viewing.

3. In Salesforce Classic, perform the following tasks:
   a. Click **Merge**.
   b. Select the field values that you want to retain in the surviving record.
   c. Click **Merge**, and then click **OK**.
4. In Lightning Experience, perform the following tasks:
   a. Click **Merge**.

      The **Potential Duplicate Records** wizard appears.

      Note: The **Merge Preview** column shows the preview of the master record based on the configured merge rules.
   b. Select the field values that you want to retain in the surviving record.
   c. Click **Next**.
   d. Based on the object type, click one of the following buttons:
      - **Merge Accounts**
      - **Merge Contacts**
      - **Merge Leads**

Flagging Duplicate Pairs as Unique

Review the duplicate pair of records. If the records are not a duplicate of each other, flag the duplicate pair as unique. If you do not flag the duplicate pair as unique, Customer 360 for Salesforce (Customer 360 for Salesforce) merges them into a single record.

1. Select the account, lead, or contact record that has a duplicate.
2. In the record details page, verify that the two records are not a duplicate.
3. Select the duplicate record check box, and then click **No Duplicate**.

CHAPTER 4

Consolidating Records

This chapter includes the following topics:

Consolidate Records Overview

Consolidate data from multiple data sources to get a single complete trusted view of the customer. You can enrich Salesforce records with data from consolidated master bean records. You can consolidate records in Salesforce Classic or Lightning Experience.

Consolidation is the process of merging data from multiple beans linked to a master bean to create a golden record with the best version of the truth. The best version of the truth is a record that has been consolidated with the best cells of data from the source records. Data can come from Salesforce objects or external sources such as SAP, ERP, or Oracle. Customer 360 for Salesforce (Customer 360 for Salesforce) checks a bean record from an external source to find the matching master bean record. The bean records from external sources might contain fields with information that is not present in the master bean. You can get a single trusted view of the customer after you consolidate the data from all beans that belong to a master bean. You can retain required information from the Salesforce record and load relevant information from the external systems into the master bean. Customer 360 for Salesforce consolidates data based on the priority of the fields and the sources.

Enrichment is the process of enriching Salesforce records with the data from the master beans after you consolidate records. You can overwrite the Salesforce records with the values from the master beans and supplement the Salesforce records with information from the external data sources.

Consolidating a Record in Salesforce Classic

The View Consolidated Information page displays the account information, the master record information, and the data sources. You can consolidate the record. After consolidation, the master record information is updated with the consolidated data.

1. On the **Accounts** tab, select the account whose details you want to view.

   The account details page appears.

2. Click **Consolidated View**.

   The **View Consolidated Information** page appears.

   Note: The **Data Sources** section displays the fields of the records from all sources. Fields with the highest priority in the data source setting are highlighted.

3. To filter the records displayed in the **Data Sources** section, select a data source. Default is `ALL`.
4. Click **Consolidate**.

   The **Consolidated Information** section displays the consolidated record details.

Consolidating a Record in Lightning Experience

The Consolidated View displays the account information, the master record information, and the data sources. You can consolidate the record. After consolidation, the master record information is updated with the consolidated data.

1. In Lightning Experience, on the navigation menu, click **Accounts**.
2. Select the account whose details you want to view.

   The account details page appears.

3. In the upper-right corner of the page, click the down arrow, and select **Consolidated View**.

   The **Consolidated View** page appears.

   Note: The **Data Sources** section displays the fields of the records from all sources. The records fields with the highest priority in the data source setting are highlighted.

4. Click **Consolidate**.

   The **Consolidated View** section displays the consolidated record details.

CHAPTER 5

Converting Leads

This chapter includes the following topics:

Lead Conversion Overview

Leads are potential opportunities. Leads are potential customers with whom you are yet to do business. When you start doing business with a lead, convert the lead to a contact. You cannot reverse the conversion of a lead.

When you convert a lead, attach the lead to an existing account or create an account and attach the lead to it. Convert the lead to a contact.

Use the list of suggested accounts for the lead. If an account is associated with the lead bean, Customer 360 for Salesforce (Customer 360 for Salesforce) attaches the lead to the account. If the lead bean is not associated with an account, Customer 360 for Salesforce searches for the best matching account for the lead. You can choose to ignore the suggestions, create an account, and attach the lead with it. Customer 360 for Salesforce checks for duplicates before creating the account.

Use the list of suggested contacts into which you can convert the lead. If you attach the lead to an existing account, you can use the contacts that belong to the account. You can choose to ignore the suggestions and convert the lead to a new contact. If you create an account for the lead, Customer 360 for Salesforce creates a contact with the lead details.

Converting a Lead

When you start doing business with a lead, convert the lead. Attach the lead with an account and create a contact for the lead.

1. On the Leads tab, select the lead that you want to convert, and then click **Convert**.

   The status of the lead changes to qualified.
2. Select the check box if you do not want to create a new opportunity when you convert the lead.

3. If you want to attach the lead to an existing account, perform the following tasks:
   a. In the Account Information section, select the **Attach to Existing** option.
   b. In the Related Contacts section, select the option **Attach to Existing** to convert the lead to an existing contact.
   c. Optionally, select the option **Create New Contact** to convert the lead to a new contact.
4. If you want to attach the lead to new account, perform the following task:
   a. In the Account Information section, select the **Create New Account** option.

   Customer 360 for Salesforce (Customer 360 for Salesforce) then creates a contact with the lead details.
5. In the Task Information section, specify the task details such as status, priority, and subject.
6. Click **Convert**.

CHAPTER 6

Hierarchies

This chapter includes the following topics:

Hierarchies Overview

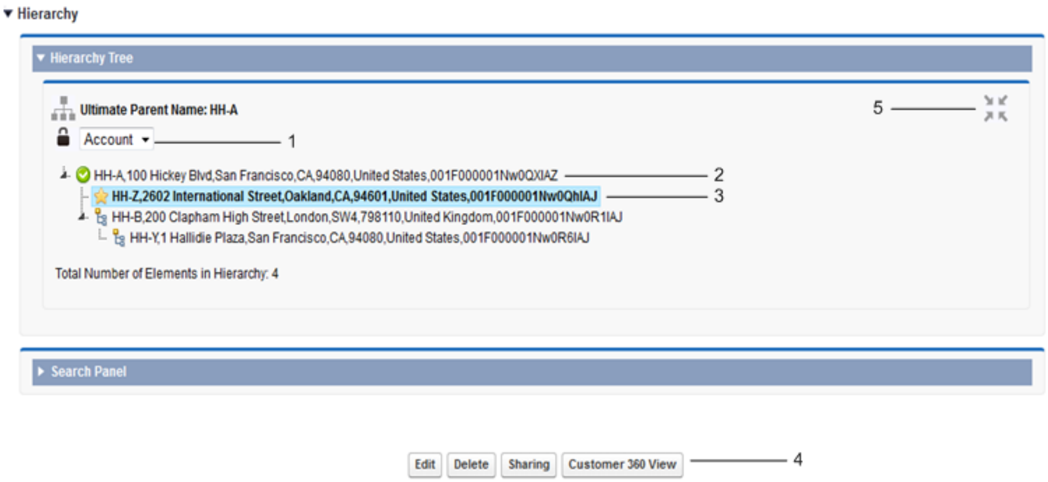
A hierarchy represents the relationship between the various accounts. When you view hierarchies, you get a global view of an organization and its subsidiaries. You can view and manage multiple types of hierarchies. You can also view the contacts, leads, and opportunities associated with the records in the hierarchy.

Records exist as nodes in the hierarchy. Use Customer 360 for Salesforce (Customer 360 for Salesforce) to view, navigate, and manage the different hierarchy types directly in Salesforce. Add nodes to a hierarchy, remove nodes from a hierarchy, or drag-and-drop nodes to reorganize a hierarchy. You can move a node from one hierarchy to another, even when the hierarchies are of different hierarchy types.

Multidimensional hierarchies contain records that are present in more than one hierarchy. Alternate hierarchies contain beans from the same external data source and link to the same master bean as that of the account.

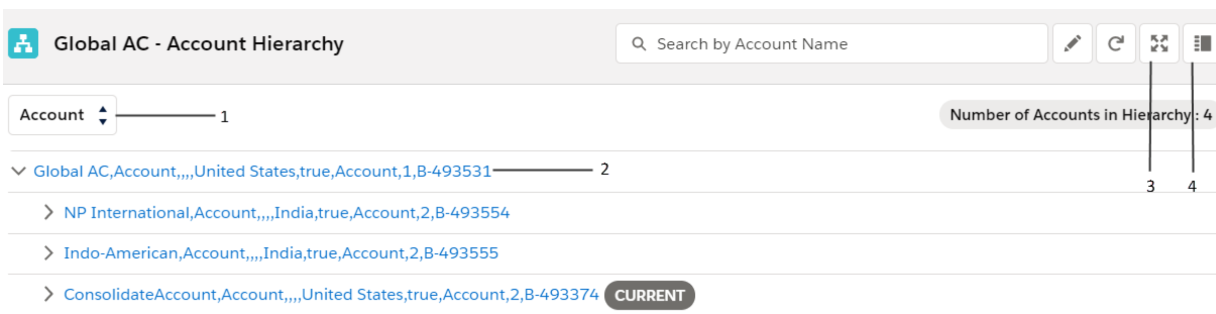
Use the Customer 360 view to get a detailed view of an organization and its subsidiaries. You can view the account hierarchy and the details of records that belong to the account. You can filter the records and alphabetically sort the records. You can search for accounts within a hierarchy. If the master bean of the account is linked to beans from external data sources, you can view the alternate hierarchies.

The following image shows the hierarchy view in Salesforce Classic:



1. Hierarchy type
2. Ultimate parent
3. Record you are viewing on the account page
4. Customer 360 View button
5. Expand All/Collapse All button

The following image shows the hierarchy view in Lightning Experience:



1. Hierarchy type
2. Ultimate parent
3. Expand/Collapse icon
4. View C360 icon

Hierarchy Types

The different hierarchy types give you an insight into the relationships between the records through multiple perspectives. You can move or copy a record from a hierarchy of one type to a hierarchy of a different type.

For example, if a record belongs to a sales hierarchy, you might organize the hierarchy according to sales territories. A legal hierarchy, on the other hand, might show where the records appear within the financial reporting structure.

When you add a node and its children to a hierarchy of a different type, Customer 360 for Salesforce (Customer 360 for Salesforce) updates the record hierarchy type to reflect the hierarchy it has become a part of. Customer 360 for Salesforce populates the hierarchy type field of child records with the hierarchy type of the ultimate parent. If you edit the hierarchy type of a child record, Customer 360 for Salesforce overrides the change with the ultimate parent hierarchy type.

If you clone a node and its children to a hierarchy of a different type, you create a multidimensional hierarchy. The original hierarchy retains its hierarchy type and the clone of the hierarchy updates to reflect the hierarchy that it has become a part of.

Account hierarchies have a hierarchy type of Account. Any hierarchy that is not an account hierarchy is an external hierarchy. The source for account hierarchies is account records, while the source for external hierarchies is records from external data sources such as SAP. The default name for external hierarchies is the source name. You can set the hierarchy type when you load the data into Customer 360 for Salesforce.

Hierarchy Status in Salesforce Classic

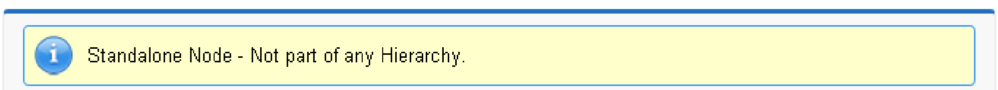
Customer 360 for Salesforce (Customer 360 for Salesforce) displays hierarchy information to indicate whether a hierarchy is unlocked or locked. Customer 360 for Salesforce also displays information to indicate when a record is a standalone record.

A hierarchy must have one of the following statuses:

Standalone node

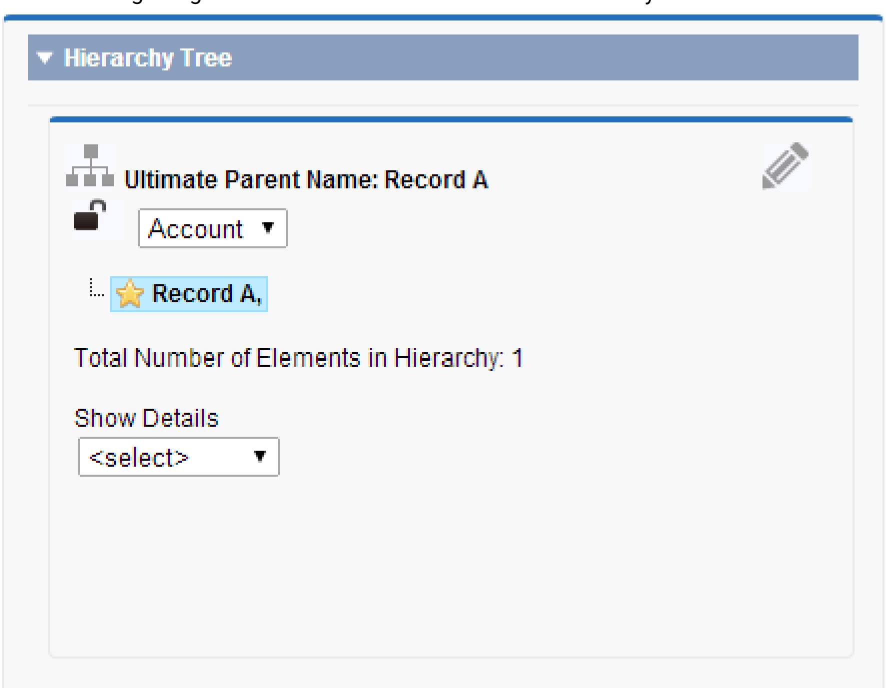
A standalone node is a record that is not part of a hierarchy.

The following image shows the status that the Hierarchy Information section displays when you view the Record Detail page for a record that is a standalone node:



In the hierarchy view, a standalone node appears as a single node with a hierarchy status of unlocked.

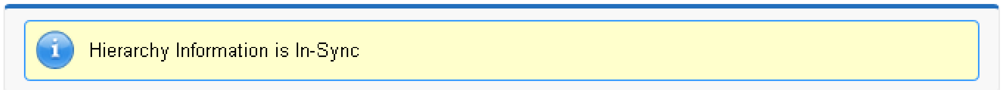
The following image shows a standalone node in the hierarchy viewer:



Unlocked

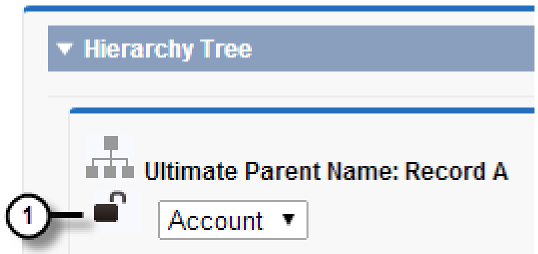
An unlocked hierarchy is a hierarchy that you can edit.

The following image shows the status that the Hierarchy Information section displays when you view the Record Detail page for a record that is part of an unlocked hierarchy:



In the hierarchy view, an unlocked hierarchy appears with an unlocked symbol.

The following image shows the unlocked symbol in the hierarchy viewer:

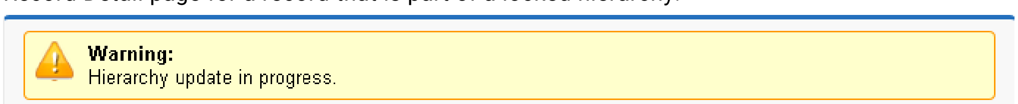


1. Unlocked hierarchy status

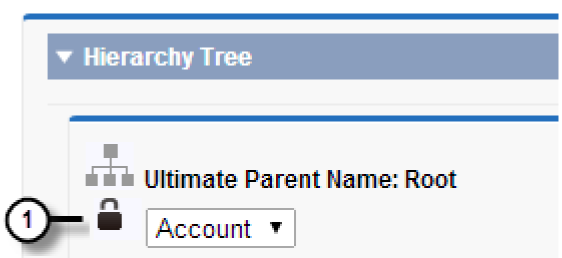
Locked

A locked hierarchy is a hierarchy that you cannot edit. Customer 360 for Salesforce locks a hierarchy until asynchronous batch processing is complete.

The following image shows the status that the Hierarchy Information section displays when you view the Record Detail page for a record that is part of a locked hierarchy:



The following image shows the locked symbol in the hierarchy viewer:



1. Locked hierarchy status

Hierarchy Status in Lightning Experience

Based on the records in a hierarchy, the hierarchy can be locked or unlocked. If the records in a hierarchy are included in an asynchronous hierarchy processing, the hierarchy becomes locked.

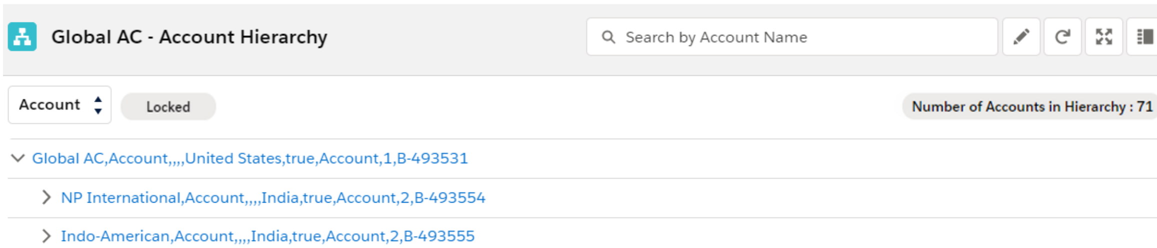
A hierarchy can have one of the following statuses:

Locked

A hierarchy is locked when the records in the hierarchy are part of an asynchronous hierarchy processing. The hierarchies are locked for a user without CC360 profile.

In the hierarchy view, a locked hierarchy appears with the label **Locked**. You cannot edit a locked hierarchy

The following image shows a locked hierarchy:



Unlocked

A hierarchy is unlocked when the records in the hierarchy are not part of an asynchronous hierarchy processing.

In the hierarchy view, you can edit an unlocked hierarchy if you have edit access to the accounts and beans.

Multidimensional Hierarchies

Multidimensional hierarchies contain records that are present in more than one hierarchy.

You can create multidimensional hierarchies so that records appear in more than one hierarchy. To create a multidimensional hierarchy, clone a node from one hierarchy type into a hierarchy of a different type. The cloned node and its children appear in both hierarchies.

Alternate Hierarchies

You can view an alternate hierarchy in the Hierarchy section of an account page. The Customer 360 for Salesforce (Customer 360 for Salesforce) administrator must enable alternate hierarchy so that you can view alternate hierarchies in the Account Hierarchy Visualforce page.

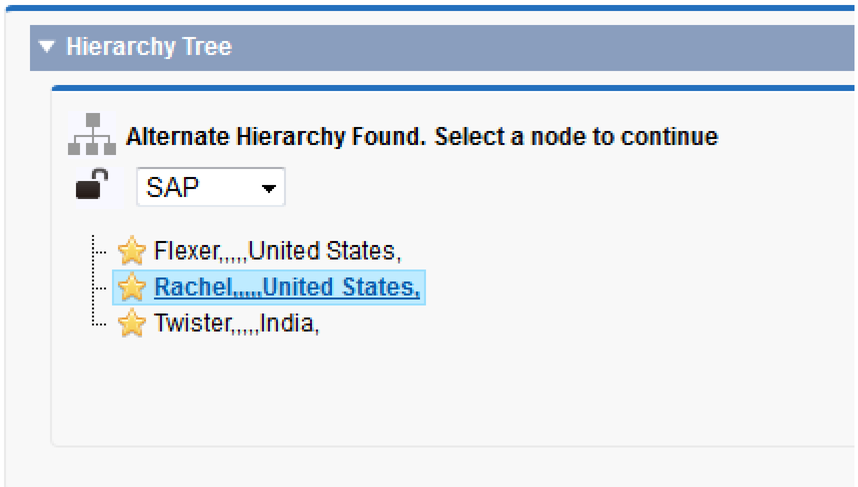
An alternate hierarchy contains a list of nodes. The nodes indicate the beans that match the following conditions:

- Must link to the same master bean.
- Must have the same data source.
- Must belong to the same hierarchy type.

If the master bean has only one bean linked to it for a specific hierarchy type, the Hierarchy section displays the complete hierarchy of the bean. You can also select other hierarchy types and view a list of nodes that match the preceding conditions.

Note: If a master bean is linked to the beans that have different data sources but belong to the same hierarchy type, some beans might not show up in the Hierarchy section.

The following image displays the alternate hierarchy for the SAP hierarchy type:



To view the complete hierarchy of a specific node, right-click the node, and select **Show Hierarchy**. The Hierarchy section displays the parent and child nodes of the selected node. You can expand or collapse the nodes in the hierarchy to view or hide the child nodes. To view the alternate hierarchy for the selected hierarchy type, right-click the node, and select **Show Alternate Hierarchies**.

Note: You cannot view alternate hierarchies in Lightning Experience.

Managing Hierarchies

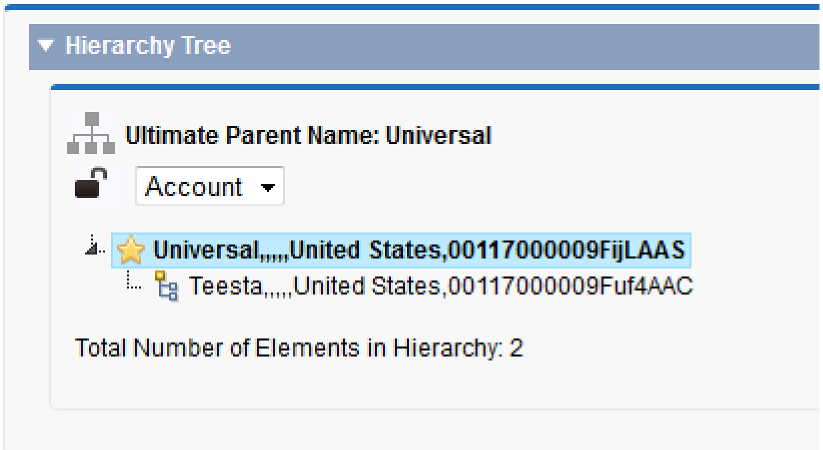
You can create hierarchies and link accounts to get a global view of a company. View, search, and reorganize the hierarchies to manage the relationships between accounts.

Viewing Hierarchies

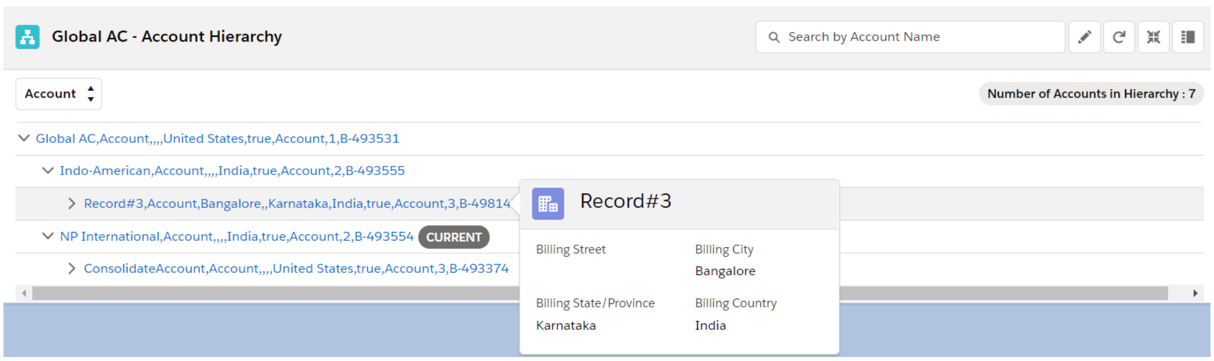
You can view a hierarchy in the Hierarchy section of an account page.

To view an account hierarchy, go to the Hierarchy section of the account page. The Hierarchy section displays the parent and child nodes of the selected account. You can expand or collapse the nodes in the hierarchy to view or hide the child nodes.

The following image shows the hierarchy of the selected account in Salesforce Classic:



The following image shows the hierarchy of the selected account in Lightning Experience:



Hover over a node to view the basic details of the account.

Viewing Hierarchy Opportunities, Leads, and Contacts in Salesforce Classic

To view information about the opportunities, leads, and contacts related to the nodes in the hierarchy, view the additional hierarchy details.

1. From the hierarchy view, click **Show Details**.
2. Click the triangle beside the **Opportunities**, **Leads**, or **Contacts** to view the details for each of these categories.

   Customer 360 for Salesforce (Customer 360 for Salesforce) displays every opportunity, lead, or contact for all the nodes in the hierarchy.

Searching a Hierarchy

You can search for nodes within a hierarchy by specifying different search criteria, such as account name and billing information.

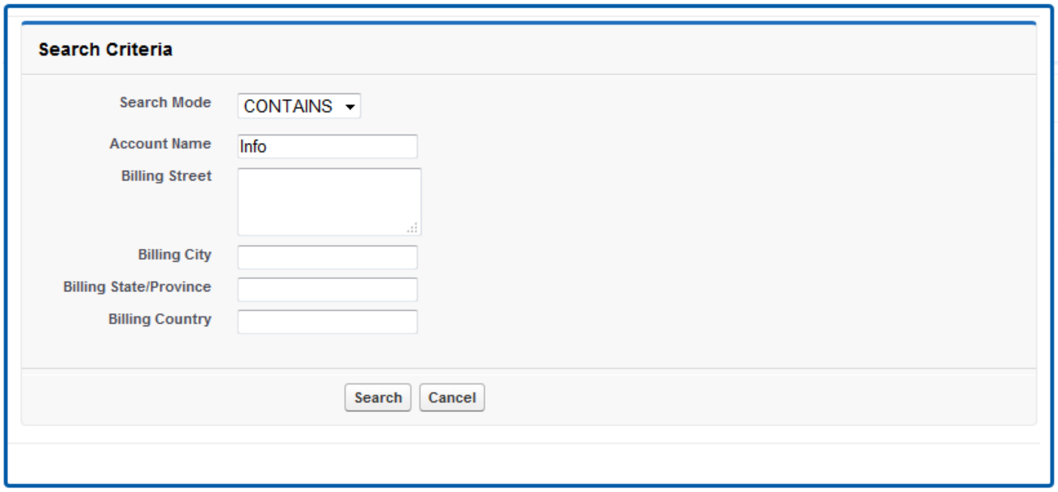
Searching a Hierarchy in Salesforce Classic

You can search for nodes within a hierarchy from the Edit Hierarchy page and the Customer 360 page.

To search for nodes within a hierarchy, perform one of the following tasks:

- In the Edit Hierarchy page, go to the Search Criteria section, and enter the details to search.
- In the **Customer 360** page, click **Click here to search within hierarchy** and enter the details to search.

The following image shows the search criteria for nodes within a hierarchy:



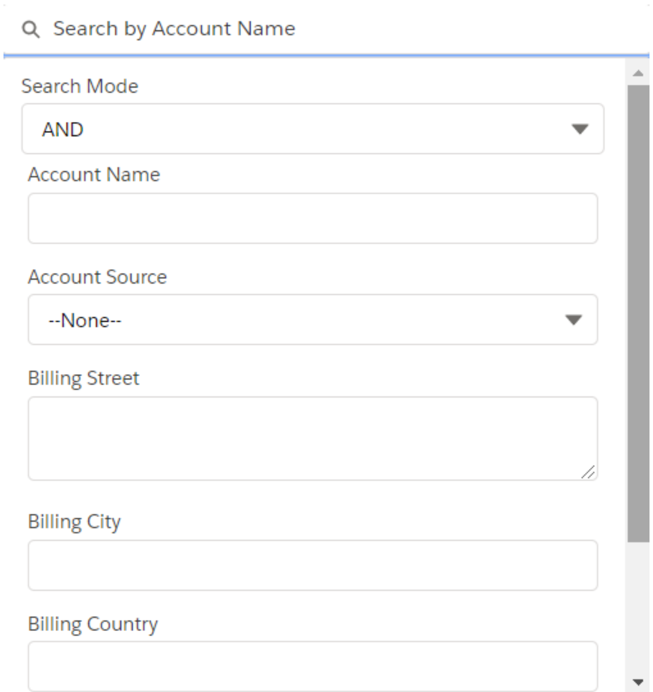
For example, if you select AND or OR and enter `Info` in the Account Name field, Customer 360 for Salesforce (Customer 360 for Salesforce) searches for account names that start with `Info`. If you select CONTAINS and enter `Info` in the Account Name field, Customer 360 for Salesforce searches for account names that contain `Info` in the account name.

Searching a Hierarchy in Lightning Experience

You can search for nodes within a hierarchy from the Hierarchy section.

To search for nodes within a hierarchy, perform one of the following tasks:

- Enter the account name in the search field.
- Click the search field, click **Advanced Search**, and then enter the details to search.
  The following image shows the details that you can enter to perform an advanced search:



For example, if you select **AND** and enter `Info` in the Account Name field, Customer 360 for Salesforce (Customer 360 for Salesforce) searches for account names that start with `Info`. If you select **CONTAINS** and enter `Info` in the Account Name field, Customer 360 for Salesforce searches for account names that contain `Info` in the account name.

Click on an account name from the search results to go to the respective node in the hierarchy.

Reorganizing Hierarchies

You can add, remove, or reparent nodes in a hierarchy to reorganize the hierarchy. You can reorganize a hierarchy only if you have edit access to accounts and beans.

Note: You must save the hierarchy changes after three edit operations.

Reparenting Hierarchies in Salesforce Classic

You cannot change the position of the ultimate parent record in the hierarchy.

1. From the hierarchy view, click the **Edit Hierarchy** icon.
2. Select the node that you want to move, and then drag the node to the new location in the hierarchy.

   The node and all child nodes move to the new location in the hierarchy. This is applicable for hierarchies for which the node count is less than or equal to the maximum trigger hierarchy limit.
3. If the node count is greater than the maximum trigger hierarchy limit, perform the following tasks:
   a. Right-click the node to move, and select **Select Node to Move**.
   b. Right-click the target node, and select **Move Node Here**.
4. Click **Save**.

Reparenting Hierarchies in Lightning Experience

You cannot change the position of the ultimate parent record in the hierarchy.

1. From the hierarchy view, click the **Edit** icon.
2. Select the node that you want to move, and then drag the node to the new location in the hierarchy.

   The node and all child nodes move to the new location in the hierarchy.
3. Click **Review**.

   The **Review and Save** page appears.
4. Review the changes, and click **Save**.

Adding Records to a Hierarchy in Salesforce Classic

To add a record to a hierarchy, edit the hierarchy and search for the record that you want to add as a node. If the record exists as a node in a different hierarchy, the node and all its children move to the hierarchy.

1. Select the account to view the account details.
2. View the hierarchy of the account in the Hierarchy Tree section.
3. Click **Edit Hierarchy**.
4. Select the parent node under which you want to add the record.
5. Click **Search**.
6. Search for the record that you want to add to the hierarchy, and then select the record.

   For more information about searching a hierarchy, see "Searching a Hierarchy in Salesforce Classic" on page 32.
7. Click **Add**.

   Customer 360 for Salesforce adds the record to the hierarchy.
8. Click **Save**.

Adding Records to a Hierarchy in Lightning Experience

To add a record to a hierarchy, edit the hierarchy and search for the record that you want to add as a node. If the record exists as a node in a different hierarchy, the node and all its children move to the hierarchy.

1. Select the account to view the account details.
2. From the hierarchy view, click the **Edit** icon.
3. Select the parent node under which you want to add the record and click the **Add** icon.

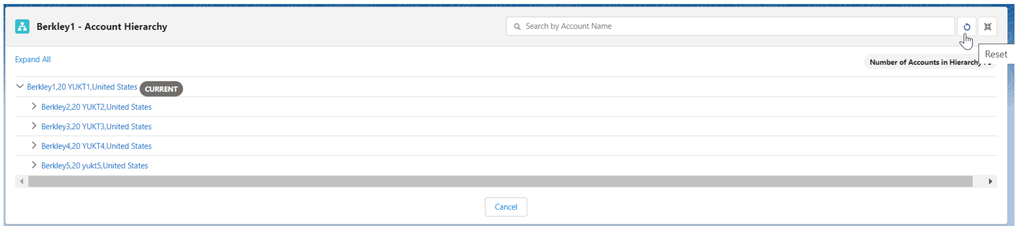
   The **Add account to the hierarchy** page appears.
4. Search for the record that you want to add to the hierarchy, and then select the record.

   For more information about searching a hierarchy, see "Searching a Hierarchy in Lightning Experience" on page 32.
5. Click **Add**.

   Customer 360 for Salesforce adds the record to the hierarchy.
6. Click **Review**.

   The **Review and Save** page appears.

Note: To undo all the changes made to the hierarchy, click the **Reset** button. You cannot reset the changes after you save the changes.



7. Review the changes, and click **Save**.

Removing a Node from a Hierarchy in Salesforce Classic

When you remove a node from a hierarchy, the node and its children are removed.

1. From the hierarchy view, click **Edit Hierarchy**.
2. In the hierarchy, right-click the node to remove, and select **Remove**.

   Customer 360 for Salesforce (Customer 360 for Salesforce) removes the node and its child nodes from the hierarchy. The node and its child nodes exist as a separate hierarchy.
3. Click **Save**.

Removing a Node from a Hierarchy in Lightning Experience

When you remove a node from a hierarchy, the node and its children are removed.

1. From the hierarchy view, click the **Edit** icon.
2. In the hierarchy, select the node to remove, and click the **Delete** icon.

   Customer 360 for Salesforce (Customer 360 for Salesforce) removes the node and its child nodes from the hierarchy. The node and its child nodes exist as a separate hierarchy.
3. Click **Review**.

   The **Review and Save** page appears.
4. Review the changes, and click **Save**.

Unlocking a Hierarchy

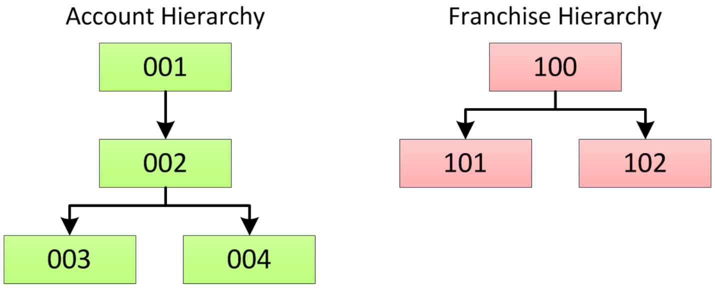
To unlock a hierarchy with a hierarchy status of **Locked** after a hierarchy batch process fails, enable **Check Hierarchy** for the ultimate parent bean.

1. From the hierarchy view, right-click the ultimate parent of the locked hierarchy and select **Go to Account Page**.
2. From the Account Detail page, scroll down to the Beans section.
3. From the bean edit page, enable **Check Hierarchy**. Click **Save**.

Multidimensional Hierarchy Example

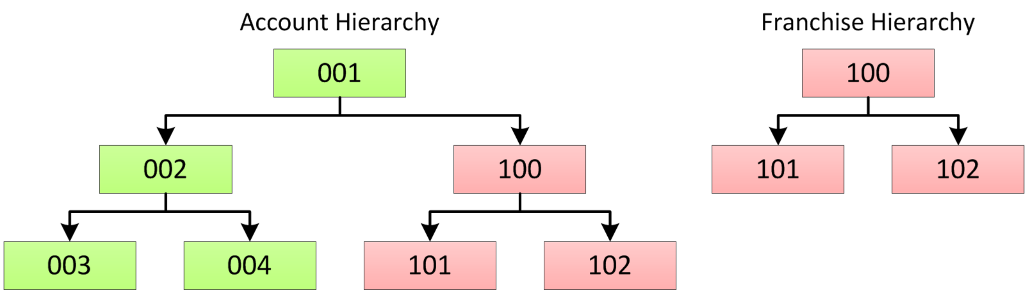
You need to create a multidimensional hierarchy that contains a franchise hierarchy within an account hierarchy.

The following figure shows an account hierarchy and a franchise hierarchy:



The franchise hierarchy is a separate hierarchy from the main corporate account hierarchy. However, you want the franchise hierarchy to also appear under the account hierarchy. To do this, clone the root node of the franchise hierarchy to the account hierarchy.

After you clone the franchise hierarchy to the account hierarchy, the records in the franchise hierarchy also appear in the account hierarchy. In this example, you want the root of the franchise hierarchy to appear under the root of the account hierarchy. The following figure shows the structure of the hierarchies after you clone the franchise hierarchy:



Creating a Multidimensional Hierarchy in Salesforce Classic

To create a multidimensional hierarchy, clone the node of a hierarchy of one type to a hierarchy of another type.

1. Edit the target hierarchy that you want to add a hierarchy clone to.
2. In the target hierarchy, select the parent node for the clone hierarchy.
3. Search for the record that you want to add to the hierarchy, and then select the record.

   For more information about searching a hierarchy, see "Searching a Hierarchy in Salesforce Classic" on page 32.
4. Click **Clone**.

   Customer 360 for Salesforce adds the record to the hierarchy.
5. Click **Save**.

Creating a Multidimensional Hierarchy in Lightning Experience

To create a multidimensional hierarchy, clone the node of a hierarchy of one type to a hierarchy of another type.

1. Edit the target hierarchy that you want to add a hierarchy clone to.
2. Select the parent node for the clone hierarchy and click the **Add** icon.

   The **Add account to the hierarchy** page appears.
3. Search for the record that you want to add to the hierarchy, and then select the record.

   For more information about searching a hierarchy, see “Searching a Hierarchy in Lightning Experience” on page 32.
4. Click **Clone**.

   Customer 360 for Salesforce adds the record to the hierarchy.
5. Click **Review**.

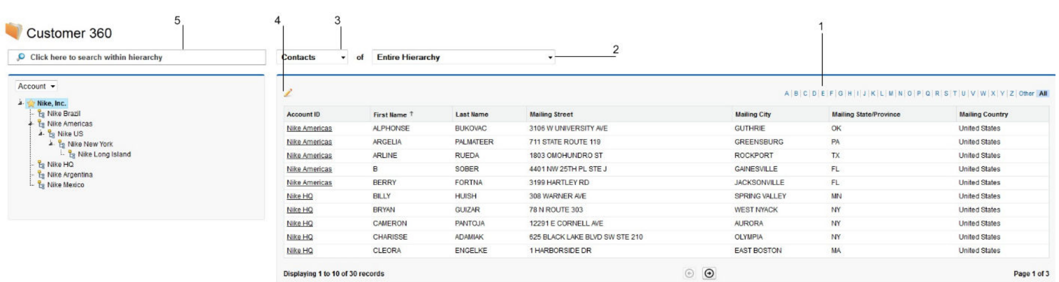
   The **Review and Save** page appears.
6. Review the changes, and click **Save**.

Customer 360 View

Use the Customer 360 view to get a detailed view of an account and its children. You can view and export the account hierarchy and the details of records that belong to an account.

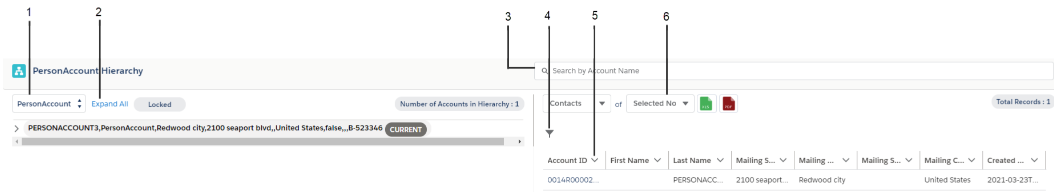
You can also search for accounts within the hierarchy. You can sort the records based on the fields.

The following image displays the details of contact records of the entire hierarchy in Salesforce Classic:



1. Filter based on alphabets
2. Filter based on node type
3. Filter based on object type
4. Filter based on conditions
5. Search for nodes within hierarchy

The following image displays the details of an account hierarchy in Lightning Experience:



1. Filter based on object type
2. Expand or collapse all the nodes within the hierarchy
3. Search for nodes within hierarchy
4. Filter based on conditions
5. Filter based on account details
6. Filter based on node type

You can expand or collapse all the nodes in an unlocked hierarchy that contains up to 500 records. The expand all button is not available for hierarchies containing more than 500 records. Depending on the number of nodes in the hierarchy, the time to expand all the nodes might vary.

You can sort the numeric fields, but not the long text area and rich text area fields.

You can filter the records in the following ways:

Filter based on Alphabets

You can alphabetically filter the text fields.

Filter Based on Object Type

You can filter records based on the object type.

Use one of the following object types:

- Contacts
- Leads
- Opportunities

Default object is Contacts. You can change the display order of the objects that you view in the Customer 360 page. The object that you move to the top functions as the default object.

You can also create additional objects based on your requirements.

Filter Based on Node Type

You can filter records based on the node type.

Use one of the following options:

- Entire Hierarchy
- Selected Node
- Selected Node and its Immediate Children
- Selected Node and All its Children

Default is Selected Node.

Note: The Selected Node and All its Children option is available only in Lightning Experience.

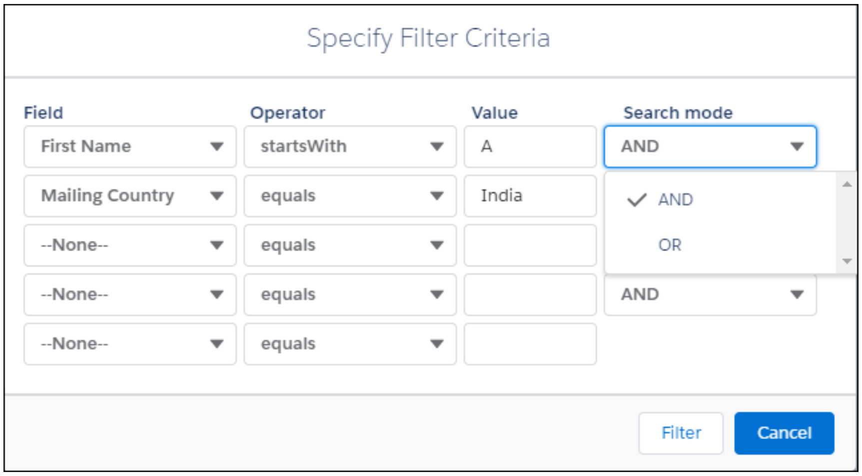
Filter Based on Conditions

You can filter the records based on conditions.

In Lightning Experience, when you use multiple conditions, you can set the AND and OR operators to join them.

In Salesforce Classic, the conditions are joined with the AND operator, and you cannot set the operator.

The following image shows the operators to join multiple conditions in Lightning Experience:



Viewing the Customer 360

You can open the Customer 360 page in Salesforce Classic or Lightning Experience.

Viewing the Customer 360 in Salesforce Classic

The Customer 360 page displays the account hierarchy and the details of the records for an account.

1. On the **Accounts** tab, select the account whose details you want to view.

   The account details page appears.
2. In the account details page, click **Customer 360 View**.

   The **Customer 360** page appears.

Viewing the Customer 360 in Lightning Experience

The Customer 360 page displays the account hierarchy and the details of the records for an account.

1. In Lightning Experience, on the navigation menu, click **Accounts**.
2. Select the account whose details you want to view.

   The account details page appears.
3. On the hierarchy view, click the **View C360** icon.

   The additional information about the account appears adjacent to the hierarchy.

Exporting Account Hierarchical Details

You can export the account hierarchical details in Salesforce Classic or Lightning Experience.

Exporting Account Hierarchical Details in Salesforce Classic

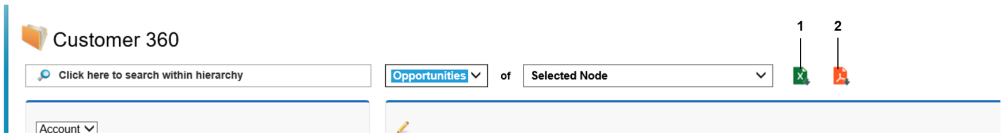
You can export the hierarchical details of an account to a PDF or Microsoft Excel file.

1. On the **Accounts** tab, select the account whose details you want to export.

   The account details page appears.
2. On the account details page, click **Customer 360 View**.

   The Customer 360 page appears.
3. Based on your requirement, select the filters.

   For example, select the filters based on object type, node type, and alphabet.
4. To export to a PDF file, click **Export To PDF**.



   1. Export To Excel
   2. Export To PDF
5. To export to a Microsoft Excel file, click **Export To Excel**.

Exporting Account Hierarchical Details in Lightning Experience

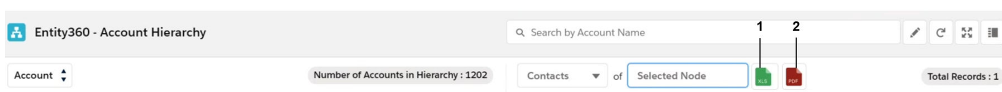
You can export the hierarchical details of an account to a PDF or Microsoft Excel file.

1. On the **Accounts** tab, select the account whose details you want to export.

   The account details page appears.
2. In the hierarchy view, click the **View C360** icon.

   The additional information about the account appears adjacent to the hierarchy.
3. Based on your requirement, select the filters.

   For example, select the filters based on object type and node type.
4. To export to a PDF file, click **Export To PDF**.



   1. Export To Excel
   2. Export To PDF
5. To export to a Microsoft Excel file, click **Export To Excel**.

APPENDIX A

Glossary

alternate hierarchy

Alternate hierarchy contains a list of nodes. These nodes link to the same master bean, nodes that have the same data source, and nodes that belong to the same hierarchy type.

automerge

Process that merges data.

bean

An object that holds data. Customer 360 for Salesforce creates a bean for every source record.

best version of the truth

The record maintained by the master bean that consists of the best data from the source records.

consolidation

The process of consolidating data from multiple source systems.

DaaS

Data as a Service (DaaS) contains address verification, phone number verification, and email address verification services. DaaS can be integrated with Customer 360 for Salesforce to verify addresses, email addresses, and phone numbers.

data conversion

The process of converting beans from external data sources to Salesforce records.

de-duplication

Process of removing duplicate records.

duplicate check

A job that identifies duplicate records.

enrichment

The process of enhancing Salesforce records with consolidated data from the master beans after you run the consolidation batch job.

master bean

Master beans link the related contact beans and lead beans to the account and also maintain the best version of the truth. Customer 360 for Salesforce creates a master bean for every account bean.

multidimensional hierarchies

Contains records that are present in more than one hierarchy.

Multi-Org

Multi-Org capability automates the cleansing, standardization, de-duplication, and master data management of data from multiple Orgs in a distributed Salesforce environment.

object

A table similar to a database table that stores information.

organization

A deployment of Salesforce with a defined set of licensed users that is similar to the operational reference store of the Multidomain MDM. An organization is the virtual space salesforce.com provides to an individual customer. Your organization includes all of your data and applications.

profile

Contains a set of permissions to perform tasks in the Customer 360 for Salesforce environment.

standardization

Standardizes data that is used inconsistently, such as country names.

synchronization

The process of migrating Salesforce data into Customer 360 for Salesforce.

ultimate parent

The root node of the hierarchy. The ultimate parent is the topmost node in the hierarchy.

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