

Mar 8th, 2022

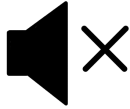
Accelerate SaaS MDM with Salesforce Records

Kamal Abrol – Senior Customer Success Technologist



Informatica

Housekeeping Tips



- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our **INFASupport YouTube channel** and **Success Portal** - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

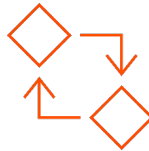
Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



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Tailored training and
content
recommendations

More Information



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<https://success.informatica.com>



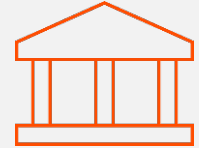
Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

Safe Harbor

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08 Mar, 2022

Accelerate C360 SaaS MDM with Salesforce Records

Kamal Abrol
Technologist- Customer Success



Informatica™

Agenda

WHAT WHY –C360 SaaS + Salesforce Integration

Accelerator Architecture- Data Flow

Overview –Salesforce accelerator

Batch Integration scenarios

Real-time Integration scenario-Search before create

Accelerator Contents & Deployment Process

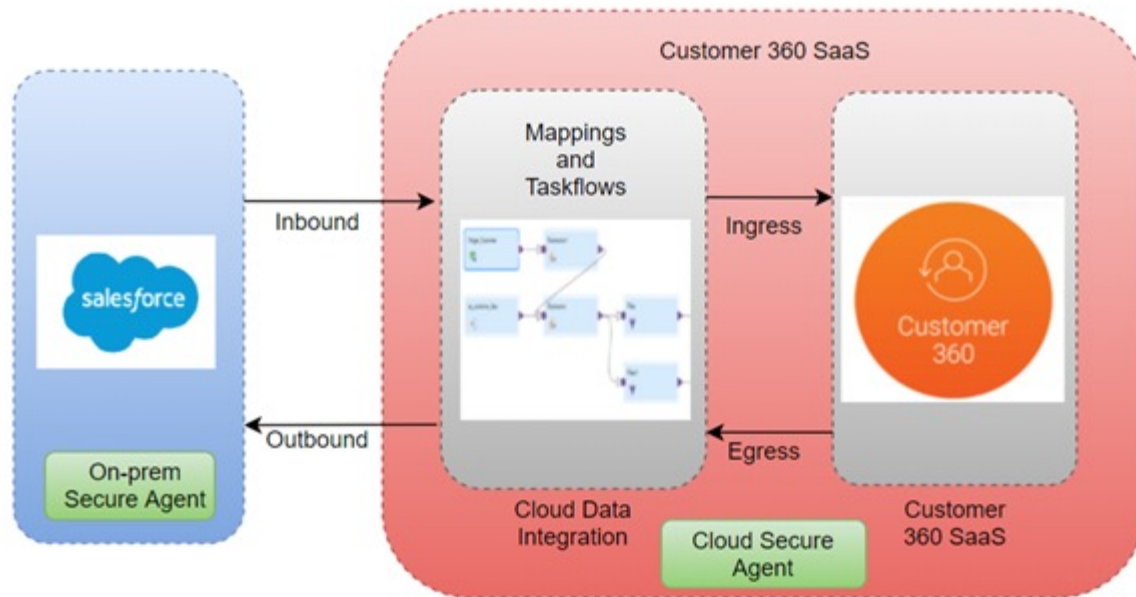
Live Accelerator Demo –MDM-Customer 360 for Salesforce

WHAT & WHY -SALESFORCE C360 SaaS Integration

Accelerator Benefits:

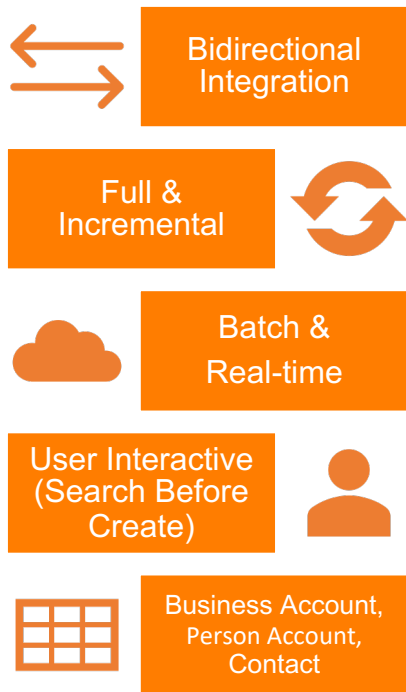
- **Salesforce CRM most popular and common sources to be integrated with MDM**
- **Jump start SaaS MDM projects – faster to production**
- **Position entire Informatica stack (MDM, CDI, CAI, CDQ, Governance)**
- **A proof-point for many niche use cases or closed industries**
- **Improve appeal to BUSINESS buyers of MDM**

Accelerator Solution Architecture - Data Flow



Salesforce Accelerator for Customer 360 SaaS

Features



Assets

Data Model Enhancements

- Fields
- Reference Data
- Relationship
- Hierarchy

Cloud Data Integration

- Mapping
- Task
- Taskflow
- Change Data Capture Logic

Cloud Application Integration

- Guides
- Processes

Cloud Data Quality

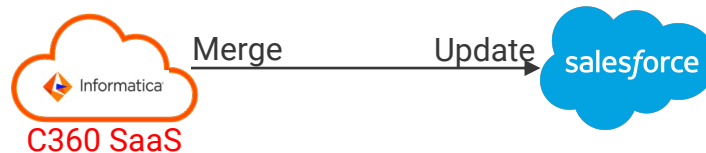
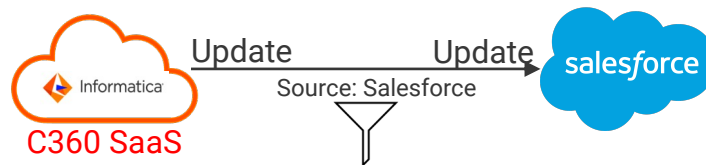
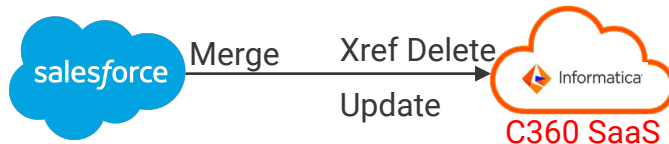
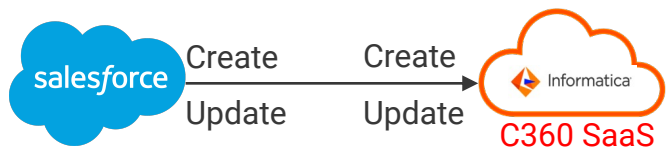
- Validation rules

Business UI

- Layouts

Salesforce Accelerator for Customer 360

Batch Integration scenarios

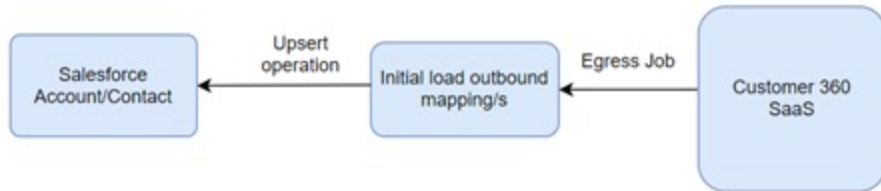
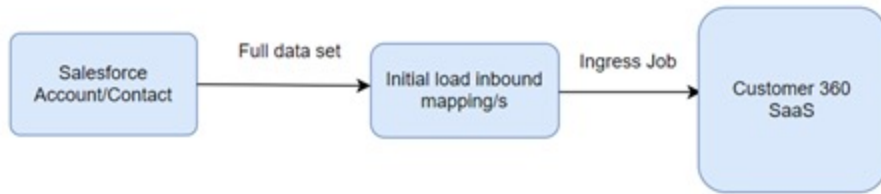


Full & Incremental Load



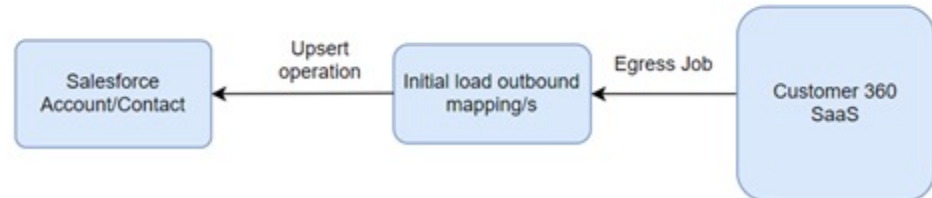
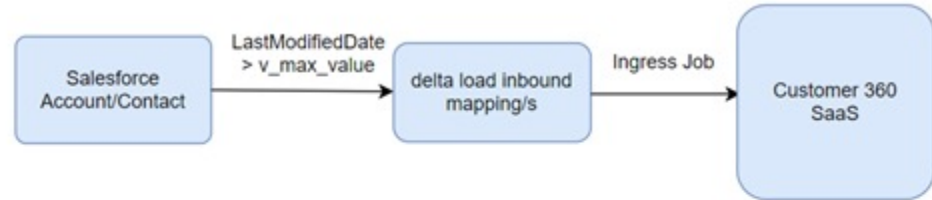
Initial Load

- During the initial load, full dataset will be fetched from the Salesforce using DI and load into MDM SaaS using the MDM Ingress job. Once the master data is created, corresponding MDM ID will be updated in Salesforce using the outbound DI mappings and export job of MDM.



Incremental Load

- For delta load, change data capture will be implemented using the **LastModifiedDate** field of Salesforce record. The last saved time stamp value of LastModifiedDate will be stored in an in-out parameter (**v_max_value**) of the mapping during a load job execution and that will be used in the source filter expression to extract data incrementally from next run using the condition **LastModifiedDate > v_max_value**.




BATCH INGRESS DEMO-

Salesforce Accelerator for Customer 360 SaaS



Salesforce Extension

**McDonald's**
000456372 | Prospect
8002446227 | Illinois | United States

UI Layouts- C360

Record DetailsSource Records

▼ General Information

Name:
McDonald's

Rating:
Hot

Company Logo:

Number of Employees:
1000100

Website:
http://corporate.mcdonalds.com/

Company Type:
Public

Year Started:
1940

Industry:
Food & Beverage

Site:
Head Quarters

▼ Account

000456372

McDonald's
Partner Referral
Prospect

▼ Address

Business

110 N Carpenter St.
Chicago | IL | US | 60607

▼ Phone

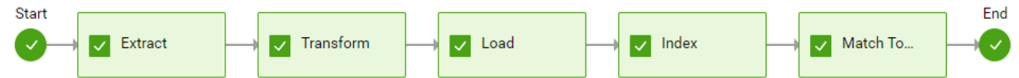
Business

8002446227
Telephone

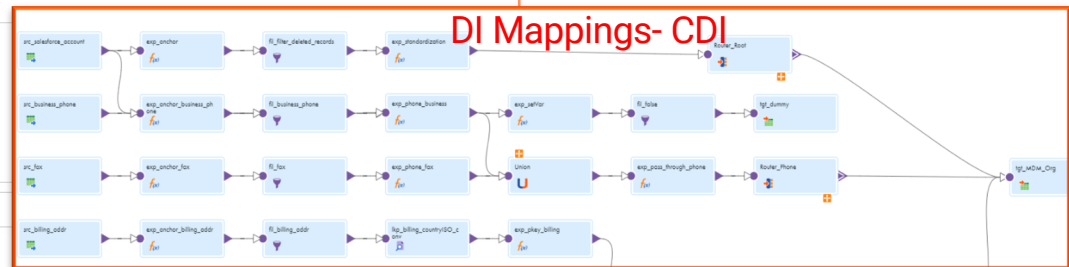
Business

8002446228
Fax

Batch Jobs-Business 360

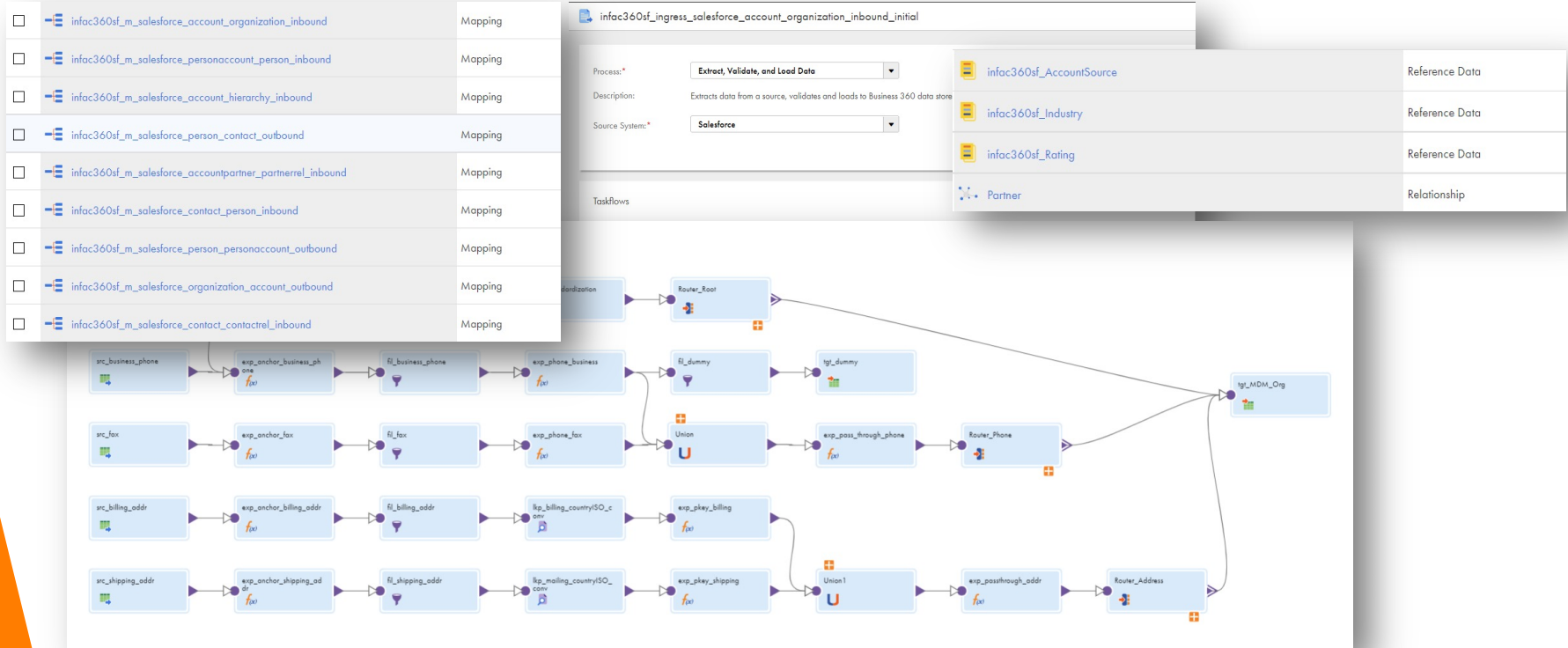


DI Mappings- CDI












Salesforce accelerator contents









Reference data, relationships, Mappings, Tasks, Job Definitions

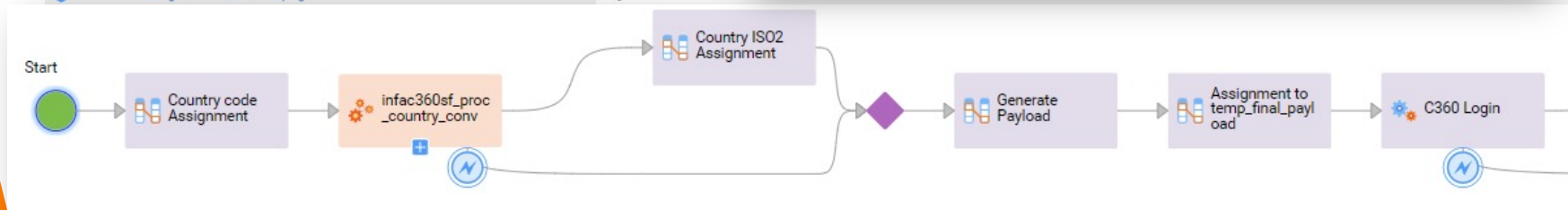


Salesforce accelerator contents

Processes & Guides, Service Connectors, App Connections, Hierarchy, UI pages

 infac360sf_proc_salesforce_account_organization_inbound_rt	Process
 infac360sf_proc_country_conv	Process
 infac360sf_proc_get_person	Process
 infac360sf_proc_PersonXrefCheck	Process
 infac360sf_proc_OrganizationSearch	Process
 Infac360sf_account_create_page	Page
 Infac360sf_contact_create_page	Page
 infac360sf_person_create_page	Page
 infac360sf_organization_create_page	Page

 C360SaaSConnector_GetOrganization	Service Connector	Oct 10, 2021, 10:41 PM
 C360SaaSConnector_GetPersonAccount	Service Connector	Oct 6, 2021, 4:37 AM
 C360SaaSConnector_Search	Service Connector	Oct 6, 2021, 3:21 AM
 Customer360	App Connection	Nov 7, 2021, 10:44 PM
 infac360sf_file_appconn	App Connection	Nov 11, 2021, 8:27 PM
 infac360sf_guide_account_search	Guide	Oct 21, 2021, 10:10 PM
 infac360sf_guide_OrganizationSearch	Guide	Oct 28, 2021, 10:55 PM
 infac360sf_guide_personAccountSearch	Guide	Nov 11, 2021, 4:01 AM

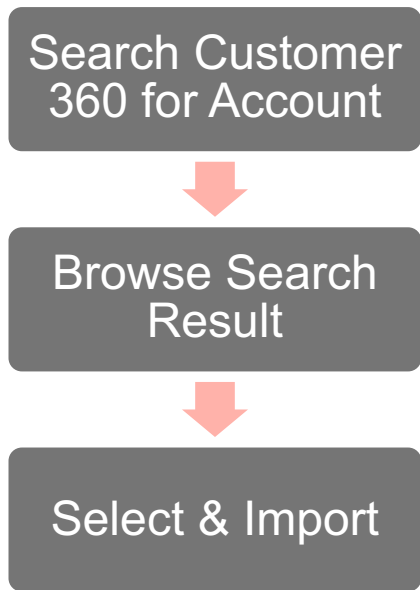


 Salesforce Account Hierarchy	Hierarchy
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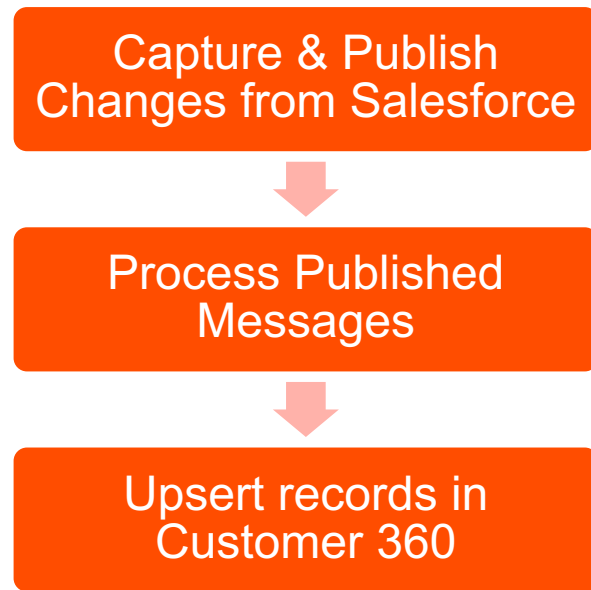
Salesforce Accelerator for Customer 360

Real-time Integration scenarios

Search Before Create in Salesforce



Real time Inbound



REAL TIME DEMO-

Salesforce Accelerator for Customer 360 SaaS



How to download and install Accelerators

- Accelerator bundles are available as a downloadable archive
- Download links are available on request through Global Customer Support
- Setup guide is available through online help for Business 360 console

▼ Deploy Extension

▼ Salesforce extension for Customer 360

Salesforce extension package

➤ Field mapping

➤ Assets related to Organization business entity

➤ Assets related to Person business entity

Process flow to deploy Salesforce extension on Customer 360

Configuring Salesforce for Business 360

Downloading the Salesforce extension package

Extracting the Salesforce extension package

Enabling custom relationships

"CRM leaders must understand the benefits of the MDM discipline to CRM and make it part of their CRM strategy. MDM is critical to enabling CRM leaders to create the 360-degree view of the customer required for an optimized customer experience."

- Gartner



Using Informatica for MDM is like using Salesforce for CRM

- Michael Eggers, Head of Sales Operations, Amazon Web Services (AWS)

Questions?



Kamal Abrol-Speaker
Dilip – C360 SaaS Panelist
Customer Success Technologist



Thank You!

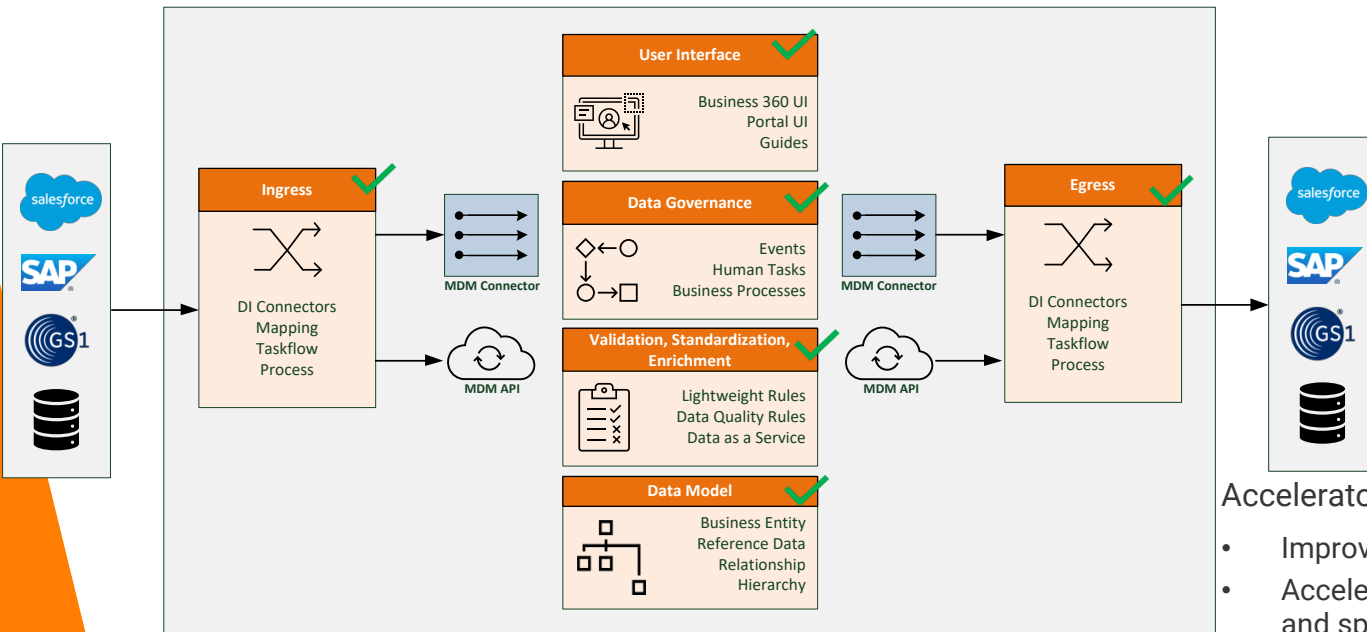
- Customer Success Technologist

References

<https://infawiki.informatica.com/pages/viewpage.action?spaceKey=DF&title=Salesforce+Accelerator+for+Customer+360+SaaS>

PM artefacts

Accelerator on Intelligent Data Management Cloud



Accelerator Benefits:

- Improve appeal to BUSINESS buyers of MDM
- Accelerate sales cycles by reducing custom work and speed-up sales ramp
- Jump start MDM projects – faster to production
- Position entire Informatica stack (MDM, CDI, CAI, CDQ, Governance)
- A proof-point for many niche use cases or closed industries