



Reltio

Solution Brief

Reltio Connected Customer Data for Salesforce

Seamlessly Synchronize Trusted
Customer Data with Salesforce

Empower Teams with Unified Customer 360 Data

Lack of Unified, Reliable Data

Today's data-driven organization relies on a variety of sales, service, marketing, and other applications running in a variety of environments. Often key account and customer data is used by teams with disconnected technologies, resulting in fragmented data that is outdated, inconsistent, duplicated, or unavailable when needed. Not only can this result in poor customer experiences and lack of customer insight, but it can also lead to inefficient processes, high costs, and ultimately disappointing business performance.

Many organizations use Reltio Connected Data Platform to improve customer experiences and operational efficiency with high-quality, real-time data. Many of these organizations also use Salesforce, well-known and respected for customer relationship management, improving sales productivity and forecasting, and accelerating sales and service.

Therefore, customers using both Reltio and Salesforce want to easily synchronize Reltio and Salesforce data without having to develop and maintain custom integration.

Fuel the Experiences of the Future

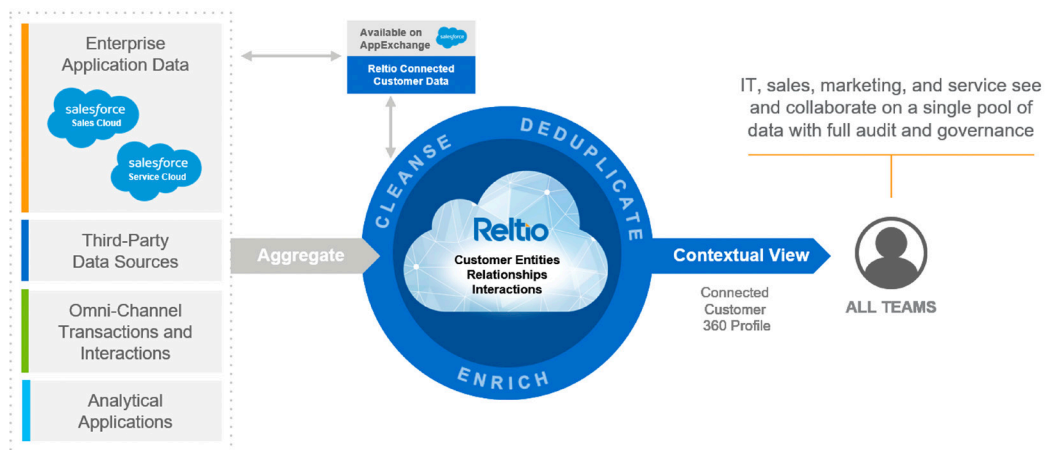
Reltio Connected Customer Data for Salesforce integrates with Salesforce Sales Cloud, Service Cloud, Veeva CRM, and the Salesforce Platform solutions to extend core abilities to boost customer retention, accelerate revenue, and simplify processes across the entire enterprise data infrastructure of a Salesforce customer—and at scale. With connected customer 360 data, all applications in your landscape will benefit from the same unified, clean, and enriched data.

Seamlessly Synchronize Salesforce and Reltio

Reltio Connected Customer Data for Salesforce empowers your Salesforce users, across Salesforce sales and service clouds and multiple Salesforce organizations, to benefit from rich, up-to-date, and actionable connected customer 360 profiles. Ensuring consistent and accurate customer information in Salesforce and other applications is critical to delivering a personalized and connected customer experience across all touchpoints—and fueling the customer experiences of the future.

With Reltio Connected Customer Data for Salesforce, your organization can increase sales momentum, build customer loyalty, enable business agility, and reduce operating costs by synchronizing its front office and back office to close the loop in real time and become a true customer- and data-driven organization.

Empower Teams with Trusted Account Data



Ensure Seamless Consistency

Build consistency across your multiple Salesforce Sales and Service Clouds and Reltio Connected Data Platform with automated, bi-directional synchronization of attribute and relationship data for always-current account and contact profiles with real-time or batch updates. In addition, search-before-create capabilities prevent introduction of duplicate account profiles.

Leverage Out-of-the-Box Connector

Get started within minutes using the pre-configured connector and mappings to minimize setup time and effort, lowering time to value and total cost of ownership. The connectors synchronize Salesforce accounts, contacts, leads, and custom objects with Reltio entities.

Unify Account and Customer Profiles

Rationalize multi-cloud and multi-organization Salesforce customer data so you get unified, enriched, reliable account and customer profiles across the enterprise. In addition, this empowers your organization to easily adapt to organizational changes and new business acquisitions.

Boost Effectiveness and Productivity

Empower your sales, service, and other customer-facing teams with enriched, accurate, and consistent account profiles to maximize their productivity, accelerate revenue, and deliver personalized customer experiences.

Features

Install quickly and easily

Reltio Connected Customer Data for Salesforce provides you with self-service installation from Salesforce AppExchange with easy setup and minimal IT involvement. The connector can use Salesforce B2C, B2B, and life sciences data models, with support for standard and custom objects.

Synchronize data automatically

Reltio for Salesforce ensures that accounts and contacts are always accurate and in sync. The connector synchronizes create, update, delete, and merge events generated by Reltio and Salesforce platforms in real time or batch mode.

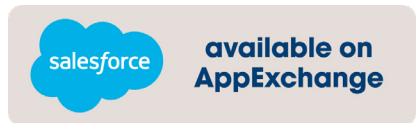
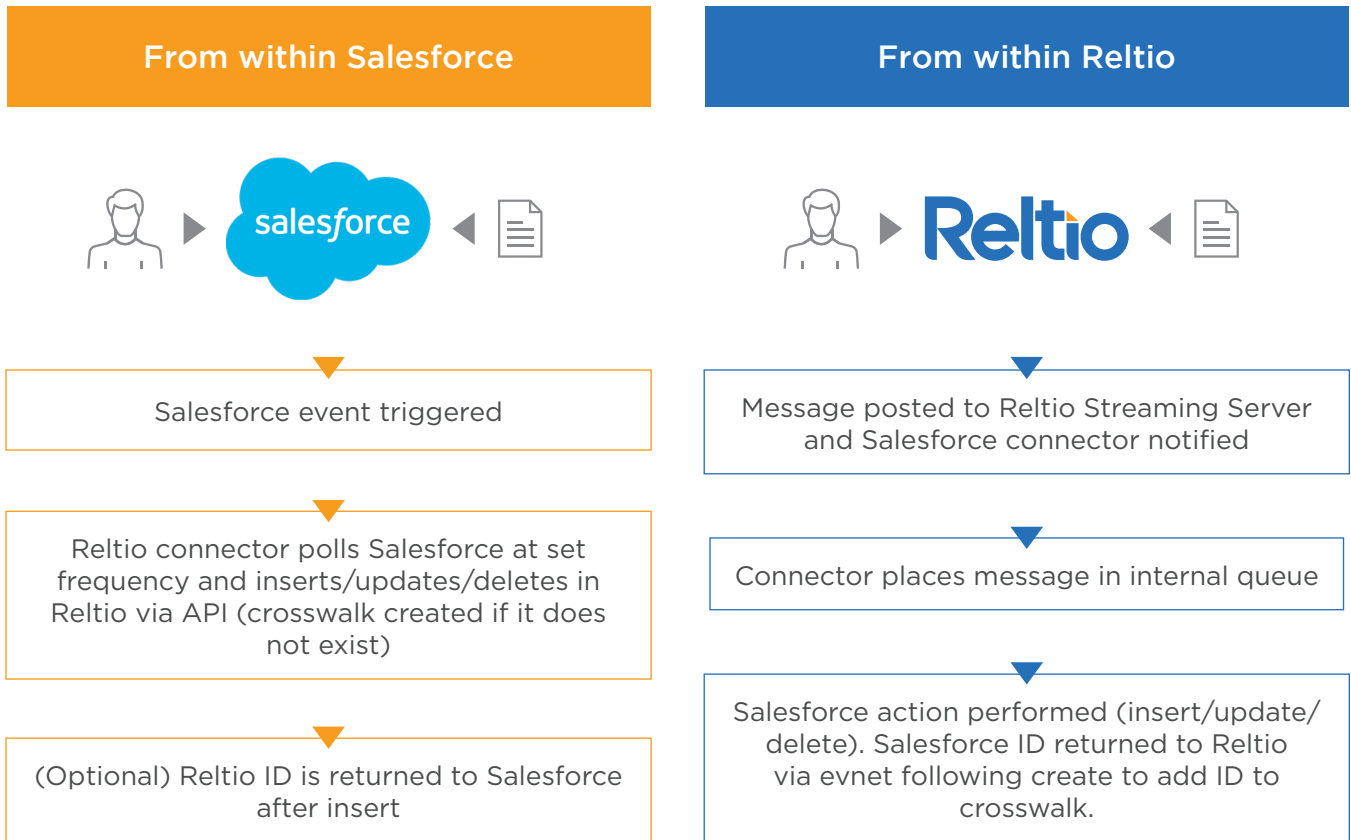
Prevent duplicates

Using Reltio Connected Customer Data for Salesforce with search-before-create capability, you can avoid introduction of duplicate account records.

Transform data

The connector supports transformation capabilities beyond simple, one-to-one mapping. It includes pre-built mappings to synchronize account, contact, and location objects with the ability to configure synchronization of additional objects and relationships.

Automated Synchronization



ABOUT RELTIO

Innovative Global 2000 companies trust Reltio to manage their mission-critical data for digital transformation. Reltio Connected Data Platform provides unified, reliable, and real-time data to fuel positive business outcomes, drive excellent customer experiences, and improve operational efficiency while simplifying management of risk and compliance. Data innovators trust Reltio Connected Customer Data for Salesforce to bring together the data that matters most to their business.



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