SALESFORCE CONNECTOR:
TRANSFORM PAIN POINTS INTO DATA-INFORMED DECISION POINTS

As companies seek better ways to manage their data spend and work to extract intelligence, it's crucial to understand the pain points, regardless of data sources or data management platform.

Matchbook AI's Salesforce Connector provides organizations with a ready-to-use packaged solution that leverages real-time actionable data and insights integrated with your third-party reference data sources. Our proprietary solution transforms the way organizations use and manage customer relationship data by simplifying the process of connecting to your Salesforce data and drastically shortening TTV (time-to-value) realization.

Matchbook AI's solution is specifically tailored for the Salesforce platform, eliminating the complexities and problems often found with custom API integration. By fully integrating with our **Reference Data as a Service (RDaaS)** platform, Salesforce Connector creates seamless integration with our core Cleanse-Match-Enrichment capabilities, which can also be shared across the enterprise. This industry-leading approach yields critical real-time insights directly into your Salesforce environment.

Features & Benefits

- **CREATE RELIABLE AND ACCURATE ACCOUNTS "THE FIRST TIME" WITH SEARCH-BEFORE-CREATE CAPABILITY**
  Pain Point Solved: Knowing real-time when creating a valid new account that SFDC does not have. This means no more repeat work to manually research and eliminate duplicates going forward.

- **FAST AND EASY IMPLEMENTATION AND CONFIGURATION**
  Pain Point Solved: Matchbook works with the SFDC admin to easily install and set up base configurations.

- **SEARCH-AFTER-CREATE CAPABILITY, ABILITY TO MERGE ACCOUNTS**
  Pain Point Solved: Salesforce Connector automatically shows linked accounts and automates the process.

- **ACCOUNT HIERARCHY AND UPWARD LINKAGE MANAGEMENT**
  Pain Point Solved: Allows users to visually create, modify and customize an organization's unique account hierarchy needs.

- **AUTOMATIC ACCOUNT PARENTING AND LINKING, AUTO-MATCH TO UNIQUE THIRD-PARTY DATA PROVIDER IDS**
  Pain Point Solved: Allows users to identify legacy account records where duplicates exist and gives functionality to quickly remove, merge and more.

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Additional company enrichments are made available and consumable natively
within the SFDC Connect app, allowing for one-stop access for related account details.

The data decision points that matter most are solved with **Matchbook AI Salesforce Connector**, which is tightly integrated with customers that license Dun & Bradstreet data and their core firmographic enrichments. Our solution includes full family tree enrichment support and fully integrates Matchbook Data Monitoring and Data Hub.