Customer Data Management (CDM)

Supported Business functions:
- Create, Maintain and View Customer data
- Assured Data Quality in Customer Master Data
- Approval mechanism for Customer data
- Easier data gathering

Need for CDM

Business Needs

With the growing business complexity and customer base, many companies are faced with great challenges in the way they manage their customer’s data. In today’s business, a single customer may have a relationship with several entities of an organization, which means that the customer data is collected through different channels. One customer may be described in different ways by each entity, which makes it difficult to obtain a unified view of the customer. In companies where there are several sources of data and the data is distributed to several systems, data environments become heterogenic. In this state, customer data is often incomplete, inaccurate and inconsistent throughout the company. The company’s success is closely linked to the efficient management of customer data. Data Quality also plays an important role in the building efficient and effective data system.

Contact our experts to setup up a discussion
Advantages of quality data include:

- Error free data
- Consistent data across shared systems
- Reduced operating costs
- Faster and more accurate transactional performance
- Improved Customer service
- Bolster privacy efforts

With Triniti’s **Customer Data Management (CDM)** Tool, users interact with a single screen to perform various operations to create & maintain customer data in Oracle eBusiness Suite.

CDM addresses the following business needs:

- Create customer with less effort, less time and more effectively and efficiently with in a single screen than confusing screens in Oracle EBS.
- Representation of a customer in hierarchical and intuitive way ensuring ALL data is captured accurately.
- To cross check the already existing customer by querying the entire customer with in a single screen by dynamic filtering conditions by location, operation unit, etc.,
Solution Architecture

- Customer Data Management Application makes use of workflow driven process which allows users to view / create / update the Customer based on their responsibilities.

Application Builder
Facilitates administrators to configure menu items, Workflows, nodes, relations, sequences, models, eWorksheets, Role Based Security (RBS) and User Based Security (UBS) profiles.

Authentication Server
Facilitates creation of roles and users, assignment of roles to the users. It maps the control access to different application features.

Customer Data Modeler
A deployable Web application that interfaces with Oracle Applications. Facilitates users to create, modify, and view Customer data from a single user-friendly interface. Hierarchical and structured data is built by dragging and dropping nodes and linking them with appropriate relation connectors.

High level Architecture & Framework for CDM
The above figure illustrates the three-tier architecture of CDM
Customer Hierarchy as constructed in CDM:

- Party creation
  - Account Name: AT&T
  - Account Number: 1001
  - Account Type: External
  - City: London
  - Country: GB
  - Operating Unit: Vision Industries
  - Statement Cycle Id: 1001.0

- Customer Account creation
  - Purpose: SHIP_T0
  - Location: London
  - Purpose: BILL_T0
  - Location: London

- Customer Site creation
  - Purpose: SHIP_T0
  - Location: Groningen
  - Purpose: BILL_T0
  - Location: Groningen

- Contacts creation
  - Purpose: SHIP_T0
  - Location: Tense
  - Purpose: BILL_T0
  - Location: Tense

- Observed productivity results using CDM for sample case. CDM can help businesses achieve close to 75% time saving.

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>Total User Time</th>
<th>Number of Screens</th>
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<tr>
<td></td>
<td>Oracle Applications</td>
<td>CDM</td>
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<tr>
<td></td>
<td>Front End</td>
<td>Front End</td>
</tr>
<tr>
<td>Party creation</td>
<td>15 Min</td>
<td>5 Min</td>
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<tr>
<td>Customer Account creation</td>
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</tr>
<tr>
<td>Customer Site creation</td>
<td>10 Min</td>
<td>3 Min</td>
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<tr>
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<td><strong>TOTAL</strong></td>
<td><strong>45 Min</strong></td>
<td><strong>14 Min</strong></td>
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Key Features of CDM

Flexibility
• Easy navigation as there is a single screen
• Query customers by any customer attribute including contacts

Data Quality Management
• Efficient data management
• Eliminate duplicates
• Simple to maintain data

Data Integrity
• Enhanced data tracking and integrity
• Easy Retrieval of Data

Approval Management
• Enabled approval mechanism for Customer data by Department (Customer Service / Finance / Planning etc.,)
• Reduced data errors and Robust data maintenance
Benefits of CDM

- Single screen navigation
- Better approach towards Data Quality Management
- Easy to use Interface
- Eliminate duplicate data
- Approval workflow reduces data errors
- Better efficiency in downstream processes including credit check, order fulfillment and reporting
- Ensure governance
- Enhanced Stewardship support with 360 view of customer oriented reports