



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.

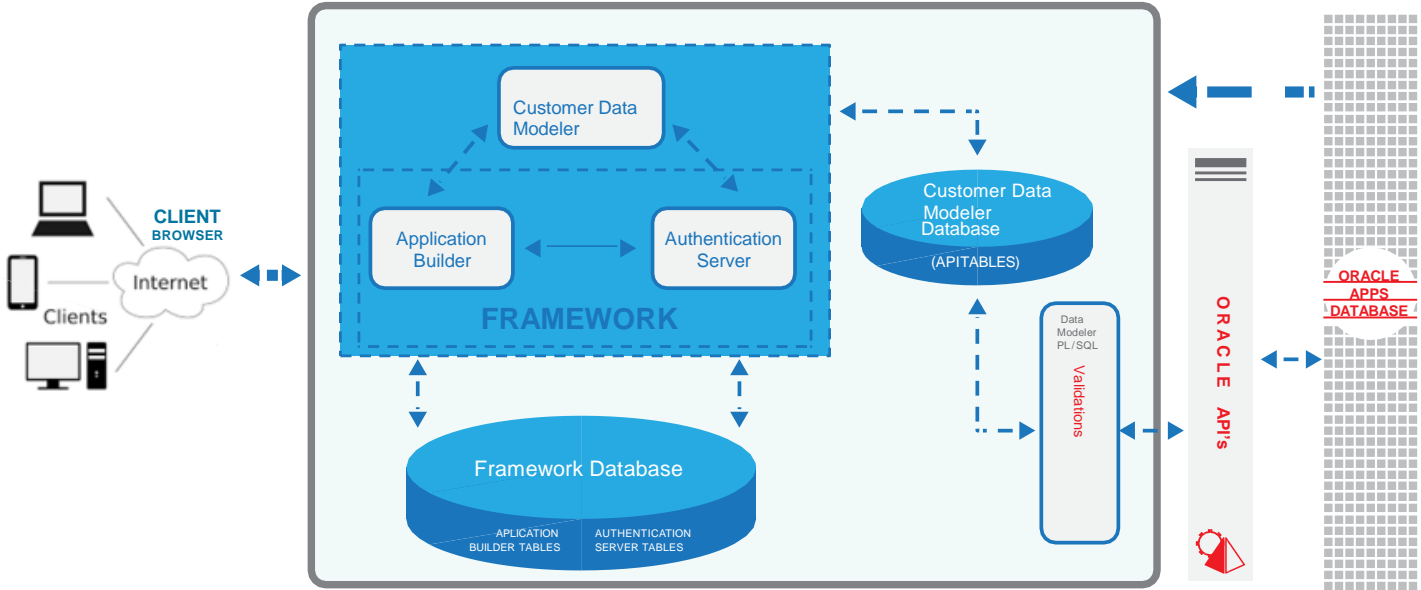
CDM addresses the following business needs:

- 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.

Customer Data Management



High level Architecture & Framework for CDM

The above figure illustrates the three-tier architecture of CDM

Application Builder

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

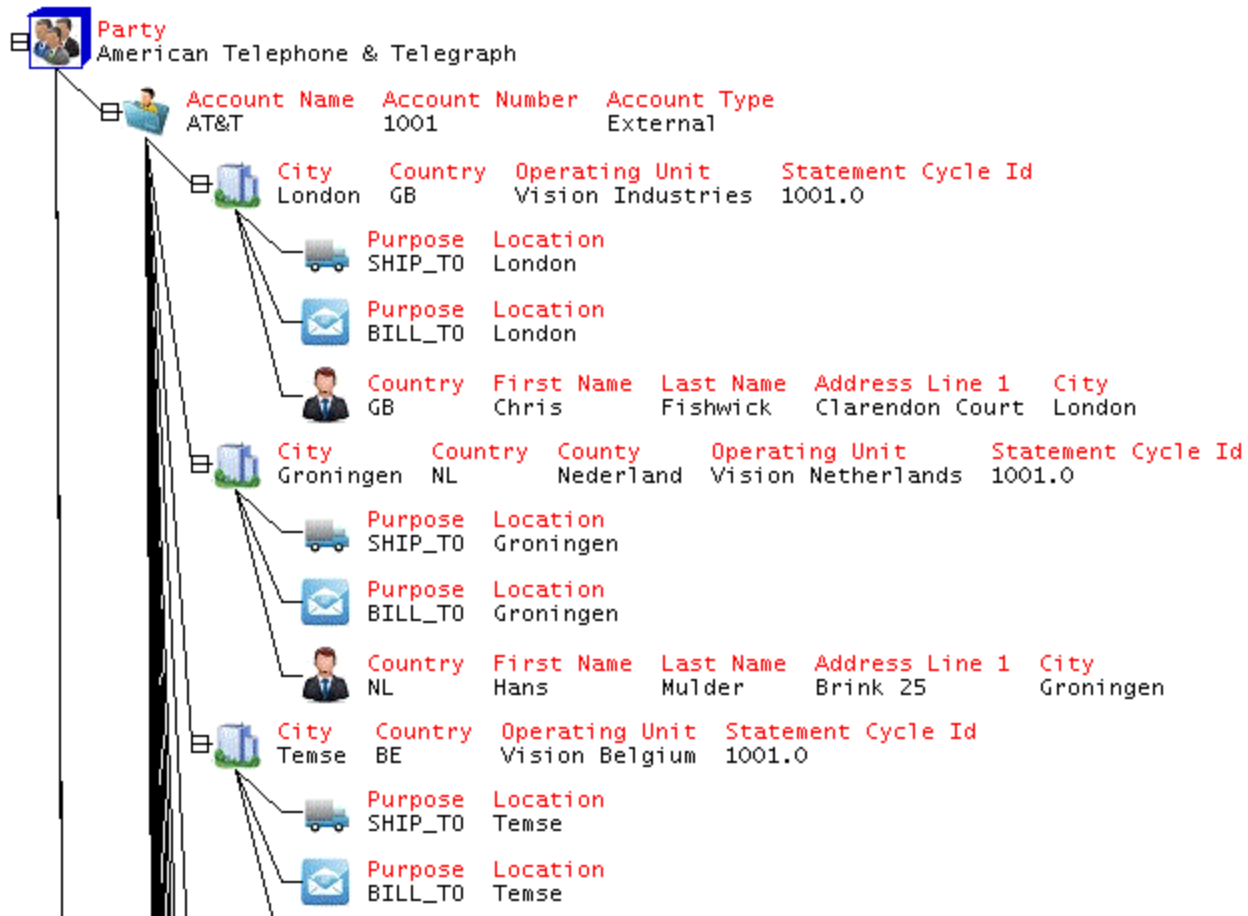
Authentication Server

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.

➤ Customer Hierarchy as constructed in CDM:



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

ACTIVITY	Total User Time		Number of Screens	
	Oracle Applications Front End	CDM	Oracle Applications Front End	CDM
Party creation	15 Min	5 Min	6	1
Customer Account creation	15 Min	5 Min	5	1
Customer Site creation	10 Min	3 Min	5	1
Contacts creation	5 Min	1 Min	1	1
TOTAL	45 Min	14 Min	17	1

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

