QAS for Microsoft Dynamics CRM 2011

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QAS

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Overview

Contact data is entered into Microsoft Dynamics CRM (MS CRM) through multiple departments and channels. And no matter how a record is created, either manually or through bulk imports, data accuracy will always be a challenge.

QAS for MS CRM is a software solution that ensures the fast and accurate capture of addresses. It works by verifying addresses immediately during data entry. Each address is reviewed against postal data sources and then consistently formatted within MS CRM.

Increase ROI

An application is only as good as the data stored within it. Investing in address accuracy from the outset will increase your CRM ROI. With more detailed contact information, expect follow up activity improvements, which will ultimately speed the sales cycle and generate greater revenue.

Reduce costs and rework

Verifying addresses prior to system entry eliminates unnecessary costs and staff rework. Each inaccurate address gone unchecked translates into dollars lost in follow up campaigns and potential revenue uncollected.

Costs are further fueled by staff productivity losses. As data inaccuracies are uncovered, through returned mail, customer inquiries, or other performance indicators, staff resources will need to be re-routed to update missing data elements.

Enhance analysis & reporting

With accurate and standardized contact data, analysis is easier and more reliable. QAS for MS CRM can also enrich the capture process by pulling verified contact and business information.

Greater contact visibility will improve database profiling and segmenting, which in turn will lead to more intelligent marketing and sales efforts.

Product features

- Real-time address verification and standardization
- Turnkey integrations into MS CRM On Demand and On Premise
- Fast capture via 3 intuitive address search engines
- Data enhancements available via Experian QAS data appends
- Access to international data

How it works

QAS for MS CRM 2011 is consistent

across the MS CRM On Premise and On Demand solutions. Once the functionality is enabled, an Experian QAS search button will appear above address line 1. Upon clicking the search button, the Experian QAS address capture window is invoked to ensure fast and accurate entry.

Users have the ability to setup a search engine to aid the creation of new addresses or access address verification by configuring the verification enigma as default. Each Microsoft User Role can be configured to use a different search engine as default.

The functionality is supported across Accounts, Contacts, Leads, Contracts, and More Addresses. Additionally, Experian QAS address verification is supported for MS CRM clients using the Outlook online connector.

Search engines
Experian QAS offers three robust address search engines, all of which are accessible via the address capture window. Organizations have the option to select a default engine to ensure maximum usability and to most effectively meet business process needs.

The Typedown Engine –
Users start by entering the postal code. With each piece of address data entered, Experian QAS refines results, ultimately reducing the number of required keystrokes to return a full address. This engine is ideal for any department that is charged with significant data entry tasks, such as a call center.

Verification Engine –
Experian QAS prompts the user for missing address details, like the apartment number, once the address has been submitted.

The Single Line Engine –
Experian QAS returns a full address from minimal input.

Admin configurations
Experian QAS offers administrator configuration capabilities to ensure that the product is used in the optimum way. For example, an administrator could preset Experian QAS differently for call center and marketing representatives.

A call center representative may automatically be prompted with the Typedown Engine to facilitate fast capture while the marketing representative may see the Verification or Single Line Engines that allow for more exploratory searches.

The administrator can also create standardization guidelines to reflect the MS CRM address layout. For example, long addresses which contain house names can be formatted to fit into a smaller number of address fields.

These configurations can be achieved in-house, reducing consultancy costs and ensuring flexibility for quick adjustments.

Integration details
Experian QAS supports MS CRM 2011 On Premise and On Demand versions via two configurations, OnLine and OnPremise OD.

QAS for MS CRM 2011 OnLine – leverage Experian QAS On Demand services, web hosted address capture prompts, and online user configurations and user setting stores.

QAS for MS CRM 2011 OnPremise OD –This hybrid solution allows MS CRM 2011 On Premise customers to leverage Experian QAS On Demand services (as listed in OnLine details).

Professional Services
Experian QAS professional services ensure that clients properly enable and leverage the full extent of our functionality.

In addition to the real-time address verification component, the Experian QAS Batch tool can be integrated with the help of our professional services team. This tool allows administrators to run regular database audits to identify and update existing address inaccuracies.

About Experian QAS
Experian QAS is an address data quality software pioneer. The company's products capture, validate, cleanse, standardize and enrich customer contact information.

Established in 1990 with offices throughout the United States, Europe and Asia Pacific, Experian QAS provides data validation software and services to more than 10,000 customers worldwide in retail, education, health care, insurance, finance, government and other sectors.

For more information, visit http://www.qas.com.