

## ***Framework 16.0 Solution Conformance***

### ***Salesforce solution for omni-channel service in Communications***

### ***Self-Assessment Process Mapping Report***

### ***Customer Information Management (1.3.6)***

***Version 1.0***

***February 2017***

*Salesforce is applying for Conformance Certification for its leading industry solution on omni-channel service.*

*This report maps Business Process Framework processes that can be supported by supporting products from Salesforce.*

## Table of Contents

1	1.3.6 Customer Information Management .....	1
1.1	1.3.6.1 Create Customer Record .....	1
1.2	1.3.6.2 Update Customer Data .....	2
1.3	1.3.6.3 Notify Customer Data Change .....	3
1.4	1.3.6.4 Archive Customer Data .....	4
1.5	1.3.6.5 Build a unified customer view .....	5
2	Supporting Evidence References (Works Cited) .....	7

## 1 1.3.6 Customer Information Management

### 1.1 1.3.6.1 Create Customer Record

#### LEVEL 3 PROCESS MAPPING DETAILS

##### 1.3.6.1 Create Customer Record

###### Brief Description

Create a new customer record in the customer inventory.AM

###### Extended description

The purpose of this process is to create a new customer record in the customer inventory. This process follows the processes in Establish Customer Relationship that make sure that a single record is created for each customer, and it persists the customer data in the customer inventory.AM

###### Salesforce Conformance Description

Salesforce standard object "Account" is used to store information about customers [REF 05].

Salesforce gives few options to create new Account through lead conversion process, programmatically (through an API) and manually.

Please refer to [REF1.3.6-06], [REF1.3.6-03], [REF1.3.6-08], [REF1.3.6-07] for additional details.

## 1.2 1.3.6.2 Update Customer Data

### LEVEL 3 PROCESS MAPPING DETAILS

#### 1.3.6.2 Update Customer Data

##### Brief Description

Update the customer data in the customer inventory. AM

##### Extended description

The purpose of this process is to update the customer data in the customer inventory. This can happen as a result of direct notification from the customer, as a result of information gathered as part of other processes (such as selling and order handling) or as a result of back office processes (such as customer data cleansing). AM

##### Salesforce Conformance Description

Salesforce provides multiple options to update customer data (fields in any Salesforce object - standard or custom) – through DML within APEX code, mass updates (Data Loader), automated field update and manually.

Please refer to [REF1.3.6-22], [REF1.3.6-18], [REF1.3.6-19], [ REF1.3.6-20], [ REF1.3.6-21] for additional details.

### 1.3 1.3.6.3 Notify Customer Data Change

<b>LEVEL 3 PROCESS MAPPING DETAILS</b>	
1.3.6.3 Notify Customer Data Change	
<b>Brief Description</b>	Notify other processes that customer data has been changed. AM
<b>Extended description</b>	The purpose of this process is to notify other processes that customer data has been changed. Other processes (mostly long-lived processes) might need to know about such changes in order to adapt to such changes. In addition, some processes which gather the data for centralized systems (such as Data Warehouse or Master Data Management) should be notified about such changes. AM
<b>Salesforce Conformance Description</b>	Salesforce platform provides a number of options for notifying other processes that data has changed – through Workflow, Triggers, Streaming API, Rest/SOAP API and Data Loader  Please refer to [REF1.3.6-09], [ REF1.3.6-10], [ REF1.3.6-11], [ REF1.3.6-12] for additional details.

## 1.4 1.3.6.4 Archive Customer Data

LEVEL 3 PROCESS MAPPING DETAILS	
1.3.6.4 Archive Customer Data	
<b>Brief Description</b>	Archive the customer data. AM
<b>Extended description</b>	The purpose of this process is to archive and clean up customer data when it is no longer needed as part of the customer inventory. The information is archived according to the CSP policies and the local regulations. In most cases customer information is not deleted unless this is specifically required by the customer. AM
<b>Salesforce Conformance Description</b>	<p>There are multiple ways to archive Salesforce data (including customer related data) – through native Salesforce tools (such as Workflow Processes, Admin Console) and partner tools. An Admin can also setup manual process to extract data.</p> <p>Please refer to [REF1.3.6-13], [REF1.3.6-14], [REF1.3.6-15], [REF1.3.6-16] for additional details.</p>

## 1.5 1.3.6.5 Build a unified customer view

### LEVEL 3 PROCESS MAPPING DETAILS

#### 1.3.6.5 Build a unified Customer view

##### Brief Description

Create a single customer record from the information stored in multiple systems and present a single, most updated record of the customer information. A

##### Extended description

The purpose of this process is to create a single customer record from the information stored in multiple systems and present a single, most updated record of the customer information. This process invokes business rules in order to reconcile the customer data in a single accurate record. This process may be activated immediately upon any update of customer data or may be invoked on request to retrieve the customer data. This process may replicate data from other systems or calculate the unified record on the fly without persisting any customer data. A

##### Salesforce Conformance Description

Salesforce Service Cloud is a customer service and support application. It helps keep your customers happy and your support team effective, whether your customers reach out to you by different channels, like email, phone, social media, online communities, or real-time Web chat. Please refer to [REF1.3.6- 01] for a high level introduction to the product.

Service Cloud integrates multiple channels and customer data into an easy to use help desk called Console, which can be customized to fit each company's unique support processes. Please refer to [REF1.3.6- 02] for more details.

The Console is where all of Salesforce service features come together, providing a unifying help desk experience for agents. It gives to service team a 360-degree view of each customer and where that customer is in the defined support process.

Service Cloud leverages the general Salesforce capability of providing a complete customer view based on all customer related and relevant data. Salesforce can master a comprehensive set of customer data directly within the platform. The data model can be easily extended, adding custom objects and fields needed to adapt to any specific context. Please refer to [REF1.3.6- 17] for more details. Besides data managed within Salesforce, part of customer data can also be mastered in

other system and made available for use to Service Agents through Salesforce views (leveraging Salesforce Integration Framework).

Please refer to [REF1.3.6-03], [REF1.3.6-04] for additional details.



## 2 Supporting Evidence References (Works Cited)

[REF 1.3.6-01]	Service Cloud Overview: <a href="https://help.salesforce.com/articleView?id=support_agents_intro.htm&amp;type=0&amp;language=en_US">https://help.salesforce.com/articleView?id=support_agents_intro.htm&amp;type=0&amp;language=en_US</a>
[REF 1.3.6-02]	Lightning Console - <a href="https://help.salesforce.com/articleView?id=console2_about.htm&amp;type=0&amp;language=en_US">https://help.salesforce.com/articleView?id=console2_about.htm&amp;type=0&amp;language=en_US</a>
[REF 1.3.6-03]	Integration Patterns and Practices - <a href="#">Winter 17 Release Document</a>
[REF 1.3.6-04]	External Objects: Objects: <a href="https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_external_objects.htm">https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_external_objects.htm</a>
[REF 1.3.6-05]	Help Documentation: <a href="#">Accounts</a>
[REF 1.3.6-06]	Help Documentation: <a href="#">Create Records from Object Tabs</a>
[REF 1.3.6-07]	Trailhead Module: <a href="#">Converting and Assigning Leads</a>
[REF 1.3.6-08]	REST API Developer Guide: <a href="#">Create a Record</a>
[REF 1.3.6-09]	Documentation on <a href="#">Workflow</a>
[REF 1.3.6-10]	Apex Developer Guide <a href="#">Trigger</a>
[REF 1.3.6-11]	API Developer Guide - <a href="#">Force.com Streaming</a>
[REF 1.3.6-12]	Developer Documentation - <a href="#">Batch Synchronization</a>
[REF 1.3.6-13]	Developer Documentation - <a href="#">Data Loader (Export data)</a>
[REF 1.3.6-14]	Developer Documentation - <a href="#">Field History Tracking</a>
[REF 1.3.6-15]	Developer Documentation - <a href="#">Field Audit Trail</a>
[REF 1.3.6-16]	Developer Documentation - <a href="#">SOQL with Archived Data</a>

[REF 1.3.6-17]	Creating Custom Objects and Fields <a href="https://trailhead.salesforce.com/en/data_modeling/creating_custom_objects_fields">https://trailhead.salesforce.com/en/data_modeling/creating_custom_objects_fields</a>
[REF 1.3.6-18]	Documentation on <a href="#">Field Update Actions</a>
[REF 1.3.6-19]	Documentation on <a href="#">Cross Object Field Updates</a>
[REF 1.3.6-20]	Product Manual - <a href="#">Salesforce Data Loader</a>
[REF 1.3.6-21]	Apex Developer Guide - <a href="#">Inserting and Updating records</a>
[REF 1.3.6-22]	Documentation - <a href="#">Set Field Permissions in Permission Sets and Profiles</a>