

RELTIO



Real-Time Customer API with MuleSoft and Reltio Integration Hub

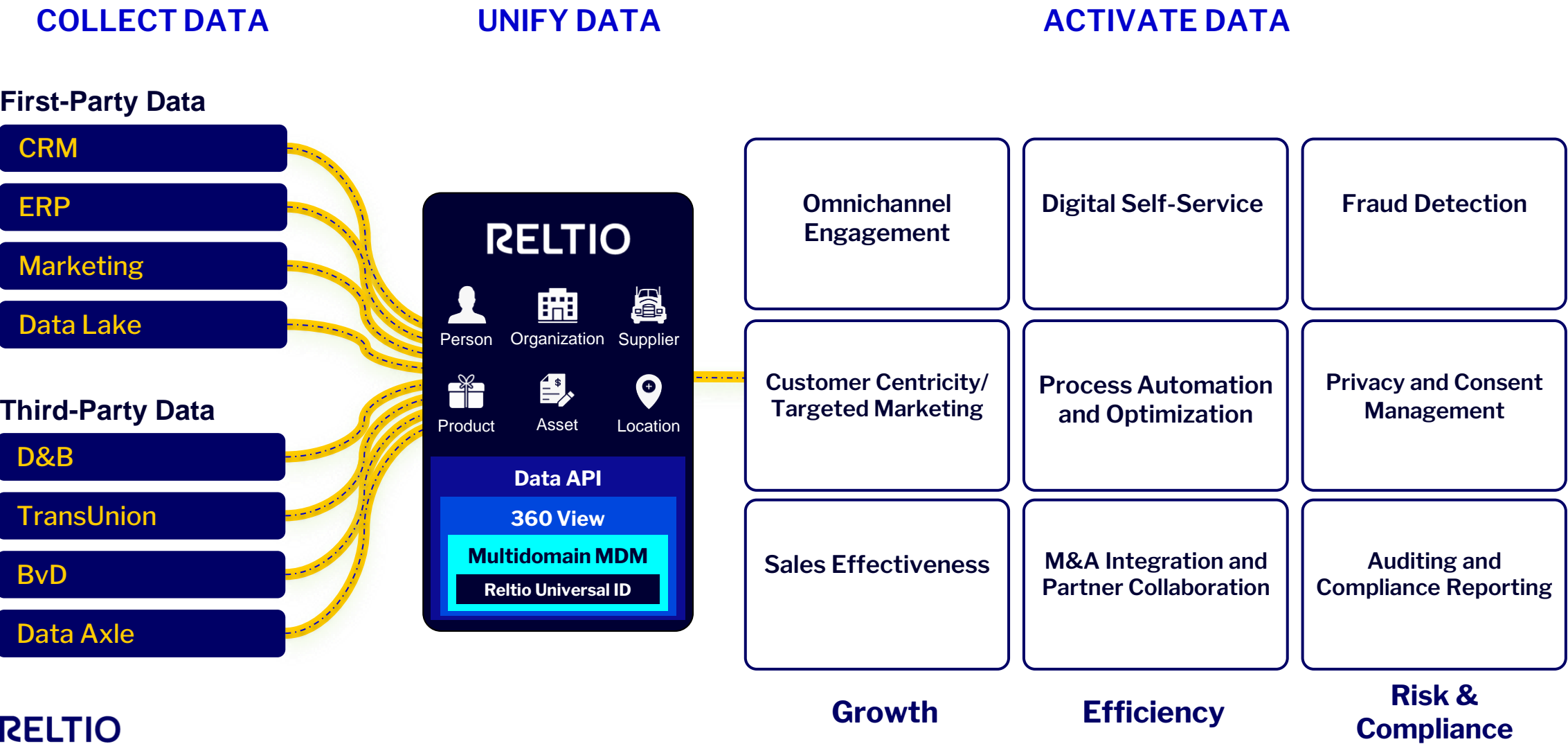
Agenda

- Real-time integrations
- MuleSoft API-led integration
- Demonstration
- Reltio Integration Hub
- Demonstration

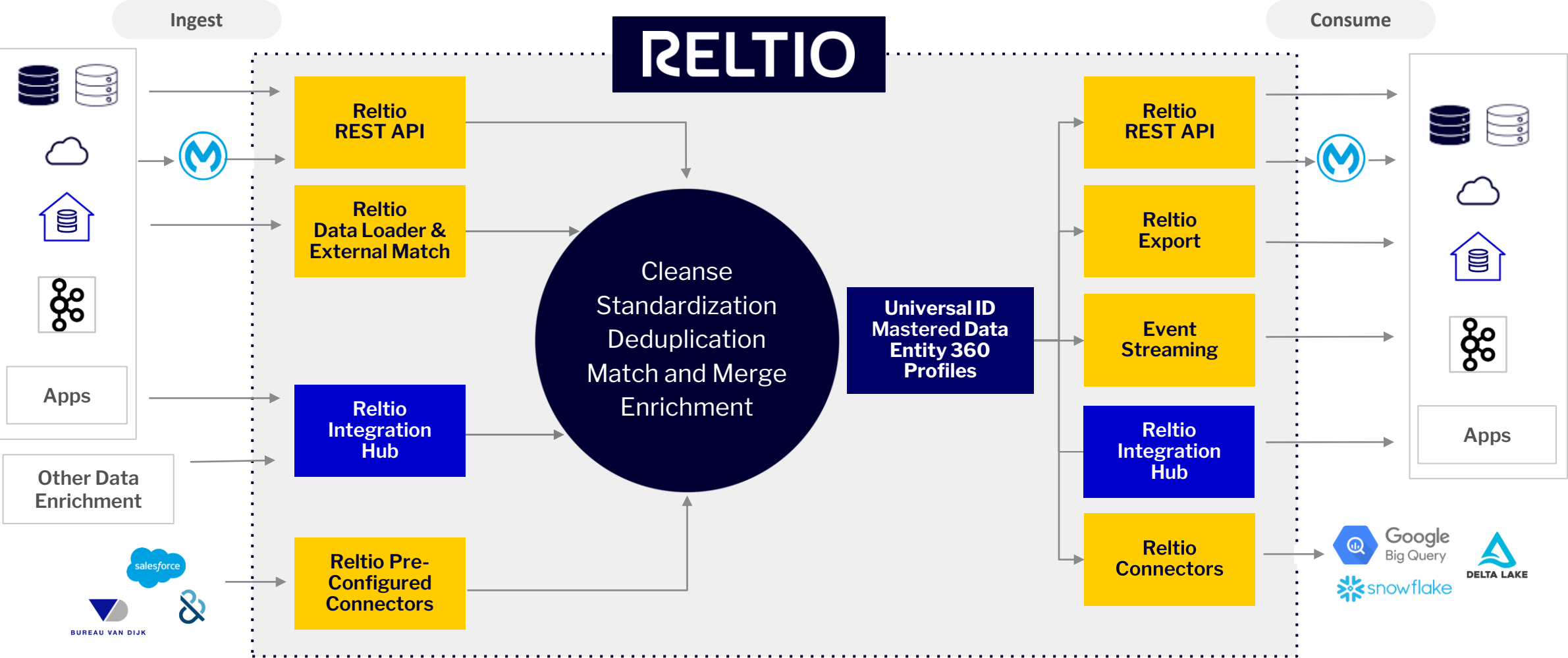
RELTIO



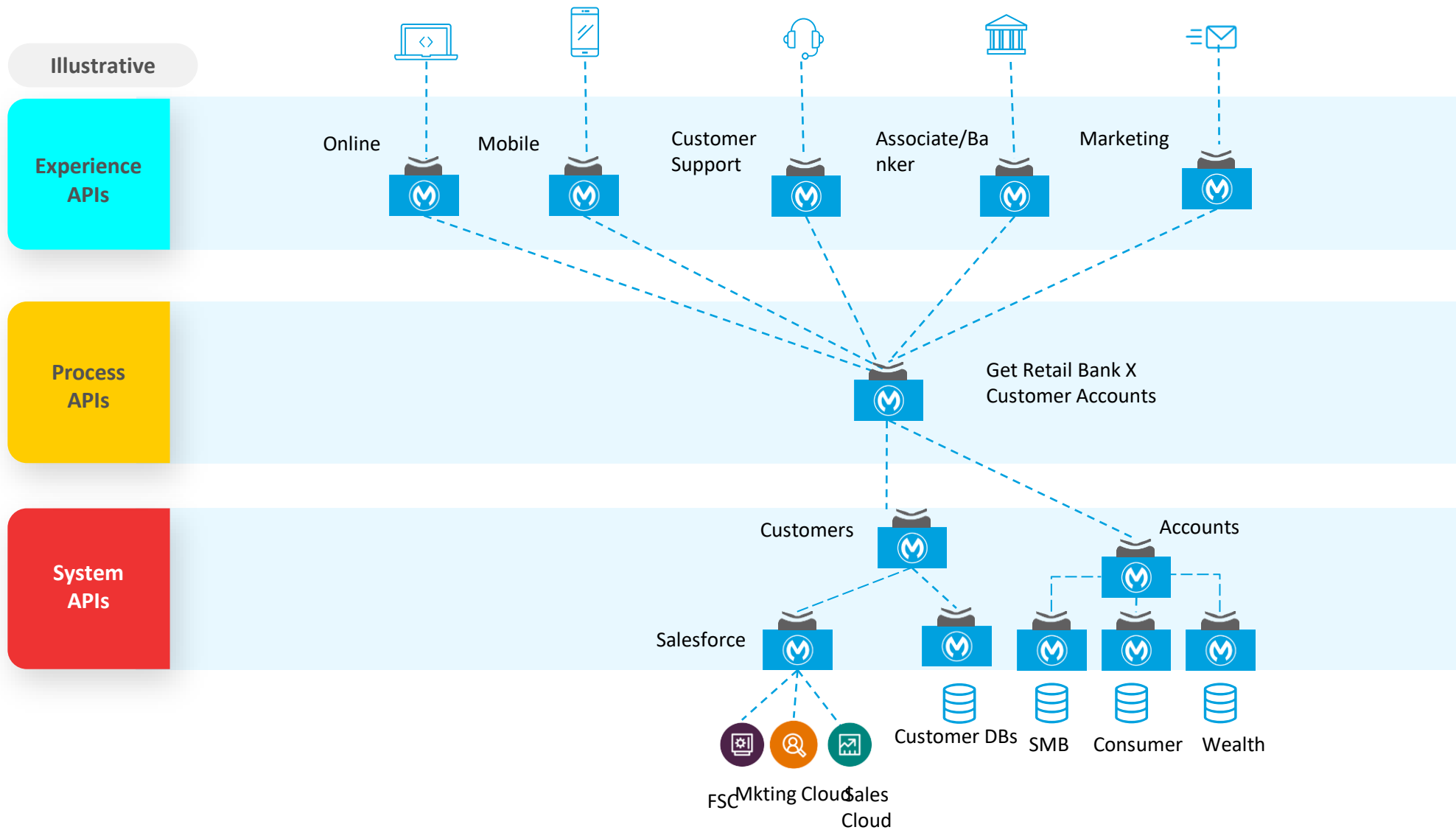
Key business initiatives we activate across industries



How can I exchange data with Reltio?



MuleSoft API-led integration (Banking example)



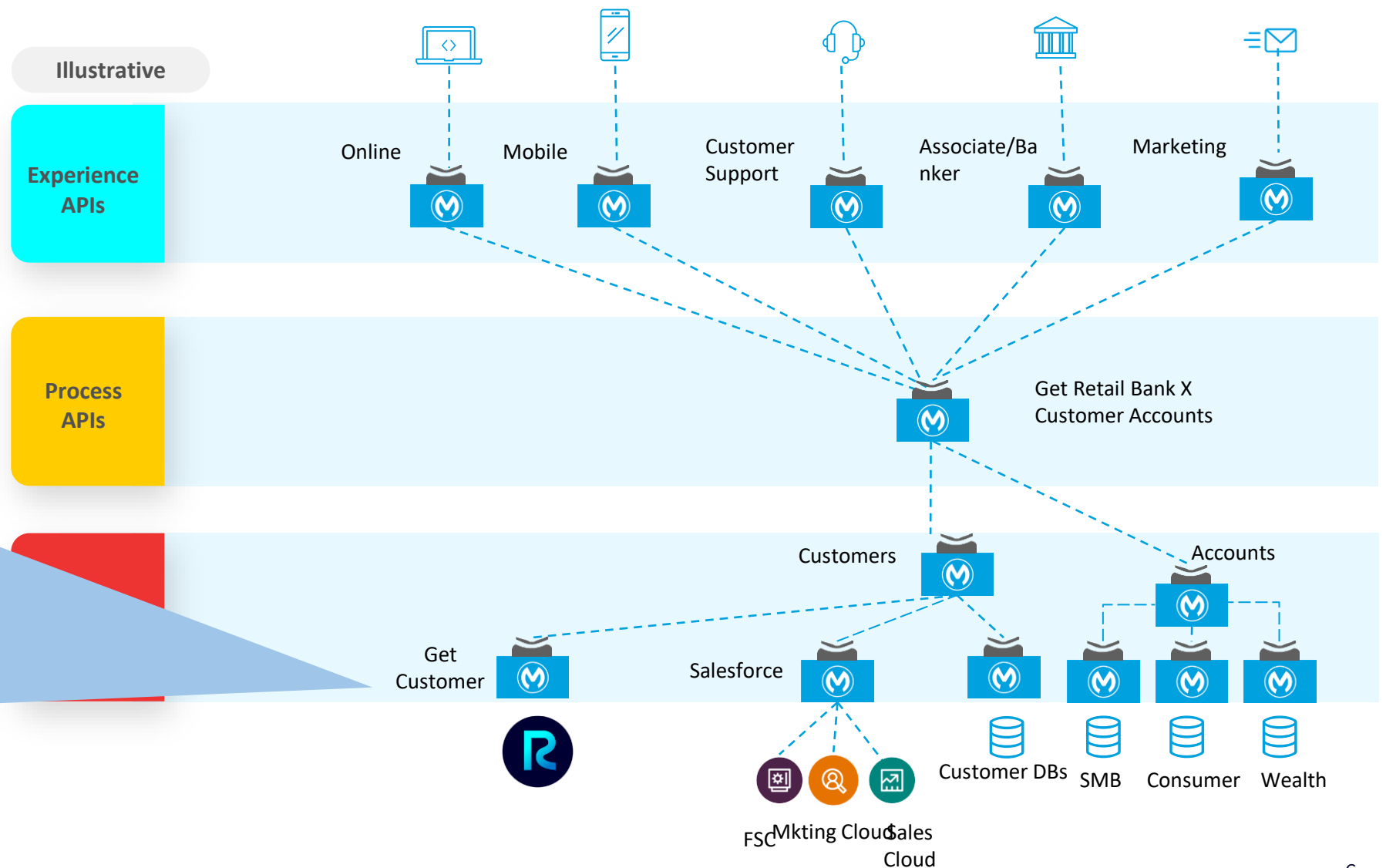
API-led integration with Reltio

In support of any r-t experience, go to Reltio FIRST to:

1. Identify the customer
2. Obtain the customer 360
3. Understand in exactly what other systems this customer exists, together with keys to fetch any additional information

Benefits:

1. No cost/latency searching systems where the customer doesn't exist
2. No need for custom development to try to resolve identity on the fly
3. No execution overheads of on the fly identification

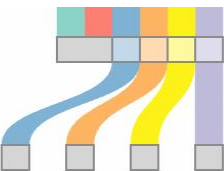


API-led integration with Reltio

Customer Profile “crosswalks” in Reltio

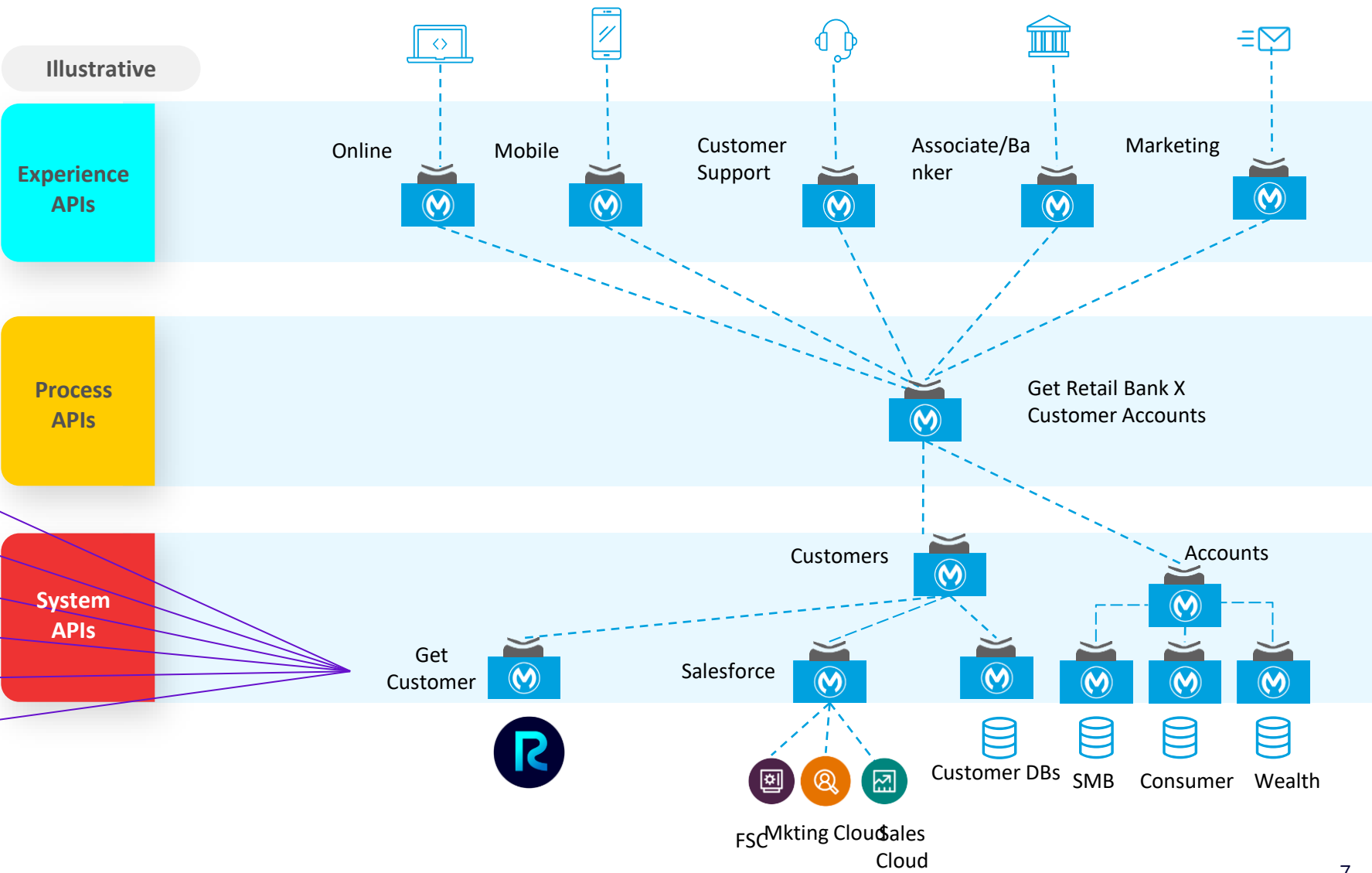
Reltio ID: 1Wmiehzc

Mark Jones, Bethesda, MD



Salesforce SC	0035b00002c2XyZAAU
Salesforce SC	0035d00003c2TgHXYR
Salesforce MC	0035v00002d7YxAANI
SMB	hief-39749-ksfh
Consumer	430843048
Wealth	RCE479327429

RELTIO

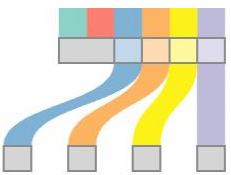


API-led integration with Reltio - use case examples

1. Online (portal) -
Customer logged in. I have the Universal (Reltio) ID

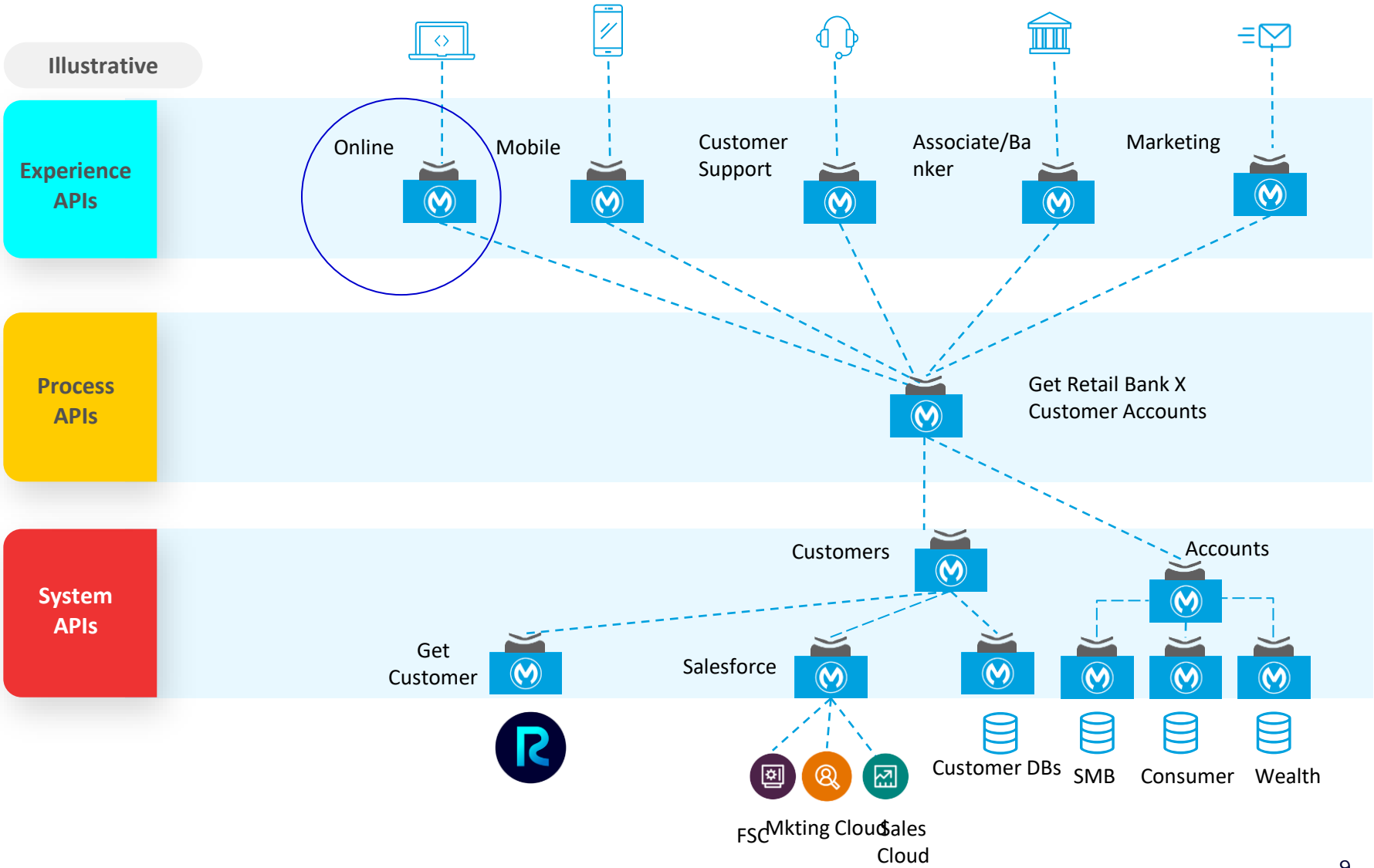
Reltio ID: 1Wmiehzc

Mark Jones, Bethesda, MD



Salesforce SC	0035b00002c2XyZAAU
Salesforce SC	0035d00003c2TgHXyR
Salesforce MC	0035v00002d7YxAANI
SMB	hief-39749-ksfh
Consumer	430843048
Wealth	RCE479327429

RELTIO



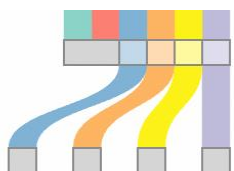
API-led integration with Reltio - use case examples

2. Marketing -

Customer identified in Salesforce MC. I have the SF MC ID

Reltio ID: 1Wmiehzc

Mark Jones, Bethesda, MD



Salesforce SC 0035b00002c2XyZAAU

Salesforce SC 0035d00003c2TgHXyR

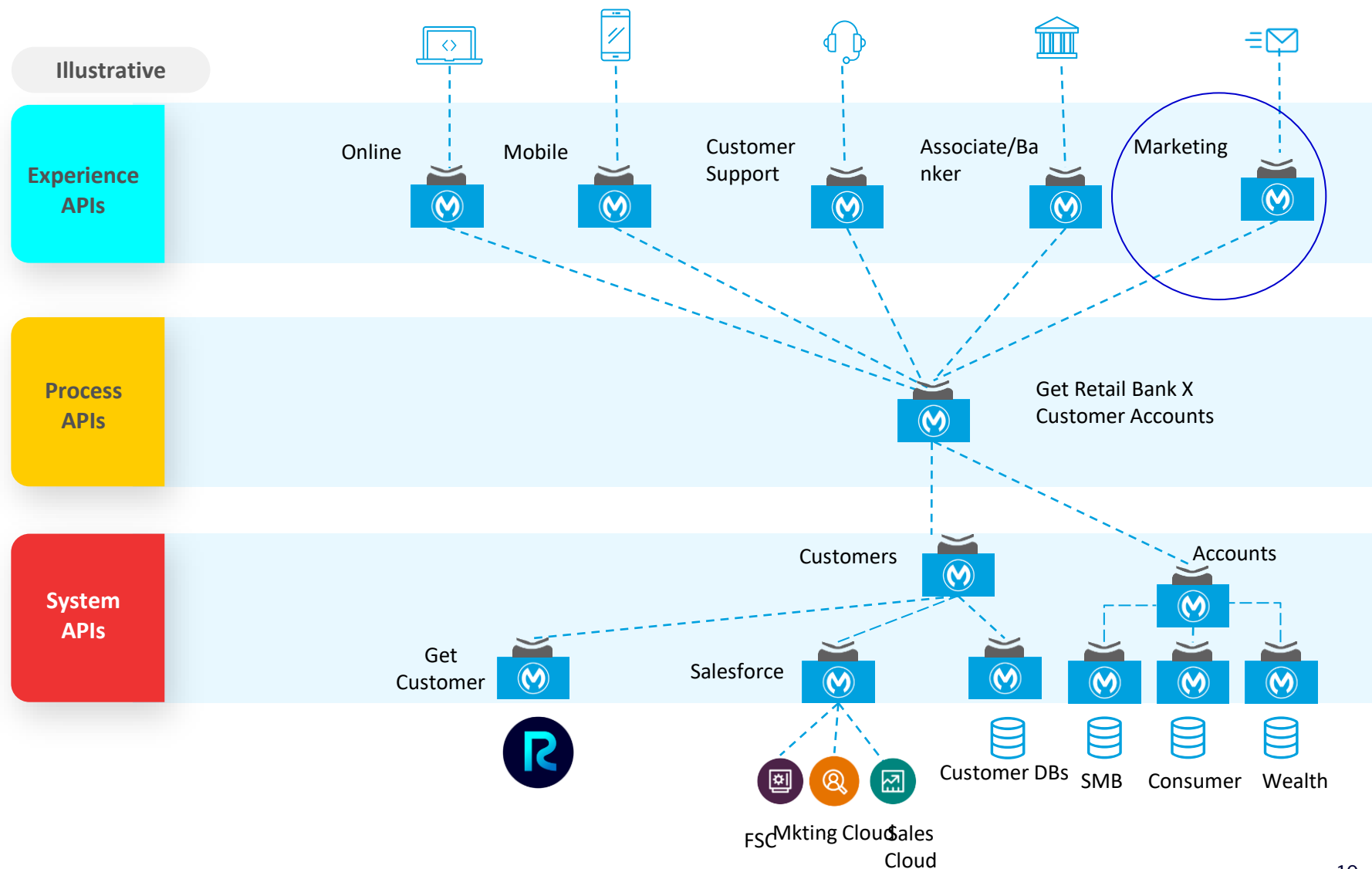
Salesforce MC 0035v00002d7YxAANI

SMB hief-39749-ksfh

Consumer 430843048

Wealth RCE479327429

RELTIO



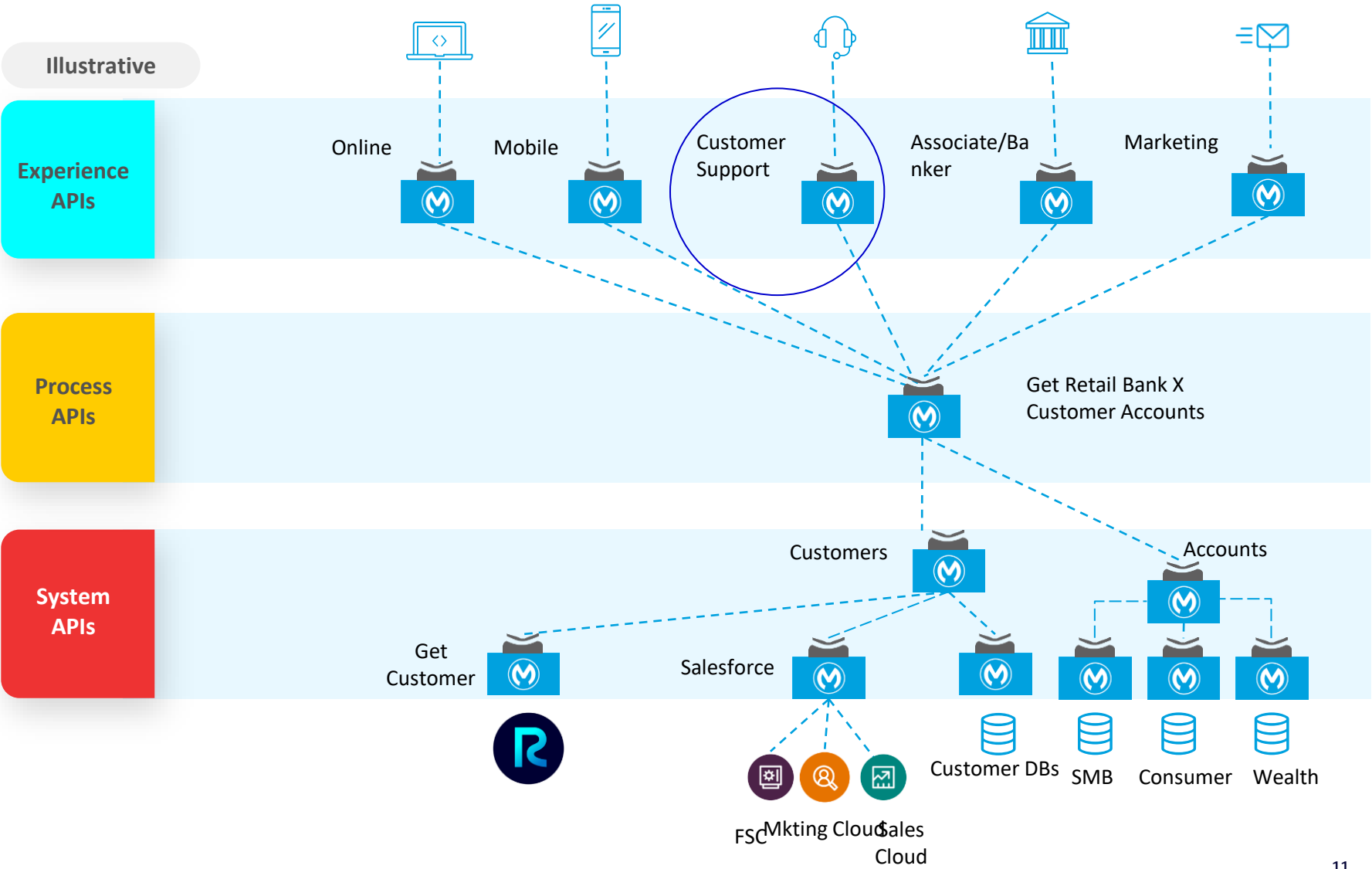
API-led integration with Reltio - use case examples

3. Customer Support - I got the customer's name, phone, email, address...

Reltio ID: 1Wmiehzc

"Last Name": "Jones",
"First Name": "Mark",
"Phone": "202-314-2562",
"Email": "mgjones@cox.net",
"Addr1": "7720 Beech Tree Rd",
"City": "Bethesda",
"State": "MD",
"Zip": "20817"

Salesforce SC	0035b00002c2XyZAAU
Salesforce SC	0035d00003c2TgHXYR
Salesforce MC	0035v00002d7YxAANI
SMB	hief-39749-ksfh
Consumer	430843048
Wealth	RCE479327429





Get Customer – Reltio system API

What is it?

- An “intelligent” upsert mechanism that can adapt to the data available to the requesting system
- Provides a common, simplified interface to accept and to return customer data
- Operates in real-time, guaranteeing an immediate response to the requesting system

What does it do?

Queries Reltio for a Customer profile:

Use available data points to try to find the customer profile using a hierarchy of methods (Reltio APIs):

1. Reltio ID (Get by URI API)
2. Source ID (Get by Crosswalk API)
3. Match using available data, leveraging match rules that you have ongoing control over (Get Matches API)

Customer not found?

Create a new, cleansed, standardized Customer profile

Returned by Reltio:

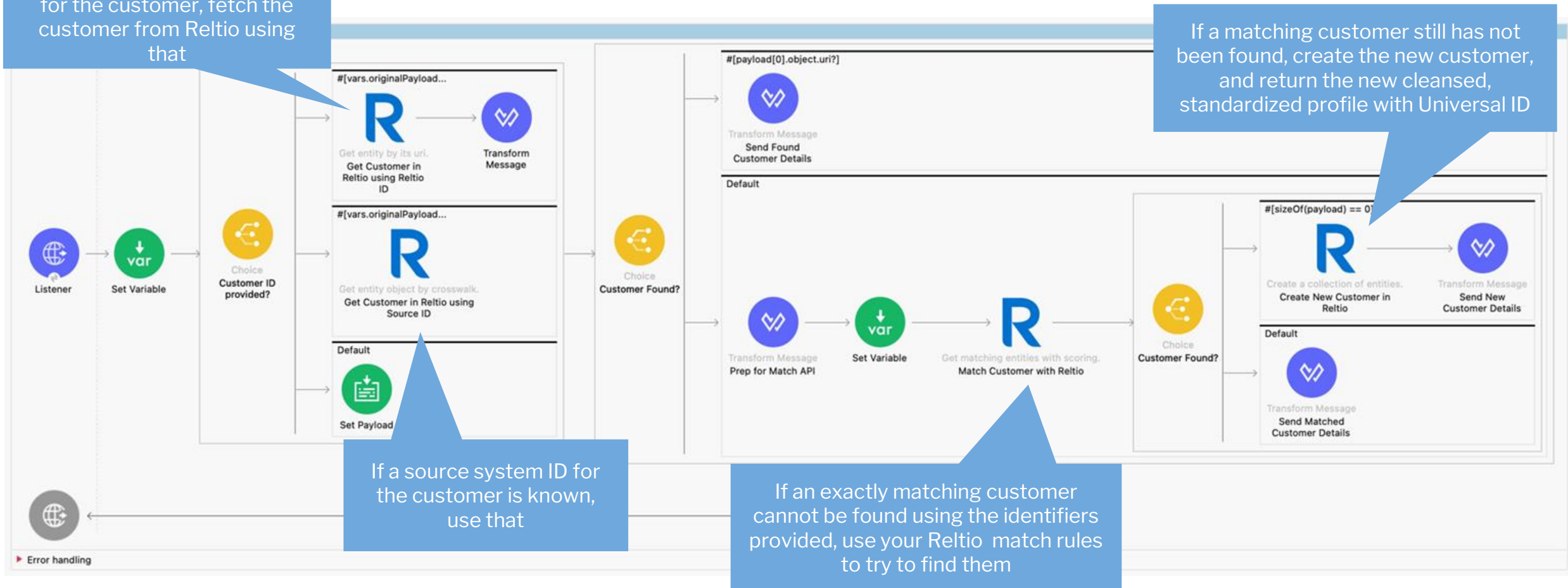
- The existing or newly created Customer Reltio ID (universal ID)
- Trusted, cleansed, complete Customer profile
- Reltio Crosswalks, providing the “keys” to the Customer across all available sources
- *Reltio Multi-channel Communication Consent attributes provide the Customer’s Consent profile*
- *Any Journey Status, Preferences, Propensity and Segmentation analytics-derived attributes that extend the profile*



Get Customer – Reltio system API

Designing the API in MuleSoft AnyPoint Studio, leveraging the Reltio MuleSoft Connector

If the requesting system knows the Universal (Reltio) ID for the customer, fetch the customer from Reltio using that



If a matching customer still has not been found, create the new customer, and return the new cleansed, standardized profile with Universal ID

If a source system ID for the customer is known, use that

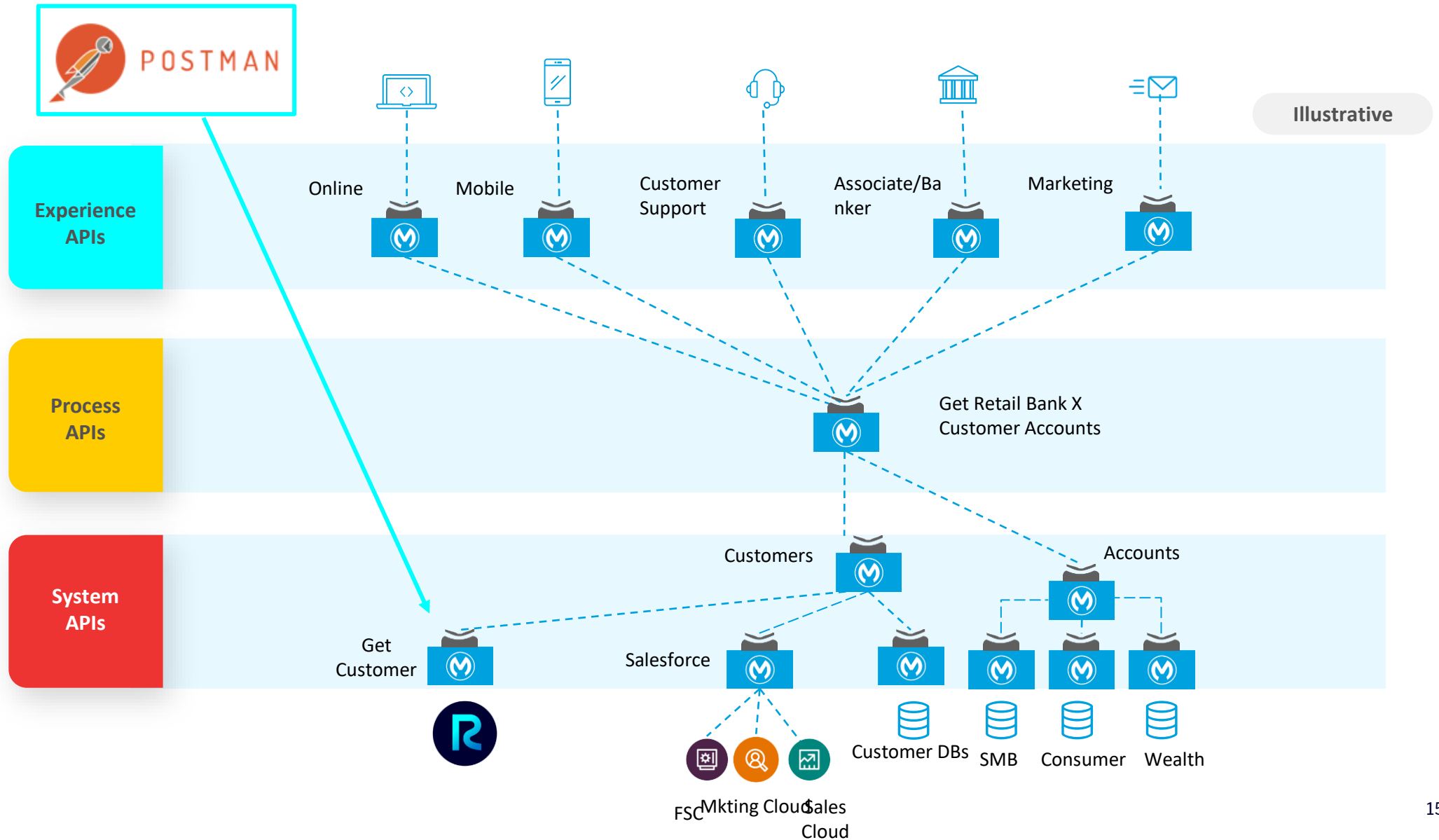
If an exactly matching customer cannot be found using the identifiers provided, use your Reltio match rules to try to find them

Demonstration



RELTIO

Demonstration



Demonstration: Using Postman - Customer found via Match Rules

POST ▼ https://getcustomerapi-zgq-v9.us-e2.cloudhub.io/getCustomer

Params Authorization Headers (8) **Body** ● Pre-request Script Tests Settings

● none ● form-data ● x-www-form-urlencoded ● raw ● binary ● GraphQL **JSON** ▼

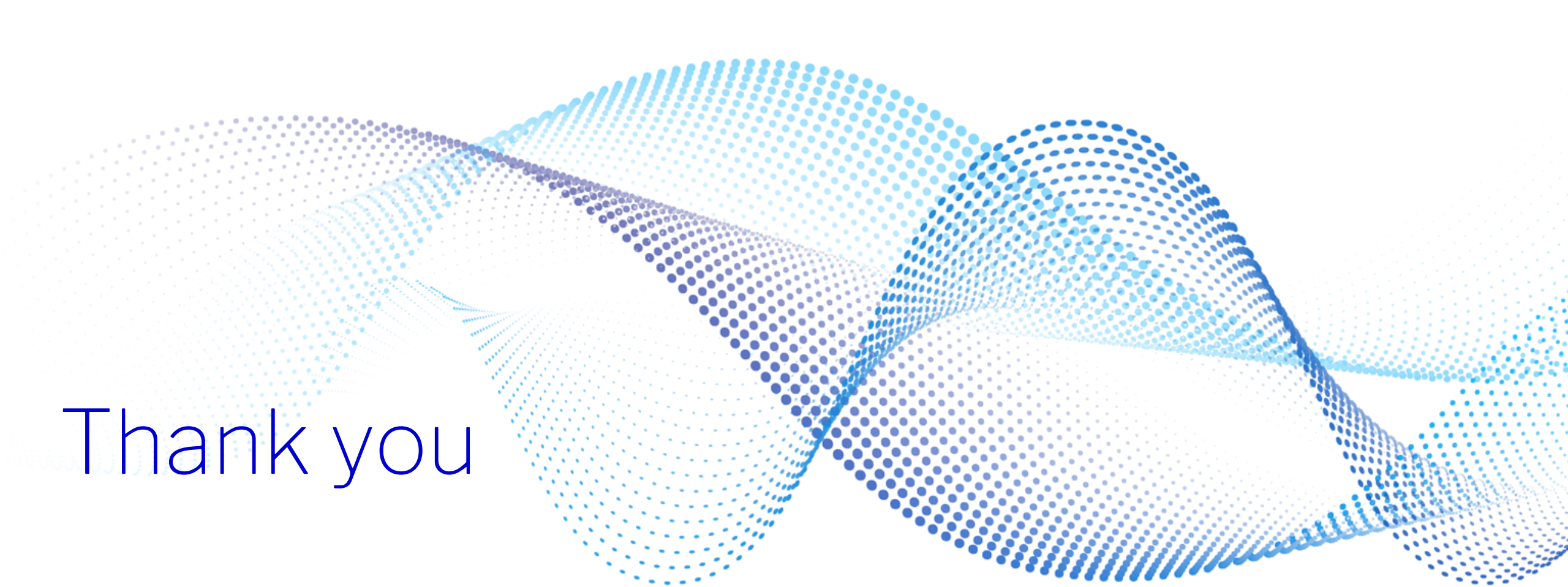
```
1 {
2   ... "reltioID": "",
3   ... "sourceName": "Web",
4   ... "sourceID": "",
5   ... "lName": "Jonas",
6   ... "fName": "Mark",
7   ... "phone": "202-314-2562",
8   ... "email": "mgjones@cox.net",
9   ... "addr1": "7720 Beech Tree Rd",
10  ... "city": "Bethesda",
11  ... "state": "MD",
12  ... "zip": "20817"
13 }
```

Body Cookies Headers (5) Test Results

Pretty Raw Preview Visualize **JSON** ▼

```
1 {
2   "Result": "Customer found using match rule: MRE Fuzzy (First, Last); Exact (Phone or Email)",
3   "ReltioID": "1Wmiehzc",
4   "Customer": {
5     "Name": "Mark Jones",
6     "FirstName": "Mark",
7     "LastName": "Jones",
8     "DoB": "1979-05-23"
9   },
10  "Contact": {
11    "Phone": [
12      {
13        "Type": "Home",
14        "Number": "202-449-1892",
15        "CountryCode": "US",
```

reltioID and sourceID are empty, and lName is incorrect, so Reltio finds the Customer using a Match rule that uses fuzzy fName and lName, & exact email or phone



Thank you