

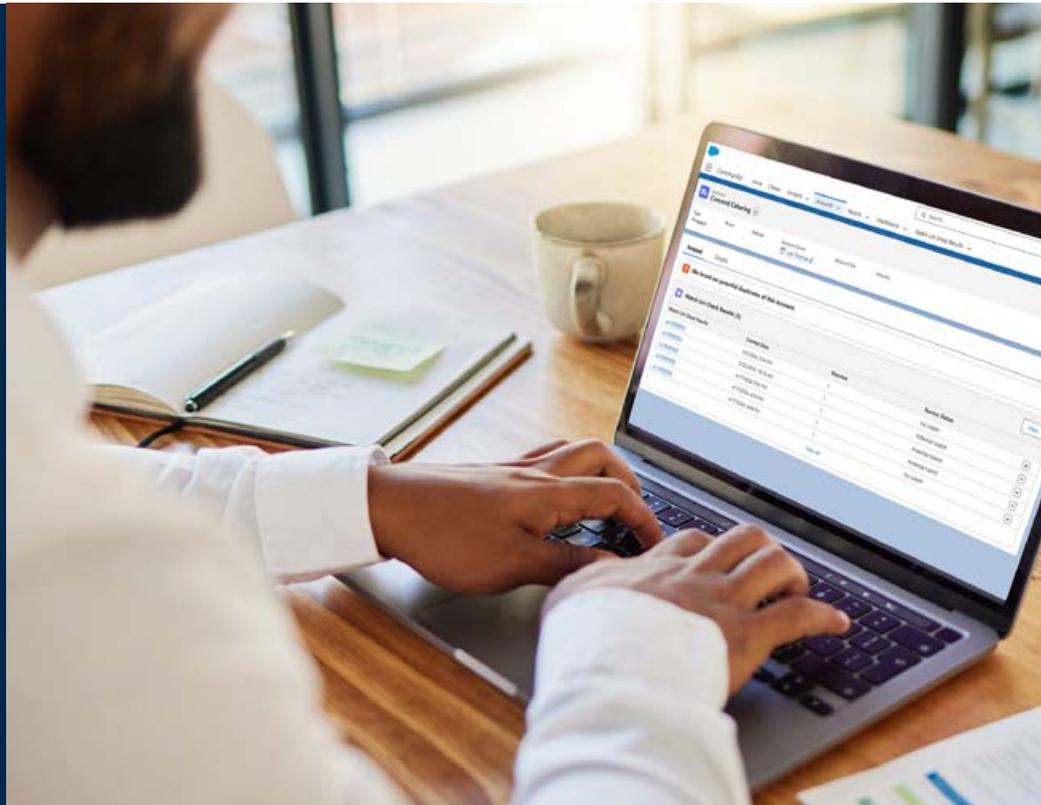
# WatchDOG® Elite Salesforce Integration



Integrated | User-Friendly | Automated

## Simplify Sanctions Screening with Our Salesforce Plugin

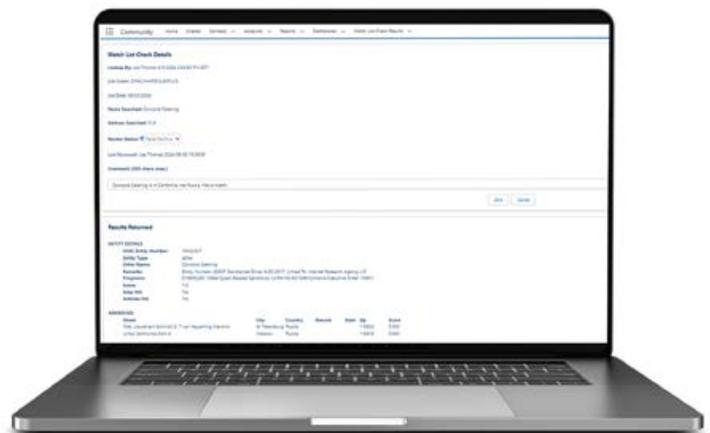
Since most organizations use CRM systems like Salesforce as a centralized platform for multiple departments, screening data within Salesforce minimizes risk and allows organizations to identify sanctions threats. With our Salesforce integration for WatchDOG® Elite, your organization can reduce inefficient screening processes and strengthen compliance.



## Benefits of Salesforce Integration with WatchDOG Elite

Our Salesforce integration allows you to verify your Salesforce records against subscribed watch lists. Any sanctioned or risky individuals are flagged in Salesforce for your review. This allows you to consolidate your tools and perform due diligence within one platform, saving you time and effort.

- Scan accounts, contacts, leads and opportunities against watch lists provided by CSI via API or batch.
- Store scanned items in the Customer Data Master (CDM) in WatchDOG Elite for rescreening.
- Conduct automatic or manual searches against watch lists to identify matches.
- Automate batch scheduling via the Salesforce plugin for additional efficiency.





## Salesforce Integration in Action

Your organization's Salesforce administrator can adjust the searches to meet your business needs, with features that include:

 “Fuzzy logic,” noise word elimination and phonetics when factoring the match score using our advanced name matching algorithm.

 Single lookup and batch file screening with review and resolve capabilities, along with optional address disqualification.

 Considering misspellings (typos), initials, abbreviations and nicknames (alternate names).

 Checking supplied country data against the OFAC Sanctioned Country list.

 An adjustable tolerance level to help you reduce the number of false positives.

## Experience Efficiencies in Your Watch List Screening

WatchDOG Elite—CSI's sanctions screening platform—streamlines and consolidates the watch list screening process by combining an advanced search algorithm with the latest technology and process automation.

We partner with your organization to alleviate the burden of monitoring, gathering, cleansing and deploying list updates. With our Salesforce integration, your organization can experience additional efficiencies in your screening process.

**Ready to streamline your screening  
with our Salesforce plugin?**

