Informatica MDM - Customer 360 delivers a single source of truth by strategically managing, enriching, visualizing, and securely sharing customer data across the business. Every successful customer initiative needs a data management backbone to fuel customer intelligence and ensure a differentiated customer experience.

Customer 360 business users are sales operations analysts and sales operations managers. An analyst adds and edits customers. A manager approves or rejects customers that the analyst onboards, edits, or merges.

Use this quick reference to understand the operations that the analysts and managers can perform in Customer 360.

### Onboard Customers

An analyst can add a single customer or import multiple customers in bulk from a .csv file.

For every customer that the analyst onboards, Customer 360 creates approval tasks for the manager based on a predefined workflow.

*For example, an analyst onboards a customer named John Jones.*

Learn how to [add customers](#).

### Perform Ad Hoc Match

When you import multiple customers, you can perform ad hoc match to identify the unique customers. You can then select to import all the customers or only the unique customers.

Learn how to [import customers](#).
Manage Customers

To view a customer, the users can search for the customer, and then open the customer record. By default, a customer record opens in the Dashboard view, which shows a 360-degree view of the customer in the read-only mode.

The users can then open the following views and manage the customer:

- Business Entity. Edit the details of the customer.
- Matching Records. Merge the duplicate customers.
- Cross-reference Records. View the best version of the truth for the customer.
- History. View the data changes over the lifespan of the customer.
- Hierarchy. View the relationship of the customer with other customers.

For example, a manager or an analyst can open the details of John Jones in the Dashboard view.

The Task Manager displays the details of the selected task and its associated customer.

For example, a manager approves the task related to customer, John Jones.

Learn how to manage tasks.

Manage Tasks

The users can use the Task Manager to organize, claim, and resolve tasks that the review process generates.

Need more help? Check out the Customer 360 User Guide.