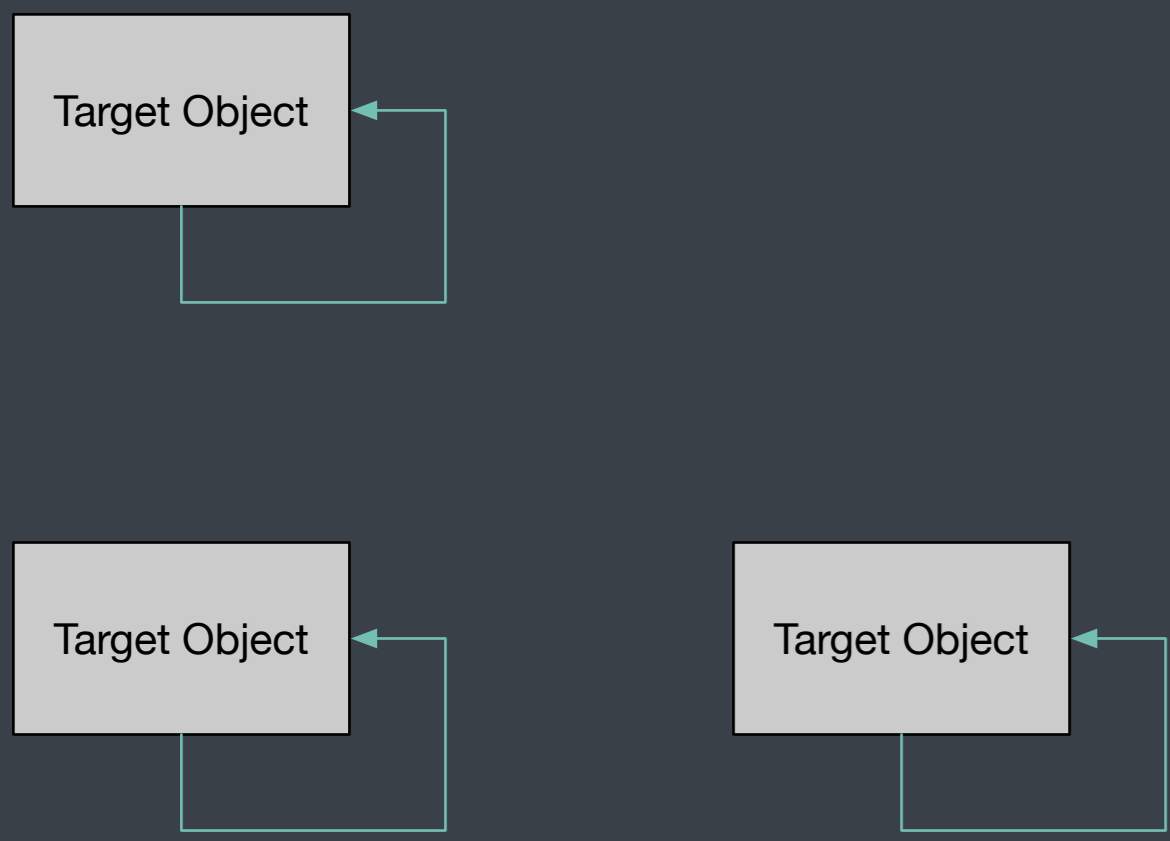


### STANDARDISE



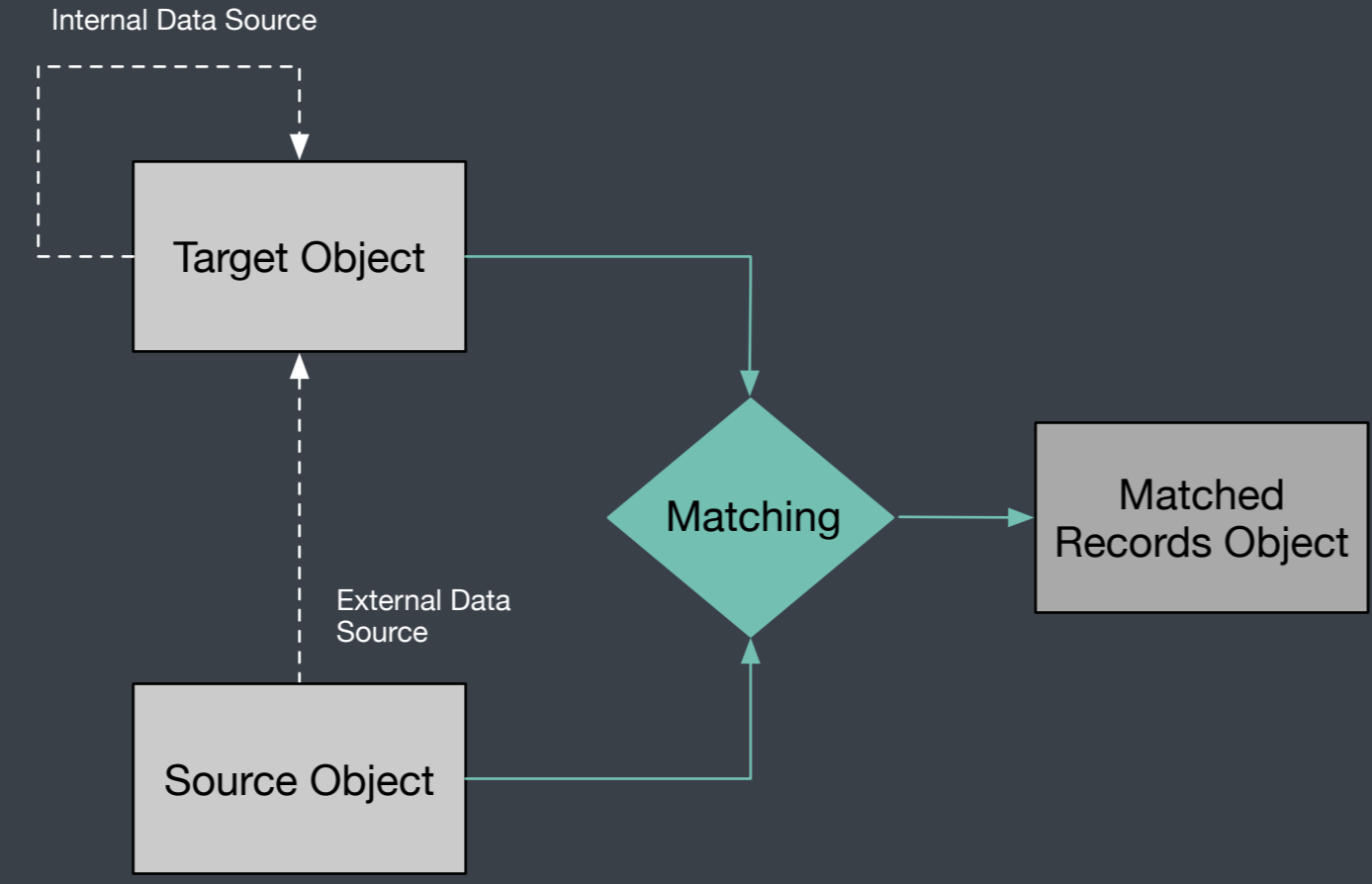
User Defined Rules can reference any custom setting defined in the subscriber org.

Standardisation Rule Types :

- Lookup { United Kingdom, UK=>GB } { Will, Bill=>William }
- Remove End { John Smith Snr=>John Smith }
- Email Domain { john.smith@constosio.com=>constosio.com }
- URL { www.constosio.com=>constosio.com }
- Format { John smith=>JOHNSMITH }

Standardisation can be applied by Batch Job or on Record Creation or Save, to populate a set of standardised field values to be used in record matching.

### RECORD MATCHING



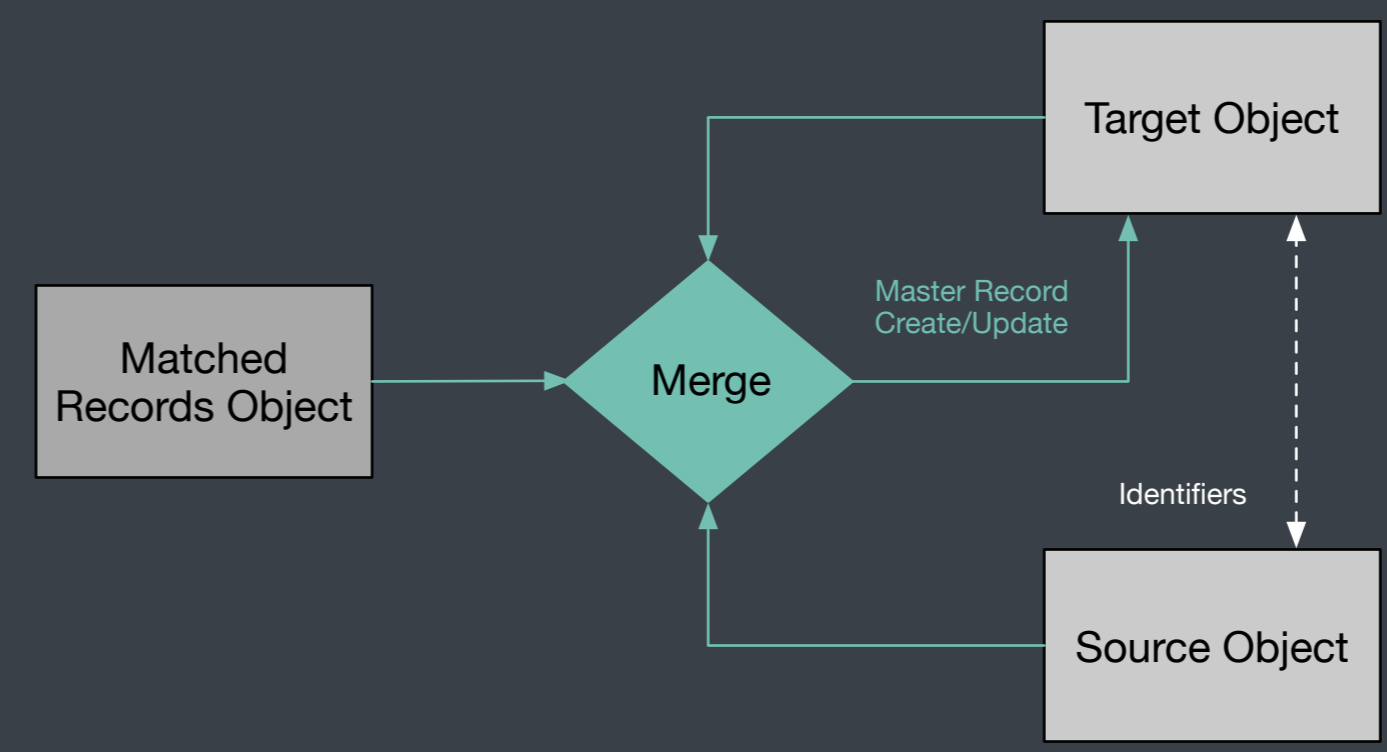
A Target Object is a Standard or Custom Object that records will be merged to. Source Objects are mapped to a Target Object to enable cross-object matching.

A Data Source maps exposes candidate records to the Matching Engine.

- Internal Data Source: Records from the Target Object
- External Data Source: Records from a Source Object, requires field mapping.

Matching Logic :  
Candidate records are grouped by matching key and transformed into the Target Object structure. The Matching Engine applies matching rules (deterministic and fuzzy) to the group, matches are populated to the Matched Records Object.

### RECORD MERGE

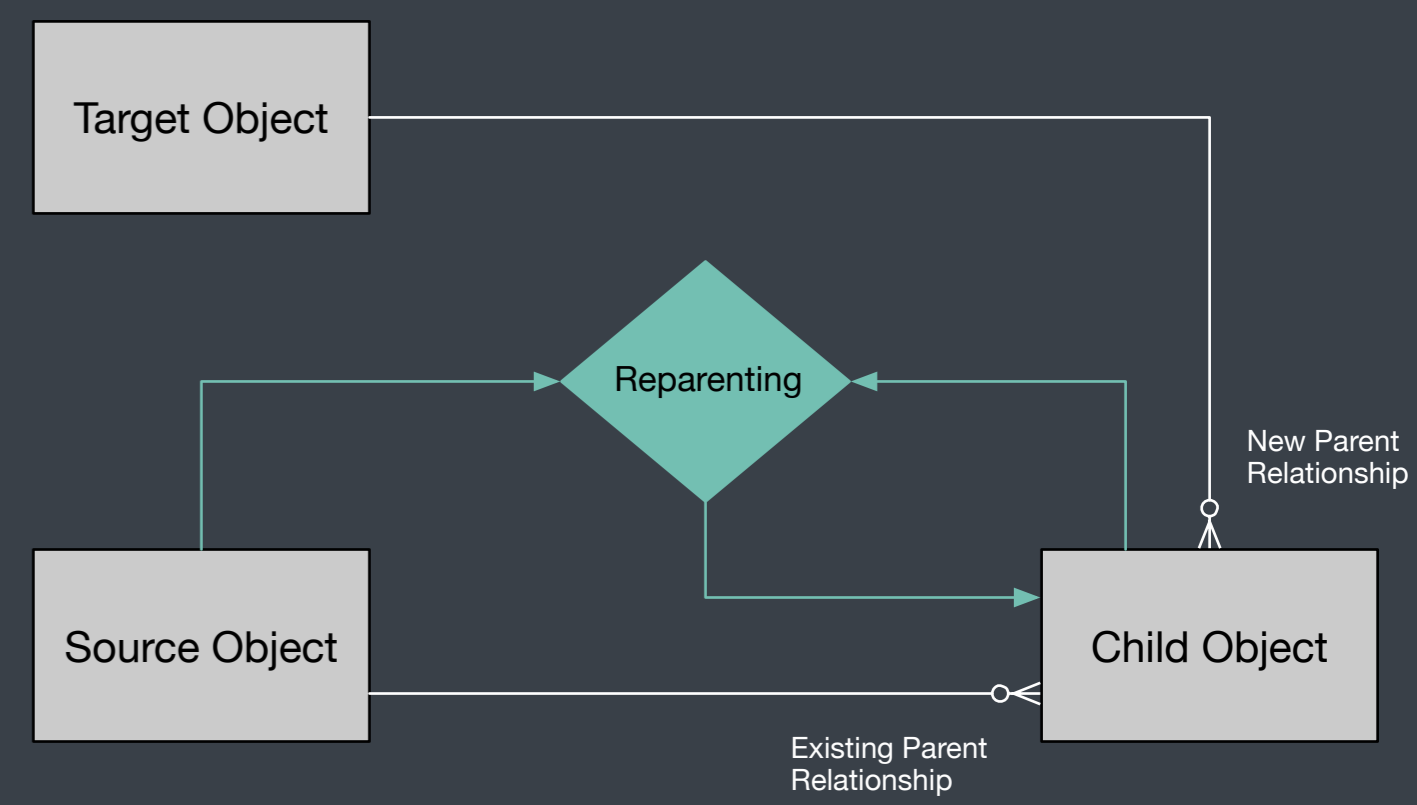


The Record Merge operation can be invoked by Batch Job or by the Merge Page.

Matched record groups are processed to identify the Master Record and the flow of field values from Source Records to the Master Record. Field level prioritisation is defined per Data Source. Where the group does not contain a target object record a new Master Record is created.

A bi-directional relationship is created between the Master and Source Records; custom external system identifiers can be copied to the Master Record.

### CHILD RECORD RE-PARENTING



Record re-parenting creates a parent relationship from the Master Record to child records associated to related Source Records.

The Record Re-Parenting operation can be invoked directly by Batch Job or indirectly following a Record Merge operation.

Data Sources are configured to enable child record re-parenting for specific child relationships.

The Record Re-parenting operation is key to the completeness of the 360° view.