

Record Matching & Merge Lifecycle :

Candidate records across Data Sources are processed by the Matching MDM operation to create Matched Record Groups, containing Matched Record Pairs.

Each Matched Record Group is processed by the Merge MDM operation to identify a Master Record and field updates to be applied from Source Records to the Master Record.

Child Records are reparented from the Source Records to the Master Records in adherence to the settings defined per Data Source.

Source Records are related to the Master Record via a relationship field.

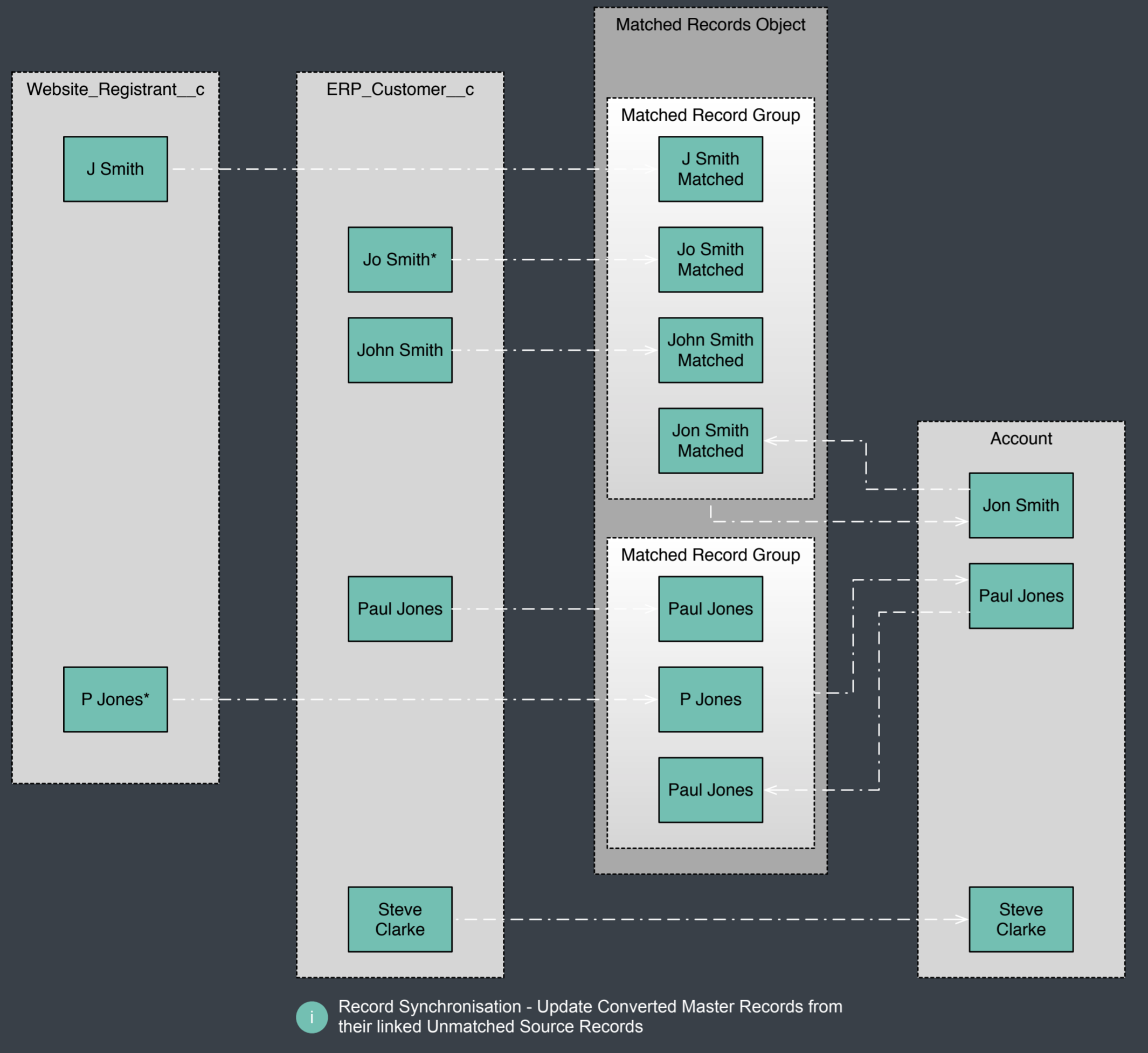
Master Records are populated with Data Source specific source system identifiers to ensure traceability.

Record Conversion Lifecycle :

Unmatched Source Records, or Source Records for Data Sources configured specifically are processed by the Conversion MDM operation to create a new Master Record per Source Record.

Source Records are related to the Master Record via a relationship field.

Master Records are populated with Data Source specific source system identifiers to ensure traceability.



Record Matching & Merge Lifecycle :

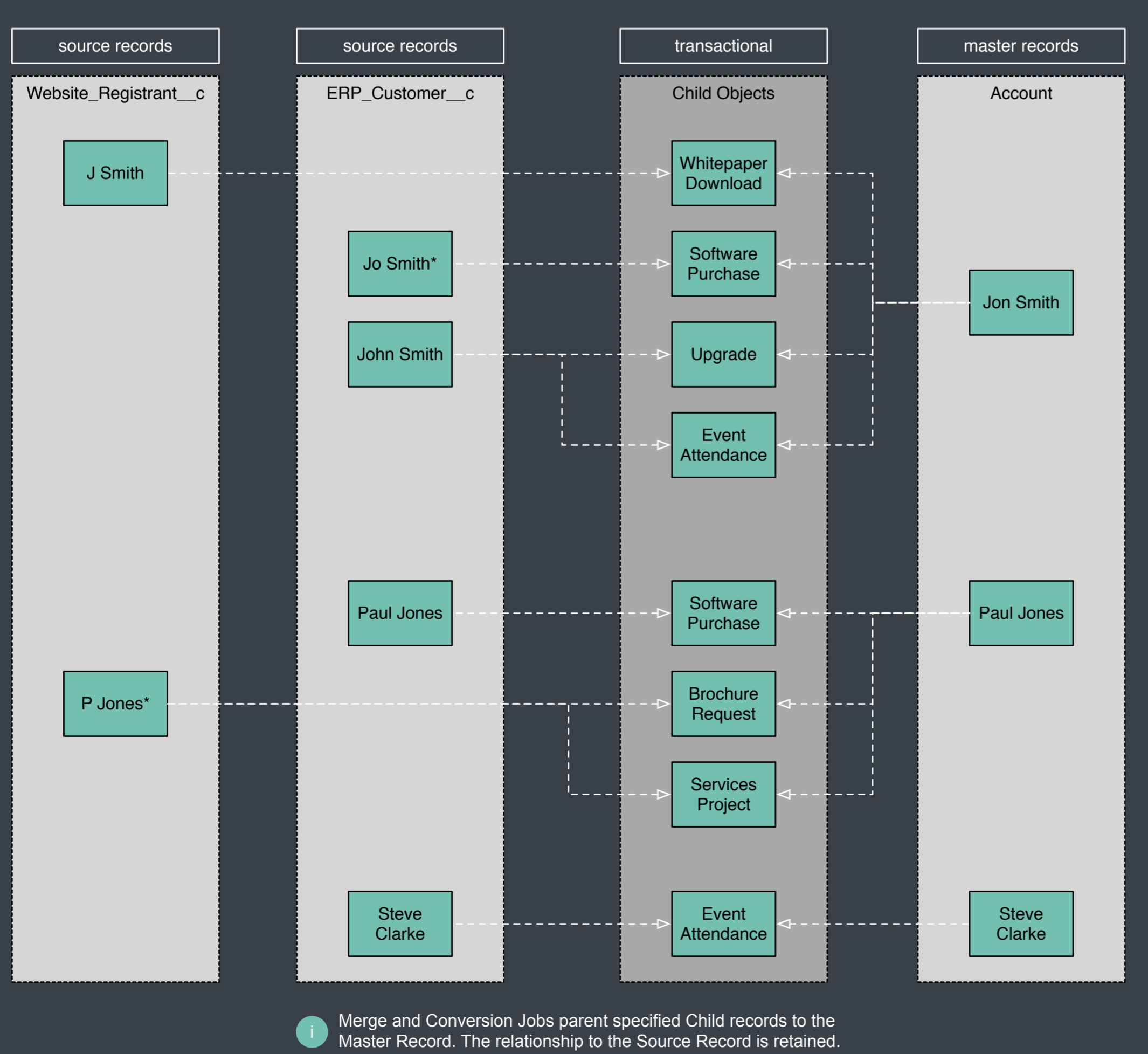
Match Once Model : Matched records can be set to "Matching Inactive" meaning the records are no longer visible to the Matching Engine. New Child Records can continue to be reparented to the Master Record. The linkages from Source Record to Master Record will not be re-evaluated.

Match Many Model : Matched Records (changed or otherwise) can be set to "Matching Active" meaning the Source Records will be processed in addition to new Source Records, as per the logic for Day 1 above. In such a model the matching state for Source Record is fully re-evaluated.

Record Conversion Lifecycle :

Switchover Model : Source Records and Master Records can be switched to the Record Matching & Merge Lifecycle and matched to the wider data set.

Synchronisation Model : Updates applied to Converted Source Records can be populated (Synchronised) to the related Master Record and new Child Records reparented.



Child Record Reparenting :

Child Records are integrated directly into transactional Child Objects and parented initially to Source Records.

For each Data Source the child object relationships for the Source Object are configured for record reparenting or to be ignored.

Where external Data Source Child Records are to be reparented a relationship field on the child object must be specified that matches the Target Object type.

For example; a Data Source "ERP Customers to Accounts" where the Source Object [ERP_Customer__c] has a lookup relationship to [Transaction__c], would require a lookup field on the child object that references the Account object.

For internal Data Sources (Source Records and Master Records are the same SObject type) standard child object relationships (Task, Opportunity etc.) can be reparented where the system allows (i.e. the parent field on the child object is updateable).

The Reparenting MDM operation can be invoked indirectly by the Merge or Conversion operations, or the manual Merge Page. This operation can also be invoked directly as a standalone job.

Record Conversion Lifecycle :

Merge and Conversion Jobs parent specified Child records to the Master Record. The relationship to the Source Record is retained.