

## Training – Setting up multiple Target Objects per Salesforce Object Module

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Document Version: v1.2

Product Version: v6.13

Date: February 2020

Last Updated: November 2022

This document will provide initial training for the setup of multiple target objects referencing the same Salesforce Object. This document does not explain the technical aspect or discuss the other functions within clearMDM. More detailed technical information can be found in the quick start guides located here [clearMDM.com](https://clearMDM.com)

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## Multiple Target Objects referencing the same Salesforce Object

### Introduction

If you have a Target Object which has more than one record type, for example, in Accounts you may have Customers and Suppliers, when creating a Master Record, you may not want to match and merge the record types together.

By setting up a separate Target Object per record type you can specify a different Blocking Key for each one so that when the jobs are run, the records will not be matched and merged as the Blocking Key will not be the same.

What this also means is that you can setup Attribute Groups (merge rules) for individual record types if you do not want the same merge rules to apply, or you can apply to all record types if you wish.

To do this, follow the steps below:

### Use Case 1 – Adding the settings within clearMDM

This example is based upon SObject Type Accounts having a specific record type of Supplier.

1. Navigate to Settings within clearMDM.
2. Click on Add.
3. Enter a name for the Target Object – in this example Supplier RT.
4. Select the SObject Type – Accounts.
5. At this point, the Record Type field will be enabled if you have more than one record type active for this SObject.
6. Click the 'Is Active' checkbox for Normalisation Settings.
7. Complete the settings as per the requirement for the Blocking Key. In this example we are going to use the Account Name:

**▼ Normalisation Settings**

Is Active?	<input checked="" type="checkbox"/>	Normalise on Create?	<input checked="" type="checkbox"/>
Auto Normalise Records?	<input type="checkbox"/>	Auto Normalise Recently Modified?	<input type="checkbox"/>
Is Normalised Field Name	Is Normalised?	Is Recently Modified?	<input checked="" type="checkbox"/>
Check Normalisation State On Save?	<input type="checkbox"/>	Normalise on Save Field Name	Normalise on Save?
Last Normalised Date Field Name	Last Normalised Date	Blocking Key Field Name	Blocking Key
Blocking Key Group Field Name	Blocking Key Group	Blocking Key Input 1 Field Name	Account Name
Blocking Key Input 1 Length	10	Blocking Key Input 2 Field Name	-- Select --
Blocking Key Input 2 Length	-- Select --	Blocking Key Input 3 Field Name	-- Select --
Blocking Key Input 3 Length	-- Select --	Is Blocking Key Complete Field Name	Is Blocking Key Complete?
Blocking Key Complete Strict?	<input type="checkbox"/>	Blocking Key Input Padding?	<input checked="" type="checkbox"/>
ISO Country Code Field Name	ISO Country Code		

8. Complete the remaining settings as per the required setup.
9. Ensure the correct Record Type is selected in the Merge Settings and Conversion Settings (Default Record Type field).
10. Click on save.

**▼ Data Quality Settings**

Is Active?	<input checked="" type="checkbox"/>	Last Quality Check Date Field Name	Last Quality Check Date
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**▼ Synchronisation Settings**

Is Active?	<input checked="" type="checkbox"/>	Last Synchronisation Date Field Name	Last Synchronisation Date
Is Recently Modified?	<input checked="" type="checkbox"/>	Is Invoked by Normalisation Job?	<input checked="" type="checkbox"/>

**▼ Matching Settings**

Is Active?	<input checked="" type="checkbox"/>	Date Matching Tolerance	0
Blocking Key Match Length	10	Auto Adjust Blocking Key Match Value?	<input type="checkbox"/>
Check for Matches on Record Creation?	<input type="checkbox"/>	Fuzzy Match Threshold %	55.0
Matching Check On Save Field Name	Matching on Save?	Auto Accept Match Threshold %	75.0
Matching Check Override Field Name	-- Select --	Auto Accept Matches?	<input checked="" type="checkbox"/>
Matching Manager Apex Class Name	StandardMatchingManager	Is Internal Matching Active?	<input checked="" type="checkbox"/>
Is Deterministic Rules First?	<input checked="" type="checkbox"/>	Is Update Unique BKMV Records?	<input checked="" type="checkbox"/>
Is Activate On Record Creation?	<input type="checkbox"/>	Is Recently Modified?	<input checked="" type="checkbox"/>
Is Invoked by Normalisation Job?	<input checked="" type="checkbox"/>	Is Invoked by Synchronisation Job?	<input checked="" type="checkbox"/>

**▼ Merge Settings**

Is Active?	<input checked="" type="checkbox"/>	MDM Status Field Name	MDM Status
Last Merged Date Field Name	Last Merged Date	Ignore Partial Groups?	<input type="checkbox"/>
Default Record Type	Supplier	Master Field Map Field Name	System Master Field Map
Create Master for New Groups?	<input type="checkbox"/>	Clone Master for New Groups?	<input type="checkbox"/>
Is Attribute Group Only?	<input checked="" type="checkbox"/>	Data Privacy Record Retention Date Field	Birth Date
Data Privacy Record Retention Policy	Oldest	Master Priority 2nd Factor Field Name	-- Select --
Merge Master Priority Field Name	-- Select --	Is Merge Recently Modified MRP?	<input type="checkbox"/>
Reset Identifier Target Fields?	<input type="checkbox"/>		
Is Invoked by Matching Job?	<input checked="" type="checkbox"/>		

**▼ Conversion Settings**

Is Active?	<input checked="" type="checkbox"/>	MDM Status Field Name	MDM Status
Is Conversion Master Field Name	Is Conversion Master?	Last Conversion Date Field Name	Last Conversion Date
Default Record Type	Supplier	Is Invoked by Matching Job?	<input checked="" type="checkbox"/>
Is Invoked by Merge Job?	<input type="checkbox"/>		

**▼ Reparenting Settings**

Is Active?	<input checked="" type="checkbox"/>	Is Reset Active?	<input checked="" type="checkbox"/>
Is Today Modified?	<input type="checkbox"/>	Is Recently Modified?	<input type="checkbox"/>
Is Invoked by Synchronisation Job?	<input type="checkbox"/>	Is Invoked by Conversion Job?	<input type="checkbox"/>

Note: Once the Target Object is setup, you cannot edit the Name, SObject Type or Record Type fields. If any of these fields need amending you will need to delete the Target Object and re-input.

## Use Case 2 – Setup the Data Source Settings for the Target Object

Once the Target Object has been setup, the Data Source will need setting up for that Target SObject Type.

1. Navigate to Settings within clearMDM.
2. Click on the Data Sources tab.
3. Click on Add Data Source.
4. Select the 'Is Active' checkbox.
5. Enter a name, in this example 'Suppliers'.
6. Click on the Target SObject Type dropdown and you will see the Target Object created in use case one.
7. Select this and complete the remaining settings as required.

**Data Source Settings**

Is Active?  Is External?

Name:

Target SObject Type:  MDM Status Field Name:

Is Active for Synchronisation?  Reset Reparenting Flag?

Is Active For Reparenting Field Name:  Is Partitioned?

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**Matching Settings**

Is Active?  Auto Match Records?

Last Matching Date Field Name:  Is Active For Matching Field Name:

Master Records Active for Matching?  Check Matching State On Save?

Master Record Flag Field Name:  Reset Source Record Matching Flag?

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**Merge Settings**

Is Active?  Master Record Id Source Field Name:

Is Transient Mode Enabled?  Identifier Source Field Name:

Identifier Target Field Name:

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**Source To Target Field Settings**

Define mappings from Source Object fields to the Target Object.

Target Field	Data Type	Match Type	Source Field	Cross Field Matching	Manual Field Merge Priority	Merge Priority
Account Name	Text	Key		<input type="text" value="-- Select --"/> <input type="text" value="Account Description"/> <input type="text" value="Account Fax"/> <input type="text" value="Account Name"/>	15	<input type="text" value="10"/>
Account Phone	Text	Ignore		<input type="text" value="-- Select --"/> <input type="text" value="Account Description"/> <input type="text" value="Account Fax"/> <input type="text" value="Account Name"/>	15	<input type="text" value="10"/>

8. Click on save.
9. The Data Source settings have been setup.

## Use Case 3 – Test the correct Blocking Key is produced for the Record Type

1. Navigate to Accounts in Salesforce.
2. Click on New.
3. Select the Record Type Supplier (in this example).
4. Enter the Supplier details.
5. Click on save.

In this example the Blocking Key is the Account Name which has been correctly produced:

Normalise on Save?  Matching on Save?

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▼ MDM Normalisation Information

Is Normalised?  Blocking Key Group   
 Is Blocking Key Complete?  Blocking Key   
 Last Normalised Date  Normalised Company Name   
 ISO Country Code

If you want to use a different Blocking Key for any other record types within the SObject Type Account, then you create the Target Object and leave the Record Type blank. So, in our example, we have a Blocking Key of Account Phone for any other record types.

Target Object

Name  Record Type   
 SObjectType

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▼ Normalisation Settings

Is Active? <input checked="" type="checkbox"/>	Normalise on Create? <input checked="" type="checkbox"/>
Auto Normalise Records? <input type="checkbox"/>	Auto Normalise Recently Modified? <input type="checkbox"/>
Is Normalised Field Name <input type="text" value="Is Normalised?"/>	Is Recently Modified? <input checked="" type="checkbox"/>
Check Normalisation State On Save? <input type="checkbox"/>	Normalise on Save Field Name <input type="text" value="Normalise on Save?"/>
Last Normalised Date Field Name <input type="text" value="Last Normalised Date"/>	Blocking Key Field Name <input type="text" value="Blocking Key"/>
Blocking Key Group Field Name <input type="text" value="Blocking Key Group"/>	Blocking Key Input 1 Field Name <input type="text" value="Account Phone"/>
Blocking Key Input 1 Length <input type="text" value="10"/>	Blocking Key Input 2 Field Name <input type="text" value="-- Select --"/>
Blocking Key Input 2 Length <input type="text" value="-- Select --"/>	Blocking Key Input 3 Field Name <input type="text" value="-- Select --"/>
Blocking Key Input 3 Length <input type="text" value="-- Select --"/>	Is Blocking Key Complete Field Name <input type="text" value="Is Blocking Key Complete?"/>
Blocking Key Complete Strict? <input type="checkbox"/>	Blocking Key Input Padding? <input checked="" type="checkbox"/>
ISO Country Code Field Name <input type="text" value="ISO Country Code"/>	

Creating a new record within Accounts which is not a Supplier will create the correct Blocking Key:

In this example, the phone has been used:

▼ MDM Normalisation Information

Is Normalised?  Blocking Key Group   
 Is Blocking Key Complete?  Blocking Key   
 Last Normalised Date  Normalised Company Name   
 ISO Country Code

This means when the matching, merging jobs are run, the two records that have been created will not be matched as the Blocking Key is different.