

ENTERPRISE-GRADE MASTER DATA MANAGEMENT FOR SALESFORCE®

DATA QUALITY



STANDARD QUALITY RULES

Packaged quality rules, actions & associated profiling analytics for Standard Object (Account, Contact & Lead) address & contact fields.

CUSTOM QUALITY RULES

Definition of custom quality rules & actions, based on custom fields, custom objects & field combinations. Corporate data quality standards can be implemented & enforced.

STANDARD ACTIONS

Data quality actions enable calculated quality metrics to be mapped to Field Update & Chatter Post actions. Rules & actions can be evaluated in real-time or on a scheduled basis.

PREVENTATIVE ACTIONS

Record modifications that degrade data quality or introduce field values that are incompatible with required formats can be blocked.

CORRECTIVE ACTIONS

Actions can be defined that address scenarios such as data standardisation, special character removal, casing inconsistency & time-based, conditional field updates.

RECORD MATCHING



ADVANCED MATCHING ENGINE

Cross-object, flexible matching with Fuzzy, Exact, Deterministic & Key rules compatible with text & date/time fields. Matching operations that scale from low to very large data volumes. Salesforce objects can now have multiple MDM configurations (defined by record type).

CROSS FIELD MATCHING

Check for field value matches across multiple fields (phone numbers, email address, physical address etc.). E.g. Business Phone to Mobile.

AUTOMATED MATCHING

Matching can be fully automated for ad-hoc bulk operations or scheduled incremental running. Auto-acceptance allows strong matches to pass-through without manual intervention. The "Find Matches" UI enables manual matching. A background queue processing model is supported for high-volume, time-critical transactional MDM architectures.

REAL-TIME MATCHING

Packaged Actions enable MDM operations to be incorporated into Process Builder (or Flow) process automations. The Quick Matching API enables external systems to reference Salesforce as the MDM hub.

DATA STEWARDING MODELS

Data stewarding can be implemented in a centralised (e.g. data team) or decentralised model (i.e. end users). Match score or condition based.

PARTITION DATA SOURCES

Salesforce object data can be partitioned using custom criteria (e.g. region, source system, quality-grade). Each Partition has distinct configuration settings.

MDM EDITIONS



RECORD MERGE & CONSOLIDATION



ADVANCED (CUSTOM) MERGE ENGINE

Cross-object, cross-field merge engine with sophisticated rules for Master Record selection & attribute promotion. Source Record identifiers can be copied to the Master Record to provide traceability. The 3-record limit applied to the standard merge feature does not apply. Salesforce objects can now have multiple MDM configurations (defined by record type).

AUTOMATED MERGE

Merge can be fully automated for ad-hoc bulk operations or scheduled incremental running. A "Custom Merge" UI is provided for manual merge operations. A background queue processing model is supported for high-volume, time-critical transactional MDM architectures.

REAL-TIME MERGE

Packaged Actions enable MDM operations to be incorporated into Process Builder (or Flow) process automations.

ATTRIBUTE GROUPS

Master Record field groupings (e.g. Address) can be defined with population logic based on time (newest, oldest values), data quality, frequency or through a relative trust scale assigned across data sources.

RELATED RECORD RE-PARENTING

Transactional Records can be re-parented from Source Record to Master Record on a selective basis. Related objects can be enabled for re-parenting & record filters applied (e.g. open Cases or recent Activities).

CUSTOM ROLLUPS

Consolidated transactional data can be analysed to populate aggregate fields on the Master Record. Functions supported include numeric calculations & text concatenation.

DYNAMIC HIERARCHIES

Dynamic data-driven hierarchies replicate external system relationships & enable visualisation of consolidated data at each hierarchy level.

DATA LINEAGE AND ROLLBACK (NEW FOR V6)

Merges can be analysed across the merge timeline and field groupings restored or the full master record state rolled-back to any point-in-time.

TECHNICAL



100% NATIVE

clearMDM installs into the customer's Salesforce instance as a Certified Managed Package. Designed for setup by Salesforce Administrators.

SECURE

Data does not leave the customer's Salesforce instance. clearMDM fully respects the configured Salesforce Sharing Model for data access.

DATA STORAGE

No duplicate record storage overhead. Some allowance is required for temporary storage of matching results data.

API

Distributed MDM architectures are supported via standards-based APIs; clearMDM can serve as an Enterprise MDM Hub or provide data-entry checks for operational systems and mobile apps etc.

COMPATIBILITY

Standard & Custom Objects Person Account compatible. Records owned by Community Users can be merged (unsupported by Salesforce merge).

EDITION LIMITS



TARGET OBJECTS (Basic = 2, Mid = 4, Enterprise = **)

DATA SOURCES (Basic = 2, Mid = 4, Enterprise = **)

***SOURCE RECORDS** (Basic = 250K, Mid = 500K, Enterprise = **)

***STANDARDISATION RULES** (Basic = 5, Mid = 10, Enterprise = 50)

***MATCHING RULES** (Basic = 10, Mid = 25, Enterprise = 200)

***MERGE RULES** (Basic = 10, Mid = 25, Enterprise = 200)

* per Target Object, ** Unlimited