CLEARMDM

PRAGMATIC 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.).

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 model (e.g. data admin team) or decentralised model (i.e. end users).

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.

Available on:

CLEARMDM = ●
BASIC EDITION

CLEARMDM = ●
MID EDITION

CLEARMDM = ●
ENTERPRISE EDITION

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

RELATED RECORD REPARENTING ● ● ●

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.

MDM RESET ● ● ●

Rollback Source Record & Master Record level modifications applied by MDM operations.

TECHNICAL

100% NATIVE ● ● ●

Designed for Salesforce by a Certified Technical Architect. No off-platform processing. Simple, per-org subscription pricing model.

DATA STORAGE ● ● ●

No duplicate Source 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. Data integration tasks can initiate bulk MDM processing as a post-processing task.

COMPATIBILITY ● ● ●

Standard & Custom Objects (including 3rd party packaged objects). Fully Person Account compatible. Records associated with Community Users can be merged (unsupported by the standard platform merge feature).

LIGHTNING READY ● ● ●

Fully Lightning Ready Certified.

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 = 3, Mid = 10, Enterprise = 25)

*MATCHING RULES (Basic = 6, Mid = 15, Enterprise = 75)

* per Target Object, ** Unlimited