

## ENTERPRISE-GRADE MASTER DATA MANAGEMENT FOR SALESFORCE®

BOOST PRODUCTIVITY,  
GAIN DEEPER CUSTOMER INSIGHTS  
AND OPTIMISE AI OUTCOMES

### CLEANSE

#### CLEANSE AND ENRICH DATA IN REAL-TIME

Cleanse, verify and enrich data via industry leading Global Data providers (usage costs apply). Implement a real-time Cleanse, Match and Merge data flow to enable time critical interactions.

#### STANDARD QUALITY RULES & ACTIONS

Packaged quality rules, actions & associated profiling analytics for standard Salesforce Objects (Account, Contact & Lead). Quality rules and actions can be evaluated in real-time or on a scheduled basis and enable data quality driven record matching and merge.

#### CUSTOM QUALITY RULES & ACTIONS

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

#### NORMALISATION

Normalise field values to improve matching accuracy. Examples: remove suffixes, prefixes, special or extraneous characters, resolve first names to the root first name, standardise address inputs to the ISO equivalents, format phone numbers to the E164 standard).

### MATCH

#### ADVANCED MATCHING ENGINE

Cross-object, flexible matching with Fuzzy, Exact, Deterministic and Key matching rules that are compatible with standard and custom objects (and fields). Matching operations scale to very large data volumes (double digit millions). MDM configurations can be defined at the record type level. For example, matching logic can be tuned to Account types.

#### CROSS FIELD MATCHING

Check for field matches across multiple fields (phone numbers, email address, physical address etc.). For example, a Contact mobile number can be matched against all Contact Phone fields to find the best match.

#### DATA GOVERNANCE

Data stewardship can be implemented in a centralised (data team) or decentralised model (Admins or end users). Potential matches enter data stewardship based on a low relative match score or due to significant attributes of the records involved (e.g. Source, VIP or Consent status).

#### DATA PARTITIONS

Records within a Salesforce object can be partitioned using custom criteria (e.g. region, market, brand, source system, quality-grade). Each Partition can have a distinct MDM configuration to enable control over activation or prioritisation. For example, an incremental rollout plan may activate geographic partitions based on region.

**CLEARMDM**   
BASIC EDITION

**CLEARMDM**   
MID EDITION

**CLEARMDM**   
ENTERPRISE EDITION

### MERGE

#### CUSTOM MERGE ENGINE

Cross-object, cross-field merge engine which supports sophisticated rules to determine the selection (or creation) of the Master Record and its field population. Source Records can be retained and linked to the Master Record or identifiers can be copied to provide traceability. The 3-record limit applied to the Salesforce merge function does not apply.

#### MERGE RULES

Master Record field groupings (e.g. Address and Contact Details) can be defined with population logic based on time (newest, oldest values), data quality, frequency or via a relative trust scale assigned across sources. Consent values can be intelligently managed across conflicting sources. The Salesforce Consent Management Data model is supported.

#### RELATED RECORDS

Related records (e.g. Tasks and Cases) can be re-parented from Source Records to the Master Record to provide a consolidated (or 360°) view. Filters can be applied to provide control (e.g. future Tasks, active Cases). The consolidated view can be aggregated to calculate unique insights at the Master Record level (e.g. CLV, first purchase date).

#### DATA LINEAGE AND ROLLBACK

Merge events can be analysed across the merge timeline and field groupings restored or the full master record state rolled-back to any point-in-time. Related records can also be returned to the original parent.

### TECHNICAL

#### 100% NATIVE AND SECURE

clearMDM installs into the customer's Salesforce instance as a Certified Managed Package which has been security reviewed by Salesforce. MDM operations run securely within Salesforce and respect the configured data access/privacy rules. Designed for setup and maintenance by Salesforce Admins. Extensible by declarative tools.

#### DATA STORAGE

No duplicate record storage overhead. Some allowance is required for temporary storage of transient matching results and audit log data; data retention policies can be applied.

#### PLATFORM INTEGRATION

Platform Actions enable MDM operations to be incorporated into Lightning Flow automations or accessed via the Salesforce REST API. Platform Events enable MDM notifications to be sent to external systems or to drive on-platform process automation.

#### PROCESSING MODELS

Real-time, scheduled job, API, or Flow. UI components are provided for rules validation and maintenance, data stewardship, duplicate blocking, potential matches display and ad-hoc manual match and merge.

#### 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.

### EDITION LIMITS

MDM CONFIGURATIONS (Basic = 2, Mid = 4, Enterprise = \*\*)

\*SOURCE RECORDS (Basic = 100K, Mid = 500K, Enterprise = \*\*)

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

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

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

\* per Salesforce Object, \*\* Unlimited