CLEARMDM

Training – Lifecycle of a Customer Record Module

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> This document provides initial training on the lifecycle of a customer record when using the clearMDM match and merge functions. This document does not go into technical detail and is intended to compliment other clearMDM training modules.

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Customer Record Introduction

This module discusses the lifecycle a customer record progresses through, as part of the clearMDM process within Salesforce. It will help understand the different stages and how ultimately the Master Record is finally created.

To help understand, there will be some exercises to undertake giving a more visual representation.

As a company, you may have multiple systems to record customer information. These could be via multiple routes, i.e. via websites, e-commerce systems, sales systems, in store if this applies. This results in a large dataset of contact information across multiple systems and different data sources.

clearMDM can take these records and identify where duplicates have occurred and create a Master Record for the contact with the most up to date information.

To keep things simple, the following steps are based upon contact information within Salesforce.

Exercise:

Step 1 – Create a duplicate record in Salesforce.

Within Sales in your Salesforce Sandbox, create a new account by following these steps:

1. Navigate to Sales>Accounts.
2. Click on New.
3. Select the record type (for this exercise select Person Account if available).
4. Click on continue.
5. Person Account Field set to Last name.
6. Starts With, in the field value input Jones and click on search.
7. Regardless of whether any matches are returned, click on Create.
8. Enter the following information:

   - Salutation – Mrs
   - First Name – Mary
   - Last Name – Jones
   - Email – enter a valid email address
   - Mobile – 07777777777
   - Enter a shipping address
   - Enter a birthdate

9. Click on save.

Repeat this step, entering the same Salutation, First Name, Last Name, different mobile phone number. You will notice the Account Record has a blocking key within the MDM status section. This is part of the normalisation process which is discussed further in the Normalisation Training Module.

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Step 2 – Match the two records.

Rather than using the Match Function (discussed further in the Match Training Module), we will match the two newly created records manually.

Exercise:

1. Navigate to clearMDM, Matching Test tab.
2. Select the Target Object (in this example it will be Person Account).
3. Check that Person Account Field is displayed as Last Name.
4. Input Jones in the Field Value and click on search.
5. In the Person Account search results select the two records created in step 1.
6. Then click on next.

Step 3 – Merge the two records

Again, rather than use the Merge Function (discussed further in the Merge Training Module), we will merge the two matched records manually.

At the moment, the two records are still being treated as individual records. What we will now do is merge these records which will create a Master Record.

Exercise:

1. Following on from Step 2, click on the Merge button.
2. Select which value you want the Master record to use by clicking on the radio buttons (including blank values) for each field.
3. Click on Merge.
4. Select ok to the message displayed.

Step 4 – Master Record

The Master Record will now be created. To view this complete the following exercise.

Exercise:

1. Click on view Master Record.
2. Validate the information is correct and the child records are also attached.

This concludes the training module for Customer Record Lifecycle.