

Training – Data Consolidation Module

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This document provides initial training on the Data Consolidation function within clearMDM . This document does not go into technical detail and is intended to compliment other clearMDM training modules. Existing experience of clearMDM is not required.

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Data Consolidation Introduction

Once a Master Record has been created (See Master Training Module for further information), then there may be the need to attach what is referred to as child object types (examples of these could be assets or cases) to the Master Record. These child object types would have originated from the records the matched pairs were established from, so although the input field information has been merged, the cases etc will not have merged to the Master Record.

More technical information can be found about Data Consolidation [here](#). If you read the terminology 360-degree view, this is another description for the Data Consolidation process as it is providing a full insight into Customer or Supplier activity.

There are two operations that the Data Consolidation process can perform and we will look at these individually and put them into context with some exercises.

Step 1 – Data Consolidation Settings.

Reparenting is the means of selecting which child records from the original record are going to be updated to the Master Record. You can select which records are going to have the reparenting operation performed on by means of a setting. We will go through this in the exercise below:

Exercise:

1. First, we need to activate the target object for the data consolidation process. Click on Settings and then Target Objects.
2. Click on edit next to the Target Object you are using. For this exercise we are using Person Account.
3. Navigate to the Reparenting Settings and tick the 'Is Active?' Check box and also the 'Is Reset Active?' Check box.
4. Also tick the 'Custom Rollups Active?' Check box.
5. Click on save.
6. Click on Data Sources tab.
7. Select the relevant data source (for this exercise it will be Person Account).
8. From the is active for Reparenting Field Name to 'Is Active for Reparenting'. This will display on the record.
9. Tick the 'Resent Reparenting Flag?' Checkbox. What this will do is reset the reparenting process to false once the matching process has run, for that data source.

10. Click on Save.

Step 2 – Setting up the Reparenting Rules.

Once the data consolidation settings have been activated you will need to indicate the child 'types' that you want to set for reparenting. This is done within the Data Source settings.

Exercise:

1. Navigate to the relevant Data Source Settings.
2. Locate the Child Object Relationships section.
3. Within here you will see a list of the different types of child objects.
4. What you will need to do is tick the 'Reparent?' Checkbox for each child type, relationship name and source field name that you would like to be part of the reparent process. Any left unchecked will not be included.
5. Click on save.

Step 3 – Setting up the Custom Rollups.

Custom Rollups are created in a separate area within Settings. A custom rollup is effectively a value that is calculated from the child record specified field and populated on the 'Parent' record. You can specify the field that the value should be taken from and the field it should be populated to. You can also decide how this is populated, e.g. Total, Average, via a rollup function. The options available are:

Sum, Average, Min, Max, Count and Text.

The following exercise will guide you through setting up a Custom Rollup.

Exercise:

1. Navigate to Settings and select Customer Rollups.
2. Click on the Add button to display the Custom Rollup Settings template.
3. Give your custom rollup a name specific to the setting, e.g. Merchandise spend.
4. Make sure the 'Is Active?' Checkbox is ticked.
5. Select which rollup function you want this setting to use from the dropdown.
6. Select the Target Object this Custom Rollup is being setup for, so for this exercise it would be Person Account.
7. Select the Target Field Name, so this is the field that will be populated on the Parent Record.

8. Within the Child Object section, select the types of records to use for calculating the outcome (this is the Child Relationship field) and also select the Field Name that provides the input into the calculation).
9. Click on save.
10. Repeat this for each Custom Rollup you would like to setup.

Running the Reparenting Job is explained in the Jobs Training Module.
This concludes the Data Consolidation Module.