CLEARMDM

Training – Matching Module

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Document Version: v1.2
Product Version: v6.13
Date: June 2018
Last Updated: November 2022

This document provides initial training on the Matching 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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Matching Introduction

Where there are similar records within your Salesforce dataset, these can be matched and identified as potential duplicates. This can easily happen where different individuals/systems/locations are used for creating contact information. Before long, the dataset can become huge and indeed some of the information will be out of date. By matching and identifying potential duplicates, the records can then be merged into creating or updating one Master Record (Refer to the Merge Training Module for more information regarding this).

Matching rules are created for fields which will identify potential pairs groupings where each record has a common Blocking Key Match value (Refer to the Normalisation Training Module for more information regarding the Blocking Key). So, for example there may be more than 2 records with the same Blocking Key, but do not necessarily all match each other, i.e record A matches to record B and record B matches to record C. When the match group is created it will contain both sets of record pairs.

The steps below will help understand how to setup the match rules and how the master record is created.

Step 1 – Determine the Match Rules

As with other functions within clearMDM , there needs to be some initial thought given to what the rules should be for the matching process up front, before creating these in clearMDM is even considered.

What you need to understand at this point though is what are the options for the rules. The table below gives a clearer understanding.

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The order the rule types are explained in the table is the order they are run when the match process is executing.

Rule Type	Definition
Key	If the rule for the field is set to key, then if the record pair values are the same for that field it is deemed to be 100% match.
Key Approximate	**Max Score**: Percentage of equivalency required. If the 2 records being compared have an approximately equivalent (and non-blank) field value, case insensitive, a 100% match score is assigned for the record-level comparison.
Deterministic	An easy way to explain this rule is if we use the field 'gender' as an example. If that field is set to deterministic and they are not the same, then it is a non-match. The reason for setting this is that deterministic rules are run second in the matching process, so as for this example, if the gender doesn't match then there is no need to run anymore rules on this record pair.
Deterministic Strict	The 2 records being compared must have an exactly equivalent (and non-blank) field value, case insensitive, otherwise a zero % match score is assigned for the record-level comparison.
Fuzzy	As the word implies, this rule looks at the record pair field values and scores it based upon how similar they are and how easy it would be to align them (for a more technical explanation please refer to the Quick Start Guide 3 Matching rules).
Exact	This is an exact match of the record pair field value.

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Ignore	This is for fields that have a merge rule but do not have or need a match rule (please refer to the Merge Rules Training Module for further information).

Step 2 – Setup the Matching Rules in clearMDM

Now that you have identified the fields and the matching rules you wish to apply to them, they need setting up in clearMDM.

Exercise:

1. Within your Salesforce sandbox, navigate to Settings.
2. First you will need to make sure the matching setting is active for the target object you are using (for this exercise we are using Person Account).

- Click on Target Object Setting.
- Select Person Account and Edit.
- Within Matching Settings section tick the 'Is Active?' Checkbox.

3. Scroll down to the Rules section (or click the rules tab if in lightning experience).
4. Select a field from the dropdown and enter the match type.
5. The max score is relevant for the Fuzzy match rule. Type in here the score for the field value relevance. This can be between 1 and 100.
6. The null score value is for when one or more of the field values are null.
7. The rule type has been discussed in the Normalisation Training Module (for reference).
8. Tick the 'Active?' Check box.
9. Continue adding all the fields and rules until complete.

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Step 3 – Matching Test

The matching test feature within clearMDM doesn't necessarily have to be used but does provide a way of testing out the rules to make sure they are setup correctly and do not need amending before the Match Job is run. It also provides a view of the scores per field and the overall match score compared to the threshold, so helps get a better understanding of the rule types. It is helpful to use this feature when in the analysis stage of a Project.

Exercise:

1. If you do not already have two records you can use as potential matches, then create these in Salesforce beforehand.
2. Click on the Matching Test tab within clearMDM.
3. Select the Target Object from the drop down (for this exercise we are using Person Object).
4. Select Person Account field of last name.
5. Ensure starts with is selected and then input the field value.
6. Click on search.
7. The search results should bring pack the two records you have identified (created).
8. Select both and then click on next.
9. This screen shows you the two records side by side and the list of fields that were identified for matching.
10. It also shows you the Scores and what the calculated score for each field is.
11. An overall score is displayed and the threshold it needed to reach.
12. It is worth spending some time going through these fields and make sure you are happy with the score values. If not, now is the time to change them. You can do that on this screen and then click on the 'Apply to settings' button.
13. Once this process is complete and the settings are correct, the Match Job can be run. (Refer to the Job Runs training Module).

NOTE: A button is now displayed on this screen called 'Merge Now'. If you click on this button, the records will merge and a Master Record will be created. This can be done if you

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are certain the records are a match and therefore you do not need to go through each individual field values.

Step 4 – View the Match Results.

Once the Match Job process has run and completed, you can now view the matched record groups before running the Merge Job process. Again, this isn't something you have to do, but may be worth doing so for training purposes.

Exercise:

1. Click on the Matched Record Pairs tab.
1. Click on one of the records.
2. Here you can view the match analysis and you can view the matched record group.
3. Click on View Matched Record Group.
4. From here click on Merge.
5. This displays a list of the field and the values per matched record.
6. You could manually select which field value you want to use for the Master Record, or you could let the Merge Job Run execute this for you based upon the Merge Rules that have been setup (Refer to the Merge Training Module for further information).

This concludes the Match Training Module.