# Training – Merge Rules Module

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| This document will provide initial training for the Merge Rules function within clearMDM. It’s intended to introduce how to setup Merge Rules based upon limited or no experience using clearMDM. This document does not explain the technical aspect or discuss the other functions within clearMDM. More detailed technical information can be found in the quick start guides located here [clearMDM.com](http://s11916.pcdn.co/wp-content/uploads/2017/05/clearMDM-QuickStart-Guide-4-Merge-v1.4.pdf) |

Table of Contents

[Training – Merge Rules Module 1](#_Toc516144494)

[Merge Function Introduction 2](#_Toc516144495)

[Step 1 – Identify the Contact Information Your Company Captures 2](#_Toc516144496)

[Step 2 – Create the Merge Rules 3](#_Toc516144497)

[Step 3 – Adding the Fields into clearMDM 4](#_Toc516144498)

[Step 4 – Creating the Attribute Groups 5](#_Toc516144499)

# **Merge Function Introduction**

The merge function is the process that happens after there have been records identified as matches (once the matching process is complete), in other words multiple contact details of individuals or companies that are actually the same. This could quite easily happen if multiple systems are being used to record contact details or if a search was not performed beforehand to see if the record already exists. These records for the same contact could contain out of date information, for example the address or the name may have changed and stored in one of these records, but not all.

Merging these multiple records into one produces what is known as the ‘Master record’. This is the record which holds the most up to date information for the contact. The other multiple records will still be referenced in the Master record, but ultimately, the information displayed is the correct information.

How the Master record is populated is determined by the Merge Rules. Hence why it is important to understand how to set these up correctly. This is a straight forward process, the more complex part is deciding what the rules will be in the first instance. Which leads us onto the first step in the process.

The steps below will help understand how to determine the merge rules to apply and also how to set these up within clearMDM.

## **Step 1 – Identify the Contact Information Your Company Captures**

The most important process for the Merge Rules is determining what these should be. This will probably need to be decided by numerous people from varying departments. Decide who this group should be keeping the numbers to a minimum

When records are created within one or multiple systems, there are numerous fields completed and information gathered. The first thing to identify is which fields are the most important and should be populated with the correct information for the Master record. For example, you would more likely want to ensure that the correct surname, title, billing address, telephone information and email address are up to date. There could be multiple fields capturing email addresses and telephone numbers, so you would also want to make sure you have the primary information for these. Look at the information your company typically captures and make a list of the fields.

**Exercise**: This process could take some time to finalise, but it’s the first step and worth putting the time and effort into it to help with the next step.

## **Step 2 – Create the Merge Rules**

Once the list of fields that will be merged has been agreed, the next step is to decide what rule will determine that the correct information for the field is updated to the Master record. This can be a rule per field, or setup as a group of fields. For example, the telephone number may have numerous fields associated with it that need updating to the Master record. In clearMDM we call this an Attribute Group. This can be numerous fields, associated with one rule or indeed just one field.

Note: The rules in clearMDM can be determined by ‘newest’, ‘oldest’ or ‘quality’. Quality is prioritised by a score (More about this in the Data Quality Rule Module), so for example you may want the mobile phone to prioritised by the mobile phone quality score. For now, concentrate on deciding the rules and groups.

We suggest using the template table below to help with this process:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Attribute Group** | **Fields** | **Primary Priority** | **Primary Priority Field** | **Secondary Priority (Quality Only)** | **Secondary Priority Field** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

* Attribute Group – Name of the group containing one or more fields.
* Fields – The predetermined list of field names that have been agreed in step 1.
* Primary Priority – This is where you decide whether the rule is going to be determined by the newest information, oldest or whether a quality score will be applied.
* Primary Priority Field – This is the field that determines the primary priority, so for example if ‘Newest’ was selected then it is likely a date field will be used to identify this.
* Secondary Priority – When ‘Quality’ has been selected as primary, you can also select a secondary priority, so for example you could select the quality score based upon the newest ‘date’.
* Secondary Priority Field – As stated above, this is likely to be a date field that determines the newest or oldest.

To put the above into a bit more context, the table below gives some examples:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Attribute Group** | **Fields** | **Primary Priority** | **Primary Priority Field** | **Secondary Priority (Quality Only)** | **Secondary Priority Field** |
| Create Date Salesforce | Creation Date Salesforce | Oldest | Creation Date Salesforce |  |  |
| Birthdate | Birthdate | Newest | System timestamp |  |  |
| Postal Address | Street  Town  City  County  Postcode | Newest | System timestamp |  |  |
| Mobile Phone Number | Number | Quality | Mobile quality score | Newest | System timestamp |

**Exercise:** Take the list of fields identified in Step 1 and using the template table, identify the attribute groups, fields and priorities.

## **Step 3 – Adding the Fields into clearMDM**

Now that you have your table completed for the Merge rules, you need to add the fields into clearMDM so that the Attribute Groups can be setup.

To do this, log into your SalesForce Sandbox (always do this first before applying to production so that you can test the outcome).

**Exercise:**

Follow these steps:

1. Within clearMDM, navigate to Settings>Target Objects.
2. Select the Target Object the Merge Rules are to be applied against (e.g. Contacts in Salesforce, or Accounts etc).
3. Navigate to the Rules tab (scroll down in Salesforce classic).
4. Click on Add.
5. From the drop down, select one of the fields identified in Step 2.
6. Tick the ‘Active?’ checkbox.
7. Select ‘Match Type’ of ‘ignore’ from the drop down.
8. Continue this process until all the fields have been added.

## **Step 4 – Creating the Attribute Groups**

Once all the fields have been added into the Target Object settings, the Attribute Groups can then be setup for the Merge Rules.

**Exercise:**

Follow these steps:

1. Within Settings, navigate to Attribute Groups tab.
2. Click on Add Attribute Group.
3. Using the table completed in Step 2, enter the following:

* Name – Name of the Attribute Group
* Target Object – Account/Contact etc that the merge rules apply to
* Priority Type – This is newest, oldest or quality(dynamic)
* Is Active? – Tick

1. Click on Add under Fields.
2. Click on the Target fields dropdown which will contain all the fields that have been added in Step 3. Select the field associated with this Attribute Group.
3. Tick the ‘Attribute Group Required?’
4. Continue adding all fields associated with this Attribute Group.
5. Click on Add under Data Sources.
6. Select the Data Source that this Attribute group relates to (i.e. where the data is currently held).
7. Select the Priority field name (e.g. System timestamp).
8. Once complete, click on save.

Repeat these steps for all the attribute groups identified in Step 2.

You can now create Merge Rules and add these into clearMDM. The next step will be to execute the Merge Process which is discussed in the ‘Jobs’ Training module.