CLEARMDM

Training – Blocking Key Process Request Module

Document Version: v1.1
Date: November 2018
Updated: August 2021

This document provides initial training on the Blocking Key Process Request function within clearMDM .This document does not go into technical detail and is intended to compliment other clearMDM training modules. It would be beneficial to have gone through some of the other Training Modules to understand the Normalisation and Matching process.

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Blocking Key Process Request Introduction

The Blocking Key Process Request checks for matched records determined by the Blocking Key Value. When it is run, it will search within the Target Object , match records and then merge.

Step 1 – Blocking Key Process Request Settings

The first step is to setup the BKPR settings within clearMDM. The assumption is that an external Data Service API request has already been put in place. The following steps explain the BKPR solely:

1. Within clearMDM navigate to Settings.
2. Click on Application Settings.
3. Navigate to the Blocking Key Process Settings.
4. Input the following:

Field	Value
Is Active?	Check
Is Transactional?	Check
Blocking Keys Per Cycle Limit	1
Parallel Processor Limit	10
Records Per Blocking Key Limit	10
Is Platform Event Active?	Check
Is Asynchronous?	Uncheck
Post Merge Processor Apex Class Name	PostMergeProcessor

5. Click on save.

Step 2 – Adding the Blocking Key Process Request to the Toolbar

The actual Blocking Key Process Request section may not already be added to the toolbar. To do this, click on the All Tabs section (in the main toolbar). Select the Blocking Key Process Requests, which will now display.

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Step 3 – Create a Blocking Key Process Request

Note: The Blocking Key is determined at the Normalisation stage. It could be based on one or more fields. This document does not specify what these are as it differs widely from company to company. For the purposes of testing you could just use the email field (which will be assumed in this next step).

1. Navigate to Target Objects within clearMDM.
2. Select the appropriate Target Object and edit.
3. Within the normalisation settings ensure the Blocking Key Input 1 Field Name is set to email.
4. Set the Blocking Key Input field length to 40.
5. Click on save.
6. Navigate to the Object being used (Customers, Contacts etc).
7. Create a new record, ensuring the email field is populated.
8. Click on save.
9. Within clearMDM navigate to the Blocking Key Process Requests.
10. A BKPR with a status of pending will be displayed.
11. The BKPR will change status to completed.

This shows you how to check the BKPR is being generated correctly.

Step 4 – Create a Matched Record pair

1. Using the same record credentials as Step 4, create a new record.
2. Input the same email value.
3. Click on save.
4. Within clearMDM navigate to the Blocking Key Process Requests.
5. The same Blocking Key Value is displayed.
6. Once the BKPR is complete navigate back to the record.
7. The two records will have one as MDM status Merge Master and one as MDM status Merge Source.
8. The record that has become Merge Master would have been determined by rules already setup.

Step 5 – Clone a Blocking Key Process Request

Whilst testing, you might want to change values in the record and effectively rerun the MDM process. To do this, follow these steps:

1. Using the two records created in step 3 and 4, edit each record and remove the MDM status.
2. Ensure the Merge Master and Merge source are no longer displayed.
3. Make any amends that are required.

4. Save the records.
5. Within clearMDM navigate to the BKPR.
6. Click on the request for the Blocking key in question (this can be found in the record).
7. Click on Clone.
8. Change the Status to new.
9. Click on save.
10. The MDM process will be rerun.
11. The BKPR status will be set to complete.
12. Navigate back to the records in question.
13. The Match and Merge will be complete.

New Features

Is Isolated?

A new enhancement has been added to the Blocking Key Process Settings (located in Application Settings) called 'Is Isolated?'. If this checkbox is ticked and set to TRUE, a new Processor instance is created for each call to the BKPR Action, or direct insert to the BKPR Object. Enabling this setting increases performance at the cost of increased AsyncApexExecutions consumption.

Queueable limit

A change has been made so the processor now checks for the queueable limit and logs, which in turn avoids an exception.

Processor

Within Application Settings, Blocking Key Process Settings, there is now the ability to be able to set the BKPR to run up to 10 processors in parallel. Each processor executes in 2 phases with the Match, Merge and Synchronisation as phase 1 followed by Reparenting. Reparenting enables identified matched records, determined by the Blocking Key, that have transactions recorded to be updated to the Master Record. The Master Record then has all the transactional history from the Merge Source Record(s).

Concurrently

If the Blocking Key Process Request is run concurrently, only one will be processed and the other will be stopped.