

## Training – Reparenting Module

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This document provides initial training on the Reparenting 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, although for this specific module it would be advantageous to have experience of the Normalisation, Matching and Merging processes.

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## Reparenting Introduction

Reparenting is the method of taking information that has been stored against a record and uploading this to the Master record that has been created as part of the Match and Merge process. This isn't the contact information like email, address, telephone number etc, this information is more specific to the record in question, so for example it could be transactions.

For the purposes of this training module we will use transactions as an example.

Reparenting is a process that runs in parallel with the Match Merge and Synchronisation processes. The blocking Key Process Request allows for up to 10 processes to run in parallel. What this means is that if you have a large database to go through the clearMDM function, it does not wait until all records have been matched and merged before doing the reparenting.

The steps below will help understand how to setup the match rules and how reparenting works.

### Step 1 – Setting up the Reparenting Process

1. Navigate to Settings within clearMDM.
2. Select the Target Object Tab.
3. Select the Target Object this relates to and edit.
4. Navigate to the Reparenting Settings section.
5. Tick the Is Active? Checkbox.
6. Tick the Is Reset Active? Checkbox.
7. You then have the choice of selecting whether it should be invoked by one of the jobs. If reset active is checked, leave these blank.
8. Click on save.

The Reparenting settings have not been setup.

### Step 2 – Select the Child Object Types for Reparenting

1. Navigate to Settings within clearMDM.
2. Select the Data Sources Tab.
3. Select the Data Source this relates to and edit.
4. Navigate to the Child Object Relationships section.
5. From the list displayed, select the Child SObject Type(s) for reparenting.
6. In this example, select transactions.

7. Click on save.

## Step 3 – Setup two records for Matching and Reparenting.

Pre-requisite: All other clearMDM settings have been applied and the blocking key has been setup.

1. Within your record object (customer, contacts etc), create a new record.
2. Place a value in the field that will trigger the blocking key.
3. Click on save.
4. Add transactions to this record.
5. Click on save.
6. Create a second record with the same credentials but do not place the value in the field that will trigger the blocking key.
7. Click on save.
8. Add transactions to this record.
9. Click on save.
10. Edit the record and add the value in the field that will trigger the blocking key and match the records.

NOTE: At this point, when the matching occurs will depend upon how your settings have been applied and when the jobs are running. For the purposes of this exercise we will assume the Normalisation, Matching Merging jobs etc are triggered upon saving a record and after each one has run.

11. Within the Batch Job Runs tab, monitor when all the jobs have a status of completed.
12. Once complete, return to the Object in question and open the record(s).
13. Once will be the Merge Master, one will be the Merge Source.

NOTE: Which is the Master and Merge Source records will be determined by the rules that would have been setup for creating the Master Record.

14. All the transactions are displayed on the Master Record.

## New Features

### Recently Modified?

Within the Reparenting Settings section a new field has been added called 'Is Recently Modified?'. When this is ticked then Source Records are processed by the Reparenting Job only based upon the date range set in the Application Settings (Resent days Limit).

|                                    |                                     |
|------------------------------------|-------------------------------------|
| ▼ Reparenting Settings             |                                     |
| Is Active?                         | <input checked="" type="checkbox"/> |
| Is Today Modified?                 | <input type="checkbox"/>            |
| Is Invoked by Synchronisation Job? | <input type="checkbox"/>            |
| Is Invoked by Merge Job?           | <input type="checkbox"/>            |
| Is Reset Active?                   | <input checked="" type="checkbox"/> |
| Is Recently Modified?              | <input checked="" type="checkbox"/> |
| Is Invoked by Conversion Job?      | <input checked="" type="checkbox"/> |