# Training – Blocking Key Process Request Module

Document Version: v1.0

Date: 15th November 2018

|  |
| --- |
| 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 benficial to have gone through some of the other Training Modules to understand the Normalisation and Matching process. |

Table of Contents

[Training – Blocking Key Process Request Module 1](#_Toc530061232)

[Blocking Key Process Request Introduction 2](#_Toc530061233)

[Step 1 – Blocking Key Process Request Settings 2](#_Toc530061234)

[Step 2 – Adding the Blocking Key Process Request to the Toolbar 2](#_Toc530061235)

[Step 3 – Create a Blocking Key Process Request 3](#_Toc530061236)

[Step 4 – Create a Matched Record pair 3](#_Toc530061237)

[Step 5 – Clone a Blocking Key Process Request 3](#_Toc530061238)

# **Blocking Key Process Request Introduction**

The Blocking Key Process Request allows for integration with a 3rd party system outside of the Salesforce environment, that may well hold records (customer/contact) information for your Company. Effectively what this means is that if any information for a matched record is changed, the Blocking Key Process Request will send this information to the external system which in tun will create a realtime MDM environment.

The fields that trigger this update are pre-determined in the Data Services settings (please refer to the Data Services Training Module).

## **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 |

1. 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.

**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.

This is the end of the Blocking Key Process Request Training Module.