

Training – Individual Object Module

Author: clearMDM

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This document will provide initial training for the Individual Object Settings within clearMDM. It's intended to introduce how to setup Individual Object Settings 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

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Individual Object Introduction

The Individual Object was introduced into Salesforce to support GDPR (General Data Protection regulation), which means that companies retaining customer data need to obtain consent from their customers to be able to hold their data.

Article 6 of GDPR states data can only be processed under any one of the following reasons:

- Consent
- Contract
- Legal Obligation
- Vital Interests
- Public Task and Legitimate Interests

Within clearMDM there are specific settings which when set will ensure the Individual Object is updated to the Master Record, based upon the following factors:

1. Data Privacy Record Retention Policy.
2. Data Privacy Record Retention Date Field.

The steps below will help understand how to setup the Individual Object Settings within clearMDM.

Step 1 – Activate Data Protection Details in records

1. Within Salesforce click on Setup.
2. Navigate to Settings.
3. Select Company Settings.
4. Click on Data Protection and Privacy.
5. Tick the checkbox 'Make data protection details available in records.'
6. Save the change.

Step 2 – Navigate to Individual Object Settings within clearMDM.

1. Within clearMDM click on the MDM Settings tab.
2. Click on the Target Objects tab.
3. Edit the Target Object in question.
4. Scroll down to the Merge Settings section.

The two fields 'Data Privacy Record Retention Policy' and 'Data Privacy Record Retention Date Field' are displayed.

The two fields are drop downs where you can select one option from the list:

Data Privacy Record Retention Policy	Keep – The Master Record existing Individual Record population is retained. Newest – The newest Individual record in the group is related to the Master Record – based upon the selected date time field. Oldest – The Oldest Individual record in the group is retained based upon the selected date time field.
Data Privacy Record Retention Date Field	Birth Date Created Date Last Modified Date Last Viewed Date System ModStamp

Step 3 – Select the values for the Individual Object fields.

1. Click on the Data Privacy Record Retention Policy field.
2. Select one of the options available.
3. Click on the Data Privacy Record Retention Date field.
4. Select one of the options available.
5. Click on Save.

The Individual Object settings have been setup.