

Training – Setting up multiple Target Objects per Salesforce Object Module

Document Version: v1.2
Product Version: 9.81
Updated: 26th May 2026

This document will provide initial training for the setup of multiple target objects referencing the same Salesforce Object. 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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Multiple Target Objects referencing the same Salesforce Object

Introduction

If you have a Target Object which has more than one record type, for example, in Accounts you may have Customers and Suppliers, when creating a Master Record, you may not want to match and merge the record types together.

By setting up a separate Target Object per record type you can specify a different Blocking Key for each one so that when the jobs are run, the records will not be matched and merged as the Blocking Key will not be the same.

What this also means is that you can setup Attribute Groups (merge rules) for individual record types if you do not want the same merge rules to apply, or you can apply to all record types if you wish.

To do this, follow the steps below:

Use Case 1 – Adding the settings within clearMDM

This example is based upon SObject Type Accounts having a specific record type of Supplier.

1. Navigate to Settings within clearMDM.
2. Click on Add.
3. Enter a name for the Target Object – in this example Supplier RT.
4. Select the SObject Type – Accounts.
5. At this point, the Record Type field will be enabled if you have more than one record type active for this SObject.
6. Click the 'Is Active' checkbox for Normalisation Settings.
7. Complete the settings as per the requirement for the Blocking Key. In this example we are going to use the Account Name:

▼ Normalisation Settings	
Is Active?	<input checked="" type="checkbox"/>
Auto Normalise Records?	<input type="checkbox"/>
Is Normalised Field Name	Is Normalised?
Check Normalisation State On Save?	<input type="checkbox"/>
Last Normalised Date Field Name	Last Normalised Date
Blocking Key Group Field Name	Blocking Key Group
Blocking Key Input 1 Length	10
Blocking Key Input 2 Length	-- Select --
Blocking Key Input 3 Length	-- Select --
Blocking Key Complete Strict?	<input type="checkbox"/>
ISO Country Code Field Name	ISO Country Code
Normalise on Create?	<input checked="" type="checkbox"/>
Auto Normalise Recently Modified?	<input type="checkbox"/>
Is Recently Modified?	<input checked="" type="checkbox"/>
Normalise on Save Field Name	Normalise on Save?
Blocking Key Field Name	Blocking Key
Blocking Key Input 1 Field Name	Account Name
Blocking Key Input 2 Field Name	-- Select --
Blocking Key Input 3 Field Name	-- Select --
Is Blocking Key Complete Field Name	Is Blocking Key Complete?
Blocking Key Input Padding?	<input checked="" type="checkbox"/>

8. Complete the remaining settings as per the required setup.
9. Ensure the correct Record Type is selected in the Merge Settings and Conversion Settings (Default Record Type field).
10. Click on save.

▼ Data Quality Settings	
Is Active?	<input checked="" type="checkbox"/>
Last Quality Check Date Field Name	Last Quality Check Date
▼ Synchronisation Settings	
Is Active?	<input checked="" type="checkbox"/>
Is Recently Modified?	<input checked="" type="checkbox"/>
Last Synchronisation Date Field Name	Last Synchronisation Date
Is Invoked by Normalisation Job?	<input type="checkbox"/>
▼ Matching Settings	
Is Active?	<input checked="" type="checkbox"/>
Blocking Key Match Length	10
Check for Matches on Record Creation?	<input type="checkbox"/>
Matching Check On Save Field Name	Matching on Save?
Matching Check Override Field Name	-- Select --
Matching Manager Apex Class Name	StandardMatchingManager
Is Deterministic Rules First?	<input checked="" type="checkbox"/>
Is Activate On Record Creation?	<input type="checkbox"/>
Is Invoked by Normalisation Job?	<input checked="" type="checkbox"/>
Date Matching Tolerance	0
Auto Adjust Blocking Key Match Value?	<input type="checkbox"/>
Fuzzy Match Threshold %	55.0
Auto Accept Match Threshold %	75.0
Auto Accept Matches?	<input checked="" type="checkbox"/>
Is Internal Matching Active?	<input checked="" type="checkbox"/>
Is Update Unique BKMV Records?	<input checked="" type="checkbox"/>
Is Recently Modified?	<input checked="" type="checkbox"/>
Is Invoked by Synchronisation Job?	<input checked="" type="checkbox"/>
▼ Merge Settings	
Is Active?	<input checked="" type="checkbox"/>
Last Merged Date Field Name	Last Merged Date
Default Record Type	Supplier
Create Master for New Groups?	<input type="checkbox"/>
Is Attribute Group Only?	<input checked="" type="checkbox"/>
Data Privacy Record Retention Policy	Oldest
Merge Master Priority Field Name	-- Select --
Reset Identifier Target Fields?	<input type="checkbox"/>
Is Invoked by Matching Job?	<input checked="" type="checkbox"/>
MDM Status Field Name	MDM Status
Ignore Partial Groups?	<input type="checkbox"/>
Master Field Map Field Name	System Master Field Map
Clone Master for New Groups?	<input type="checkbox"/>
Data Privacy Record Retention Date Field	Birth Date
Master Priority 2nd Factor Field Name	-- Select --
Is Merge Recently Modified MRP?	<input type="checkbox"/>
▼ Conversion Settings	
Is Active?	<input checked="" type="checkbox"/>
Is Conversion Master Field Name	Is Conversion Master?
Default Record Type	Supplier
Is Invoked by Merge Job?	<input type="checkbox"/>
MDM Status Field Name	MDM Status
Last Conversion Date Field Name	Last Conversion Date
Is Invoked by Matching Job?	<input checked="" type="checkbox"/>
▼ Reparenting Settings	
Is Active?	<input checked="" type="checkbox"/>
Is Today Modified?	<input type="checkbox"/>
Is Invoked by Synchronisation Job?	<input type="checkbox"/>
Is Reset Active?	<input checked="" type="checkbox"/>
Is Recently Modified?	<input type="checkbox"/>
Is Invoked by Conversion Job?	<input type="checkbox"/>

Note: Once the Target Object is setup, you cannot edit the Name, SObject Type or Record Type fields. If any of these fields need amending you will need to delete the Target Object and re-input.

Use Case 2 – Setup the Data Source Settings for the Target Object

Once the Target Object has been setup, the Data Source will need setting up for that Target Object Type.

1. Navigate to Settings within clearMDM.
2. Click on the Data Sources tab.
3. Click on Add Data Source.
4. Select the 'Is Active' checkbox.
5. Enter a name, in this example 'Suppliers'.
6. Click on the Target SObject Type dropdown and you will see the Target Object created in use case one.
7. Select this and complete the remaining settings as required.

Data Source Settings

Is Active? Is External?

Name

Target SObject Type MDM Status Field Name

Is Active for Synchronisation? Reset Reparenting Flag?

Is Active For Reparenting Field Name Is Partition?

▼ Matching Settings

Is Active? Auto Match Records?

Last Matching Date Field Name Is Active For Matching Field Name

Master Records Active for Matching? Check Matching State On Save?

Master Record Flag Field Name Reset Source Record Matching Flag?

▼ Merge Settings

Is Active? Master Record Id Source Field Name

Is Transient Mode Enabled? Identifier Source Field Name

Identifier Target Field Name

▼ Source To Target Field Settings

Define mappings from Source Object fields to the Target Object.

Target Field	Data Type	Match Type	Source Field	Cross Field Matching	Manual Field Merge Priority	Merge Priority
Account Name	Text	Key		-- Select -- Account Description Account Fax Account Name	15	<input type="text" value="10"/>
Account Phone	Text	Ignore		-- Select -- Account Description Account Fax Account Name	15	<input type="text" value="10"/>

8. Click on save.
9. The Data Source settings have been setup.

Use Case 3 – Test the correct Blocking Key is produced for the Record Type

1. Navigate to Accounts in Salesforce.
2. Click on New.
3. Select the Record Type Supplier (in this example).
4. Enter the Supplier details.
5. Click on save.

In this example the Blocking Key is the Account Name which has been correctly produced:

Normalise on Save? Matching on Save?

▼ MDM Normalisation Information

Is Normalised? <input checked="" type="checkbox"/>	Blocking Key Group <input type="checkbox"/> MRJ
Is Blocking Key Complete? <input checked="" type="checkbox"/>	Blocking Key <input type="checkbox"/> MRJONES__
Last Normalised Date <input type="checkbox"/> 28/02/2020 08:52	Normalised Company Name <input type="checkbox"/>
	ISO Country Code <input type="checkbox"/>

If you want to use a different Blocking Key for any other record types within the SObject Type Account, then you create the Target Object and leave the Record Type blank. So, in our example, we have a Blocking Key of Account Phone for any other record types.

Target Object

Name SObjectType Record Type

▼ Normalisation Settings

Is Active? <input checked="" type="checkbox"/>	Normalise on Create? <input checked="" type="checkbox"/>
Auto Normalise Records? <input type="checkbox"/>	Auto Normalise Recently Modified? <input type="checkbox"/>
Is Normalised Field Name <input type="text" value="Is Normalised?"/>	Is Recently Modified? <input checked="" type="checkbox"/>
Check Normalisation State On Save? <input type="checkbox"/>	Normalise on Save Field Name <input type="text" value="Normalise on Save?"/>
Last Normalised Date Field Name <input type="text" value="Last Normalised Date"/>	Blocking Key Field Name <input type="text" value="Blocking Key"/>
Blocking Key Group Field Name <input type="text" value="Blocking Key Group"/>	Blocking Key Input 1 Field Name <input type="text" value="Account Phone"/>
Blocking Key Input 1 Length <input type="text" value="10"/>	Blocking Key Input 2 Field Name <input type="text" value="-- Select --"/>
Blocking Key Input 2 Length <input type="text" value="-- Select --"/>	Blocking Key Input 3 Field Name <input type="text" value="-- Select --"/>
Blocking Key Input 3 Length <input type="text" value="-- Select --"/>	Is Blocking Key Complete Field Name <input type="text" value="Is Blocking Key Complete?"/>
Blocking Key Complete Strict? <input type="checkbox"/>	Blocking Key Input Padding? <input checked="" type="checkbox"/>
ISO Country Code Field Name <input type="text" value="ISO Country Code"/>	

Creating a new record within Accounts which is not a Supplier will create the correct Blocking Key:

In this example, the phone has been used:

▼ MDM Normalisation Information

Is Normalised? <input checked="" type="checkbox"/>	Blocking Key Group <input type="checkbox"/> +44
Is Blocking Key Complete? <input checked="" type="checkbox"/>	Blocking Key <input type="checkbox"/> +447777777
Last Normalised Date <input type="checkbox"/> 28/02/2020 08:58	Normalised Company Name <input type="checkbox"/>
	ISO Country Code <input type="checkbox"/>

This means when the matching, merging jobs are run, the two records that have been created will not be matched as the Blocking Key is different.