### Training – Setting up multiple Target Objects per Salesforce Object Module

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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 <u>clearMDM.com</u>

#### **Table of Contents**

Training – Setting up multiple Target Objects per Salesforce Object Module	1
Multiple Target Objects referencing the same Salesforce Object	2
Use Case 1 – Adding the settings within clearMDM	2
Use Case 2 – Setup the Data Source Settings for the Target Object	4
Use Case 3 – Test the correct Blocking Key is produced for the Record Type	5

#### 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:

<ul> <li>Normalisation Settings</li> </ul>				
Is Active?		Normalise on Create?		
Auto Normalise Records?		Auto Normalise Recently Modified?		
Is Normalised Field Name	Is Normalised? ~	Is Recently Modified?		
Check Normalisation State On Save?		Normalise on Save Field Name	Normalise on Save?	$\sim$
Last Normalised Date Field Name	Last Normalised Date ~	Blocking Key Field Name	Blocking Key	$\sim$
Blocking Key Group Field Name	Blocking Key Group V	Blocking Key Input 1 Field Name	Account Name	$\sim$
Blocking Key Input 1 Length	10 ~	Blocking Key Input 2 Field Name	Select	$\sim$
Blocking Key Input 2 Length	Select V	Blocking Key Input 3 Field Name	Select	$\sim$
Blocking Key Input 3 Length	Select V	Is Blocking Key Complete Field Name	Is Blocking Key Complete?	$\sim$
Blocking Key Complete Strict?		Blocking Key Input Padding?		
ISO Country Code Field Name	ISO Country Code V			

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

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Is Active For Reparenting First Name Is Active for Reparenting (`) Reset Reparenting First Name   Is Puttition?	Is Active for	or Synchronisation?								
Is Partition?       Is Partition?         * Matching Settings       Is Active ?         Last Matching Date       Is Active?         Last Matching Date       Is Active?         Last Matching Date       Is Active?         Master Records Fleid Name       Is Active?         Master Records Fleid Name       Is Active?         Master Records Fleid Name       Is Active?         Master Record Flag Fleid Name       Is Active?         Master Record Flag Fleid Name       Is Active?         Is Active?       Is Master Record?         Master Record Flag Fleid Name       Is Active?         Is Active?       Is Master Record Id Source Fleid Name         Is Active?       Is Master Record Id Source Fleid Name         Is Translet Mode Enabled?       Identifier Source Fleid Name         Is Translet Mode Enabled?       Identifier Source Fleid Name         Source To Target Fleid Settings       Econneroe Customer Id         * Source To Target Fleid Settings       Identifier Source Fleid Name         Perfere mappings from Source Object Reds to In Target Object.       Identifier Target Fleid Name         Account Name       Text       Reget Clam         Account Rame       Key       In Corona Flag         Account Pane       Igore       In Corona Flag <td>Is Active For Repa</td> <td>arenting Field Name</td> <td>Is Active for Reparenting</td> <td>n V</td> <td></td> <td>Reset Reparenting</td> <td>Flag?</td> <td></td>	Is Active For Repa	arenting Field Name	Is Active for Reparenting	n V		Reset Reparenting	Flag?			
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Last Matching Date     Is Active For Matching?       Master Record Active for Matching Date     Chee For Matching State On Save?       Master Record Active for Matching?     Chee For Matching State On Save?       Master Record File State Record Active for Matching?     Reset Source Record Matching File?       Master Record Active for Matching?     Master Record I discription       Master Record I discription     In Active?       In Active?     Master Record I discription       In Cative?     In Cative?       In Cative?     In Cative?       In Cative?     In Cative?       In Cative?     In Cative?       In Cative?     In Cative? <td></td> <td>Is Active?</td> <td></td> <td></td> <td></td> <td>Auto Match Rec</td> <td>ords?</td> <td></td>		Is Active?				Auto Match Rec	ords?			
Master Records Active for Matching***         Check Matching State On Save?         Cell           Master Record Flag Field Name         Is Active?         Rest Source Record Matching Flag?         Cell           * Marge Settings         Is Active?         Master Record I Source Field Name         Commerce Customer Id            * In Carsient Mode Enabled?         Is Active?         Master Record I Source Field Name         Econmerce Customer Id            * Source To Target Field Name         Commerce Customer Id          Econmerce Customer Id          Econmerce Customer Id            * Source To Target Field Source Field Source Field Name         Field Name         Master Record I Source Source I del         Econmerce Customer Id            * Source To Target Field Source I del         Econmerce Customer Id          Econmerce Customer Id            * Cource To Target Field Source Field Sourc	Last Matchin	ing Date Field Name	Last Matching Date	$\sim$		Is Active For Matching Field	Name Is Active For Matching?	$\checkmark$		
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	Account Phone T	Text	Ignore		Select Account Description Account Fax Account Name	× 15		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? 🥥 🏹	Blocking Key Group 🥝 MRJ
Is Blocking Key Complete? 🥑 🏹	Blocking Key 🧿 MRJONES
Last Normalised Date 🥝 28/02/2020 08:52	Normalised Company Name 🥝

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	Accounts		
SObjectType	Account 🗸	Record Type	- Select - V
▼ Normalisation Settings			
Is Active?		Normalise on Create?	
Auto Normalise Records?		Auto Normalise Recently Modified?	
Is Normalised Field Name	Is Normalised?	Is Recently Modified?	
Check Normalisation State On Save?		Normalise on Save Field Name	Normalise on Save?
Last Normalised Date Field Name	Last Normalised Date $\sim$	Blocking Key Field Name	Blocking Key 🗸
Blocking Key Group Field Name	Blocking Key Group 🗸 🗸	Blocking Key Input 1 Field Name	Account Phone ~
Blocking Key Input 1 Length	10 ~	Blocking Key Input 2 Field Name	Select V
Blocking Key Input 2 Length	Select V	Blocking Key Input 3 Field Name	Select V
Blocking Key Input 3 Length	Select V	Is Blocking Key Complete Field Name	Is Blocking Key Complete? V
Blocking Key Complete Strict?		Blocking Key Input Padding?	
ISO Country Code Field Name	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				
ls Normalised? 🧿 🇹	Blocking Key Group 🥝 +44			
Is Blocking Key Complete? 🧿 🇹	Blocking Key 🥥 +447777777			
Last Normalised Date 😑 28/02/2020 08:58	Normalised Company Name 🥥			
	ISO Country Code 😳			

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.