

## Training – Potential Matches Module

Author: clearMDM

Document Version: v1.0

Product Version: v6.43

Date: October 2023

Potential Matches can be identified when new Accounts, Contacts or Leads are created. This document goes through how to configure the Page Layout to display the Potential Matches component and how to Match and Merge records using this feature.

### Table of Contents

<b>Training – Potential Matches Module</b> .....	<b>1</b>
<b>Potential Matches Introduction</b> .....	<b>2</b>
<b>Configuration</b> .....	<b>2</b>
<b>Test Scenario</b> .....	<b>3</b>

## Potential Matches Introduction

When creating new Records within Salesforce, clearMDM notifies whether there are any potential records that are matched with the information entered, by displaying in the Potential Matches Component. You can then view the Matches and decide whether they are indeed the same Record that is being created.

A list of Potential Matches are displayed and you can specify one or all as Matched and therefore require Merging into one Master Record. You can choose which record will become the Master Record from the following 3 options:

- Let clearMDM Decide
- This Record
- Choose a Matched Record

The Potential Matches feature allows for a quick and easy way to Match and Merge existing records.

## Configuration

To view the Potential Matches Component within the Record Pages, the following Configuration steps need to be followed:

1. Navigate to Lightning App Builder (Setup Menu).
2. Edit the Lightning Page you want to add the Component to.
3. Add the Flow Component Potential Matches to the page, below Attribute Group Lineage.
4. Create a new Component Visibility Filter:
  - a. Record Field = MDM Status
  - b. Operator = Not Equal
  - c. Value = Merge Source
5. Save the Changes.

This will display the Potential Matches Component on the selected Record Page where the MDM Status is not Merge Source, i.e. the losing or child records after Matching and Merging.

To provide access to Users, the following will need applying:

1. Add Permission Sets 'MDM User', 'MDM Manual Merge' and 'MDM Account all Fields' to the User.
2. Add the Permissions 'Run Flows' and 'Lightning Experience' to the Users Profile.

## Test Scenario

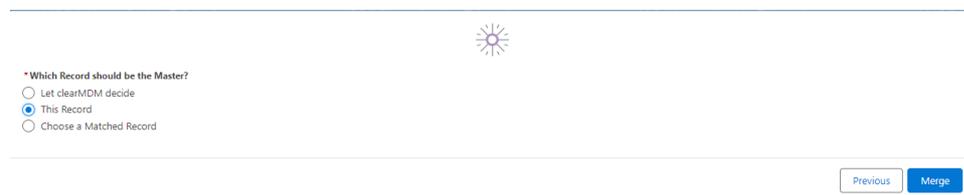
Follow these steps to Match and Merge Records using the Potential Matches Component:

### Test Scenario – Account Record Potential Matches

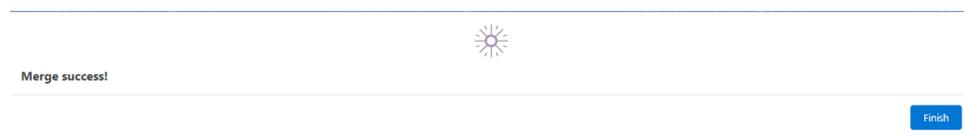
- Create a new Account entering the Name, Email and Mailing Address Information.
- Create a Second Account entering the same details.
- The newly created Record will display the Potential Matches Component.



- Click on the View Matches button.
- The next step shows the Potential Matches, click on the checkbox and select Next.
- The next step allows you to select which Record should become the Master.



- Select 'This Record' and click on the Merge Button.
- Once complete, a Merge Success message will be displayed.



- Click on the Finish Button.

This record has now become the Master Record, and displays the Attribute Group Lineage for the Merge Results.

# CLEARMDM

## Attribute Group Lineage

Attribute Group	Timestamp	Record Name	Field	Value
Attribute Groups				
Home Phone				
Customer Name				
Mailing Address				