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Training – MDM Address and Email Data Services Connector Module

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Document Version: v1.1
Data Services Version: v1.4
Date: December 2023

MDM Data Services provides a selection of connectors for global providers, to enable the quality and validity of Addresses and Emails to be verified. The Data Services Package comes as a separate Installation (usage costs do apply). This document explains how to setup the configuration after installation and provides example test scenarios.

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MDM Data Services Introduction

Addresses

Within Records, e.g Account, there is the ability to be able to record Address Information which could be a Mailing or Billing Address. The Data Services Package will send address field details via a Data Service Callout to global address verification providers, and a response will be sent back to validate the information provided.

The Address is then indicated as Valid or not, and a quality value is returned. These values are Excellent through to Bad and are automatically populated in the Address Quality field.

Email

As well as Addresses, there is also the ability, following the same process, to validate Email addresses.

For these processes to occur, once the MDM Data Services Package has been installed, the following configuration needs setting up.

Configuration

Users

The MDM Data Services User Permission set needs assigning to all users that will be using this service.

Page Layouts

The following fields will need adding to the Page Layouts for the Objects (Accounts, Contacts, PersonAccounts or Leads).

- Create a new Section in the Page Layout and name 'MDM Data Services'.
- Within this section, add the fields 'Processing Priority' and 'Last Data Services Update Date'.
- Either in this section, or with the Address fields, add the following 'Is Valid Address?', 'Address Quality' and 'Last Address Cleanse Date'.
- Ensure 'Is Active for Update?' is displayed in the MDM Information Section.

- With the email fields, add the following 'Last Email Cleanse Date', 'Is Valid Email?', 'Email is Disposable?', 'Email is System Mailbox?'.

MDM Settings – Data Services

Within the MDM Settings in clearMDM, a new Data Service needs setting up. Click on the 'Add Data Service' button and enter the following details:

Data Services Settings - Address

- Is Insert Active? = checked
- Is Transactional? = checked
- Is Isolated Processor? = checked
- Is Update Active? = checked
- Name = Address High Priority
- Connector Apex Class Name (we will provide this information, please get in touch)
- Filter Field Name = Processing Priority
- Filter Field Value = High
- Is Active for Update Field Name = Is Active for Update?
- Last Update Date Field Name = Last Data Services Update Date
- Is Transactional Callout? = checked
- Is isolated Callout Processor = checked

Fields

In this section, the fields that require change monitoring for the Data Service are added, so for example all Billing Address fields including the field 'Processing Priority'.

Data Services Settings - Email

- Is Insert Active? = checked
- Is Transactional? = checked
- Is Isolated Processor? = checked
- Is Update Active? = checked
- Name =Email High Priority
- Connector Apex Class Name (we will provide this information, please get in touch)
- Filter Field Name = Processing Priority
- Filter Field Value = High
- Is Active for Update Field Name = Is Active for Update?
- Last Update Date Field Name = Last Data Services Update Date
- Is Transactional Callout? = checked

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- Is isolated Callout Processor = checked

Fields

In this section, the fields that require change monitoring for the Data Service are added, so for example 'Email' including the field 'Processing Priority'.

Normalise, Match and Merge

For records to Match and Merge, they need to be normalised first which creates a Blocking Key. The Blocking Key is the first step in the matching process. The Data Service Connectors can be configured to do one of the following:

- Normalise
- Match and Merge
- Normalise, Match and Merge

To do this, follow these steps:

1. Click on Setup.
2. Under Custom Code, select Custom Metadata Types.
3. Select Manage Records against Data Service Connector.
4. Edit the Data Service Connector you want to set the Post Processing Action for.
5. In the Response Information section, select the Post Processing Action.
6. Click on Save.

Normalise

If Normalise is set as the Post Processing Action, then when records are created, the Blocking Key will be populated, based upon the Target Object settings. The Match and Merge clearMDM jobs will then process as configured.

Match and Merge

If Match and Merge is set as the Post Processing Action, the records when created will need the Blocking Key set. This is done in the MDM Settings for the Target Object. Once the record is created, a Blocking Key Process Request will be generated. This will look for matched records and merge dependent upon the MDM settings.

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Normalise Match and Merge

If Normalise, Match and Merge is set as the Post Processing Action, then the Blocking Key will be created, the Blocking Key Process and records will be matched and merged.

Test Scenario 1

Follow these steps to Validate and qualify a Billing Address within an Account Record:

Test Scenario – Valid Billing Address

1. Create a new Account entering the details including a valid Billing Address.
2. Ensure the 'Processing Priority' field is set to 'High'.
3. Ensure the 'Is Active for Update?' checkbox is ticked.
4. Click on Save.

The 'Is Valid Billing Address?' checkbox will either be ticked or unticked depending upon the 'Billing Address Quality' value. The 'Last Billing Address Cleanse Date' field will also be timestamped.

Where an address is valid, but not all information has been input, e.g. State/Province, this value will be returned and populated.

The processing of the Address cleanse can also be monitored in the Data Service Update Requests Tab and the Data Service Callouts Tab. If the result is not as expected, the Audit Log Entry will provide further information.

Test Scenario 2

Follow these steps to Validate and qualify an Email within a Contact Record:

1. Create a new Contact entering the details including a valid email.
2. Ensure the 'Processing Priority' field is set to 'High'.
3. Ensure the 'Is Active for Update?' checkbox is ticked.
4. Click on Save.

The 'Is Valid Email? Checkbox will either be ticked or unticked depending upon the response from the Data Service. The 'Last Email Cleanse Date' field will also be timestamped.