

Product Overview

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CLEARMDM
ENTERPRISE-GRADE MASTER DATA MANAGEMENT FOR SALESFORCE*

STANDARDISE MATCH MERGE 360° VIEW

APP Enterprise & Up No Limits

clearMDM
Enterprise-Grade Master Data Management for Salesforce
★★★★★ (No Rating)
Paid - *Details below*

OVERVIEW DETAILS REVIEWS PROVIDER Save Get It Now

App by Audit9

- 100% native Master Data Management solution
- Deliver a Clear 360-degree View for Standard & Custom Objects
- Manage Duplicate Data with Record Lifecycle Automation & Point-of-entry Protection
- Match & Merge records integrated from External Sources

RELEASED
PRICING

CLEAR MDM Dashboard Preview

Current Match Ranking by Target Object

Target Object	Match Score
Account	High
Contact	Medium
Lead	Low

Match Activity by MDM Operation by Month

Month	Match Activity
Jan	High
Feb	Medium
Mar	Low

Match Details

Match ID	Source	Target	Status
1	Account	Contact	Matched
2	Contact	Lead	Matched

Content

- Master Data Management Challenges
- clearMDM – Enterprise-grade MDM Solution
- Key Concepts
- Business Benefits
- Product Demo

Master Data Management Challenges

- **Single Point of Reference**
 - Disparate business operations across the back-office to front-office lifecycle have a different view of the same record (Customer, Product etc.).
 - A consolidated view (including interactions and activity) across business divisions can be complex and time consuming to establish; different stakeholders, technologies and data governance standards are contributory factors.
- **Traceability & Ownership**
 - Cross-system relationships (linkages) between records can be difficult to maintain; solutions must be lifecycle-based not adhoc.
 - Record ownership (Authoritative Source) must be clear and enforceable; business rules will determine the behaviour of consuming systems. End-user experience is a key success factor.
- **Duplicate Prevention**
 - Point-of-entry controls should prevent the creation of duplicate records across all business systems; this may require transactional data integrations to be introduced or the implementation of an MDM hub (with a global view).
- **Data Stewarding**
 - MDM is a process-centric activity; procedures and practices must be implemented for data management, quality and governance. The Data Steward role is required to manage such processes and to drive continual improvement.

clearMDM – Enterprise-grade MDM Solution

- **Single Point of Reference**
 - clearMDM provides flexible record matching and merge configurations with support for internal data management and external data consolidation use cases.
 - A key product function is the 360° view (of the Customer/Supplier/Product..); supporting features include transactional data consolidation and aggregation at the master record level.
- **Traceability & Ownership**
 - MDM operations enable record/system identifiers to be consolidated into fields on the master record. Alternatively lookup relationships can be established to enable display of source record related lists on the master record view.
- **Duplicate Prevention**
 - 2 models of point-of-entry (POE) protection are supported. The active model enforces Search-before-Create avoiding time wasted on duplicate record data entry. The passive model applies the matching configuration to new or existing records at the point-of-save.
- **Data Stewarding**
 - clearMDM has been developed in consultation with Data Stewards to deliver a configurable set of end-to-end data stewarding lifecycles. Product features work in concert with standard platform process automation, notification and reporting capabilities to deliver seamless native processes.

clearMDM – Enterprise-grade MDM Solution

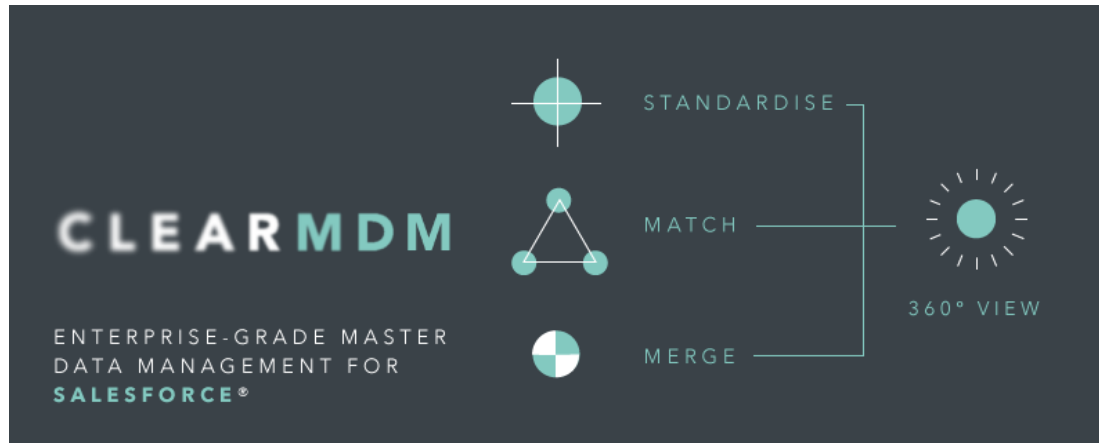
- **100% Native Master Data Management Solution**
 - Architected specifically for the Salesforce platform.
 - No off-platform data processing.
- **Implementation Models**
 - Salesforce Internal MDM – Accounts, Contacts etc.
 - MDM Hub - External data Consolidation.
- **Enterprise-grade Solution**
 - Scalable, Flexible and Secure.
 - Simplified Setup & Configuration.
 - No Data Storage Overhead.
 - No Custom Code Required.
- **Designed by a Salesforce Certified Technical Architect**
 - To deliver high-scalability and performance.
 - To exploit the potential of the very latest platform enhancements.

Key Concepts – Configuration

- **Target Object.** A compatible object that is defined as the target for MDM operations and where Master Records will be created or updated.
- **Data Source.** A compatible object that provides data to MDM operations. Partition data sources enable a single object to support multiple data sources each with distinct configurations.
- **Master Record.** The Master Record is the output of the Conversion and Merge MDM operations and is optionally related to the underlying Source Records via relationship field or simply through the concatenation of record identifiers into a field on the Master Record.
- **Source Record.** Source Records are the input to MDM operations and may be related to a Master Record. Source Records can be retained or deleted.

A broad range of Standard Objects (including Person Accounts) are supported as both Target Objects and Data Sources. Custom Objects are also supported.

Key Concepts – MDM Operations



- **Standardisation** (United Kingdom/Britain => UK)
- **Matching** (Flexible matching rules; fuzzy logic / cross-object)
- **Merge** (Source Records=>Master Record – linkages maintained)
- **360-degree View** (Re-parent transactions, calculate rollups)

MDM operations support manual, batch, Process Builder or REST API invocation. Standardisation and Matching can be applied to record save/create operations.

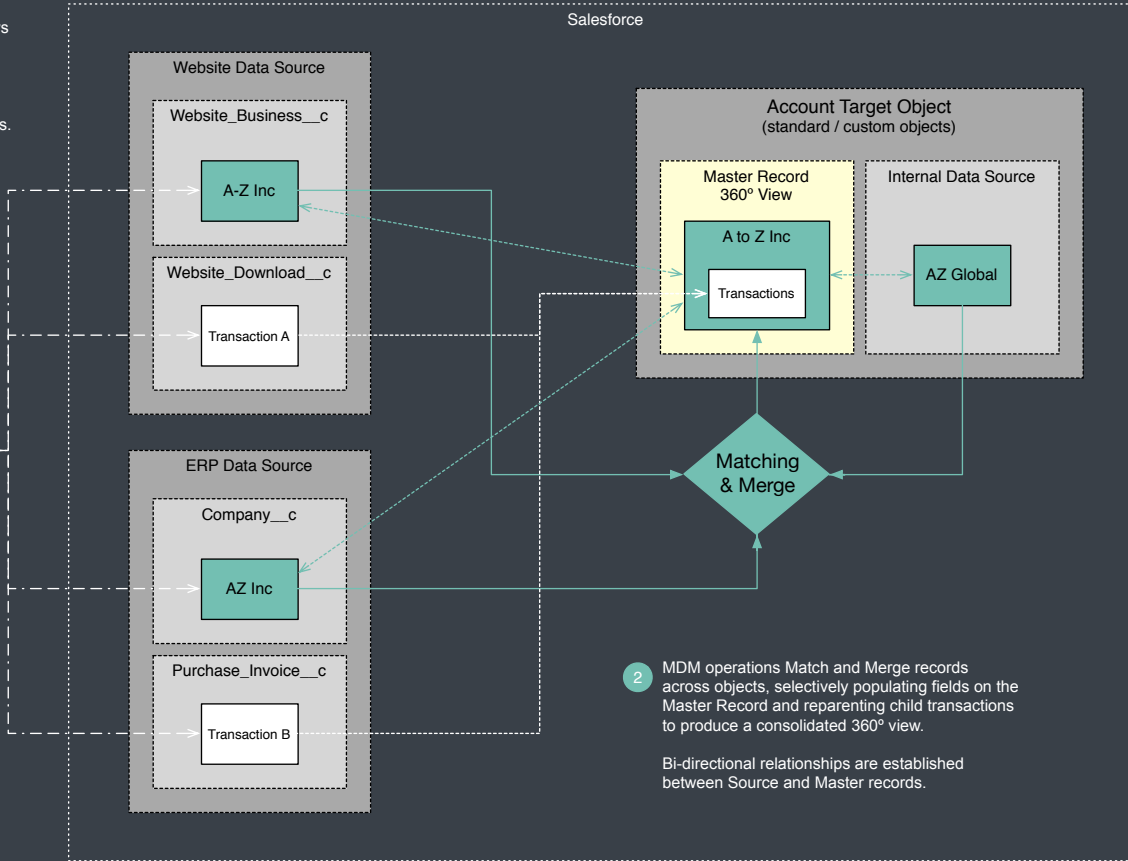
Exemplar Use Case - External Data Consolidation

Implementation Model 1 - External Data Consolidation

1 Data Integration flows transit master data records plus transactions to the MDM Hub in their native data structures.

Salesforce

Data Integration Layer



2 MDM operations Match and Merge records across objects, selectively populating fields on the Master Record and reparenting child transactions to produce a consolidated 360° view.

Bi-directional relationships are established between Source and Master records.

External Data Consolidation Notes :

- Data is integrated using native data structures to provide future extensibility.
- External system data is transient and can be deleted following MDM processing.
- Identifiers from external systems can be populated on the Master Record.
- Source records can be related to the Master Record via Lookup relationship field.

Business Benefits

- **Operational Efficiency.** One Master Record in the CRM layer per Customer or Business – abstracts duplicated data in external systems.
- **360-degree Insight.** Transactional Data can be consolidated at the Master Record level and aggregations performed.
- **Traceability.** Relationships between Source Records and the Master are maintained across MDM operations.
- **Data Management.** Duplicate management is an administrative issue not a business concern.
- **Data Quality.** Point-of-entry protection. Quality reporting and analytics.
- **Implementation Cost.** Straightforward to configure and maintain, validated implementation model. No code required.