

Match and Merge for Salesforce Data

Information Asset supports the master data management concepts of match and merge for Salesforce® data, including:

- Identifying potential duplicate standard and custom object records based on multiple fields and exact or fuzzy matching
- Approval processes for confirming match and merge suggestions
- Reports and dashboards for duplicate and other data quality issue reporting

Figure 1 shows potential duplicates for a PreAccount record. Duplicates have been identified based on fuzzy matching of name and exact matching of address and phone number.

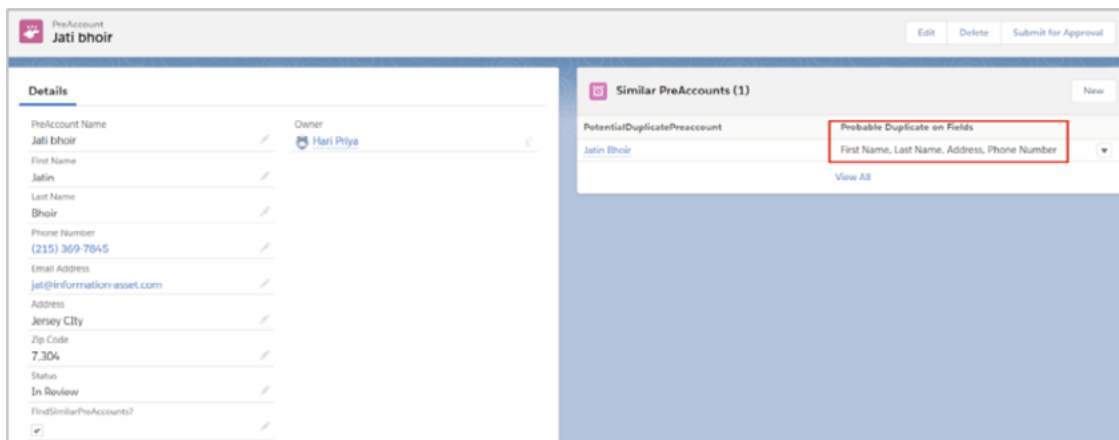


Figure 1: Custom Object Record Potential Duplicates

Benefits

This solution provides important benefits:

- Automate the capture and resolution of duplicate records for your Salesforce standard and custom objects.
- Identify the golden record for Account, Contact, and more, and achieve a single-view of customer.

Next Steps

If you'd like to explore how to build custom Salesforce applications for data-enabled digital transformation, please contact sales@information-asset.com. For more information, please visit our website, www.information-asset.com.