



07 May, 2024

# Comprehensive Overview of Data Survivorship in MDM SaaS

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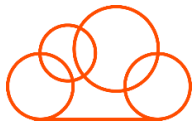
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- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our [Success Portal](#) - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

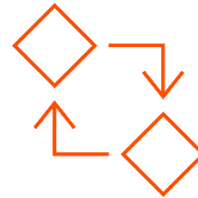
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POC Customers**



**Enriched Customer  
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**Product  
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and Weekly  
Expert Sessions**



**Informatica  
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## Documentation

<https://docs.informatica.com>



## University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

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# Data Survivorship in MDM SaaS



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# Agenda

1 Overview of Survivorship

3 Configuration

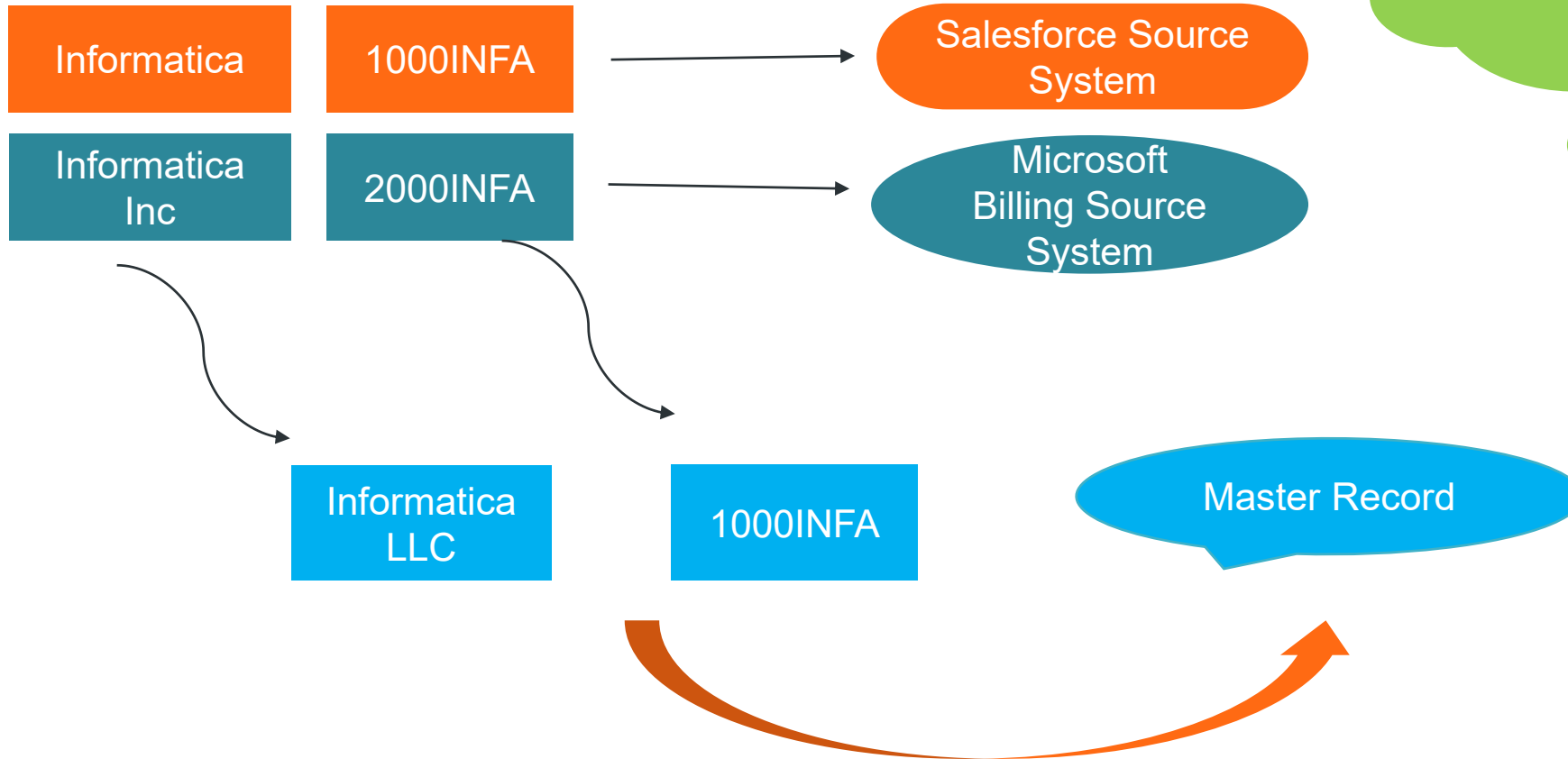
5 Block Survivorship & Deduplication

2 Key Concepts

4 Behavior of API

6 Questions ?

# Why Survivorship???



# Types of Survivorship

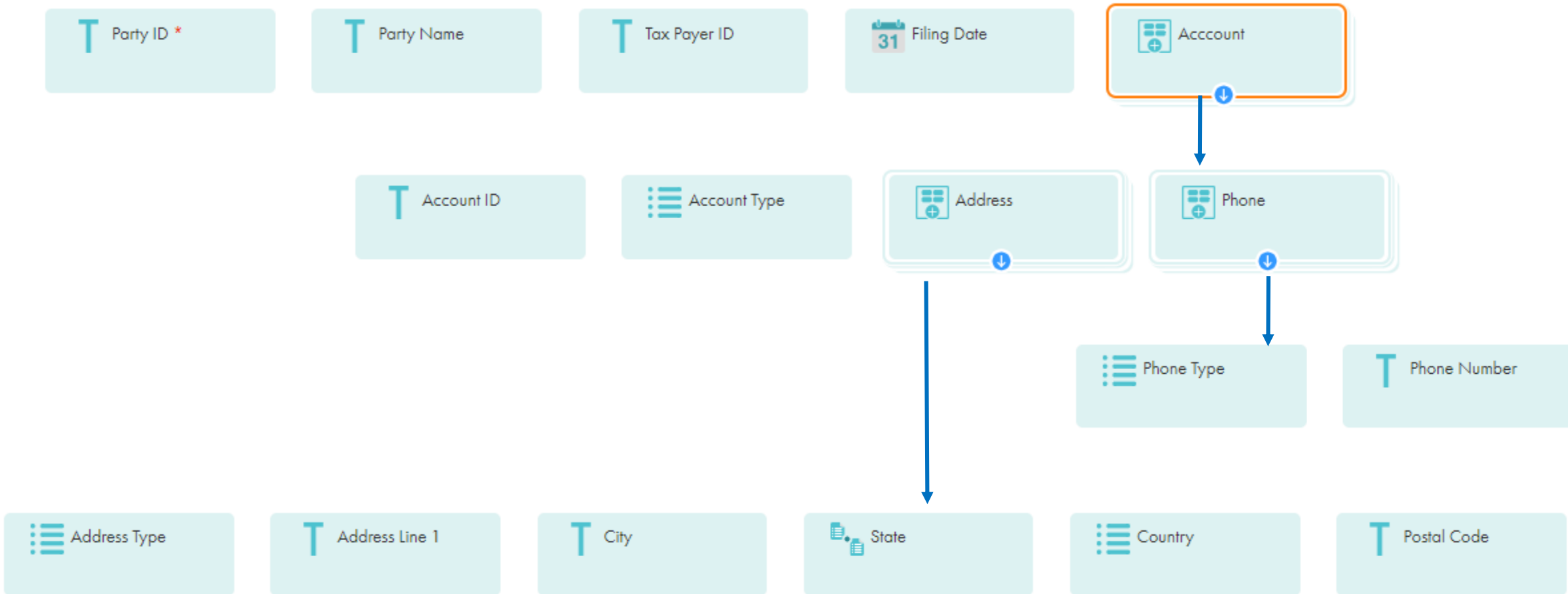
- Field level survivorship
  - Compete by each entry

Field	Xref1	Xref2	Master M1 (Xref1 wins for partyID XRef2 wins for Tax payer id)
PartyID	Informatica	Informatica Inc	Informatica
Tax Payer ID	2000INFA	1000INFA	1000INFA

- Block level survivorship
  - Compete the whole underlying group

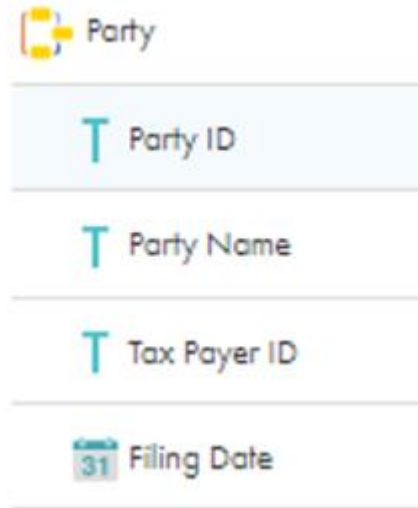
Block	Xref1	Xref2	Master M1(Xref2 block wins)
PartyID	Informatica	Informatica Inc	Informatica Inc
Tax Payer ID	2000INFA	1000INFA	1000INFA

# Data model used as an example



# When Survivorship calculated?

## Root BE Fields Data Model



- ✓ Load
- ✓ Merge
- ✓ Unmerge
- ✓ API

	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
Salesforce Billing	1	Informatica	1000INFA	04/04/2023	MDM00000000FFK
Salesforce CRM	2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFL

# Master Record Result After Merge or Update

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000FFK



PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFL



# Key Concepts

1 Source Ranking

3 Source Last Update Date

5 Block Survivorship

2 Rule

4 Highest Mongo ID

6 Deduplication

# Configuring Survivorship

- Step1:- Select Object
- Step2:- Rank Source System
- Step 3:- Configure survivorship rules

Person | Valid

Model | Data Flow | Consumption

Attributes | Data Quality | Match | **Survivorship** | Events

Fields (193)

Fields	Rules
<input type="checkbox"/> Person	Source Ranking (Rank 0)
<input type="checkbox"/> T First Name	Inherited
<input type="checkbox"/> T Middle Name	Inherited
<input type="checkbox"/> T Last Name	Inherited
<input type="checkbox"/> T Full Name	Inherited

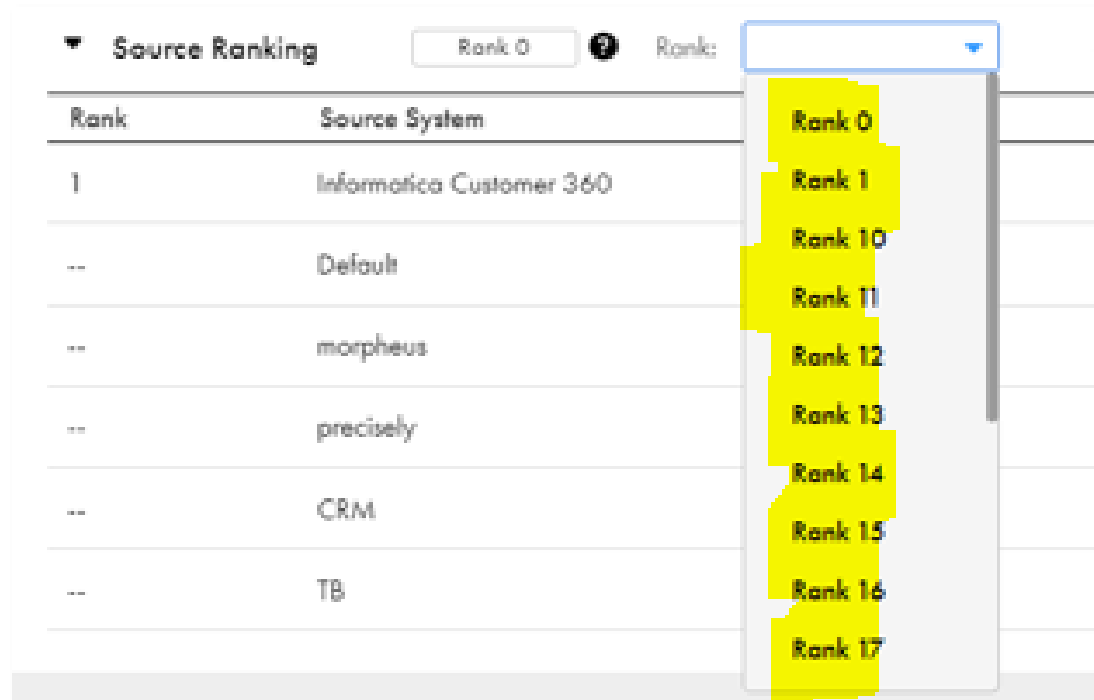
Source Ranking Rank 3 ? Rank: Rank 1 Rank 2 Show: All

Rank	Source System
1	Informatica DaaS
--	Default
--	Informatica Custo...

# Source Ranking

- Determines the reliability of source system
- Each ranking is saved with a different label for identification.

Multiple Ranks tied to Source system



The screenshot shows a web interface for 'Source Ranking'. At the top, there is a dropdown menu currently set to 'Rank 0' with a help icon and a 'Rank:' label. Below this is a table with two columns: 'Rank' and 'Source System'. The table contains the following data:

Rank	Source System
1	Informatica Customer 360
--	Default
--	morpheus
--	precisely
--	CRM
--	TB

To the right of the table, a dropdown menu is open, displaying a list of ranks from 'Rank 0' to 'Rank 17'. The items are highlighted in yellow, and a scroll bar is visible on the right side of the dropdown.

# Case 1: When rank is set

## PROBLEM STATEMENT:-

You have source ranking as:-

1. Informatica Customer 360
2. Salesforce Billing
3. Salesforce CRM.

- ✓ Which source system record will win after merge???
- ✓ Which source system record will win after update???

Records coming from different sources are as below:-

Source pkey	Source System	Party ID	Party Name	Tax payer id
P_1	salesforce_billing	101	Informatica	1000INFA
P_2	salesforce_crm	102	Informatica LLC	1000INFA
P_3	c360.default.system	103	Informatica Inc	1000INFA

# Rule

- Based on the survivorship configuration, a rule identifies the trusted value for a field.
- The conditions to determine the survivorship of fields and field groups can be based on their values or on other root field values.
- These rules are editable and can also be deleted.
- Types of survivorship rules are :-
  - Decay
    - The decay rate indicates the rate at which the trust level must decrease over a period of time.
  - Maximum
    - Identifies the maximum value of a field as the trusted value.
  - Minimum
    - Identifies the minimum value of a field as the trusted value.

# Case 2: When Decay is Set:-

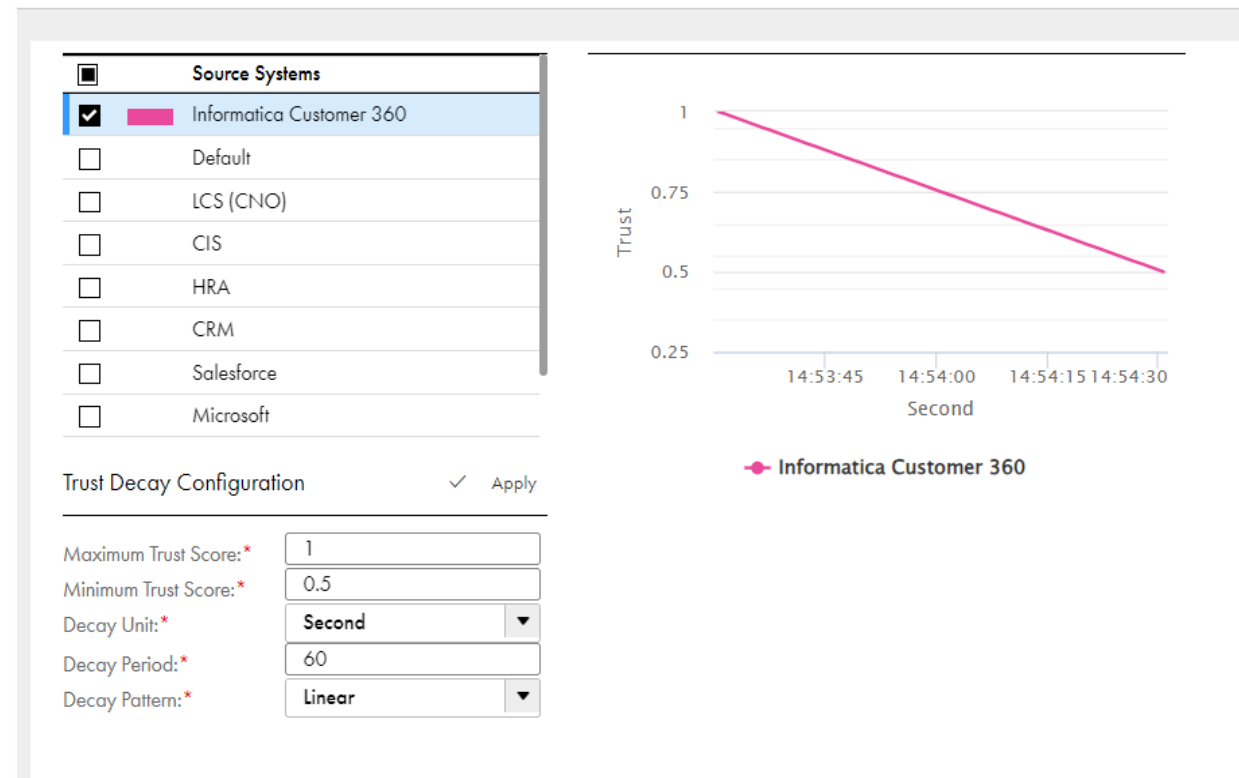
## PROBLEM STATEMENT:-

On top of ranking , now we have Rule configured.

Below is the sample data where we get an update for Address line 1.

Source pkey	Source System	Party ID	Party Name
P_1	c360.default.system	101	Informatica
Account_Src_Pkey	Source System	AccountID	Parent_id
A_1	c360.default.system	A101	P_1
Address_Src_Pkey	Source System	Address line 1	Parent_id
ADD_1	c360.default.system	Bangalore	A_1
		↓	
		California	

Edit Rule



**Note:-** The Decay works only on update and not while we create.

# Maximum and Minimum

- To understand maximum and minimum , let us consider the below set of records as this is applicable in Field groups only:-

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	1	Informatica	1000INFA	04/04/2023	MDM00000000FFK
AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
SFDC123	IT	120 Bremner Blvd	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd	Office	+1650-385-5001	Fax

Salesforce CRM	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFL
AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2400	VoIP
SFDC124	Legal	2100 Seaport Blvd	Mailing	+1416-590-2400	Fax

Party
<input checked="" type="checkbox"/> Party ID
<input checked="" type="checkbox"/> Party Name
<input checked="" type="checkbox"/> Tax Payer ID
<input checked="" type="checkbox"/> Filing Date
Account
<input type="checkbox"/> Account ID
<input type="checkbox"/> Account Type
Address
<input type="checkbox"/> Address Type
<input type="checkbox"/> Address Line 1
<input type="checkbox"/> City
<input type="checkbox"/> State
<input type="checkbox"/> Country
<input type="checkbox"/> Postal Code
Phone
<input type="checkbox"/> Phone Type
<input type="checkbox"/> Phone Number

# Source Last Update Date

- Helps identify the value to survive during merge process.
- If the trust score and source ranking have the same value, the source last updated date field determines the survivorship of the field.

Root

enrichedIndicator
statusCode
statusMessage
Address_parentId
<u>_cm_sourceLastUpdateDate</u>

Field Group

Properties: Address

**General**

Status:  Enabled  
 Disabled

**Data Quality**

Display Name: \* Address

Internal ID: \* Address

Description: Defines all the fields in a standardized, global address.

Uniqueness Criteria: ?

Source Last Update Date:  Enable

# Case 3:-When source last\_update\_date is considered

PROBLEM STATEMENT:-

Assume a scenario where for now you do not have any rank or rule configured.

But you need to find the Golden record among the two records when merged.

Or if update comes then which Xref should win as a master record.



Here comes **Source\_Last\_Update** in picture

Recent Source Last update will win !!!

Below is sample records :-

Source pkey	Source System	Party ID	Party Name	Tax payer id	Source_last_update_date
FI20	c360.default.system	102	Informatica_USA1	1000INFA	4/21/2024 12:43
FI30	c360.default.system	103	Informatica_INDIA1	1000INFA	4/22/2024 22:40

# Case 4: When Highest InternalID is considered

```
1 Source pkey,Source System,Party ID,Party Name,Tax payer id,Source_last_update_date  
FI2,salesforce_billing,102,Informatica_USA,1000INFA,2024-04-08 12:43:02  
FI3,salesforce_billing,103,Informatica_INDIA,1000INFA,2024-04-08 12:43:02
```

Informatica_USA	
▼ System Fields	
Business ID	: MDM000000012KW
ID	: 6614ea48e6563331367e72d2
Updated On	: 04/09/2024
Updated By	: ankulkarni_p01
Record State Indicator	: ACTIVE
Population	:
Not Ready For Match	:
▼ General Information	
Party ID	: 102
Party Name	: Informatica_USA
Tax Payer ID	: 1000INFA

Source Records   1 of 1 source records	
Informatica_INDIA	
▼ System Fields	
Business ID	: MDM000000012KX
ID	: 6614ea48e6563331367e72d3
Updated On	: 04/09/2024
Updated By	: ankulkarni_p01
Record State Indicator	: ACTIVE
Population	:
Not Ready For Match	:
▼ General Information	
Party ID	: 103
Party Name	: Informatica_INDIA
Tax Payer ID	: 1000INFA

# Conclusion - Tie Handling

- The source ranking will act as a tie break rule in case of the multiple records different source system with same trust score.
- In case of multiple XREFs with the same trust score from the same source system the value from the XREF with the newer LUD will survive.
- In the case there are multiple Xrefs with the same trust score from the same source system with the same LUD, the record with the highest mongo id (`_id`) will survive
- There can be a tie in the mongo id. This can happen when picking a winning element in a multivalue field, the highest 'element\_id' will be the one that will survive for this case.

## Order of Survivorship Rules :

**Decay (if set) -> Source Ranking -> Last Updated Date -> Highest Mongoid**

# Case1 of Validation:- DQ validation to downgrade trust:-

- Consider a situation when you do not have rule or rank configured.
- But you have a Data Quality Advance rule configured where TaxPayerID of a client can never be "TEST". It should be some valid Alphanumeric value.

Party | Data Quality > TaxpayerIDCheck

---

### General

Enable rule association

Run the rule association even if all input fields are empty

Applied Field: \* TaxpayerID

Rule Specification: \*

Name \*

Internal ID TaxpayerIDCheck\_1714550343594

Description:

---

### Input and Output Fields

[Validation](#)

Configure the status that indicates a successful validation. You can also configure the error message to display and the percentage to downgrade the trust score when the validation fails.

Rule Status	Error Status	Trust Score
Rule Status Field: ? <input type="text" value="Rule_Client_Check"/>	Error Severity: <input type="text" value="Information"/>	Downgrade Trust Score On: ? <input type="text" value="TaxpayerID"/>
Rule Is Valid When Status Is: ? <input type="text" value="Valid"/>	Error Message: ? <input type="text" value="From Rule Specification Field"/>	Downgrade Trust Score(%): ? <input type="text" value="100"/>
	Rule Output Field: <input type="text" value="Rule_Client_Check"/>	



# Extending Survivorship to Field Groups

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID MDM00000000FF K	
	1	Informatica	1000INFA	04/04/2023		
<u>Account Field Group ID</u>	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124Bill_id	SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			#1550, 120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
SFDC123Bill_id	SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

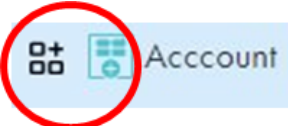
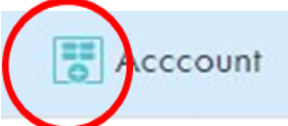
Salesforce CRM	PartyID	PartyName	TaxPayerID	FilingDate	Business ID MDM00000000FF L	
	2	Informatica Inc	1000INFA	04/03/2023		
<u>Account Field Group ID</u>	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123CRM_id	SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
			2100 Seaport Blvd,	Office	+1416-590-2401	VoIP
SFDC124CRM_id	SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

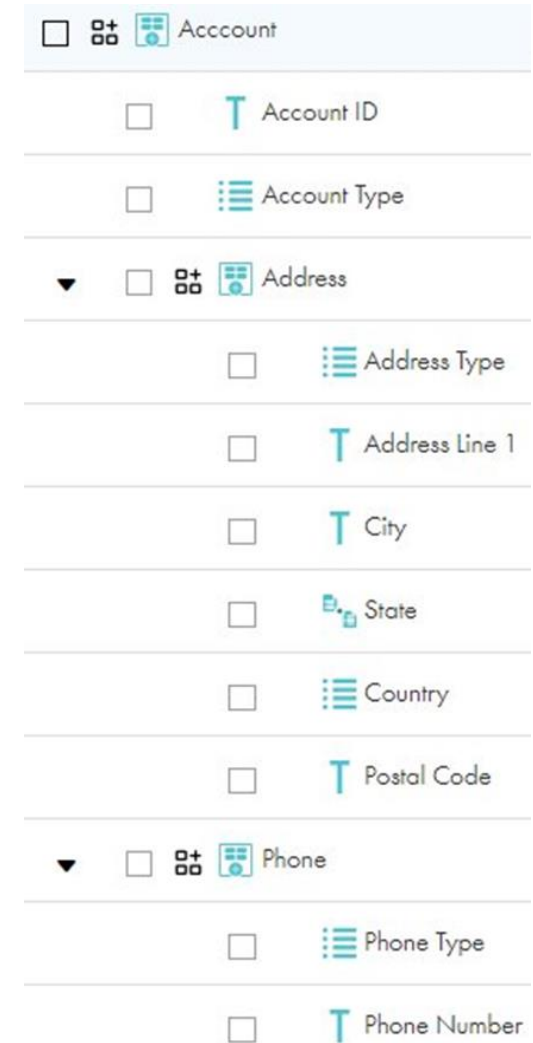
# Master Record: Result after merge

Account Field Group ID	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
<b>Salesforce Billing</b>	<b>PartyID</b> 1	<b>PartyName</b> Informatica	<b>TaxPayerID</b> 1000INFA	<b>FilingDate</b> 04/04/2023	<b>Business ID</b> MDM00000000FF K	
<b>SFDC124Bill_id</b>	<b>SFDC124</b>	<b>Legal</b>	120 Bremner Blvd, #1550	<b>Billing</b>	<b>+1650-687-6200</b>	<b>LandLine</b>
			#1550, 120 Bremner Blvd	<b>Mailing</b>	<b>+1650-385-5001</b>	<b>VoIP</b>
<b>SFDC124CRM_id</b>	<b>SFDC124</b>	<b>Legal</b>	2100 Seaport Blv, Redwood City	<b>Mailing</b>	<b>416-590-2412</b>	<b>Fax</b>
<b>SFDC123Bill_id</b>	<b>SFDC123</b>	<b>IT</b>	120 Bremner Blvd, #1550	<b>Billing</b>	<b>+1650-687-6200</b>	<b>LandLine</b>
			120 Bremner Blvd, Suite 1550	<b>Office</b>	<b>650-385-4424</b>	<b>Fax</b>
<b>SFDC123CRM_id</b>	<b>SFDC123</b>	<b>IT</b>	2100 Seaport Blvd, Redwood City	<b>Billing</b>	<b>+1416-590-2400</b>	<b>LandLine</b>
			2100 Seaport Blvd,	<b>Office</b>	<b>+1416-590-2401</b>	<b>VoIP</b>

# Block Survivorship

- Allows fields and nested field groups within a field group, to be treated as a block
- When a field group is enabled to survive as a block, the survivorship configuration applies to all fields and field groups within the block
- By default, a field group is treated as a block
- One can disable a field group from surviving as a block but field groups nested within survive as a block
- One can also disable the nested field group from surviving as a block

- Icon when block survivorship is enabled - 
- Icon when block survivorship is disabled - 



The screenshot displays a configuration interface for field groups. It shows a list of field groups, each with a checkbox and an icon indicating its survivorship status. The 'Account' field group is expanded, showing its nested fields: 'Account ID', 'Account Type', 'Address' (expanded), 'Address Type', 'Address Line 1', 'City', 'State', 'Country', and 'Postal Code'. The 'Phone' field group is also expanded, showing 'Phone Type' and 'Phone Number'. The 'Account' field group and its nested 'Address' field group are marked with a 2x2 grid icon, indicating they are enabled to survive as blocks. The 'Phone' field group is marked with a field group icon, indicating it is also enabled to survive as a block. The 'Account ID', 'Account Type', 'Address Type', 'Address Line 1', 'City', 'State', 'Country', 'Postal Code', 'Phone Type', and 'Phone Number' fields are marked with a 'T' icon, indicating they are not enabled to survive as blocks.

# Deduplication Criteria

Account Field Group ID	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124BillLid	<u>SFDC124</u>	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			#1550, 120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
SFDC124CRMLid	<u>SFDC124</u>	Legal	2100 Seaport Blvd Redwood City	Mailing	416-590-2412	Fax
SFDC123BillLid	<u>SFDC123</u>	IT	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax
SFDC123CRMLid	<u>SFDC123</u>	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
			2100 Seaport Blvd,	Office	+1416-590-2401	VoIP

- Identifies and merges duplicate field group values
- Fields within field groups can be set as criteria for deduplication
- Field group values survive based on survivorship rules
- Applicable for mandatory fields, nested field groups, and optional fields
- Identification of duplicate values is case-insensitive
- If a field is not used for deduplication, default deduplication is based on Field Group Id (or Pkey of field group if mapped via Ingress/IFI)

# Case 1: Block on Account with Deduplication on Account ID

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000FFM

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFN

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP
SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

Field Group Selected : Account

Set a rule and source ranking for the selected field. Currently only

▼ Block Survivorship

Survive as a block

▼ Deduplication

Account ID

► Rule

▼ Source Ranking  Rank:

Rank	Source System
1	Salesforce Billing
2	Salesforce CRM

# Master Record: Result after merge

## Master Record

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	1	Informatica	1000INFA	04/04/2023	MDM00000000FF M
AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

# Case 2: Unblock and deduplicate on Account, block on Address and Phone

**1.**

- Tax Payer ID *Inherited*
- Filing Date *Inherited*
- Account *Source Ranking (Rank 8)*
- Account ID *Inherited*
- Account T... *Inherited*

**Block Survivorship**

Survive as a block

**Deduplication**

Account ID

**2.**

- Account ID *Inherited*
- Account T... *Inherited*
- Address *Source Ranking (Rank 8)*
- Address... *Inherited*
- Address... *Inherited*
- City *Inherited*
- State *Inherited*
- Country *Inherited*
- Postal ... *Inherited*

**Block Survivorship**

Survive as a block

**Deduplication**

**Rule**

**Source Ranking** Rank 8

Rank	Source System
1	Salesforce Billing
2	Salesforce CRM

**3.**

- Account ID *Inherited*
- Account T... *Inherited*
- Address *Source Ranking (Rank 8)*
- Address... *Inherited*
- Address... *Inherited*
- City *Inherited*
- State *Inherited*
- Country *Inherited*
- Postal ... *Inherited*
- Phone *Source Ranking (Rank 7)*

**Block Survivorship**

Survive as a block

**Deduplication**

**Rule**

**Source Ranking** Rank 7

Rank	Source System
1	Salesforce CRM
2	Salesforce Billing
--	Default

# Case 2: Unblock and deduplicate on Account, block on Address and Phone

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000N5 K

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FF V

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP
SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

# Master Record: Result after merge

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
		2100 Seaport Blvd	Mailing	416-590-2412	Fax
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax
		2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	1	Informatica	1000INFA	04/04/2023	MDM00000000N5 K

# Case 3: Unblock and deduplicate on Account, block and deduplicate on Address and Phone

1.

2.

Block Survivorship

Survive as a block

Deduplication

Account ID

Fields

Rules

Account Source Ranking (Rank 8)

Account ID Inherited

Account T... Inherited

3.

Block Survivorship

Survive as a block

Deduplication

Address Type

Rule

Source Ranking Rank 8

Rank	Source System
1	Salesforce Billing
2	Salesforce CRM

Account ID Inherited

Account T... Inherited

Address Source Ranking (Rank 8)

Address... Inherited

Address... Inherited

City Inherited

State Inherited

Country Inherited

Postal ... Inherited

Phone Source Ranking (Rank 7)

Block Survivorship

Survive as a block

Deduplication

Phone Type

Rule

Source Ranking Rank 7

Rank	Source System
1	Salesforce CRM
2	Salesforce Billing
..	Default

Fields

Rules

Account Source Ranking (Rank 8)

Account ID Inherited

Account T... Inherited

Address Source Ranking (Rank 8)

Address... Inherited

Address... Inherited

City Inherited

State Inherited

Country Inherited

Postal ... Inherited

Phone Source Ranking (Rank 7)

# Case 3: Unblock and deduplicate on Account, block and deduplicate on Address and Phone

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000N5L

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000N5M

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP
SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

# Master Record: Result after merge

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1416-590-2400	LandLine
		120 Bremner Blvd, Suite 1550	Office	+1416-590-2401	VoIP
				650-385-4424	Fax
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	VoIP
		#1550, 120 Bremner Blvd	Mailing	416-590-2412	Fax
				+1650-385-5001	LandLine

# Behavior of PATCH API in Survivorship

## 1) Update using Business ID

PATCH  `{{MDM_URL}}/business-entity/public/api/v1/entity/party/{{BID}}?sourceSystem=salesforce_crm`

Params  Authorization Headers (11) **Body**  Pre-request Script Tests Settings

none  form-data  x-www-form-urlencoded  raw  binary  GraphQL **JSON**

```
1 [
2   {
3     "op": "replace",
4     "path": "account[SFDC124Bill].phone[SFDC124_FaxCRM].phone_number",
5     "value": "+1416-590-2413"
6   }
7 ]
```

## 2) Update using Business ID to replace complete grandchild

PATCH  `{{MDM_URL}}/business-entity/public/api/v1/entity/party/{{BID}}?sourceSystem=salesforce_crm`

Params  Authorization Headers (10) **Body**  Pre-request Script Tests Settings

none  form-data  x-www-form-urlencoded  raw  binary  GraphQL **JSON**

```
1 [
2   {
3     "op": "replace",
4     "path": "account[SFDC124Bill]",
5     "value": {
6       "phone": [
7         {
8           "_id": "SFDC124_FaxCRM",
9           "phone_number": "+1416-590-2401"
10        }
11      ]
12    }
13  }
14 ]
```

## 3) Update using Business ID to change grandchild type

PATCH  `{{MDM_URL}}/business-entity/public/api/v1/entity/party/{{BID}}?sourceSystem=salesforce_crm`

Params  Authorization Headers (10) **Body**  Pre-request Script Tests Settings

none  form-data  x-www-form-urlencoded  raw  binary  GraphQL **JSON**

```
1 [
2   {
3     "op": "replace",
4     "path": "account[SFDC123Bill].phone[SFDC123_FaxBill].phone_type.Code",
5     "value": "LandLine"
6   },
7   {
8     "op": "replace",
9     "path": "account[SFDC123Bill].phone[SFDC123_FaxBill].phone_number",
10    "value": "+1416-590-2400"
11  }
12 ]
```

# Points to be noted

- Limitation of maximum 500 unique field groups that can be deduplicated
- Current limitation on Source Records screen
  - Fields groups displayed one below the other
  - The winning nested field groups from lowest ranked source are not being shown that they were contributed from that source
- Need to re-ingress data for recalculation of BVT
- BVT is not recalculated when data is at rest
- Maximum of 40 field groups can be shown on the Source Records screen
- Any non-surviving deduplicated value not making it to the master, cannot be searched for, if it is enabled as Searchable

# Questions?



# Thank You

Where data & AI come to **LIFE**



# Data Survivorship in MDM SaaS



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# Disclaimer

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# Agenda

1 Overview of Survivorship

3 Configuration

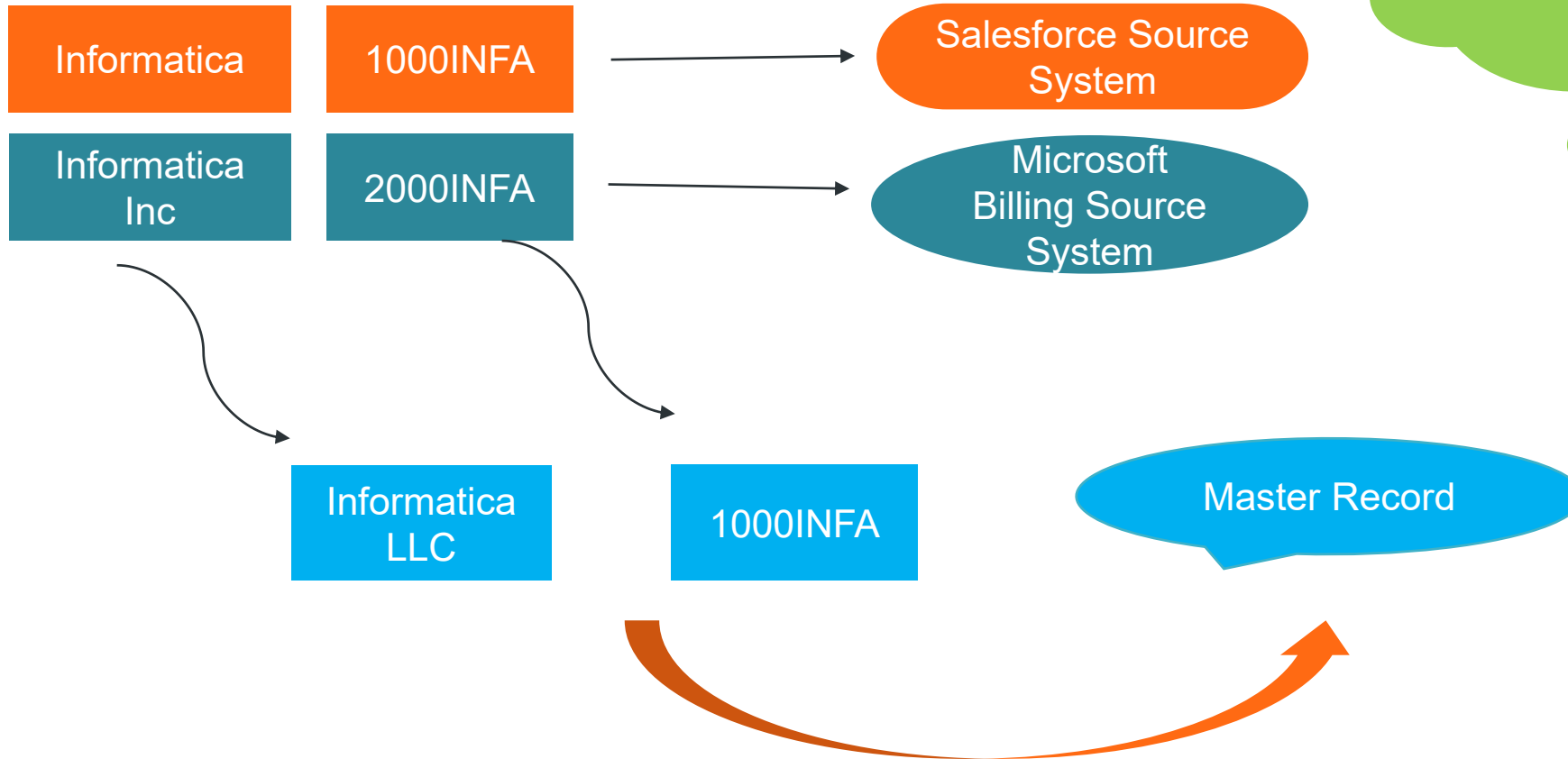
5 Block Survivorship & Deduplication

2 Key Concepts

4 Behavior of API

6 Questions ?

# Why Survivorship???



➤ Which record to survive?  
➤ Which source system are most trusted?  
➤ If records are not valid, how do we downgrade the trust score?

# Types of Survivorship

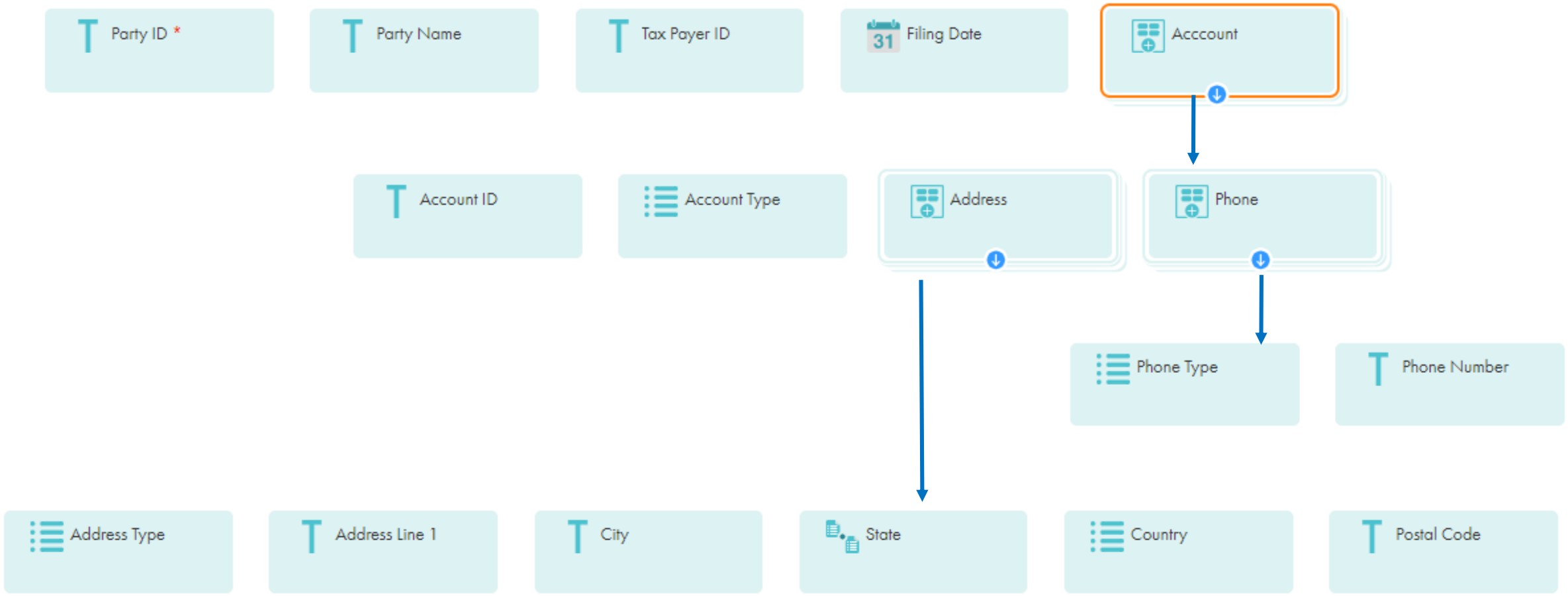
- Field level survivorship
  - Compete by each entry

Field	Xref1	Xref2	Master M1 (Xref1 wins for partyID XRef2 wins for Tax payer id)
PartyID	Informatica	Informatica Inc	Informatica
Tax Payer ID	2000INFA	1000INFA	1000INFA

- Block level survivorship
  - Compete the whole underlying group

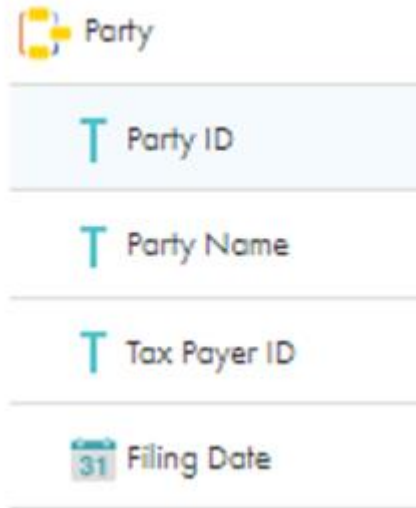
Block	Xref1	Xref2	Master M1(Xref2 block wins)
PartyID	Informatica	Informatica Inc	Informatica Inc
Tax Payer ID	2000INFA	1000INFA	1000INFA

# Data model used as an example



# When Survivorship calculated?

## Root BE Fields Data Model



- ✓ Load
- ✓ Merge
- ✓ Unmerge
- ✓ API

	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
Salesforce Billing	1	Informatica	1000INFA	04/04/2023	MDM00000000FFK
Salesforce CRM	2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFL

# Master Record Result After Merge or Update

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID MDM00000000FFK
	1	Informatica	1000INFA	04/04/2023	



Salesforce CRM	PartyID	PartyName	TaxPayerID	FilingDate	Business ID MDM00000000FFL
	2	Informatica Inc	1000INFA	04/03/2023	



# Key Concepts

1 Source Ranking

3 Source Last Update Date

5 Block Survivorship

2 Rule

4 Highest Mongo ID

6 Deduplication

# Configuring Survivorship

- Step1:- Select Object
- Step2:- Rank Source System
- Step 3:- Configure survivorship rules

Person | Valid

Model | Data Flow | Consumption

Attributes | Data Quality | Match | **Survivorship** | Events

Fields (193)

Fields	Rules
<input type="checkbox"/> Person	Source Ranking (Rank 0)
<input type="checkbox"/> T First Name	Inherited
<input type="checkbox"/> T Middle Name	Inherited
<input type="checkbox"/> T Last Name	Inherited
<input type="checkbox"/> T Full Name	Inherited

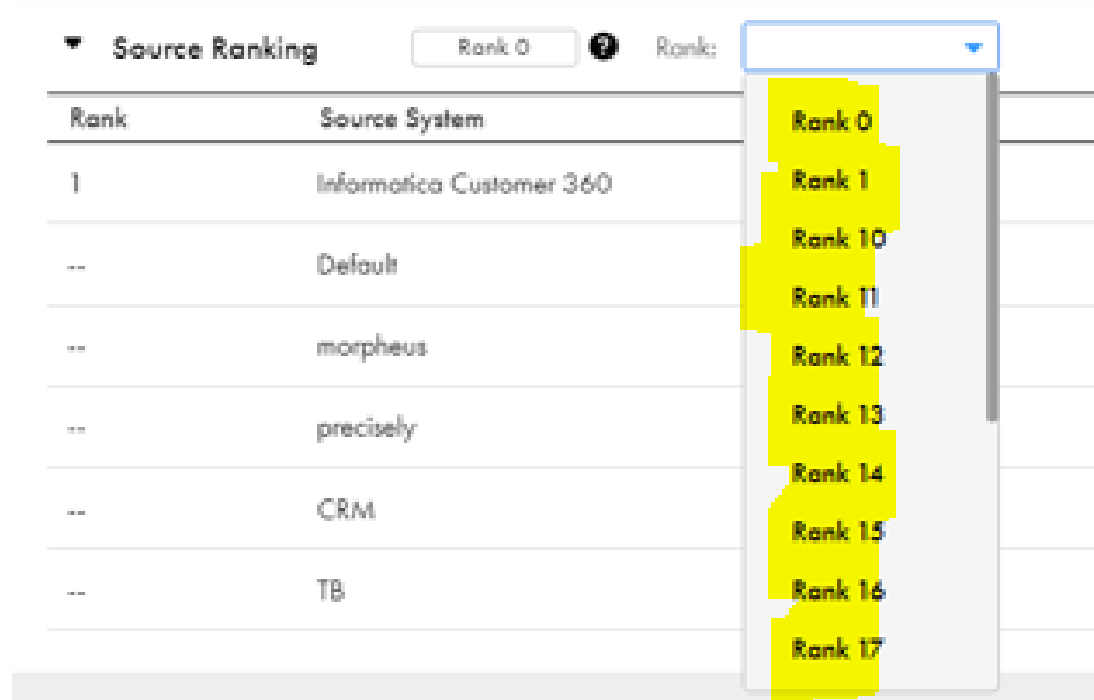
Source Ranking Rank 3 ? Rank: Rank 1 Rank 2 Show: All

Rank	Source System
1	Informatica DaaS
--	Default
--	Informatica Custo...

# Source Ranking

- Determines the reliability of source system
- Each ranking is saved with a different label for identification.

Multiple Ranks tied to Source system



The screenshot shows a web interface for 'Source Ranking'. At the top, there is a dropdown menu currently set to 'Rank 0'. Below this is a table with two columns: 'Rank' and 'Source System'. The table contains several rows with different source systems and their corresponding ranks. A dropdown menu is open over the 'Rank' column, showing a list of rank options from Rank 0 to Rank 17. The options are: Rank 0, Rank 1, Rank 10, Rank 11, Rank 12, Rank 13, Rank 14, Rank 15, Rank 16, and Rank 17. The 'Rank 1' option is highlighted in yellow.

Rank	Source System
1	Informatica Customer 360
--	Default
--	morpheus
--	precisely
--	CRM
--	TB

# Case 1: When rank is set

## PROBLEM STATEMENT:-

You have source ranking as:-

1. Informatica Customer 360
2. Salesforce Biling
3. Salesforce CRM.

- ✓ Which source system record will win after merge???
- ✓ Which source system record will win after update???

Records coming from different sources are as below:-

Source pkey	Source System	Party ID	Party Name	Tax payer id
P_1	salesforce_billing	101	Informatica	1000INFA
P_2	salesforce_crm	102	Informatica LLC	1000INFA
P_3	c360.default.system	103	Informatica Inc	1000INFA

# Rule

- Based on the survivorship configuration, a rule identifies the trusted value for a field.
- The conditions to determine the survivorship of fields and field groups can be based on their values or on other root field values.
- These rules are editable and can also be deleted.
- Types of survivorship rules are :-
  - Decay
    - The decay rate indicates the rate at which the trust level must decrease over a period of time.
  - Maximum
    - Identifies the maximum value of a field as the trusted value.
  - Minimum
    - Identifies the minimum value of a field as the trusted value.

# Case 2: When Decay is Set:-

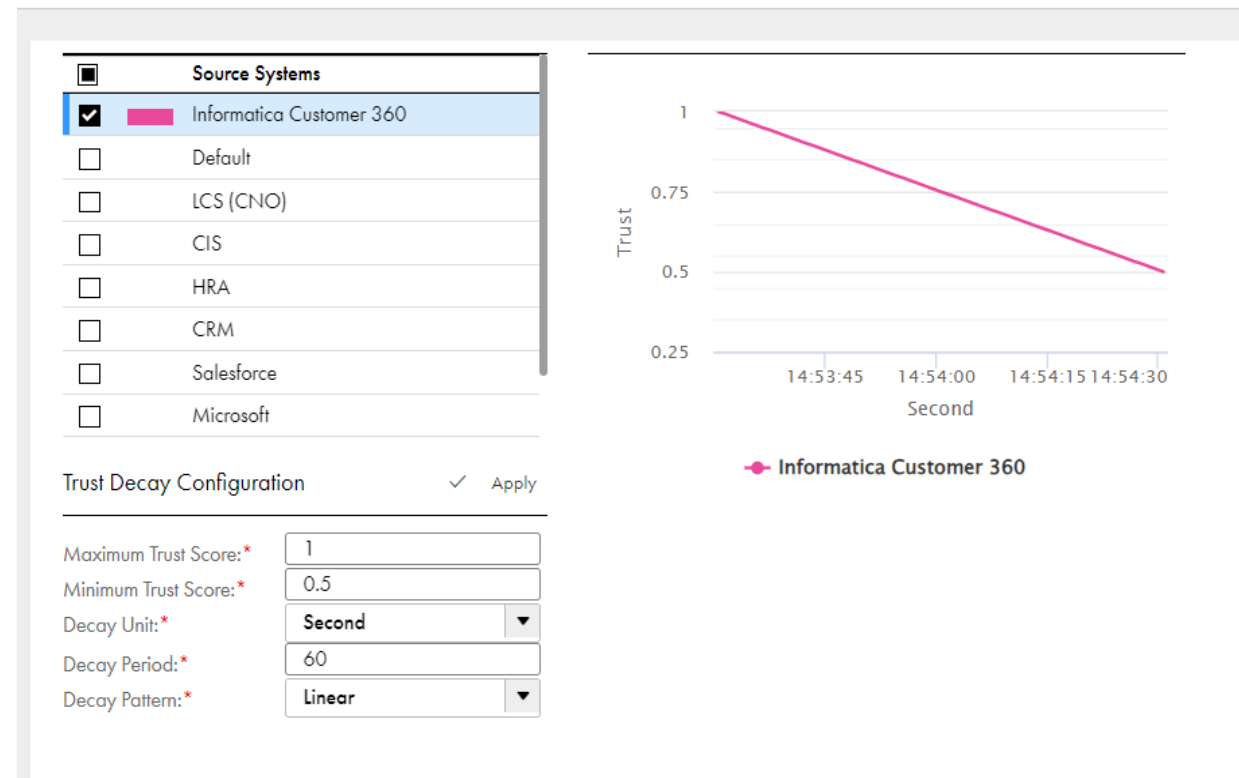
## PROBLEM STATEMENT:-

On top of ranking , now we have Rule configured.

Below is the sample data where we get an update for Address line 1.

Source pkey	Source System	Party ID	Party Name
P_1	c360.default.system	101	Informatica
Account_Src_Pkey	Source System	AccountID	Parent_id
A_1	c360.default.system	A101	P_1
Address_Src_Pkey	Source System	Address line 1	Parent_id
ADD_1	c360.default.system	Bangalore	A_1
		↓	
		California	

Edit Rule



**Note:-** The Decay works only on update and not while we create.

# Maximum and Minimum

- To understand maximum and minimum , let us consider the below set of records as this is applicable in Field groups only:-

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	1	Informatica	1000INFA	04/04/2023	MDM00000000FFK
AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
SFDC123	IT	120 Bremner Blvd	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd	Office	+1650-385-5001	Fax

Salesforce CRM	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFL
AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2400	VoIP
SFDC124	Legal	2100 Seaport Blvd	Mailing	+1416-590-2400	Fax

Party
<input checked="" type="checkbox"/> Party ID
<input checked="" type="checkbox"/> Party Name
<input checked="" type="checkbox"/> Tax Payer ID
<input checked="" type="checkbox"/> Filing Date
Account
<input type="checkbox"/> Account ID
<input type="checkbox"/> Account Type
Address
<input type="checkbox"/> Address Type
<input type="checkbox"/> Address Line 1
<input type="checkbox"/> City
<input type="checkbox"/> State
<input type="checkbox"/> Country
<input type="checkbox"/> Postal Code
Phone
<input type="checkbox"/> Phone Type
<input type="checkbox"/> Phone Number

# Source Last Update Date

- Helps identify the value to survive during merge process.
- If the trust score and source ranking have the same value, the source last updated date field determines the survivorship of the field.

Root

enrichedIndicator
statusCode
statusMessage
Address_parentId
<u>_cm_sourceLastUpdateDate</u>

Field Group

Properties: Address

**General**

Status:  Enabled  Disabled

**Data Quality**

Display Name: \* Address

Internal ID: \* Address

Description: Defines all the fields in a standardized, global address.

Uniqueness Criteria: ?

Source Last Update Date:  Enable

# Case 3:-When source last\_update\_date is considered

## PROBLEM STATEMENT:-

Assume a scenario where for now you do not have any rank or rule configured.

But you need to find the Golden record among the two records when merged.

Or if update comes then which Xref should win as a master record.



Here comes **Source\_Last\_Update** in picture

Recent Source Last update will win !!!

Below is sample records :-

Source pkey	Source System	Party ID	Party Name	Tax payer id	Source_last_update_date
FI20	c360.default.system	102	Informatica_USA1	1000INFA	4/21/2024 12:43
FI30	c360.default.system	103	Informatica_INDIA1	1000INFA	4/22/2024 22:40

# Case 4: When Highest InternalID is considered

```
1 Source pkey,Source System,Party ID,Party Name,Tax payer id,Source_last_update_date  
FI2,salesforce_billing,102,Informatica_USA,1000INFA,2024-04-08 12:43:02  
FI3,salesforce_billing,103,Informatica_INDIA,1000INFA,2024-04-08 12:43:02
```

Informatica_USA	
▼ System Fields	
Business ID	: MDM000000012KW
ID	: 6614ea48e6563331367e72d2
Updated On	: 04/09/2024
Updated By	: ankulkarni_p01
Record State Indicator	: ACTIVE
Population	:
Not Ready For Match	:
▼ General Information	
Party ID	: 102
Party Name	: Informatica_USA
Tax Payer ID	: 1000INFA

Source Records   1 of 1 source records	
Informatica_INDIA	
▼ System Fields	
Business ID	: MDM000000012KX
ID	: 6614ea48e6563331367e72d3
Updated On	: 04/09/2024
Updated By	: ankulkarni_p01
Record State Indicator	: ACTIVE
Population	:
Not Ready For Match	:
▼ General Information	
Party ID	: 103
Party Name	: Informatica_INDIA
Tax Payer ID	: 1000INFA

# Conclusion - Tie Handling

- The source ranking will act as a tie break rule in case of the multiple records different source system with same trust score.
- In case of multiple XREFs with the same trust score from the same source system the value from the XREF with the newer LUD will survive.
- In the case there are multiple Xrefs with the same trust score from the same source system with the same LUD, the record with the highest mongo id (`_id`) will survive
- There can be a tie in the mongo id. This can happen when picking a winning element in a multivalue field, the highest 'element\_id' will be the one that will survive for this case.

## Order of Survivorship Rules :

**Decay (if set) -> Source Ranking -> Last Updated Date -> Highest Mongoid**

# Case1 of Validation:- DQ validation to downgrade trust:-

- Consider a situation when you do not have rule or rank configured.
- But you have a Data Quality Advance rule configured where TaxPayerID of a client can never be "TEST". It should be some valid Alphanumeric value.

Party | Data Quality > TaxpayerIDCheck

---

### General

Enable rule association

Run the rule association even if all input fields are empty

Applied Field: \* TaxPayerID

Rule Specification: \*

Name \*

Internal ID TaxpayerIDCheck\_1714550343594

Description:

---

### Input and Output Fields

[Validation](#)

Configure the status that indicates a successful validation. You can also configure the error message to display and the percentage to downgrade the trust score when the validation fails.

Rule Status	Error Status	Trust Score
Rule Status Field: ? <input type="text" value="Rule_Client_Check"/>	Error Severity: <input type="text" value="Information"/>	Downgrade Trust Score On: ? <input type="text" value="TaxPayerID"/>
Rule Is Valid When Status Is: ? <input type="text" value="Valid"/>	Error Message: ? <input type="text" value="From Rule Specification Field"/>	Downgrade Trust Score(%): ? <input type="text" value="100"/>
	Rule Output Field: <input type="text" value="Rule_Client_Check"/>	

# Trust Override Concept:-

What if the system decided value as master record is not satisfying the Data Steward???

In such scenario Data Steward has an option to override the trust of any particular attribute .

Actions ▼ | ⚙️

- ✎ Override Surviving Values
- ↺ Unmerge Records

Infaworld2	Infaworld2 Source System: Informatica Customer 360	Infaworld2	Infaworld1 Source System: Informatica Customer 360
▶ System Fields			
▶ Match Pair Details <span>↔</span>			
▼ General Information			
Party ID : 678	678	33.33	456
Party Name : Infaworld2	Infaworld2	33.33	Infaworld1 <span>Select to override trust score? <input checked="" type="checkbox"/> <input type="checkbox"/></span>

# Extending Survivorship to Field Groups

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID MDM00000000FF K	
	1	Informatica	1000INFA	04/04/2023		
<u>Account Field Group ID</u>	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124Bill_id	SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			#1550, 120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
SFDC123Bill_id	SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax



Salesforce CRM	PartyID	PartyName	TaxPayerID	FilingDate	Business ID MDM00000000FF L	
	2	Informatica Inc	1000INFA	04/03/2023		
<u>Account Field Group ID</u>	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123CRM_id	SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
			2100 Seaport Blvd,	Office	+1416-590-2401	VoIP
SFDC124CRM_id	SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

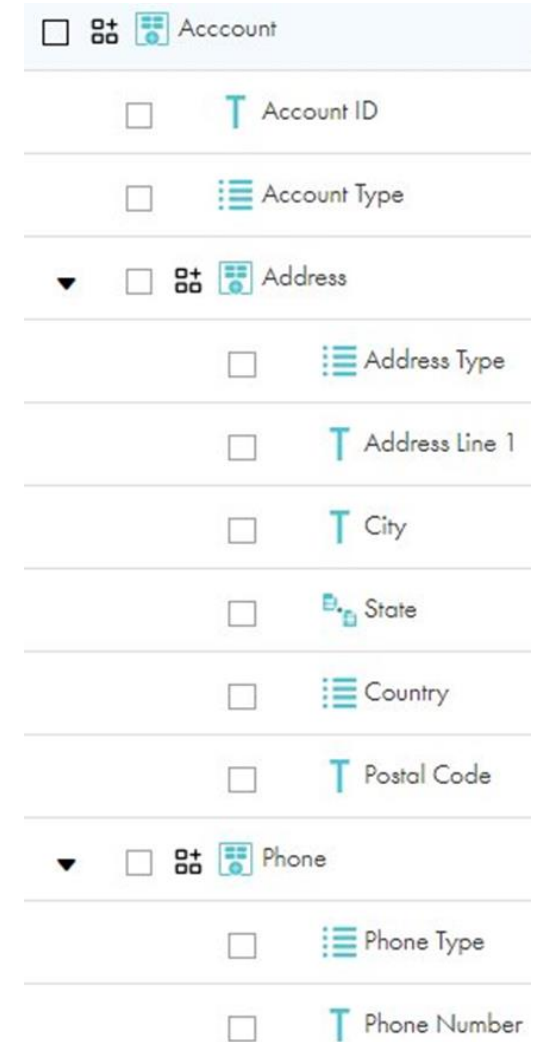
# Master Record: Result after merge

Account Field Group ID	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
<b>Salesforce Billing</b>	<b>PartyID</b> 1	<b>PartyName</b> Informatica	<b>TaxPayerID</b> 1000INFA	<b>FilingDate</b> 04/04/2023	<b>Business ID</b> MDM00000000FF K	
<b>SFDC124Bill_id</b>	SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			#1550, 120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
<b>SFDC124CRM_id</b>	SFDC124	Legal	2100 Seaport Blv, Redwood City	Mailing	416-590-2412	Fax
<b>SFDC123Bill_id</b>	SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax
<b>SFDC123CRM_id</b>	SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
			2100 Seaport Blvd,	Office	+1416-590-2401	VoIP














# Block Survivorship

- Allows fields and nested field groups within a field group, to be treated as a block
- When a field group is enabled to survive as a block, the survivorship configuration applies to all fields and field groups within the block
- By default, a field group is treated as a block
- One can disable a field group from surviving as a block but field groups nested within survive as a block
- One can also disable the nested field group from surviving as a block

- Icon when block survivorship is enabled -  Account
- Icon when block survivorship is disabled -  Account



The screenshot shows a configuration interface for field groups. It lists several field groups, each with a checkbox and an icon indicating its survivorship status:

-  Account
-  Account ID
-  Account Type
-  Address
-  Address Type
-  Address Line 1
-  City
-  State
-  Country
-  Postal Code
-  Phone
-  Phone Type
-  Phone Number

# Deduplication Criteria

Account Field Group ID	AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124BillId	<u>SFDC124</u>	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			#1550, 120 Bremner Blvd	Mailing	+1650-385-5001	VoIP
SFDC124CRMLid	<u>SFDC124</u>	Legal	2100 Seaport Blvd Redwood City	Mailing	416-590-2412	Fax
SFDC123BillId	<u>SFDC123</u>	IT	120 Bremner Blvd, #1550	Billing	+1650-687-6200	LandLine
			120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax
SFDC123CRMLid	<u>SFDC123</u>	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
			2100 Seaport Blvd,	Office	+1416-590-2401	VoIP

- Identifies and merges duplicate field group values
- Fields within field groups can be set as criteria for deduplication
- Field group values survive based on survivorship rules
- Applicable for mandatory fields, nested field groups, and optional fields
- Identification of duplicate values is case-insensitive
- If a field is not used for deduplication, default deduplication is based on Field Group Id (or Pkey of field group if mapped via Ingress/IFI)

# Case 1: Block on Account with Deduplication on Account ID

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000FFM

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FFN

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP
SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

Field Group Selected : Account

Set a rule and source ranking for the selected field. Currently only

▼ Block Survivorship

Survive as a block

▼ Deduplication

Account ID

► Rule

▼ Source Ranking   Rank:

Rank	Source System
1	Salesforce Billing
2	Salesforce CRM

# Master Record: Result after merge

## Master Record

Salesforce Billing	PartyID	PartyName	TaxPayerID	FilingDate	Business ID
	1	Informatica	1000INFA	04/04/2023	MDM00000000FF M
AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

# Case 2: Unblock and deduplicate on Account, block on Address and Phone

**1.**

- Tax Payer ID *Inherited*
- Filing Date *Inherited*
- Account *Source Ranking (Rank 8)*
- Account ID *Inherited*
- Account T... *Inherited*

**Block Survivorship**

Survive as a block

**Deduplication**

Account ID

**2.**

- Account ID *Inherited*
- Account T... *Inherited*
- Address *Source Ranking (Rank 8)*
- Address... *Inherited*
- Address... *Inherited*
- City *Inherited*
- State *Inherited*
- Country *Inherited*
- Postal ... *Inherited*

**Block Survivorship**

Survive as a block

**Deduplication**

**Rule**

**Source Ranking** Rank 8

Rank	Source System
1	Salesforce Billing
2	Salesforce CRM

**3.**

- Account ID *Inherited*
- Account T... *Inherited*
- Address *Source Ranking (Rank 8)*
- Address... *Inherited*
- Address... *Inherited*
- City *Inherited*
- State *Inherited*
- Country *Inherited*
- Postal ... *Inherited*
- Phone *Source Ranking (Rank 7)*

**Block Survivorship**

Survive as a block

**Deduplication**

**Rule**

**Source Ranking** Rank 7

Rank	Source System
1	Salesforce CRM
2	Salesforce Billing
...	Default

# Case 2: Unblock and deduplicate on Account, block on Address and Phone

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000N5 K

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000FF V

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP
SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

# Master Record: Result after merge

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
		2100 Seaport Blvd	Mailing	416-590-2412	Fax
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax
		2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP

# Case 3: Unblock and deduplicate on Account, block and deduplicate on Address and Phone

1.

Block Survivorship

Survive as a block

Deduplication

Account ID

Fields: Tax Payer ID (Inherited), Filing Date (Inherited), Account (Source Ranking (Rank 8)), Account ID (Inherited), Account T... (Inherited)

2.

Block Survivorship

Survive as a block

Deduplication

Address Type

Rule

Source Ranking (Rank 8)

Rank	Source System
1	Salesforce Billing
2	Salesforce CRM

Fields: Account ID (Inherited), Account T... (Inherited), Address (Source Ranking (Rank 8)), Addre... (Inherited), Addre... (Inherited), City (Inherited), State (Inherited), Country (Inherited), Postal ... (Inherited), Phone (Source Ranking (Rank 7))

3.

Block Survivorship

Survive as a block

Deduplication

Phone Type

Rule

Source Ranking (Rank 7)

Rank	Source System
1	Salesforce CRM
2	Salesforce Billing
..	Default

Fields: Account (Source Ranking (Rank 8)), Account ID (Inherited), Account T... (Inherited), Address (Source Ranking (Rank 8)), Addre... (Inherited), Addre... (Inherited), City (Inherited), State (Inherited), Country (Inherited), Postal ... (Inherited), Phone (Source Ranking (Rank 7))

# Case 3: Unblock and deduplicate on Account, block and deduplicate on Address and Phone

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
1	Informatica	1000INFA	04/04/2023	MDM00000000N5L

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		#1550, 120 Bremner Blvd	Mailing	+1650-687-6200	VoIP
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1650-385-5001	LandLine
		120 Bremner Blvd, Suite 1550	Office	650-385-4424	Fax

PartyID	PartyName	TaxPayerID	FilingDate	Business ID
2	Informatica Inc	1000INFA	04/03/2023	MDM00000000N5M

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	2100 Seaport Blvd, Redwood City	Billing	+1416-590-2400	LandLine
		2100 Seaport Blvd	Office	+1416-590-2401	VoIP
SFDC124	Legal	2100 Seaport Blvd, Redwood City	Mailing	416-590-2412	Fax

# Master Record: Result after merge

AccountID	AccountType	AddressLine	AddressType	PhoneNumber	PhoneType
SFDC123	IT	120 Bremner Blvd, #1550	Billing	+1416-590-2400	LandLine
		120 Bremner Blvd, Suite 1550	Office	+1416-590-2401	VoIP
				650-385-4424	Fax
SFDC124	Legal	120 Bremner Blvd, #1550	Billing	+1650-687-6200	VoIP
		#1550, 120 Bremner Blvd	Mailing	416-590-2412	Fax
				+1650-385-5001	LandLine

# Behavior of PATCH API in Survivorship

## 1) Update using Business ID

PATCH  `{{MDM_URL}}/business-entity/public/api/v1/entity/party/{{(BID)}}?sourceSystem=salesforce_crm`

Params  Authorization Headers (11) **Body**  Pre-request Script Tests Settings

none  form-data  x-www-form-urlencoded  raw  binary  GraphQL **JSON**

```
1 [
2   {
3     "op": "replace",
4     "path": "account[SFDC124Bill].phone[SFDC124_FaxCRM].phone_number",
5     "value": "+1416-590-2413"
6   }
7 ]
```

## 2) Update using Business ID to replace complete grandchild

PATCH  `{{MDM_URL}}/business-entity/public/api/v1/entity/party/{{(BID)}}?sourceSystem=salesforce_crm`

Params  Authorization Headers (10) **Body**  Pre-request Script Tests Settings

none  form-data  x-www-form-urlencoded  raw  binary  GraphQL **JSON**

```
1 [
2   {
3     "op": "replace",
4     "path": "account[SFDC124Bill]",
5     "value": {
6       "phone": [
7         {
8           "_id": "SFDC124_FaxCRM",
9           "phone_number": "+1416-590-2401"
10        }
11      ]
12    }
13  }
14 ]
```

## 3) Update using Business ID to change grandchild type

PATCH  `{{MDM_URL}}/business-entity/public/api/v1/entity/party/{{(BID)}}?sourceSystem=salesforce_crm`

Params  Authorization Headers (10) **Body**  Pre-request Script Tests Settings

none  form-data  x-www-form-urlencoded  raw  binary  GraphQL **JSON**

```
1 [
2   {
3     "op": "replace",
4     "path": "account[SFDC123Bill].phone[SFDC123_FaxBill].phone_type.Code",
5     "value": "LandLine"
6   },
7   {
8     "op": "replace",
9     "path": "account[SFDC123Bill].phone[SFDC123_FaxBill].phone_number",
10    "value": "+1416-590-2400"
11  }
12 ]
```

# Points to be noted

- Limitation of maximum 500 unique field groups that can be deduplicated
- Current limitation on Source Records screen
  - Fields groups displayed one below the other
  - The winning nested field groups from lowest ranked source are not being shown that they were contributed from that source
- Need to re-ingress data for recalculation of BVT
- BVT is not recalculated when data is at rest
- Maximum of 40 field groups can be shown on the Source Records screen
- Any non-surviving deduplicated value not making it to the master, cannot be searched for, if it is enabled as Searchable

# Questions?



# Thank You

Where data & AI come to **LIFE**

