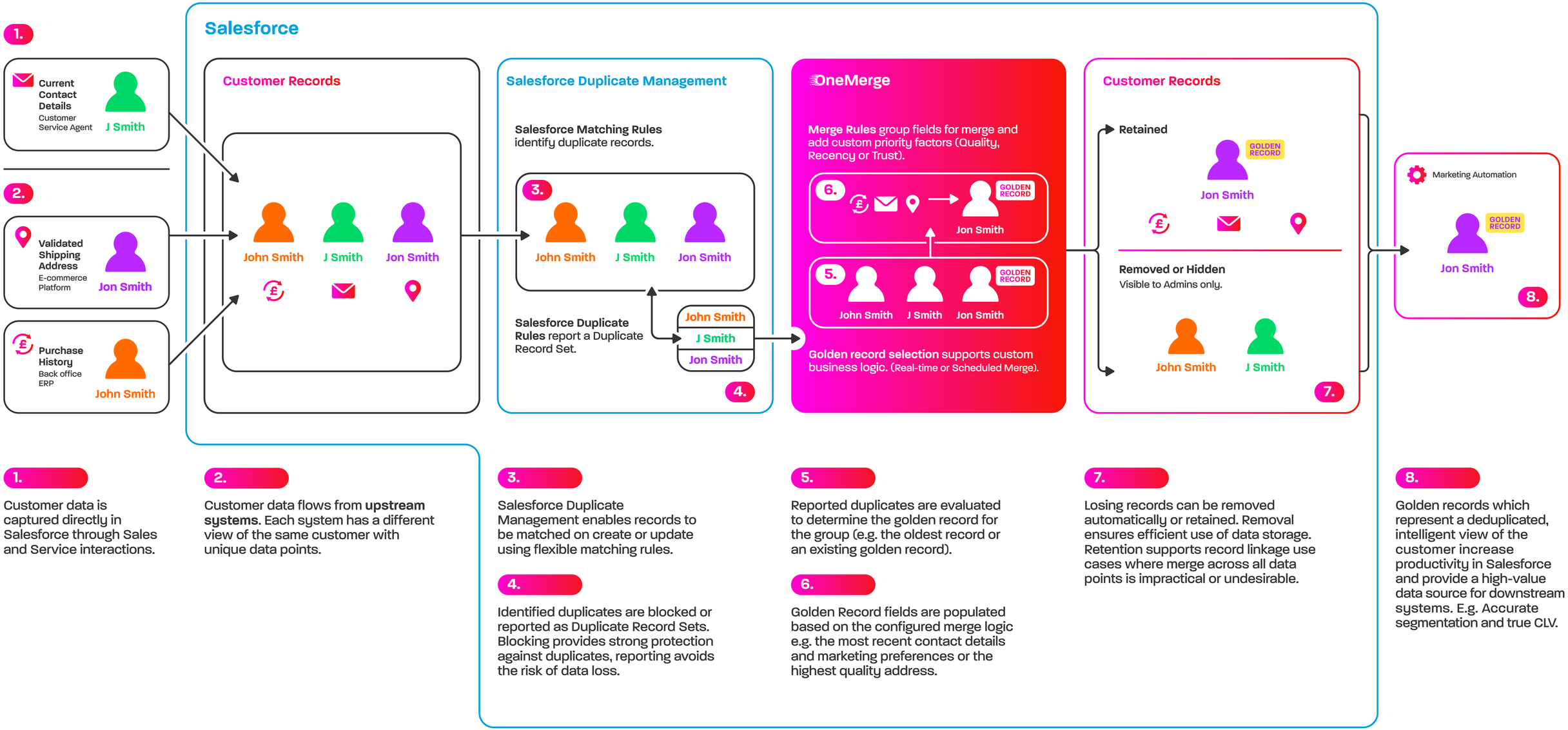
OneMerge



1.

Customer data is captured directly in Salesforce through Sales and Service interactions.

2.

Customer data flows from **upstream systems**. Each system has a different view of the same customer with unique data points.

3.

Salesforce Duplicate Management enables records to be matched on create or update using flexible matching rules.

4.

Identified duplicates are blocked or reported as Duplicate Record Sets. Blocking provides strong protection against duplicates, reporting avoids the risk of data loss.

5.

Reported duplicates are evaluated to determine the golden record for the group (e.g. the oldest record or an existing golden record).

6.

Golden Record fields are populated based on the configured merge logic e.g. the most recent contact details and marketing preferences or the highest quality address.

7.

Losing records can be removed automatically or retained. Removal ensures efficient use of data storage. Retention supports record linkage use cases where merge across all data points is impractical or undesirable.

8.

Golden records which represent a deduplicated, intelligent view of the customer increase productivity in Salesforce and provide a high-value data source for downstream systems. E.g. Accurate segmentation and true CLV.