

Lab Exercise 6 – Harmonization & Unification

(Identity Resolution)

This lab helps learners understand how Salesforce Data Cloud unifies fragmented customer data across multiple sources into a **single “golden profile.”**

Objective

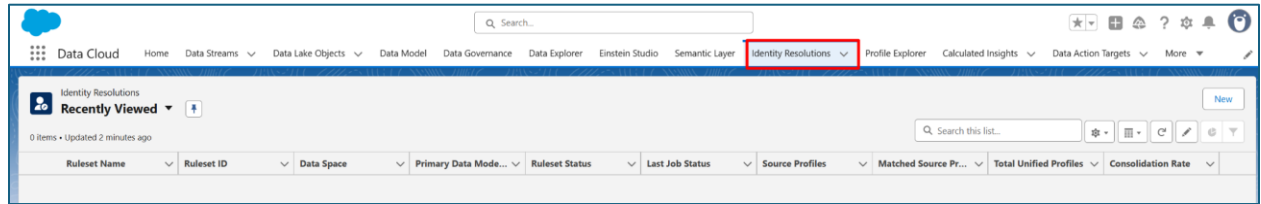
By the end of this lab, learners will be able to:

- Create and configure an **Identity Resolution Ruleset** in Salesforce Data Cloud.
- Apply **Exact**, **Normalized**, and **Fuzzy** match rules.
- Configure **Reconciliation Rules** to determine which data wins during merging.
- Run and preview ruleset results.
- Analyze the **Resolution Summary** and verify unified profiles using **Profile Explorer**.

Hands-on: Create and Test an Identity Resolution Ruleset

Step 1: Navigate to the Identity Resolution Workspace

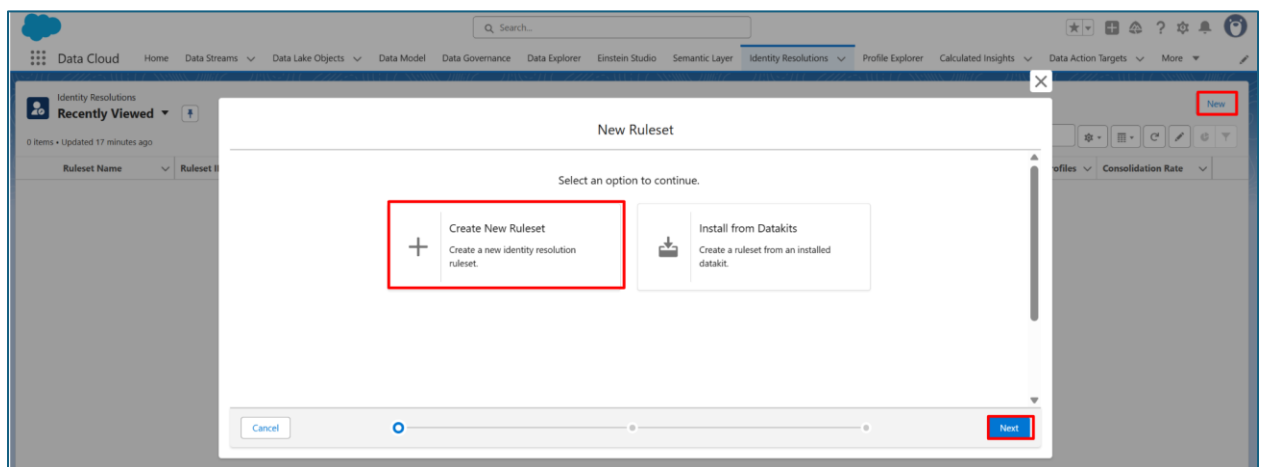
1. Log in to your **Salesforce Data Cloud Developer Edition**.
2. From the **App Launcher (grid icon)**, search for and open the **Data Cloud** app.
3. In the left-hand navigation pane, select **Identity Resolution**.



4. You'll land on the **Rulesets** page — this lists any existing or sample rulesets.

Step 2: Create a New Ruleset

1. Click the **New Ruleset** button (top-right corner).



2. In the **Ruleset Properties** window:

- **Label:** Customer Unification Ruleset
- **API Name:** auto-fills

- **Data Model Object (DMO):** Select Individual (or your Customer Profile DMO).
- **Description:** *Unify customer records from CRM and Web Engagement based on name, email, and phone.*

3. Click **Save & Next**.

Step 3: Define Match Rules

You'll now configure how the system identifies matching records across sources.

3.1 Add Exact Match Rule

1. Click **Add Rule**.
2. Set:
 - **Rule Name:** Exact Email Match
 - **Match Type:** Exact
 - **Fields:** Email
 - **Active:** Checked

3. Click **Save Rule**.

💡 *Use exact match for unique, structured fields like Email or Customer ID.*

3.2 Add Normalized Match Rule

1. Click **Add Rule** again.

2. Set:

- **Rule Name:** Normalized Phone Match
- **Match Type:** Normalized
- **Fields:** MobilePhone
- **Active:** Checked

3. Click **Save Rule**.

💡 *Normalization removes special characters, spaces, and formatting differences (e.g., +91-999 vs. 0999).*

3.3 Add Fuzzy Match Rule

1. Click **Add Rule** again.

2. Set:

- **Rule Name:** Fuzzy Name Match
- **Match Type:** Fuzzy
- **Fields:** FirstName, LastName
- **Active:** Checked

3. Click **Save Rule**.

Fuzzy matching uses phonetic similarity — it can catch “Jon” vs “John.”

Step 4: Configure Reconciliation Rules

After defining how to match, you must define how Salesforce decides which field values to keep in the unified profile.

1. Click the **Reconciliation Rules** tab (next to Match Rules).
2. For each field group (e.g., Email, Phone, Address, Name), choose:
 - **Rule Type:**
 - Most Recent → Keeps data from the latest updated record.
 - Most Frequent → Uses the value that appears most often.
 - Source Priority → Prefers a specific data source.

3. Example configuration:

Field	Rule Type	Notes
Email	Most Frequent	Avoids one-off email typos
Phone	Most Recent	Keeps freshest phone number
Address	Source Priority	Prefer CRM over Engagement

4. Click **Save**.

Step 5: Run the Ruleset

1. From the top-right, click **Run**.

2. In the pop-up:

- Choose **Preview Mode** if you want to see results without committing.
- Or select **Full Run** to actually consolidate data.

3. Click **Run Ruleset**.

Step 6: View the Resolution Summary

Once the run completes (can take 1–3 minutes for sample data):

1. Open your **Ruleset Details Page** → select the **Resolution Summary** tab.

2. Review key metrics:

- **Records Processed:** Total profiles checked.
- **Matched Pairs:** Number of detected duplicates.
- **Unified Profiles Created:** How many golden profiles were built.
- **Average Match Confidence:** (Higher % = better rule accuracy)

3. Click **View Details** to expand results and see which rule contributed most to matching (Exact / Fuzzy / Normalized).

If match rates seem low, experiment by adjusting field combinations or match types.

Step 7: Iterate and Improve

1. Click **Clone Ruleset** (from top-right) to make a copy for testing.
2. Add another field — for example, City or PostalCode — to improve confidence.
3. Run again and compare **Resolution Summary** results.
4. Note the difference in Match Rate and Unified Profiles.

Step 8: Validate Unified Profiles

1. In the Data Cloud navigation, click **Profile Explorer**.

2. Search for a customer by **Email** or **Full Name**.
3. Open one of the unified profiles.
4. In the **Identity Resolution panel**, you'll see:
 - Linked source records (CRM + Engagement).
 - Which fields were reconciled (highlighted with “winning” data).
 - Data provenance (source object name).
5. Expand the record to view **Engagement Events**, **Purchases**, or other linked datasets.

You've now validated your unified “Golden Record” profile successfully!