



Customer MDM



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1 Overview

This course takes you through the Customer MDM delivery by covering the Understanding of CX360 (Customer MDM) Concepts, Data Modeling, Data Onboarding, Data Matching and Data Merging, Data Management, Data Security, Data Governance, UI Configurations, and RESTFUL API Scenarios.

Note that this journey is designed with a Tell Me, Show Me, and Try Me learning format, so that you get the maximum benefits.

2 Objectives

By the end of this module, you will be able to:

- Understand the concept of Party Domain Data Modeling, Different Entity Types, Attributes, Relationships, and Onboarding the Single and Bulk Entities to the application.
- Define the Deterministic and ML-based match rules to help the application match the Source Record with the Golden Record.
- Define the Merge Threshold Values to help the system perform Auto or Manual Merge based on the match score calculated between Source Record and Golden Record.
- Explore the Golden Record Management stages the Source Record will undergo and enrich the values, such as Source Record Management (SRM), Address Record Management (ARM), and Golden Record Management (GRM).
- Concepts of Data Management.
- Data Security concepts to secure the data in the application by granting access permissions to users based on their roles Concepts of Analysing Data.
- Apply the Data Governance rule for each entity and business conditions for computation and validation use cases.
- Tenant-specific folder structure and customize the UI elements based on the business needs.

3 Duration

The course duration is 667 minutes.

4 Agenda

4.1 Module 1: Data Modeling – 98 Minutes

- Data Model Concepts
 - Base Data Model
 - Reference Data
 - Match Configuration
 - EARC Structure
- Base Data Model
- Reference Data Model

4.2 Module 2: Data Match – 82 Minutes

- Data Match Concepts
- Deterministic Match Rules
- ML Based Match Rules
- Standardization
- Match Data Profiler

4.3 Module 3: Data Merge – 38 Minutes

- Merge Concepts
- Auto Merge
- Manual Merge
- Merge Configuration

4.4 Module 4: Golden Record Management – 82 Minutes

- Match and Merge Management
 - Source Record Management (SRM)
 - Address Record Management (ARM)

- Golden Record Management (GRM)
- GRM State and GRM Process State
- Deterministic Match Flow
- Golden Record Management Flow
- How to Configure GRM Flow?
- GRM Workflow

4.5 Module 5: Data Management – 63 Minutes

- Data Enrichment Concepts
- Data Search and Manage in the Application
- Governance Concepts and Scenarios

4.6 Module 6: Data Security – 58 Minutes

- Authentication and Authorization in the Application
- Permissions and Authorization Model
- Set Domain Level Permissions
- How to set up the Permissions at Entity and Attribute levels in the Application?
- Hide Entity Type

4.7 Module 7: Dynamic Authorization – 36 Minutes

- Overview of Dynamic Authorization
- Role-based v/s Dynamic Authorization
- How does Dynamic Authorization work?
- Components
- Related Use Cases
- Set Attribute Permission at Entity and Domain Level

4.8 Module 8: Data Governance – 60 Minutes

- Data Governance Concepts

- Entity Manage Object
- Business Language
- Business Rule Concepts
- Business Rule Builder
- Populate GRM State
- Copy Account ID to MDM ID

4.9 Module 9: Analyzing Data – 12 Minutes

- Entity Network Viewer
- Hierarchy View
- Customer Hierarchy – Organization View

4.9 Module 10: UI Configurations – 138 Minutes

- Prerequisites
- Overview
- Folder Structure
- Understand OOTB Configuration
- Guidelines
- Tenant Code Base – Folder Structure
- Default Coalesce Path
- Configurations at Different Levels
- UI Config Manage
- Tenant Level Configuration
- Entity Creation Wizard Setup
- Entity App Configurations

5 Contact Us

For any additional information on the available catalog, please write to us at the following address university@syndigo.com