**Universal Leadz - Lead to Account Matcher**

1. Solution Overview

This project implements an automated Lead-to-Account matching mechanism within Salesforce using Apex. The matching logic determines the most relevant Account for a given Lead based on the domain of the Lead's email and fuzzy matching similarity on company name. It supports three match types: Domain, Fuzzy, and Combined.

2. Matching Criteria & Logic

Trigger fires on ‘before insert’ event of Leads. ‘LeadAccountMatcher’ class runs and fetches all active Accounts. For each Lead it runs below mentioned matching criteria to perform Lead-to-Account match and then updates the Lead record fields accordingly.

1. Domain Matching: Compares the domain extracted from Lead.Email with the domain extracted from Account.Website.
2. Fuzzy Matching: Uses Jaro-Winkler similarity between Lead.Company and Account.Name (threshold ≥ 0.85), which can be adjusted as per the business requirements.
3. Combined Matching: Occurs when both Domain and Fuzzy criteria are satisfied (match score = 1.0).

3. Configuration

1. Custom Fields on Lead Object:  
   - Matched\_Account\_\_c (Lookup to Account)  
   - Matched\_By\_\_c (Picklist: Domain, Fuzzy, Combined)  
   - Match\_Score\_\_c (Number)
2. Supporting Apex Classes:  
   - LeadAccountMatcher.cls  
   - StringMatchUtils.cls  
   - Lead Trigger and handler class for automation

- Test Classes

1. Reports & Dashboards

- Custom report type to track Leads with/without matched Accounts.

- Dashboard component to show match percentage with daily refresh.