[PG-6978] Create contact matching service Created: 05/Mar/21 Updated: 08/Mar/21

Status:	To Do
Project:	Project Guardian
Components:	None
Affects versions:	None
Fix versions:	None

Type:	Story	Priority:	Medium
Reporter:	Craig Kelso	Assignee:	Ishan Sharma
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	Not Specified		
Time Spent:	Not Specified		
Original estimate:	Not Specified		

Issue links:	**Cloners**			
	is cloned by	PG-6990	Update contact object (Member CRM) wi...	To Do
Acceptance Criteria:	**1 .Given**: a policy type is overseas cover. **When**: user provisioning service is called **Then**: contact matching rule will find and return the contact exist in member crm based on First name, Last name, dob, email(if provided), mobile(if provided). **2. Given**: a policy type is not overseas cover. **When**: user provisioning service is called **Then**: contact matching rule will find and return the contact exist in member crm based on First name, Last name, dob, mailing address or residential address, email(if provided),mobile(if provided). **3. Given**: user provisioning service is called **When**: Contact does not exist with above matching rule. **Then**: matching rule will return(or message) null and go to next criteria 4. Please use matching rules as outlined below: **Contact Matching Rules** Identify if PHI Customer record exist in Member CRM. Compare the values of customer name, email address, mobile number, address and date of birth for matching in Member CRM. Each user provisioning service must include the following customer details			

CONTACT TYPE	FIELDS	Required types
Individual	• First Name • Last Name	Required
Email	• Email Address	Optional*
Mobile	• Mobile	Optional*
Address	• Address Line 1 • City Name • Country Name	Required
Date Of Birth	• Date of Birth	Required
Product Type	• ProductType	Required
SSO Matching ID	• SSO Matching ID	Required
PHI Status	• PHI Status (Active, Inactive)	Required
SSO Source System	• SSO Source System	Required

- **Do not use blank fields as part of matching criteria.**

Matching Rules

SET OF CRITERIA	WHAT IT MATCHES
Name and Email	Fuzzy first name, exact last name, and exact email address
Name and Phone Number	Fuzzy first name, exact last name, and exact Mobile
Name and Address	Fuzzy first name, exact last name, and exact address details
Name, Email, and Mobile Number	Fuzzy first name, exact email address, and exact Mobile
Name, Email, and DoB	Fuzzy first name, exact email address, and exact DoB
Name, Address, and DoB	Fuzzy first name, exact address, and exact DoB

Note : please leverage Salesforce duplicate management to implement this feature
https://help.salesforce.com/articleView?id=sf.matching_rule_map_of_reference.htm&type=5

Story Points:	5

Sprint:	PG SSO Sprint 2.3 FY-21 SP-1
Epic Link:	SSO - New PHI Customer provisioning
Back-End Dev:	5

Description

The below requirements involve matching customer record data (from Retail Org passed via webmethods to the Member CRM) against the Contact object in Member CRM.

*__Assumption__: address details coming from EDP has gone through DQ check & validation and any errors are remediated. If not done, may result duplicate log-in records in Member CRM.

*__Notes__:
-This user story does not include the Webmethod API service to subscribe to changes from PHI Org.
-QA effort has not been assigned to this story yet because there is no QA resource at the moment.

Comments

Comment by Craig Kelso [05/Mar/21]

Afework Feyissa As discussed, could you please meet with Ishan to discuss detailed matching rules; and when complete please update the AC (if required) and attach these matching rules to this ticket. Thanks.

Fyi Syed Ahmed Ishan Sharma

Comment by Craig Kelso [08/Mar/21]

As confirmed by Afe, I have updated the below fields in the matching rules table in above acceptance criteria.

Incorrect field to use	Correct field to use
Source ID	SSO Matching ID
Status	PHI Status
SourceSystem	SSO Source System

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