**Contact Matching Rules**

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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 | |
| Source ID | | * SourceID | | Required | |
| Status | | * Status (Active, Inactive) | | Required | |
| SourceSystem | | * SourceSystem | | Required | |

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

Match 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 and Global Party ID | Fuzzy first name, exact identification name, and exact identification number |
| 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>