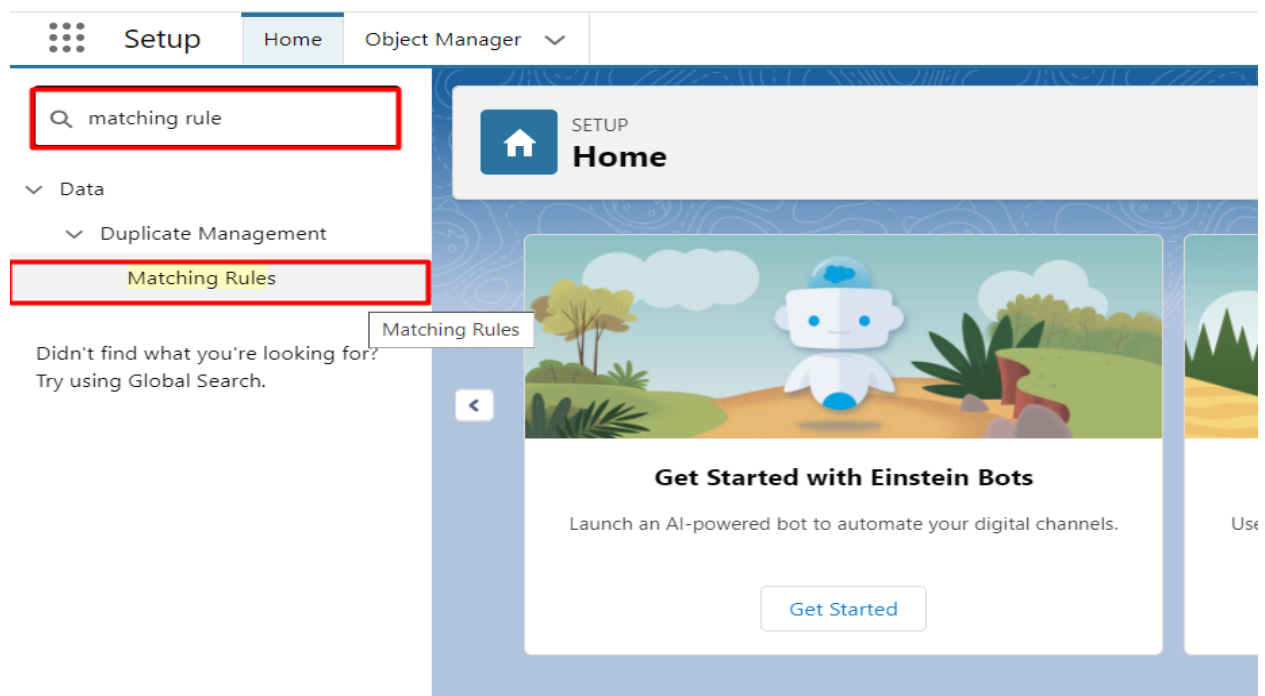


Step 1: First step is to go to the quick search option and search for matching rule, click on it to open.



Step 2: As you click on it on the next page you will see an option to create a new matching rule. Click on it on the next page you will see certain details which are to be filled up .

The screenshot shows the 'Create New View' page for Matching Rules. The page has a header with 'Matching Rules' and 'Create New View'. Below the header, there are 'Save' and 'Cancel' buttons. The page is divided into three steps:

- Step 1. Enter View Name**: This section contains two input fields: 'View Name:' and 'View Unique Name:'. The 'View Unique Name' field has a small information icon (i) to its right.
- Step 2. Specify Filter Criteria**: This section is titled 'Filter By Additional Fields (Optional):'. It contains a table with three columns: 'Field', 'Operator', and 'Value'. There are five rows, each with a dropdown menu for 'Field' (all set to '--None--'), a dropdown menu for 'Operator' (all set to '--None--'), and a text input field for 'Value'. To the right of each row is an 'AND' connector. Below the table is a link that says 'Add Filter Logic...'.

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
- Step 3. Select Fields to Display**: This section contains two columns: 'Available Fields' and 'Selected Fields'. Under 'Available Fields', there is a text input field with the value 'Unique Name'. Under 'Selected Fields', there is a text input field with the value 'Rule Name'.

Step 3: Here we have to select fields so I am selecting email exact and here is another option available as match blank fields so if you select this option so if two records are having blank field they will be matched by default.

Unique Name: Check_Duplicate_Conta

Description:

Matching Criteria

Tell the rule which fields to compare and how.

	Field	Matching Method	Match Blank Fields
1.	Email	Exact	<input type="checkbox"/>
2.	--None--	Exact	<input type="checkbox"/>
3.	--None--	Exact	<input type="checkbox"/>
4.	--None--	Exact	<input type="checkbox"/>
5.	--None--	Exact	<input type="checkbox"/>

Add Row Remove Row

Clear Filter Logic

Filter Logic: 1

Tips ?

Step 4: Clicking on save as you click save on the next page you will see the record is created and there is an option as activate so clicking on it to activate it.

Matching Rule

Check Duplicate Contact matching rule

Matching Rule Detail

	Object	Contact
Rule Name	Check Duplicate Contact matching rule	
Unique Name	Check_Duplicate_Contact_matching_rule	
Description		
Matching Criteria	Contact: Email EXACT MatchBlank = FALSE	
Status	Inactive	
Created By	Admin User, 5/22/2021, 5:10 AM	

Modified By: Admin User, 5/22/2021, 5:10 AM

Buttons: Edit, Delete, Clone, **Activate**

Step 5: Now I am creating a new contact and naming it as contact 2 and I am going to fill the same email ID so now you will see as you fill the same email it will show you a message for potential duplicate.

The screenshot shows a contact creation form with fields for Title, Department, Birthdate, Reports To, Lead Source, Weekday, Other Phone, Fax, Email, Assistant, and Asst. Phone. The Email field is highlighted in yellow and contains the text "sanjaygupta.techschool@gmail.com". An orange warning box is overlaid on the form, stating "Similar Records Exist" and "This record looks like an existing record. Make sure to check any potential duplicate records before saving." with a link to "View Duplicates".

Step 6: As you click on the view duplicate option you will see the record with similarly information.

The screenshot shows the "View Duplicates" screen. At the top, it says "View Duplicates". Below that, a message reads: "The record you're about to create looks like a duplicate. Open an existing record instead?". Under the heading "CONTACT (1)", there is a card for "Test Contact". The card displays the following information: Name: Test Contact, Account Name: (blank), Account Site: (blank), Phone: (blank), Email: sanjaygupta.techschool@gmail.com, and Contact Owner Alias: AUser. At the bottom of the card, there is a link that says "Open This Contact".