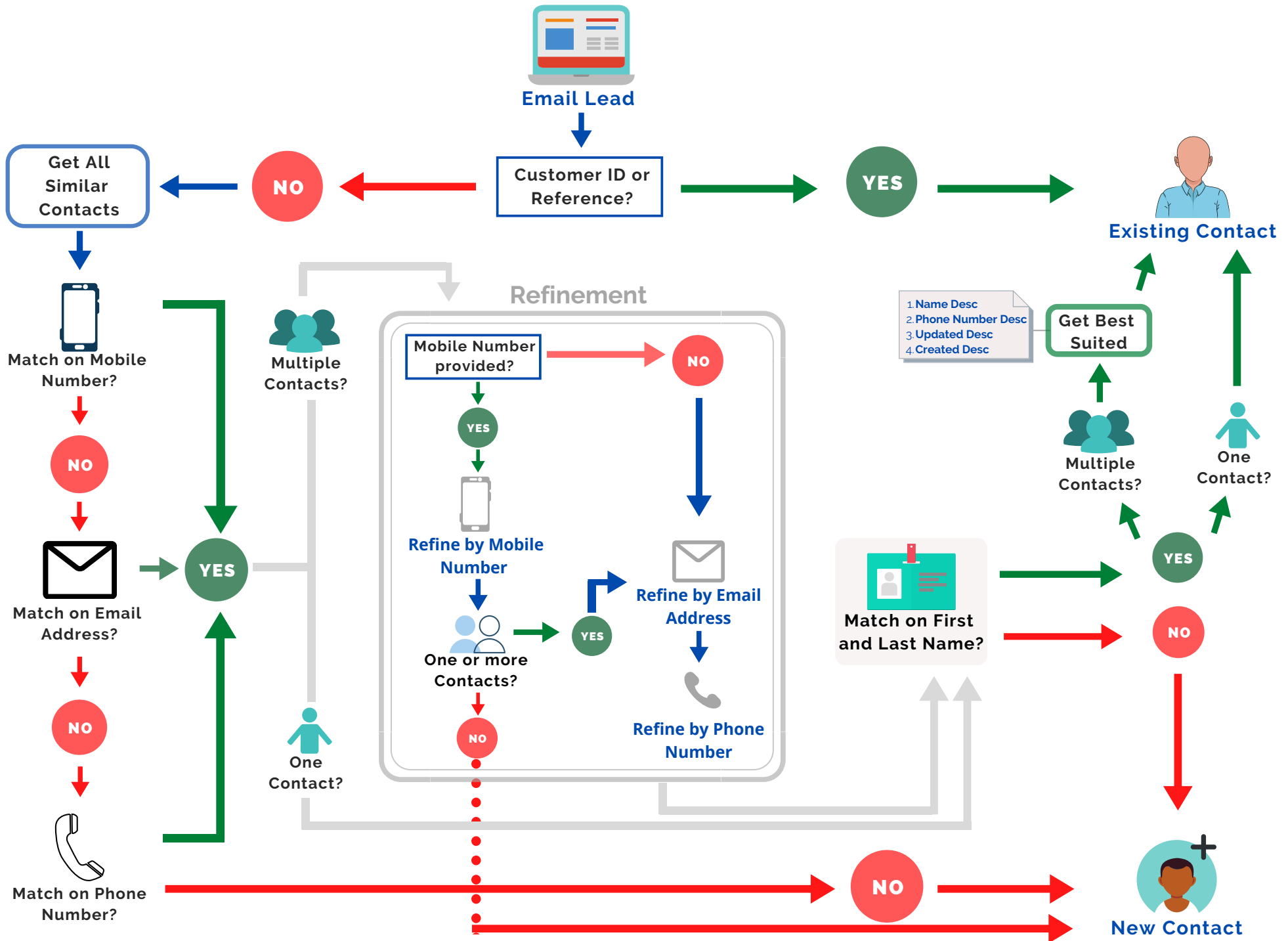




Contact Matching – Step by Step

1. We receive an email lead
2. If we have a CustomerID (ours) or Customer Ref (external system) then all the below is skipped, regardless on whether a match is found or not
3. We identify a pool of contacts with some fuzzy matching that look to be like the contact we have just received
4. We first attempt to **match** by mobile number as we consider this king
 - a) If there is a single match it proceeds to (10)
 - b) If there are multiple matches it proceeds to (7)
 - c) If there are no matches it proceeds to (5)
5. We secondly attempt a **match** by Email
 - a. If there is a single match it proceeds to (10)
 - b. If there are multiple matches it proceeds to (7)
 - c. If there are no matches it proceeds to (6)
6. We thirdly attempt a **match** by Phone
 - a. If there is a single match it proceeds to (10)
 - b. If there are multiple matches it proceeds to (7)
 - c. If there are no matches to phone it will create a new customer
7. We attempt to **refine** the matches on mobile number (if mobile number is provided)
 - a. If there is a single match it goes to (10)
 - b. If there are multiple matches it proceeds to (8)
 - c. ***If there are no matches it creates a new contact***
8. We secondly attempt to **refine** by Email
 - a. If there is a single match it goes to (10)
 - b. If there are multiple matches it proceeds to (9)
 - c. If there are no matches on Email, it gets the previous set of matches and goes to (9)
9. We thirdly attempt to **refine** by Phone
 - a. If there is a single match it goes to (10)
 - b. If there are multiple matches it proceeds to (10)
 - c. If there are no matches to Phone, it gets the previous set of matches and goes to (10)
10. We attempt to **match** on First and Last Name
 - a. If there is a single match it will ***pick that contact***
 - b. If there are no matches it will ***create a new contact***
 - c. If there are still multiple matches it will ***pick the best suited contact*** (sorted by name, phone number, updated and created descending).