LeanData Matching
Match Settings Guide

Overview

The LeanData Match Settings tab within the Matching section of the LeanData App allows you to customize how matched objects are selected, prioritized, or updated with three sections: Domain Matching, Preserve Manual Updates, and Routing Match Limits.

Finding the Match Settings Page

To locate the Match Settings page, go to the **Matching** tab on the left sidebar in the LeanData Dashboard and select **Match Settings** from the dropdown menu.
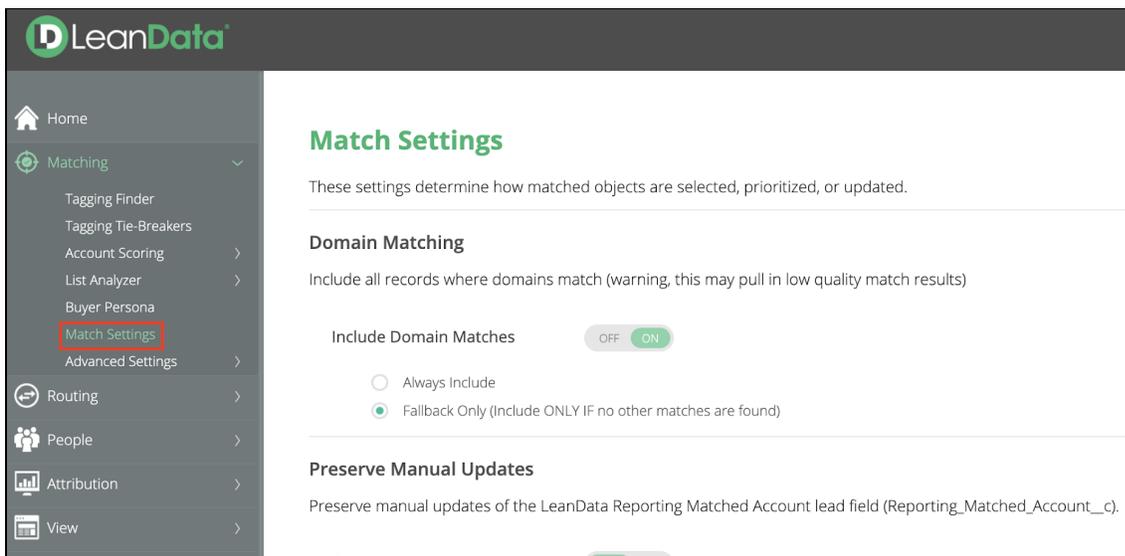
Domain Matching Setup

The first section on the Match Settings page is **Domain Matching**.

To clarify, even with this setting turned **OFF**, domain is always considered as one of the multiple matching criteria in the LeanData Matching Algorithm. But typically, if domain is the *only* matching criteria between lead and account, it is insufficient to form a match. Enabling this setting will allow Lead-Account matches where domain is the *only* matching criteria.

When toggled **ON** you have the option to select **Fallback Only (Include ONLY IF no other matches are found)**. If you decide to include domain-only matches, this is our recommended setting because it considers other higher quality matches first while using domain-only matching as a fallback, if no higher quality matches are otherwise found.

Always Include will always pull in domain-only matches as potential matches and subject these to tiebreakers alongside other higher quality matches. There is a greater likelihood of selecting low quality matches with this setting.

Best Practices

When considering your options for domain-only matches, keep in mind that the fuzzy matching algorithm evaluates company name, email domain, website domain, phone number and address.

Enabling this domain-only match setting will allow a lead to match to an account if they have the same domain associated with them, even if the company names are completely unrelated.

This is why it is recommended that you either keep the "Fallback only" setting on or keep domain matching toggled OFF, so that your match settings aren't overly dependent on domains.

Preserve Manual Updates

The next section of the match settings tab is the **Preserve Manual Updates** settings. This section allows you to preserve any updates manually made to the Reporting Matched Account field on your leads, preventing LeanData from overwriting your change with either a continuous matching job or a one-time matching job.

This section is split into continuous matching and one-time matching. You can toggle the preserve manual update button for each matching scenario, whether it be for continuous matching or one-time matching

Preserve Manual Updates

Preserve manual updates of the LeanData Reporting Matched Account lead field (Reporting_Matched_Account__c).

Continuous Matching   `OFF` ON

Preserve manually entered values in the Reporting Matched Account lead lookup field (LeanData matching will not overwrite manually entered values)

One-Time Matching   `OFF` ON

Preserve manually entered values in the Reporting Matched Account lead lookup field (LeanData matching will not overwrite manually entered values for one-time match jobs)

This comes into play when you may decide that a different account is a better match for a lead than the one that LeanData has tagged the Lead with. If you want to manually update the Reporting Matched Account to the better match, but this is a one-off case and will not require changing your Tagging Filters and Tiebreakers, preserving manual updates will prevent LeanData from changing it back to the original account.

Routing Match Limits

The last section of match settings, **Routing Match Limits**, is used for controlling the maximum amount of potential matched records that can be returned for a particular object that you're matching against, which affects system performance. You may have a lot of potential matched records in your system that you want to evaluate for your matches and expand that number to more than 1,000.

Routing Match Limits

Specify the number of matched records to return in LeanData Routing. 1,000 or fewer matched records are recommended to improve overall system performance

Matched Leads	Return the first	1000	matched **leads** sorted by	Last Modified Date / Most Recent
Matched Contacts	Return the first	1000	matched **contacts** sorted by	Last Modified Date / Most Recent
Matched Accounts	Return the first	1000	matched **accounts** sorted by	Last Modified Date / Most Recent
Matched Opportunities	Return the first	1000	matched **opportunities** sorted by	Last Modified Date / Most Recent

If the number of potential matched records LeanData identifies exceeds the amount in the settings (in the above case, 1,000), the default setup will only consider the 1,000 matched records that have been most recently modified.

The criteria for which records will be considered can be customized in the right hand side dropdown menus. You can choose between 'created date', 'last modified date', or 'last activity'. From there you can also select between the 'most recent' or 'oldest' records.

Note: this setting is rarely modified, and should only be used if you have many records with over 1,000 potential matches, and LeanData is missing the correct match because it hasn't been recently modified.