

Configuring Find Similar Clients Order Module

When the module runs, the order fields you set are compared to existing accounts looking for similarities.

1. Select the **First Name** field, if you want to compare the first name from the current order to your existing clients.
2. Select the **Last Name** field, if you want to compare the last name from the current order to your existing clients.
3. Select the **Company** field, if you want to compare the company name from the current order to your existing clients.
4. Select the **Email** field, if you want to compare the email from the current order to your existing clients.
5. Select the **Phone** field, if you want to compare the phone number from the current order to your existing clients.
6. In the **Number of Matching Fields Required for Automatic Association** field, enter the number from 1 to 5 numeric digits that must match for the order to be associated to an existing client.

On this page:

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Add Order Action

Details

Prereqs

Config

Order must match the following to be automatically associated:

First Name:

☒

Last Name:

☒

Company:

☒

Email:

☐

Phone:

☐

Number of Matching Fields Required for Automatic Association:

Save

Save & New

Cancel

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