eServices Administrator's Guide

Contact Identification

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Contact Identification

To perform contact identification, UCS takes the contact data included in the new interaction and tries to match it with its existing contact records based on certain attributes.

This page describes the default process of contact identification.

What UCS Checks

The default list of the attributes that UCS checks is `FirstName, LastName, Title, EmailAddress,` and `PhoneNumber.`

Important

This chapter refers to contact attributes by their system names. The system name is the one that is used in the UCS and Configuration Server databases, and the one that appears in the `Name` box of the attribute's `Properties` window in Configuration Manager. In Configuration Manager there is also a display name which usually differs slightly; for example, system name `PhoneNumber`, display name `Phone Number`.

Order of Checking

The attributes that UCS uses in contact identification have a ranking which tells UCS what priority to give them in searching. The default ranking is:
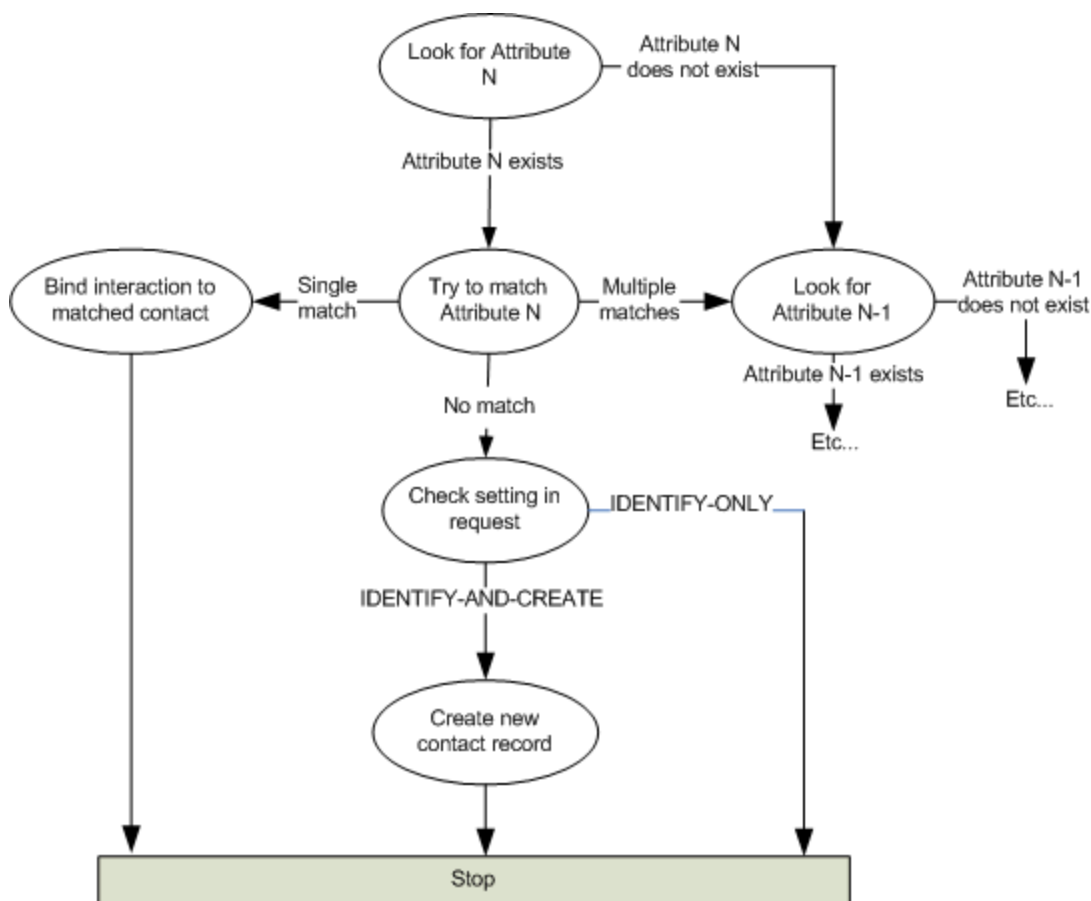
`EmailAddress—0`

`PhoneNumber—1`

`FirstName—2`

`LastName—2`

`Title—3`

The general procedure that UCS follows in the default case can be diagrammed as in the figure below, where Attribute N is the highest-ranked attribute available in the interaction's contact data, Attribute N-1 is the next highest, and so on.

Default Process for Contact Identification

Example

An example of the default identification process is available.

Customizing

You can alter the default process of contact identification in both aspects:

- Whether an attribute is used in contact identification
- What priority an attribute has in matching

You can do this for all interactions globally or for interactions of a specific media type.

With these differing scopes of customization, the more specific scope takes precedence. UCS operates according to the following order:

1. If a media type has its own configuration for how a contact attribute is used in contact identification, that takes precedence over any other configuration.

2. Configuration of a contact attribute itself is more general and applies only to those media types that lack their own configuration for contact identification.

3. In any areas where items 1 and 2 do not apply, UCS follows the default behavior described on this page.