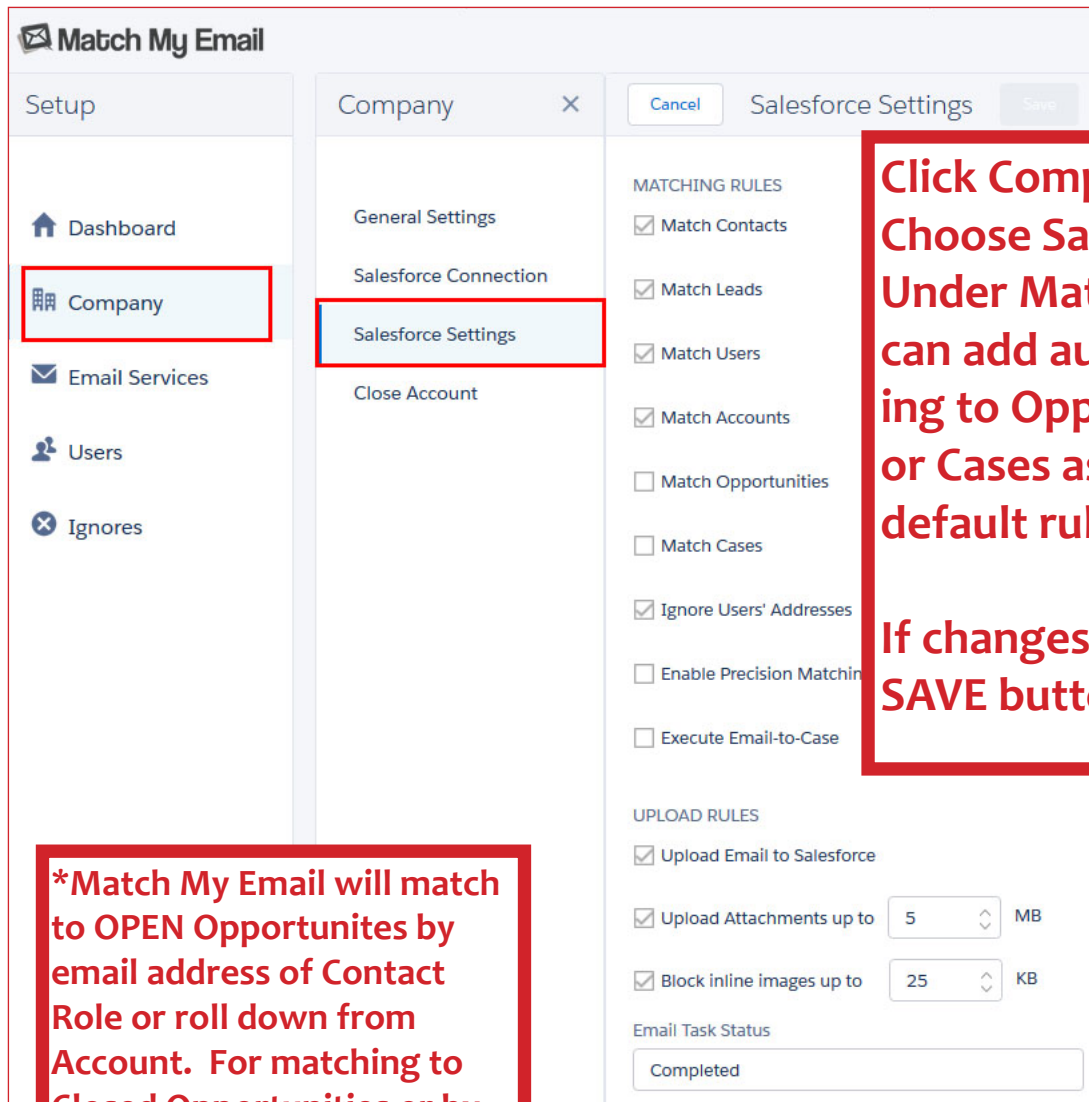
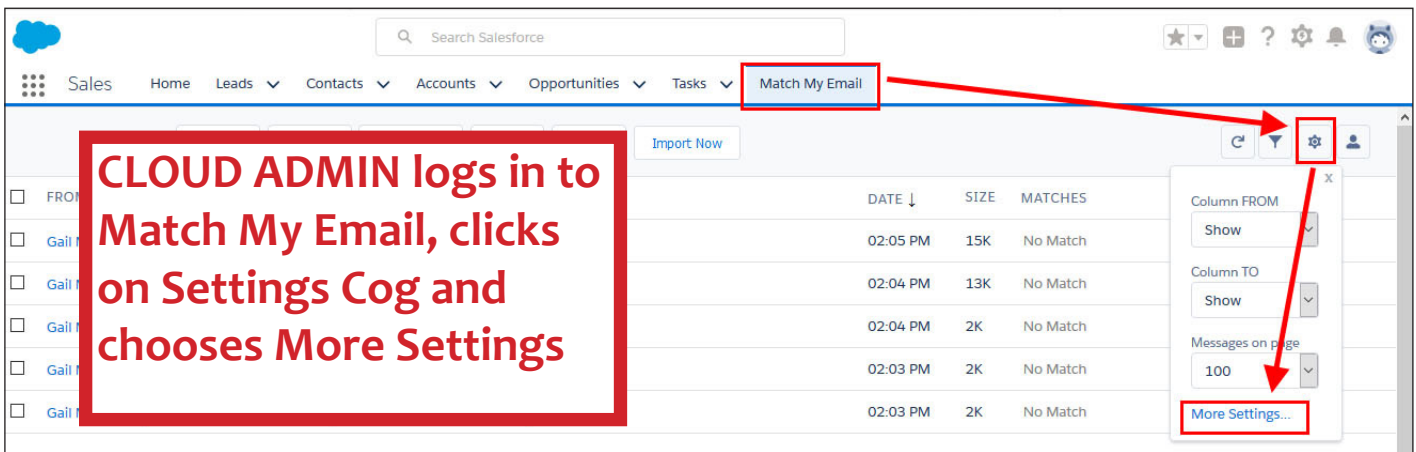


# Expand matching to Opportunity and Case records

Matching rules by default are for Lead, Contact and Account records. Matching rules can be further enabled for Opportunity and/or Case records.



**Click Company on left. Choose Salesforce Settings. Under Matching Rules, you can add automatic matching to Opportunities\* and/or Cases as well as modify default rules.**

**If changes are made, Click SAVE button.**

**\*Match My Email will match to OPEN Opportunites by email address of Contact Role or roll down from Account. For matching to Closed Opportunities or by precision, contact Support.**