All new Flipcause Gateway transactions and transaction data imports from other systems will trigger the Flipcause Match algorithm. This algorithm determines whether the transaction should create a new Contact Record or assign the transaction to an existing Contact Record.

Once a transaction enters the system, this algorithm runs to attempt to match the transaction data with existing Contact Record Data:

**Match Type:** Depending on the Record Type, either the “Standard Match Sequence” or the “Alternate Associated Match Sequence” will be used.

**Standard Match Sequence: Based on email address**

This sequence is used for the following record types:

- Transactions through Campaign Landing Pages and Widgets
- Registrations
- Volunteers
- Peer Pages
- Soft Credits
- Engagement Records
- Transactions through the Manual Gateway (with no CID previously assigned)
  - **Email Match** - All Contact IDs (CIDs) with an EXACT match for “Email” field are located. If there is ONLY 1 record that meets this criteria, then the new transaction (and all associated personal data) is assigned to the matching Contact. If more than 1 records match, then the “Multiple Match” sequence is followed.
  - **No Matches** - If the Email Match results in zero CID matches, then a NEW Contact Record is created using the Personal Details from the Transaction.
- **Multiple Matches** - If more than 1 records contain the same email address, all matching records undergo a “Full Name” exact match comparison. If there is not an exact match for “Full Name”, a new Contact Record is created. If there is a match for “Full Name”, the transaction data is assigned to the most recently added record.

*A note on Manual Payments:*
The CID standard match sequence is run when the “Finish” button is clicked on the Manual Payments main page. A CID will be assigned based on the standard match sequence (Email match). If there is no email added, a CID will not be assigned.

After this main page, there is a confirmation page where you have the option to add or edit the name and email fields and send a receipt. If you add or edit information on this page, the original transaction will be edited, so the match sequence must run again when the “Save” button is clicked. If there was already a CID assigned to the transaction from the main page, nothing will happen (since CID is already associated with a transaction).

**Alternative Associated Match Sequence: Based on existing associated CID**

This match sequence is used for the following record types:

- Donation Records
- Item Order Records
- Sponsorship Records
- Mailing List Records
- Subscription Records
- Refund Records
- Soft Credit Records (when added from Activity Reports > Details Overlays)
- Transactions through the Recurring Gateway (based on existing subscriber’s CID assignments)

During CID assignment, the above record types that use the “Alternative Associated Match”. This means that they will be assigned the same CID as their Associated Record. For example: If D1000123 has the Associated Transaction ID T1000123, then D1000123 will match the Assigned CID of T1000123. However, this should not be retroactive, only
during initial CID assignment. For example if the CID assignment of T1000123 is edited by the user at a later time, it will not change the CID assignment for D1000123.

A Note on Recurring Payments

If the subscriber changes their personal info from their Personal Edit link, or if you change their details from Activity Management > Edit Subscriber, your subscriber data and their associated CID data and Contact Profile is automatically updated with the new data.