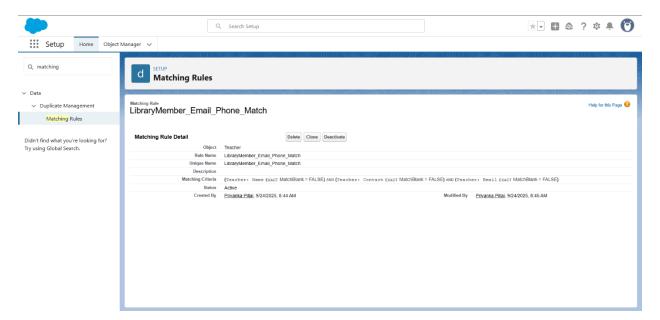
# Phase 8: Library Management Data Management & Deployment

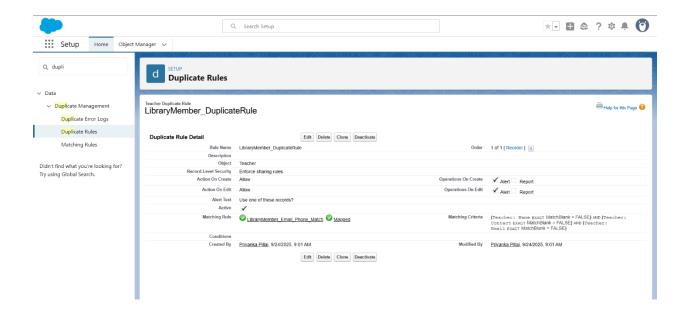
- 1. Create the Matching Rule
- Setup → Quick Find → Matching Rules → New Rule
- Object: Teacher
- Rule Name: LibraryMember Email Phone Match
- Add Matching Criteria:
  - Field = Email → Matching Method = Exact
  - Click Add Row → Field = Phone → Matching Method = Exact
- Click Save
- Click Activate



# 2) Create the Duplicate Rule

- Setup → Quick Find → Duplicate Rules → New Rule
- Object: Teacher
- Rule Label: LibraryMember\_DuplicateRule

- Under Matching Rules: click Add and select the LibraryMember\_Email\_Phone\_Match matching rule you activated in the previous step.
- Action on Create: choose Alert (recommended while testing so users are warned but not blocked).
- Action on Edit: choose Alert.



### Step 2: Data Backup - Library Management

**Goal:** Regularly back up all key Library Management data (Teachers, Students, Books, Borrow Requests, etc.) for safety and compliance.

#### Steps

- Go to Setup.
- In Quick Find, type Data Export → click Data Export.
- Choose one:
  - o **Export Now** → run a one-time backup.
  - Schedule Export → set weekly or monthly backups.

# • Select the objects you want:

- Library Members (Teachers/Students)
- Books/Resources
- Borrow Requests / Returns
- Classes / Courses
- Librarians (Users)
- Any other standard objects you use (e.g., Users, Attachments).
- Click Start Export (for immediate) or Save (for scheduled).
- Wait Salesforce will email you when the backup is ready.
- **Download** the .zip file from the export page → extract CSV files.
- Store the backup securely (encrypted drive, secure server, or trusted cloud storage).

