

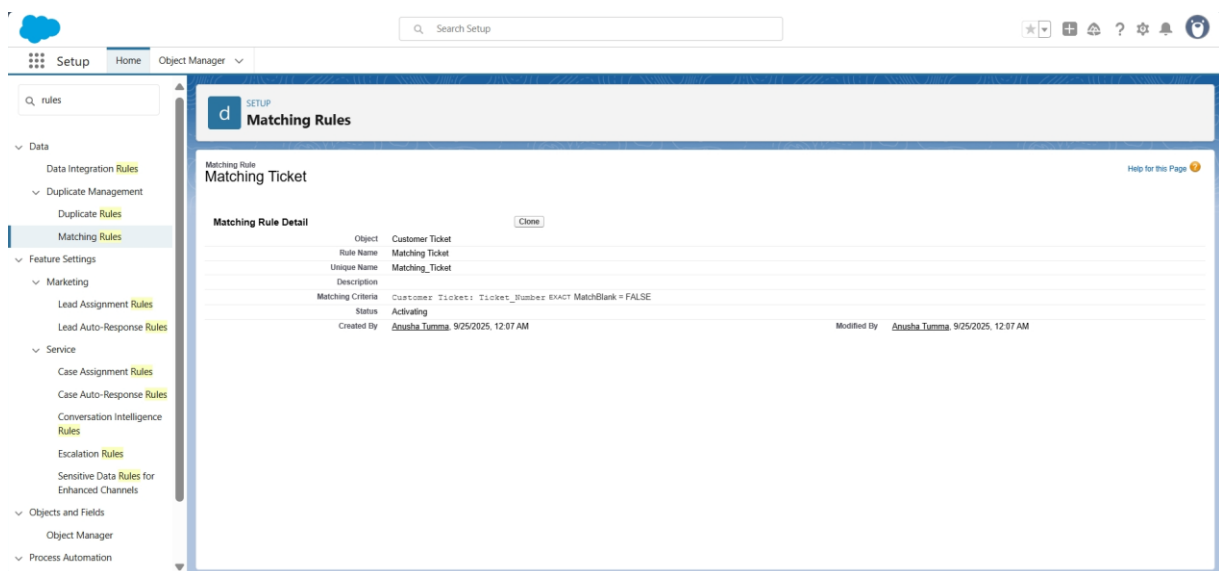
# Customer Support Ticketing System

## Phase 8: Data Management & Deployment

### Step 1: Duplicate Management

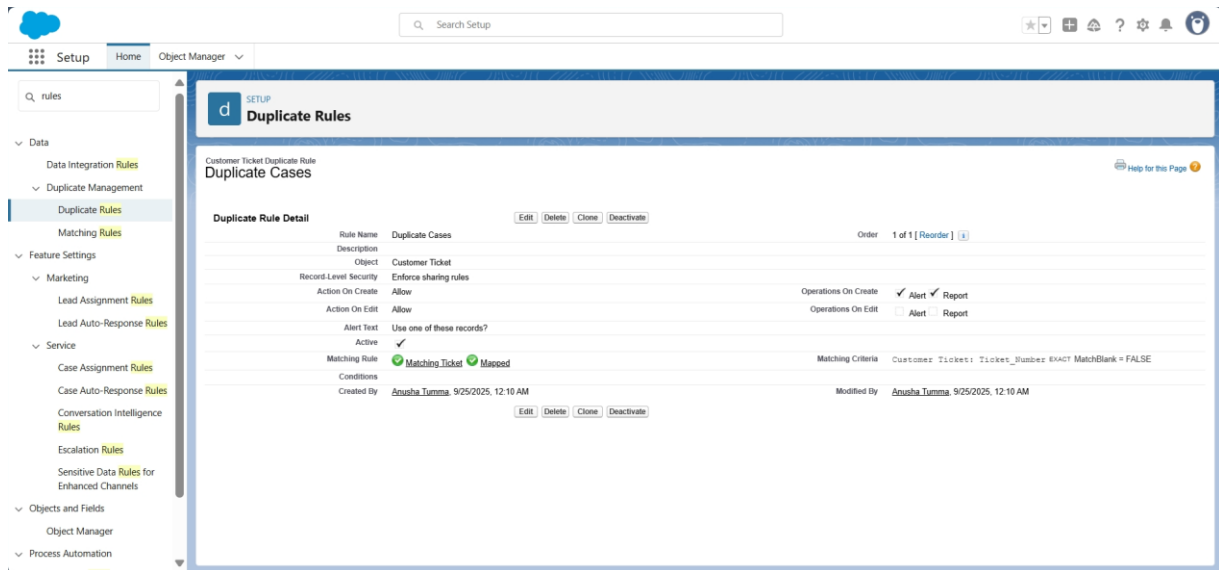
#### 1) Matching Rule

- Define the criteria for identifying **potential duplicates**.  
Example: Two tickets with the same **Email + Ticket Number**.
- Helps prevent duplicate tickets and improves data quality.



#### 2) Duplicate Rule

- Use matching rules to block, alert, or allow duplicates.
- For a support ticketing system, duplicate prevention improves agent efficiency and data accuracy.
- Block creation of a ticket with same **Email + Ticket Number**.
- Alert agent if a possible duplicate is found and allow override.



## Step 2: Data Backup

### A. Manual Export (Data Export Service)

- Salesforce standard tool; free; exports CSV.

### B. Scheduled Export

- Automates weekly or monthly exports, good for Case/Ticket backups.

### C. Third-Party Backup Tools

- Own Backup.
- Provide scheduled backups, and metadata backup.

### D. Data Loader / API Export

- Use **Data Loader** to export objects programmatically.

Setup

Home

Object Manager

Search Setup

data

Data

Big Objects

Conversation Transcript Export

Data Export

Data Integration Metrics

Data Integration Rules

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Mass Delete Records

Mass Transfer Approval Requests

Mass Transfer Records

Mass Update Addresses

Picklist Settings

Schema Settings

State and Country/Territory Picklists

Storage Usage

SETUP

Data Export

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:  
None

Export Now

Schedule Export

Scheduled By  
Anusha Tiwaria

Schedule Date  
9/25/2025

Export File Encoding  
Unicode (UTF-8)

The exported data files were created using Unicode (UTF-8) character encoding. To view the characters correctly, open the files in a text editor, or follow the instructions below for opening the files in Microsoft® Excel.

Microsoft® Excel (pre-2003 versions)

1. Open the file in Microsoft® Excel and select File -> Save As, and save the file as type Web Page.  
2. Select Tools -> Options -> General tab and click the Web Options button.  
3. Select the Encoding tab, and then choose the "Unicode (UTF-8)" option.  
4. Click OK to close the dialog boxes.  
5. Select File -> Save to save the file with selected encoding.  
These steps will need to be repeated for each file.

Microsoft® Excel 2003

1. Open Microsoft® Excel and click File -> New.  
2. Click Data -> Import External Data -> Import Data.  
3. Select the CSV file to open and Microsoft® Excel will launch the text import wizard.  
4. Select "Delimited" and choose the "Unicode (UTF-8)" option for File origin.  
5. Click Next.  
6. Select "Comma" in the Delimiters section and click Finish. You may be prompted to select a range of cells.  
These steps will need to be repeated for each file.

Action

File Name

File Size

download

WE\_00Dgl.00000742B2UA2\_1.ZIP

6.9K